



THE LAW FIRM **AUTOMATION** AUDIT

50+ Processes You Can Automate Today

With realistic time savings and the exact technology
to implement each one.

Introduction

The average law firm owner spends 40% of their time on tasks that could be automated. That's not practicing law—that's playing administrator.

This audit identifies 50+ specific processes in your firm that can be automated, along with realistic time savings and the exact technology to implement each one.

Use this checklist to audit your current operations. Check off what you've already automated, identify quick wins, and build a roadmap to reclaim your time.

How to Use This Audit

Step 1: Review each category and check off processes you've already automated.

Step 2: Circle 3-5 'quick wins' that could be implemented this month.

Step 3: Calculate your total potential time savings.

Step 4: Schedule a strategy call with 8 Figure Firm to build your implementation roadmap.

Section 1: Client Intake & Onboarding

Potential Time Savings: 15-25 hours/week

1.1 ☐ Lead Capture Form Automation

Automatically capture leads from website forms, Facebook ads, and landing pages into your CRM without manual entry.

Time Savings: **3-5 hours/week**

Technology: [Clio Grow](#), [Lawmatics](#), [HubSpot](#)

1.2 ☐ Instant Lead Response

Send automated text/email within 60 seconds of inquiry. First responder wins 78% of the time.

Time Savings: **2-3 hours/week**

Technology: [Lawmatics](#), [Lead Docket](#), [Smith.ai](#)

1.3 ☐ Appointment Scheduling

Let prospects book consultations directly on your calendar without back-and-forth emails.

Time Savings: **3-4 hours/week**

Technology: [Calendly](#), [Acuity](#), [Clio Scheduler](#)

1.4 ☐ Pre-Consultation Questionnaire

Automatically send intake forms before the consultation so you arrive prepared.

Time Savings: **1-2 hours/week**

Technology: [Lawmatics](#), [Typeform](#), [Clio Grow](#)

1.5 ☐ Conflict Check Automation

Automatically cross-reference new leads against existing clients and adverse parties.

Time Savings: **2-3 hours/week**

Technology: [Clio](#), [MyCase](#), [PracticePanther](#)

1.6 ☐ Fee Agreement Generation

Auto-generate engagement letters with client info pre-populated from intake forms.

Time Savings: **2-3 hours/week**

Technology: [PandaDoc](#), [DocuSign](#), [Clio](#)

1.7 ☐ E-Signature Collection

Send and track electronic signatures without printing, scanning, or mailing.

Time Savings: **1-2 hours/week**

Technology: [DocuSign](#), [HelloSign](#), [PandaDoc](#)

1.8 ☐ Welcome Packet Delivery

Automatically send welcome emails with firm policies, team bios, and next steps.

Time Savings: **1-2 hours/week**

Technology: [Mailchimp](#), [ActiveCampaign](#), [Lawmatics](#)

1.9 ☐ Client Portal Setup

Automatically create secure client portals for document sharing upon retainer.

Time Savings: **1 hour/week**

Technology: [Clio](#), [MyCase](#), [Rocket Matter](#)

1.10 ☐ Payment Plan Setup

Automate recurring payment enrollment during onboarding.

Time Savings: **1-2 hours/week**

Technology: [LawPay](#), [Clio Payments](#), [Headnote](#)

Section 2: Case Management & Workflow

Potential Time Savings: 10-20 hours/week

2.1 ☐ Task Assignment Automation

Automatically create and assign tasks when cases reach specific stages.

Time Savings: **3-5 hours/week**

Technology: [Clio](#), [Filevine](#), [Smokeball](#)

2.2 ☐ Deadline Calculation

Auto-calculate court deadlines based on jurisdiction rules and filing dates.

Time Savings: **2-3 hours/week**

Technology: [LawToolBox](#), [Deadlines.com](#), [Clio](#)

2.3 ☐ Status Update Triggers

Automatically move cases through workflow stages when conditions are met.

Time Savings: **2-3 hours/week**

Technology: [Filevine](#), [Litify](#), [Smokeball](#)

2.4 ☐ Case Stage Notifications

Alert team members and clients when cases hit key milestones.

Time Savings: **1-2 hours/week**

Technology: [Clio](#), [MyCase](#), [PracticePanther](#)

2.5 ☐ Document Request Automation

Automatically request missing documents from clients based on case type.

