

# Common Pitfalls in Case Management

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## Bottlenecks in Workflow

Processes and procedures should be in place so that as soon as a client signs up, your case management team knows what to do. These processes should be constantly reviewed and cultivated so they are streamlined and optimized. You want to avoid pileups in particular stages (think demands). Getting stuck in a stage will delay the ultimate outcome of the case. Be thorough.

## Inconsistent Software Usage

You can't make good decisions if you don't have reliable data in your case management system. Too many firms allow team members to enter the data they want, how and if they want. Inconsistent data entry prevents you from pulling quality data out of your system, so making informed decisions becomes impossible. Your firm should have a manual in place, and usage should be non-negotiable. Be consistent.

## Leaving Money on the Table

If your firm is failing to maximize the value of your cases, you're likely overlooking critical value drivers. Involving seasoned attorneys as an additional resource will allow your team to get a better understanding of how to reach maximum case value for all your clients. Ensure your newer attorneys have an experienced mentor with whom they work. Be inclusive.

## Fumbling the Handoff

When a file transitions at your firm, you must ensure that process is smooth. Setting appropriate internal expectations will allow your firm to avoid departmental strife. Ensure that everyone knows their roles and knows how to execute. Your Case Management team's priority should be to establish relationships with your clients. Make sure that your roles align with the ultimate goals of each department. Be smooth.

