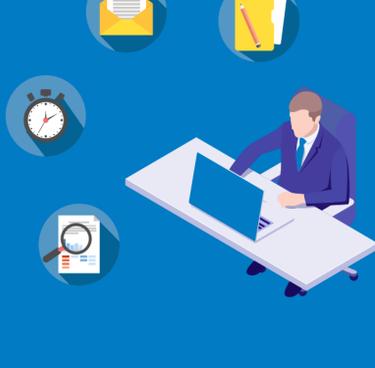


# Tips for effective case management

Whether you're a lawyer or paralegal, being efficient, organised and precise are paramount to successful case management.

Here are 9 invaluable tips that will help you become a case management pro and deliver the best client service.



## TIP 1 Organise your case files

The average lawyer deals with over **26,000 documents a year**.

To stay organised, use a common system for filing all of the documents related to a case, including:

- Correspondence
- Pleadings
- Discovery
- Research
- Client claim file
- Invoices
- Bills/expenses
- Memoranda
- In-house emails
- Witness lists
- Service/contact list
- Subpoenaed records lists



## Use checklists for routine tasks

Use checklists to stay on top of routine tasks so you don't miss a critical step!

Create checklists for:

- Client in-take
- File opening
- Trial preparation
- Drafting of complaints
- Discovery
- Motion practice
- Post-trial proceedings



## TIP 3 Prioritise your tasks by case

With so many cases to manage at once, prioritising tasks according to their importance and urgency will help you give attention to the right case at the right time.

	Urgent	Not Urgent
Important	<b>Do it now.</b> Deadlines with open cases are both important and usually urgent – making them high value.	<b>Decide</b> when to do it.
Not Important	<b>Delegate</b> to junior or paralegal since these do not bring value.	<b>Delete</b> it from your list. These activities are just a distraction – avoid them if possible.

## Assign and schedule tasks

Assign deadlines to your tasks, as well as the ones you delegate.

Not only will this help you manage your time and leverage staffing but monitoring deadlines will also help you be the best lawyer to your clients.



## TIP 5 Follow up on tasks

Tasks are very often part of a chain of events that involve reviews, approvals and next actions.

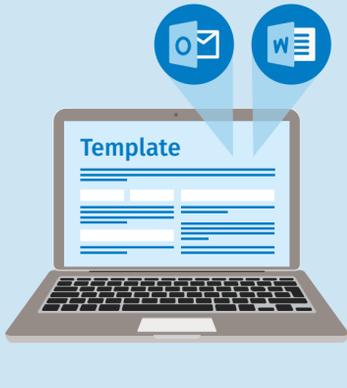
Define your follow up tasks in advance and use a reminder system to make sure you send that next email or make that next phone call.



## Use templates for routine correspondence

Administrative work, like drafting memos, emails or documents, can take valuable time out of your day.

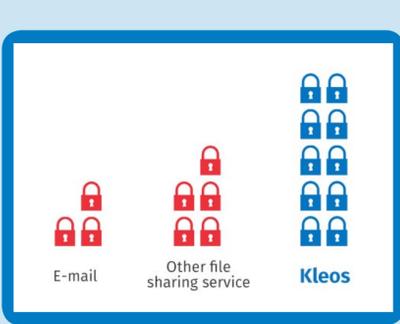
Using email and document templates for repetitive, routine tasks can help you make the most of billable time!



## TIP 7 Create a process for sharing documents securely

Sharing documents with sensitive information by email is risky. **23% of legal professionals** overheard reported that their firms had experienced a security breach at some point.

Using a secure portal for sharing documents with clients, third parties and/or other law firms can greatly reduce this risk.



## Move to the cloud

When asked about the most important benefits to using the cloud, for **68% of lawyers**, it is the easy browser access from anywhere while for **59% of lawyers**, it is the 24x7 availability.

Using cloud-based practice management software gives you the freedom to work from anywhere, from any device.



## TIP 9 Conduct after-action interview

**62% of clients** find a law firm through a family or friends.

Implementing a standardised system to collect client feedback will help you improve satisfaction, which in turn can result in positive word of mouth.



### Kleos

Kleos is the leading cloud-based practice management technology used by over 20,000 lawyers to deliver distinctive client service and boost profitability.

Find out why over 20,000 legal professionals trust Kleos to manage more than 1 million cases, track over 100 million documents and generate 50 million timesheets!

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