Overmatch Digital

FAMILY LAW FIRM RESOURCE

Family Law Digital Operations Checklist

Forty-eight questions for evaluating the systems and workflows supporting a modern family law practice

How to use this checklist

For each statement, select Established, Partial, Not Established, or Not Applicable. Use the Notes field to record follow-up questions, ownership, or improvement priorities.

PLEASE NOTE
This checklist is an operational planning resource. It is not legal, ethical, cybersecurity, privacy, or compliance advice.

Who this is for

- Firm owners and managing attorneys
- Operations managers
- Lead paralegals
- Professionals responsible for firm growth and client experience
- Firm administrators
- Intake coordinators
- Technology decision-makers

Overmatch Digital provides digital operations consulting. We do not provide legal services or legal advice, and completing this checklist does not establish ethical, privacy, cybersecurity, or regulatory compliance.

What this checklist helps you identify

- Breakdowns between website inquiries and consultations
- Manual intake and onboarding work
- Inconsistent matter-opening procedures
- Disconnected email, files, calendars, and case-management systems
- Repetitive client communication
- Limited lead-source and conversion visibility
- Unstructured AI use
- Access, continuity, and ownership gaps
- Practical priorities for the next 90 days

Do not enter client names, case facts, privileged information, personal data, financial information, or other sensitive content. Describe processes in general terms only.

Family Law digital operations: overmatchdigital.com/industries/family-law

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SECTION 1 OF 8

Digital Business Foundation

Review the core accounts, productivity tools, file systems, access practices, and protections supporting everyday work.

	ESTABLISHED	PARTIAL	NOT ESTABLISHED	NOT APPLICABLE
The firm uses organization-controlled business email accounts rather than personal accounts.	☐	☐	☐	☐
The firm has intentionally selected Microsoft 365 or Google Workspace based on its operational needs.	☐	☐	☐	☐
Multifactor authentication protects email, case-management, financial, and administrative systems.	☐	☐	☐	☐
Shared files have defined storage locations, folder structures, and naming practices.	☐	☐	☐	☐
The firm controls administrative access to its domain, email, website, case-management system, and major platforms.	☐	☐	☐	☐
Access can be removed promptly when a staff member, contractor, or vendor relationship ends.	☐	☐	☐	☐

SECTION REFLECTION

Which account, platform, or category of information would be most difficult to recover or transfer if the person currently managing it became unavailable?

PRIORITY ☐ Low ☐ Medium ☐ High

FOLLOW-UP OWNER

TARGET REVIEW DATE

NOTES

SECTION 2 OF 8

Website and Lead Capture

Review whether the website helps prospective clients understand the firm, take the next step, and enter a measurable intake process.

	ESTABLISHED	PARTIAL	NOT ESTABLISHED	NOT APPLICABLE
Visitors can quickly understand the types of family law matters the firm handles.	☐	☐	☐	☐
The website clearly explains the firm’s geographic service area.	☐	☐	☐	☐
Calls, contact forms, and scheduling options work properly on desktop and mobile devices.	☐	☐	☐	☐
Website forms request only the information needed at that stage.	☐	☐	☐	☐
Each inquiry can be associated with a lead source.	☐	☐	☐	☐
The firm can identify which marketing sources produce consultations and retained clients, not merely website traffic.	☐	☐	☐	☐

SECTION REFLECTION

Where is a qualified prospective client most likely to encounter confusion, delay, or unnecessary friction?

PRIORITY ☐ Low ☐ Medium ☐ High

FOLLOW-UP OWNER

TARGET REVIEW DATE

NOTES

SECTION 3 OF 8

Intake and Consultation

Review how inquiries are screened, followed up, scheduled, and moved toward a consultation.

	ESTABLISHED	PARTIAL	NOT ESTABLISHED	NOT APPLICABLE
New inquiries receive a timely and consistent initial response.	☐	☐	☐	☐
Staff follow a documented initial screening process.	☐	☐	☐	☐
Conflict checks occur at an appropriate and defined point.	☐	☐	☐	☐
Prospective clients can schedule consultations without unnecessary back-and-forth.	☐	☐	☐	☐
Consultation fees, confirmations, and reminders are handled consistently.	☐	☐	☐	☐
Unqualified matters, declined matters, and referrals are closed or routed through a defined process.	☐	☐	☐	☐

SECTION REFLECTION

Which part of the intake process creates the greatest delay or loss of qualified prospective clients?

PRIORITY ☐ Low ☐ Medium ☐ High **FOLLOW-UP OWNER**

TARGET REVIEW DATE

NOTES

SECTION 4 OF 8

Client Onboarding

Review how a prospective client becomes an active client and matter.

	ESTABLISHED	PARTIAL	NOT ESTABLISHED	NOT APPLICABLE
Engagement documents can be prepared and signed electronically.	☐	☐	☐	☐
Required payments can be collected through an approved and consistent process.	☐	☐	☐	☐
Retained clients receive clear instructions describing what happens next.	☐	☐	☐	☐
Client and matter information moves into Clio or the firm's case-management system without avoidable re-entry.	☐	☐	☐	☐
Initial document requests are standardized by matter type.	☐	☐	☐	☐
Attorneys and staff receive the tasks and notifications needed to begin work.	☐	☐	☐	☐

SECTION REFLECTION

What information or action is most commonly missing after a client retains the firm?

