



Case Management:

How to Win Back Control and
Never Lose It Again



As a lawyer, you probably laugh when you watch an episode of *Law and Order*. The DA's office somehow only works on one case at a time. The magic of television leaves out one of the most frustrating parts of a lawyer's job: juggling a caseload.

With every case, you're not just dealing with clients. You have to deal with government offices to file paperwork, evidence collection, your own team to assign tasks, witnesses to collect statements, and more. Every case has a million steps in the process, and it's impossible to keep the status of every task top of mind. But disorganized administrative habits and lack of solid communication are two of the biggest sources of malpractice claims.

If you feel like you're drowning in tasks because of all your cases, here's how to regain control of your workload.



Common case management challenges

While each law office has unique challenges with case management, there are some common issues that frustrate lawyers across firms and practice areas. Below are four big ones.

Keeping tasks up to date

Processes make the legal world go 'round, but if tasks fall by the wayside, your work can come to a screeching halt. This is especially true if you operate a practice where you rely on other attorneys, paralegals, or assistants to facilitate case work.

Organizing client information

Making satisfactory progress on a legal matter involves a heavy-duty exchange of information in the form of agreements, contracts, evidence, consent letters, notices, and much more.

Getting that information, however, and keeping it organized and usable can be a challenge.

Getting trapped by busy work

A lot of little details go into keeping your cases organized, and those little details can take up a lot of time and energy. (Two things you probably don't have an excess of!) Even if you can delegate administrative tasks or busy work to team members, without a clear strategy for doing so, it can feel like you're constantly treading water.



Not using the right tools

Even if you promise yourself that you'll stay organized with your cases, without the right tools, it's a losing battle. Tracking cases on spreadsheets and to-do lists can be helpful but are cumbersome to deal with daily. Email or messaging apps like Slack can facilitate good communication regarding tasks for your cases, but you have to make sure updates from those platforms translate into action items for your team.

And while the legal pad has many benefits, relying on analog case management in a digital world can be a risky move.

What happens when you don't manage your cases efficiently?

The risks are numerous. When your case management suffers, you can find yourself:

- Missing important filing deadlines
- Losing track of case progress
- Responding to clients, colleagues, and other parties too slowly
- Harming client relationships
- Losing productivity and profitability





Why you need to start resolving case management problems

It's easy to put off organization because you think you're too busy, but the overwhelming benefits of resolving case management problems make it worthwhile.

Case management ensures that:

- You prioritize your most important tasks
- You can handle everything that's on your plate
- You keep your clients satisfied
- You never miss critical court deadlines

The only risk to resolving case management problems is never resolving them at all. Not addressing case management problems can ultimately make the problems worse. What's more, if you ignore the issues, you're opening yourself up to malpractice claims that could put you out of work or even cause you to lose your license to practice law.

Tips for organizing your caseload

Robust [legal case management software](#) can help you implement most of these helpful tips to organize your caseload. However, it can only do part of the job—you have to stay disciplined to ensure you're not taking on more clients or cases than you can handle.

1. Stop using paper files

An easy way to misplace anything is to print it out. If stacks of papers cover your desk so high that you can barely find anything, it's [time to go paperless](#). With a paperless practice, it's easy to find everything you need quickly. Every document is stored in your document management software. Once you establish your online filing system, you can pull up legal documents in seconds.

If you're uncertain whether you finished a legal document or received paperwork from a client, you can easily check in your software and get it crossed off your list. No more scouring your office for fifteen minutes to find what you need.

2. Implement CRM software

Client intake takes an enormous amount of time for any law firm. It's a non-billable process that's critical to taking on new clients, but it can eat away at your day. Plus, to start a case off right, you need to utilize a robust intake form so new clients answer all the questions that you need to kick start your legal services.



CRM software organizes the client intake process

for you. Create a pre-screening interview that's automatically sent to interested potential clients. Automate follow-up via text message and email to create personal messages to clients without having to call them back.

The best part of CRM software that integrates with your legal practice management? All the data transfers over, meaning no tedious data entry and fewer typos due to human error.

When you're creating legal documents for your client, you can use all the information they submitted in their initial interview. No more lost hours working on cases where you're simply inputting the same client information over and over in different places.



3. Utilize task management software with your calendar

Robust task management is the key to managing cases well. [Task management software](#) allows you to create, track, update, and assign tasks to yourself and your team. See all the tasks in a dashboard to gain a clear understanding of your entire workload.

Better yet, when you get a new matter, you can use templates to automatically populate a specific set of tasks that's unique to that type of matter. This creates simple, easy-to-understand workflows for everyone involved. If you assign certain types of tasks to the same people over and over, then your whole team will know who to check with when issues regarding that task come up.

Your task management tools also establish clear due dates to tasks and [integrate tasks with your preferred calendar system](#). Employees will see in their calendars all the work they have to do for the day. If they check in the task management system, the tasks with the most recent due date will show up first. It's also easier to prioritize tasks—simply filter what's pending, due, and completed across every matter.



4. Look at all of your cases in one place with case management software

One of the hardest things about staying on top of all of your cases is tracking statuses. Case management software shows you all of the critical details regarding each matter in one place.

[Customizable matter dashboards](#) show every detail related to that matter, including:

- Calendar events
- Tasks
- Related contacts
- Time and billing data
- Account balances

When you see all the information at a glance, you can quickly pin down what needs to be done to move the case along. Use matter templates to create a virtual checklist of every task that needs to be completed for different types of matters.



5. Use existing templates in document management software

Creating legal documents can be a confusing process that's easy to lose control of. [Document creation tools](#) in legal practice management software can give you the upper hand in document creation again.

Merge legal templates with the information already stored in your legal practice management system. Systems like Rocket Matter identify your merge fields and let you know if any information is missing or incorrect before you finalize a document.

6. Track time for every project

It's easy to spend more time working on a task than expected. Even if you rely on value-based billing, [tracking time for every project](#) is helpful because it ensures that the hourly rate associated with it is profitable. This also enables you to establish more accurate pricing for matters in the future and identify inefficient or unprofitable elements in your workflow.





Win back control of your caseload with Rocket Matter

Rocket Matter's best-of-breed [legal practice management software](#) comes with every tool you need to control your caseload, including:

- Time tracking
- Case management
- Document automation
- Task and calendar management

If you're tired of feeling like you don't have enough time in your workday, take the first step to reign in your caseload and [schedule a demo](#) with Rocket Matter today.

[SCHEDULE A DEMO](#)