Time Savings: **2-3 hours/week**

Technology: [Lawmatics](#), [Filevine](#), [Litify](#)

2.6 □ Checklist Generation

Auto-generate case-type-specific checklists when new matters open.

Time Savings: 1-2 hours/week

Technology: [Clio](#), [Smokeball](#), [Filevine](#)

2.7 □ Case Assignment Rules

Automatically assign new cases to attorneys based on practice area, capacity, or rotation.

Time Savings: 1 hour/week

Technology: [PracticePanther](#), [Litify](#), [Filevine](#)

2.8 □ Statute of Limitations Tracking

Automated alerts for approaching SOL dates with escalation protocols.

Time Savings: 1-2 hours/week

Technology: [LawToolBox](#), [Clio](#), [Smokeball](#)

Section 3: Document Management

Potential Time Savings: 8-15 hours/week

3.1 □ Document Assembly

Generate contracts, pleadings, and letters from templates with auto-populated client data.

Time Savings: 4-6 hours/week

Technology: [HotDocs](#), [Clio Draft](#), [Smokeball](#)

3.2 □ Document Naming & Filing

Automatically name and organize documents based on predefined conventions.

Time Savings: 2-3 hours/week

Technology: [NetDocuments](#), [Clio](#), [iManage](#)

3.3 □ Version Control

Automatic versioning with full edit history and comparison tools.

Time Savings: 1-2 hours/week

Technology: [NetDocuments](#), [Google Workspace](#), [Clio](#)

3.4 □ OCR & Document Search

Convert scanned documents to searchable text automatically.

Time Savings: 1-2 hours/week

Technology: [Adobe Acrobat](#), [ABBYY](#), [Clio](#)

3.5 □ Email-to-Matter Filing

Automatically file emails to appropriate matters based on rules.

Time Savings: 2-3 hours/week

Technology: [Clio](#), [NetDocuments](#), [Outlook add-ins](#)

3.6 □ Document Request Portals

Let clients upload documents directly to their matter folder.

Time Savings: **1-2 hours/week**

Technology: [Clio](#), [MyCase](#), [Filevine](#)

3.7 □ Redaction Automation

AI-powered automatic redaction of sensitive information.

Time Savings: **1-2 hours/week**

Technology: [Relativity](#), [Logikcull](#), [Adobe Acrobat](#)

Section 4: Client Communication

Potential Time Savings: 8-12 hours/week

4.1 ☐ Case Status Updates

Send automated weekly/monthly case updates to clients via email or text.

Time Savings: **3-5 hours/week**

Technology: [Lawmatics](#), [Clio](#), [MyCase](#)

4.2 ☐ Appointment Reminders

Automated text/email reminders 24-48 hours before appointments.

Time Savings: **1-2 hours/week**

Technology: [Clio](#), [Calendly](#), [Lawmatics](#)

4.3 ☐ Court Date Notifications

Alert clients automatically when court dates are scheduled or changed.

Time Savings: **1-2 hours/week**

Technology: [Clio](#), [Filevine](#), [Smokeball](#)

4.4 ☐ Document Ready Alerts

Notify clients when documents are ready for review or signature.

Time Savings: **1 hour/week**

Technology: [Clio](#), [DocuSign](#), [PandaDoc](#)

4.5 ☐ Post-Consultation Follow-Up

Automated follow-up sequences for prospects who haven't retained.

Time Savings: **2-3 hours/week**

Technology: [Lawmatics](#), [ActiveCampaign](#), [HubSpot](#)

4.6 ☐ Birthday & Anniversary Messages

Automated personal touch messages to build relationships.

Time Savings: **30 min/week**

Technology: [Lawmatics](#), [Mailchimp](#), [CRM automations](#)

4.7 ☐ Review Request Automation

Automatically request Google/Avvo reviews after case completion.

Time Savings: **1-2 hours/week**

Technology: [Birdeye](#), [Podium](#), [Lawmatics](#)

4.8 ☐ Chatbot for Website

24/7 automated chat to capture leads and answer FAQs.

Time Savings: **3-5 hours/week**

Technology: [Drift](#), [Intercom](#), [Smith.ai Chat](#)

Section 5: Billing & Payments

Potential Time Savings: 6-10 hours/week

5.1 ☐ Time Entry Capture

Automatic time tracking based on calendar events, emails, and documents.