PRIORITY ☐ Low ☐ Medium ☐ High **FOLLOW-UP OWNER**

TARGET REVIEW DATE

NOTES

SECTION 5 OF 8

Matter and Document Workflows

Review whether common matters follow consistent workflows without removing necessary professional judgment.

	ESTABLISHED	PARTIAL	NOT ESTABLISHED	NOT APPLICABLE
Common case types use approved task lists, phases, or workflow templates.	☐	☐	☐	☐
Responsibilities are clear at important case stages and handoffs.	☐	☐	☐	☐
Deadlines and follow-up tasks do not depend solely on individual memory.	☐	☐	☐	☐
Documents follow consistent naming, storage, and version practices.	☐	☐	☐	☐
Email and other client communications can be associated with the correct matter.	☐	☐	☐	☐
Leadership can identify matters that are stalled, waiting for information, approaching a deadline, or missing an assigned next step.	☐	☐	☐	☐

SECTION REFLECTION

Which matter stage depends most heavily on individual knowledge or manual follow-up?

PRIORITY ☐ Low ☐ Medium ☐ High **FOLLOW-UP OWNER**

TARGET REVIEW DATE

NOTES

SECTION 6 OF 8

Client Communication and Experience

Review how the firm manages routine communication, sensitive information, expectations, and recurring client questions.

	ESTABLISHED	PARTIAL	NOT ESTABLISHED	NOT APPLICABLE
Clients understand how and when the firm will communicate with them.	☐	☐	☐	☐
Routine status updates, reminders, and information requests are standardized where appropriate.	☐	☐	☐	☐
Sensitive information and documents are exchanged through approved channels.	☐	☐	☐	☐
Client questions are routed to the appropriate attorney or staff member.	☐	☐	☐	☐
Communication templates reflect the firm’s voice and use attorney-approved language.	☐	☐	☐	☐
The firm identifies recurring questions that may reveal a workflow, onboarding, or information gap.	☐	☐	☐	☐

SECTION REFLECTION

Which client question or request repeatedly consumes time that could be addressed more consistently?

PRIORITY ☐ Low ☐ Medium ☐ High **FOLLOW-UP OWNER**

TARGET REVIEW DATE

NOTES

SECTION 7 OF 8

AI Use and Governance

Review whether AI use is connected to real operational needs and supported by appropriate data-handling and human-review requirements.

	ESTABLISHED	PARTIAL	NOT ESTABLISHED	NOT APPLICABLE
The firm has identified specific approved uses for AI.	☐	☐	☐	☐
Attorneys and staff know which AI platforms and accounts are approved.	☐	☐	☐	☐
Confidential or sensitive information is not entered into unapproved or unvetted AI systems.	☐	☐	☐	☐
Substantive AI-assisted work receives appropriate attorney review.	☐	☐	☐	☐
AI-generated facts, quotations, citations, and legal authorities are independently verified.	☐	☐	☐	☐
The firm has written guidance covering permitted uses, prohibited uses, data handling, human review, and accountability.	☐	☐	☐	☐

SECTION REFLECTION

Where is AI already being used informally without firm-level guidance or visibility?

PRIORITY ☐ Low ☐ Medium ☐ High

FOLLOW-UP OWNER

TARGET REVIEW DATE

NOTES

SECTION 8 OF 8

Reporting, Security, and Continuous Improvement

Review whether leadership has the information, controls, and improvement process needed to manage the firm's digital operations.

	ESTABLISHED	PARTIAL	NOT ESTABLISHED	NOT APPLICABLE
The firm tracks inquiries, consultations, consultation attendance, retained matters, and lead sources.	☐	☐	☐	☐
Leadership can identify where prospective clients leave the intake process.	☐	☐	☐	☐
Access reflects the responsibilities of attorneys, employees, contractors, and vendors.	☐	☐	☐	☐
Access is reviewed when roles or relationships change.	☐	☐	☐	☐
Critical information has appropriate backup and recovery arrangements.	☐	☐	☐	☐
Workflow problems, vendor performance, and technology priorities are reviewed periodically and assigned an owner.	☐	☐	☐	☐

SECTION REFLECTION

What operational question is hardest for firm leadership to answer with current information?

PRIORITY ☐ Low ☐ Medium ☐ High **FOLLOW-UP OWNER**

TARGET REVIEW DATE

NOTES

FINAL REVIEW

Identify Your 90-Day Priorities

The objective is not to replace every system or automate every task. Use this review to identify the improvements that would have the greatest effect on firm capacity, consistency, visibility, security, or client experience.

01 Which workflow creates the most administrative effort?

02 Where are qualified prospective clients most likely to disengage?

03 Which system contains information that is difficult to locate or trust?

04 Which client request or question occurs repeatedly?

05 Which process depends too heavily on one person?

06 Which AI use is occurring without formal guidance?

07 Which improvement could be completed within the next 90 days?

08 Which improvement requires a broader platform, vendor, or integration decision?

FINAL REVIEW

Identify Your 90-Day Priorities (continued)

09 Who owns each next action?

10 When will progress be reviewed?

FINAL REVIEW

Priority Action Plan

Record up to five priorities. Keep entries general and avoid client-specific detail.

PRIORITY	CURRENT PROBLEM	DESIRED IMPROVEMENT	OWNER	TARGET DATE	NEXT STEP

Identified an area that deserves closer attention?

Overmatch can help your firm assess the current process, clarify its requirements, and determine whether a focused workflow improvement, platform implementation, AI capability, or ongoing support model is the appropriate next step.

Tell Us What You Want to Improve overmatchdigital.com/contact

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