

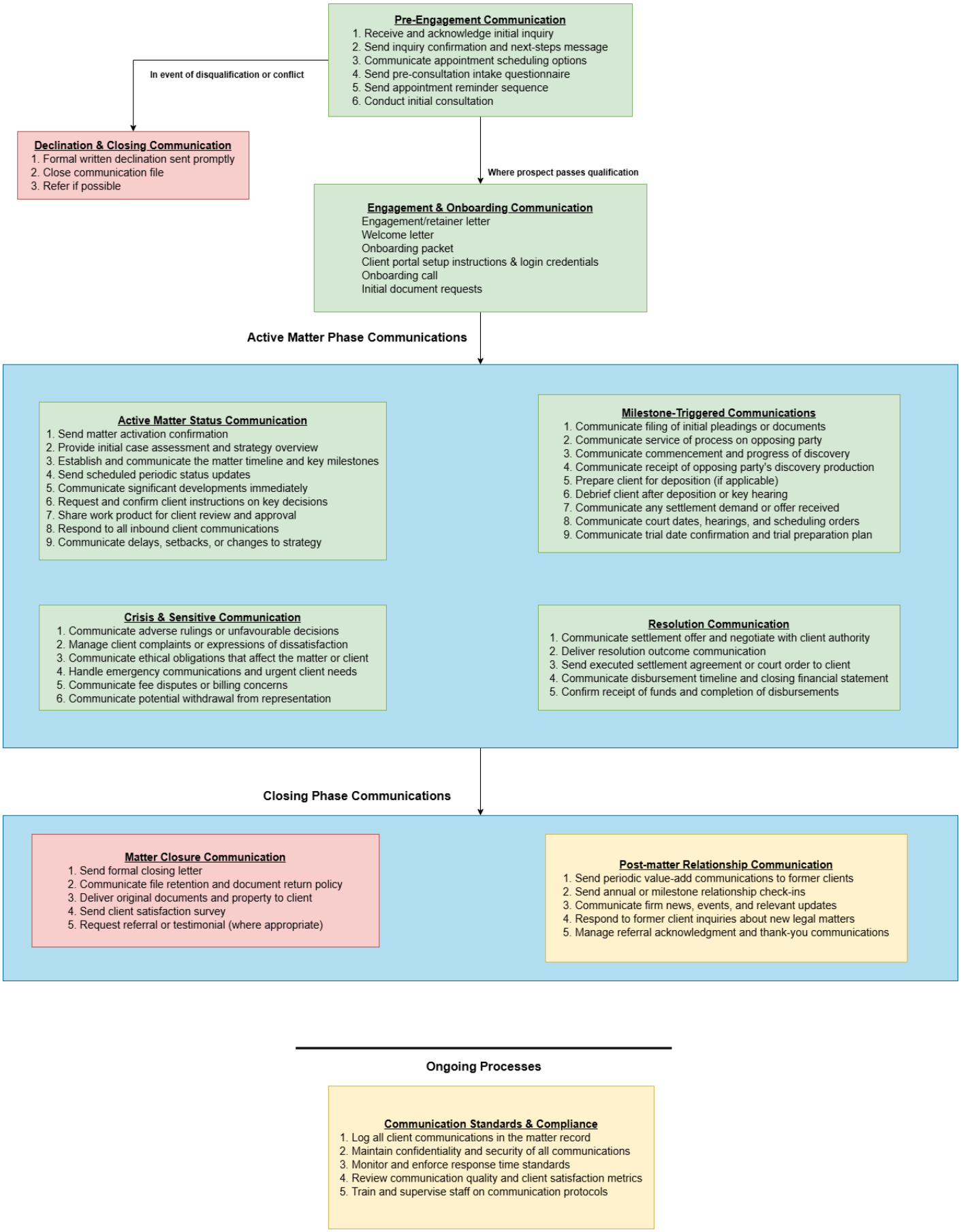
Client Communication Workflow Outline

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Client Communication Flowchart



Required Automations & Humans-in-Loop

TASK / ACTIVITY	TYPE	HUMANS-IN-LOOP	RELEVANT TOOLS
PHASE 1 — PRE-ENGAGEMENT COMMUNICATION			
Receive and acknowledge initial inquiry	Manual & Automatable	Receptionist Intake coordinator	Lawmatics Clio Grow Tidio chatbot Intercom
Send inquiry confirmation and next-steps message	Automatable	N/A	Lawmatics Clio Grow Mailchimp HubSpot
Communicate appointment scheduling options	Automatable	N/A	Calendly Clio Grow Acuity Scheduling Microsoft Bookings
Send pre-consultation intake questionnaire	Automatable	N/A	Lawmatics Typeform Clio Grow JotForm
Send appointment reminder sequence	Automatable	N/A	Lawmatics Clio Grow Calendly Acuity Scheduling
Conduct initial consultation	Manual	Attorney	N/A
PHASE 2 — ENGAGEMENT & ONBOARDING COMMUNICATION			
Send engagement letter with personalised cover note	Manual & Automatable	Attorney (drafts cover note & approves)	Clio Grow HotDocs Documate DocuSign Adobe Sign
Deliver welcome letter and onboarding packet	Automatable	N/A	Lawmatics Clio Grow Mailchimp
Send client portal setup instructions and login credentials	Automatable	N/A	Clio for Clients MyCase portal Filevine SmartVault
Conduct onboarding call to set communication expectations	Manual	Attorney Paralegal	N/A
Confirm billing communication preferences	Manual & Automatable	Billing coordinator	Clio Billing Bill4Time LawPay
Send initial document request with instructions	Automatable	N/A	Clio Grow SmartVault Lawmatics NetDocuments
PHASE 3 — ACTIVE MATTER STATUS COMMUNICATION			
Send matter activation confirmation	Automatable	N/A	Lawmatics Clio Grow PMS auto-trigger
Provide initial case assessment and strategy overview	Manual	Attorney	N/A