Time Savings: **3-5 hours/week**

Technology: [Clio](#), [TimeSolv](#), [Toggl Legal](#)

5.2 ☐ Invoice Generation

Automatically generate invoices on a set schedule with all unbilled time.

Time Savings: **2-3 hours/week**

Technology: [Clio](#), [QuickBooks Legal](#), [LEAP](#)

5.3 ☐ Invoice Delivery

Automated email delivery of invoices with payment links.

Time Savings: **1 hour/week**

Technology: [Clio](#), [LawPay](#), [MyCase](#)

5.4 ☐ Payment Reminders

Automated escalating reminders for overdue invoices.

Time Savings: **1-2 hours/week**

Technology: [Clio](#), [LawPay](#), [Headnote](#)

5.5 ☐ Recurring Billing

Automated monthly billing for retainer clients or payment plans.

Time Savings: **1-2 hours/week**

Technology: [LawPay](#), [Clio Payments](#), [Stripe](#)

5.6 ☐ Trust Account Reconciliation

Automated tracking of trust deposits and disbursements.

Time Savings: 1-2 hours/week

Technology: [Clio](#), [CosmoLex](#), [LEAP](#)

5.7 ☐ Payment Processing

Accept credit cards, ACH, and payment plans without manual processing.

Time Savings: 1 hour/week

Technology: [LawPay](#), [Clio Payments](#), [Headnote](#)

Section 6: Calendar & Scheduling

Potential Time Savings: 4-8 hours/week

6.1 ☐ Court Date Sync

Automatically sync court calendars with firm calendars.

Time Savings: 1-2 hours/week

Technology: [LawToolBox](#), [Clio](#), [CourtAlert](#)

6.2 ☐ Meeting Scheduling

Self-service booking for consultations and client meetings.

Time Savings: 2-3 hours/week

Technology: [Calendly](#), [Acuity](#), [Clio Scheduler](#)

6.3 ☐ Resource Booking

Automated conference room and equipment scheduling.

Time Savings: 30 min/week

Technology: [Robin](#), [Envoy](#), [Google Calendar](#)

6.4 ☐ Deposition Scheduling

Coordinate availability across multiple parties automatically.

Time Savings: 1-2 hours/week

Technology: [Calendly](#), [Doodle](#), [Court Reporter services](#)

6.5 ☐ Calendar Conflict Detection

Automatically flag scheduling conflicts and suggest alternatives.

Time Savings: 30 min/week

Technology: [Clio](#), [Calendly](#), [Outlook](#)

Section 7: Marketing & Lead Generation

Potential Time Savings: 5-10 hours/week

7.1 ☐ Social Media Scheduling

Pre-schedule posts across all platforms weeks in advance.

Time Savings: **2-3 hours/week**

Technology: [Hootsuite](#), [Buffer](#), [Later](#)

7.2 ☐ Email Newsletter Automation

Automated drip campaigns and monthly newsletters.

Time Savings: **2-3 hours/week**

Technology: [Mailchimp](#), [ActiveCampaign](#), [ConvertKit](#)

7.3 ☐ Lead Scoring

Automatically prioritize leads based on engagement and fit criteria.

Time Savings: **1-2 hours/week**

Technology: [HubSpot](#), [Lawmatics](#), [Salesforce](#)

7.4 ☐ Retargeting Campaigns

Automated ads to website visitors who didn't convert.

Time Savings: **1 hour/week**

Technology: [Facebook Ads](#), [Google Ads](#), [AdRoll](#)

7.5 ☐ Referral Tracking

Automatically track and attribute referral sources.

Time Savings: **1 hour/week**

Technology: [Lawmatics](#), [Clio Grow](#), [ReferralCandy](#)

7.6 ☐ Content Repurposing

Automatically convert blog posts into social content.

Time Savings: 1-2 hours/week

Technology: [Repurpose.io](#), [Lately](#), [Canva](#)

Section 8: HR & Team Management

Potential Time Savings: 4-8 hours/week

8.1 ☐ PTO Request Management

Automated time-off requests with approval workflows.

Time Savings: 1-2 hours/week

Technology: [Gusto](#), [BambooHR](#), [Deputy](#)

8.2 ☐ Timesheet Collection

Automated timesheet reminders and approval routing.

Time Savings: 1-2 hours/week

Technology: [Gusto](#), [TSheets](#), [Harvest](#)

8.3 ☐ Onboarding Workflows

Automated new hire paperwork and training assignments.

