# Process Discovery Checklist

Legalboards

Step 1

# Initial Workflow Mapping

## Identify Key Workflows

- [ ] **Catalog Case Types:** List all types of cases you usually work with (e.g., civil, criminal, family law).
- [ ] **Recurring Tasks and Standard Procedures:** Identify activities that occur regularly regardless of the case type.

## Map Out Current Processes

- [ ] **Document Current Workflows:** Describe the step-by-step process for each case type, from start to finish.
- [ ] **Stages of Case Progression:** Break down each case life cycle into distinct phases (e.g., client intake, discovery, trial preparation).

## Document current processes and identify key workflows.

Map out all case types and tasks, detailing the steps for each case type from start to finish. This foundational step helps visualize and understand your firm's operations, reducing inefficiencies and errors.

Step 2

# Roles and Responsibilities

## Identify Potential Bottlenecks and Delays In Your Team

- ☐ **List Team Members and Roles**: Enumerate all staff and their job titles.
- ☐ **Responsibilities for Each Role:** Specify individual responsibilities at each stage of a case.

## Define team roles and assign responsibilities.

Clearly defining roles and responsibilities is crucial for efficient legal operations, because it helps avoid confusion, and reduce overlaps. Well-defined roles make it easier to spot any workflow gaps, so firms can have optimized resource allocation and boost their effectiveness.

As the saying goes, "there's too many cooks in the kitchen," meaning that with unclear responsibilities, there is a lack of focus that could lead to neglected or duplicated tasks. Specific job titles and responsibilities can circumvent that by bringing clarity to teams and fostering effective collaboration on cases.

Step 3

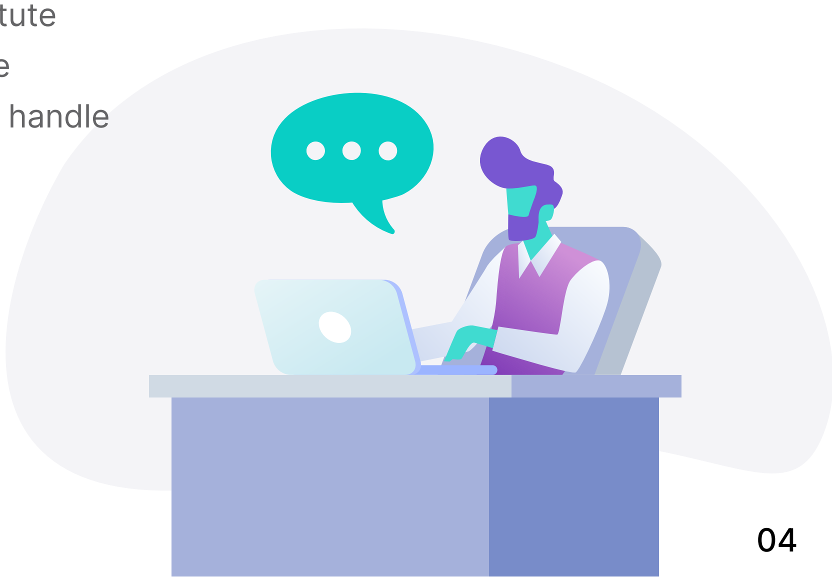
# Process Documentation and Pain Points

### Gather Existing Documentation and Identify Bottlenecks

- ☐ **Collect Process Documentation:** Compile existing manuals, guidelines, and/or checklists used.
- ☐ **Review Gaps and Inconsistencies:** Identify missing or unclear information, like outdated documents.
- ☐ **Interview Team Members:** Discuss common obstacles and frustrations within the workflow.
- ☐ **Note Common Delays:** Identify stages or tasks that regularly cause delays.

## Documentation and Bottleneck Identification

Collect all current process documentation and identify gaps. The Legal Executive Institute indicates that firms with comprehensive documentation are better positioned to handle complex cases and scale operations.



Step 4

# Communication, Performance, and Technology

## Potential Communication, Metrics, and/or Technology Delays

- [ ] **Assess Information Sharing:** Review current communication methods (e.g. emails, meetings) to ensure they are effective.
- [ ] **Identify Communication Tools:** List and evaluate current tools.
- [ ] **Collect Data on Timelines and Satisfaction:** Gather statistics on case duration, outcomes, and client feedback.
- [ ] **Identify Key Performance Indicators (KPIs):** Determine relevant success metrics to overall firm goals.
- [ ] **List Current Software and Tools:** Take inventory of software and tools for case management and task tracking.
- [ ] **Evaluate Effectiveness and User Satisfaction:** Assess tool effectiveness and user satisfaction.

## Communication and Technology Assessment

Evaluate current communication practices, gather performance data, and assess technology tools. Utilizing modern technology and effective communication practices leads to higher client and team satisfaction and improved operational efficiency.

# Conclusion

We hope that you'll be able to improve your team's productivity and efficiency by utilizing this checklist. By embracing the Kanban framework and other agile methodologies, you've fostered a positive environment for better service delivery, increased client and team satisfaction, and other improved outcomes.

But please remember, it's an ongoing process that needs to be continuously improved. By maintaining a reiterative process and refining your workflows, you'll be able to keep up with, if not stay ahead, of the ever-changing legal landscape.

If you need help reviewing and implementing changes to your workflow, contact us at info@legalboards.com for more information about our consulting services or take advantage of our free services.

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