

3 Automations Every Law Firm Should Build **First**

The three highest-ROI workflows for South Florida legal practices.

01

Client Intake

When a new client form lands in someone's inbox, that person becomes the bottleneck. Out sick, at lunch, or buried under 20 other requests, and the lead sits for hours. The automation never takes a day off. The second a lead submits, it enters the data into your CRM and routes the matter to the right paralegal.

THE RESULT

Every lead captured the moment it arrives, routed in seconds, none lost to a busy morning.

02

Document Studio

Your team re-drafts the same motions, sworn proofs of loss, and notices of appearance from scratch. Document Studio writes the first draft from your matter data, then routes it to a paralegal to review and approve. Approve it, and the system files it for you. Built-in tools round out the suite: a metadata viewer to inspect files sent by clients or opposing counsel, and document compression to pull oversized PDFs under court e-file limits.

THE RESULT

First drafts in minutes, every filing approved by a paralegal first, plus tools to read metadata and compress documents to size.

03

Appointment Scheduling

A booking link like Calendly or Microsoft Bookings is only the start. The value is everything after the booking: reminders people actually open, one-tap rescheduling that updates your calendar and case file, and automatic no-show recovery that re-engages the lead instead of losing it. We build that workflow layer on top of the tools you already use.

THE RESULT

Fewer no-shows, every reschedule handled without a phone call, and no booked consult that slips through the cracks.

Book a free discovery call.

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