Time Savings: 2-3 hours/week

Technology: [BambooHR](#), [Rippling](#), [Trainual](#)

8.4 ☐ Performance Review Scheduling

Automated reminders and scheduling for review cycles.

Time Savings: 30 min/week

Technology: [BambooHR](#), [15Five](#), [Lattice](#)

8.5 ☐ Payroll Processing

Automated payroll calculations and direct deposits.

Time Savings: 1-2 hours/week

Technology: [Gusto](#), [ADP](#), [Paychex](#)

Section 9: Financial & Accounting

Potential Time Savings: 4-6 hours/week

9.1 ☐ Bank Feed Sync

Automatic import of bank transactions for reconciliation.

Time Savings: 1-2 hours/week

Technology: [QuickBooks](#), [Xero](#), [CosmoLex](#)

9.2 ☐ Expense Categorization

AI-powered automatic categorization of expenses.

Time Savings: 1-2 hours/week

Technology: [QuickBooks](#), [Expensify](#), [Divvy](#)

9.3 ☐ Accounts Payable Automation

Automated bill capture, approval, and payment.

Time Savings: 1-2 hours/week

Technology: [Bill.com](#), [BILL](#), [QuickBooks](#)

9.4 ☐ Financial Report Generation

Automated weekly/monthly P&L and cash flow reports.

Time Savings: 1 hour/week

Technology: [QuickBooks](#), [Xero](#), [Fathom](#)

9.5 ☐ Receipt Capture

Mobile receipt scanning with automatic expense logging.

Time Savings: 30 min/week

Technology: [Expensify](#), [Dext](#), [Hubdoc](#)

Section 10: Reporting & Analytics

Potential Time Savings: 3-5 hours/week

10.1 ☐ KPI Dashboard Updates

Real-time dashboards that update automatically.

Time Savings: **2-3 hours/week**

Technology: [Clio](#), [Filevine](#), [Google Data Studio](#)

10.2 ☐ Marketing ROI Tracking

Automated tracking of lead sources and conversion rates.

Time Savings: **1-2 hours/week**

Technology: [CallRail](#), [Lawmatics](#), [HubSpot](#)

10.3 ☐ Matter Profitability Reports

Automatic calculation of matter-level profitability.

Time Savings: **1 hour/week**

Technology: [Clio](#), [CosmoLex](#), [Smokeball](#)

10.4 ☐ Team Productivity Reports

Automated tracking of billable hours and utilization.

Time Savings: **1 hour/week**

Technology: [Clio](#), [TimeSolv](#), [Toggl](#)

10.5 ☐ Client Satisfaction Surveys

Automated NPS surveys sent after matter completion.

Time Savings: **30 min/week**

Technology: [Typeform](#), [SurveyMonkey](#), [Clio](#)

Calculate Your Automation Score

Count the number of processes above that you've already fully automated:

0-10 processes: Early Stage — Significant opportunity for transformation

11-25 processes: Developing — Good foundation, but leaving money on the table

26-40 processes: Advanced — Strong operations, time for optimization

41+ processes: Elite — Operating at peak efficiency

Total Potential Time Savings

Based on the categories above, full automation could save your firm:

67-119 hours per week

That's 1-3 full-time employees worth of work.

Your Next Steps

Step 1: Identify Your Quick Wins

Circle 3-5 automations from this list that would have the biggest immediate impact on your firm. Look for processes that are currently eating up the most time with the simplest implementation.

Step 2: Calculate Your ROI

For each quick win, multiply the weekly time savings by your hourly billing rate. This is the revenue you're currently leaving on the table.

Step 3: Build Your Roadmap

Implementation order matters. Some automations are prerequisites for others. Some require significant change management. Getting the sequence wrong can cost you months.

Step 4: Get Expert Help

The firms that see the fastest results don't try to figure this out alone. They work with implementation partners who've done this dozens of times and know exactly what works.

Ready to Transform Your Firm?

8 Figure Firm specializes in helping law firm owners implement the exact automations in this audit. Our clients typically see:

- **40%+ reduction in administrative overhead**
- **25% increase in billable hour capture**
- **50% faster client intake**
- **Predictable, scalable revenue growth**

Schedule Your Free Strategy Call

Visit: www.8figurefirm.com

Let's build your automation roadmap together.

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