Communicate matter timeline and key milestones	Manual & Automatable	Paralegal Attorney (verify)	Clio MyCase Filevine Notion
Send scheduled periodic status updates	Manual & Automatable	Attorney Paralegal	Lawmatics Clio Grow Outlook Gmail
Communicate significant developments immediately	Manual	Attorney	N/A
Request and confirm client instructions on key decisions	Manual	Attorney	N/A
Share work product for client review and approval	Manual & Automatable	Attorney (approve to share)	Clio SmartVault NetDocuments DocuSign
Respond to all inbound client communications	Manual	Attorney Paralegal	N/A
Communicate delays, setbacks, or strategy changes	Manual	Attorney	N/A
PHASE 4 — MILESTONE-TRIGGERED COMMUNICATIONS			
Communicate filing of initial pleadings or documents	Manual & Automatable	Paralegal	Clio PACER State e-file portals SmartVault
Communicate service of process on opposing party	Manual & Automatable	Paralegal	ServeManager ABC Legal Clio
Communicate commencement and progress of discovery	Manual	Attorney	N/A
Communicate receipt of opposing party's document production	Manual & Automatable	Paralegal Attorney	Relativity Everlaw Clio NetDocuments
Prepare client for deposition	Manual	Attorney	N/A
Debrief client after deposition or key hearing	Manual	Attorney	N/A
Communicate settlement demand or offer received	Manual	Attorney	N/A
Communicate court dates, hearings, and scheduling orders	Manual & Automatable	Paralegal	Clio Calendar CompuLaw CourtAlert Docket Alarm
Communicate trial date confirmation and preparation plan	Manual	Attorney	N/A
PHASE 5 — CRISIS & SENSITIVE COMMUNICATION			
Communicate adverse rulings or unfavourable decisions	Manual	Attorney	N/A
Manage client complaints or expressions of dissatisfaction	Manual	Attorney Managing partner	N/A
Communicate ethical obligations affecting the matter	Manual	Attorney Ethics partner	N/A

Handle emergency communications and urgent client needs	Manual	Attorney On-call paralegal	N/A
Communicate fee disputes or billing concerns	Manual	Attorney Billing coordinator	N/A
Communicate potential withdrawal from representation	Manual	Attorney Managing partner	N/A
PHASE 6 — RESOLUTION COMMUNICATION			
Communicate settlement offer and negotiate with client authority	Manual	Attorney	N/A
Deliver resolution outcome communication	Manual	Attorney	N/A
Send executed settlement agreement or court order to client	Manual & Automatable	Paralegal Attorney (approve)	SmartVault Clio DocuSign NetDocuments
Communicate disbursement timeline and closing financial statement	Manual & Automatable	Attorney Billing coordinator	Clio Accounting TrustBooks LawPay
Confirm receipt of funds and completion of disbursements	Manual & Automatable	Billing coordinator	Clio Payments LawPay TrustBooks
PHASE 7 — MATTER CLOSURE COMMUNICATION			
Send formal closing letter	Manual & Automatable	Attorney (approve)	HotDocs Documate Clio Draft DocuSign
Communicate file retention and document return policy	Manual & Automatable	Paralegal	Clio NetDocuments Firm retention schedule
Return original documents and property to client	Manual	Paralegal Legal secretary	N/A
Send client satisfaction survey	Automatable	N/A	Lawmatics SurveyMonkey Clio Grow Google Forms + Zapier
Request referral or testimonial where appropriate	Manual	Attorney Client relations coordinator	N/A
PHASE 8 — POST-MATTER RELATIONSHIP COMMUNICATION			
Send periodic value-add communications to former clients	Automatable	N/A	Lawmatics Mailchimp HubSpot Clio Grow
Send annual or milestone relationship check-ins	Manual & Automatable	Attorney	Clio Grow HubSpot Lawmatics
Send firm news, events, and thought leadership content	Automatable	N/A	Mailchimp HubSpot Constant Contact Clio Grow
Respond to former client inquiries about new legal matters	Manual & Automatable	Intake coordinator Attorney	Clio Grow Lawmatics CRM

Manage referral acknowledgment and thank-you communications	Manual	Attorney	N/A
PHASE 9 — COMMUNICATION STANDARDS & COMPLIANCE (ONGOING PROCESS)			
Log all client communications in matter record	Manual & Automatable	All staff Attorney	Clio MyCase Filevine Outlook integration
Maintain confidentiality and security of all communications	Manual & Automatable	IT administrator All staff	Proofpoint Mimecast Virtru Clio secure portal Microsoft 365 encryption
Monitor and enforce response time standards	Manual & Automatable	Managing partner Practice group leader	Clio Insights MyCase analytics PMS dashboards
Review communication quality and client satisfaction metrics	Manual	Managing partner Firm administrator	N/A
Train and supervise staff on communication protocols	Manual	Managing partner Practice group leader HR manager	N/A

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It contains the essential features of law management practice apps like Clio, MyCase, Lawmatics, Filevine, etc.

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