The Client Journey Map

Walk the client's path and mark every point where automation saves time without touching legal judgment

Every firm has a process. Most of it is invisible to the client. This map makes it visible - and shows where the machine can carry the load so your people carry the work that matters.

Track A is pure automation: structured data in, structured data out, no AI step reading content or making a judgment call. That is the territory this map covers. Every win you see here lives on Track A - and that is exactly why it is the safest place to start.

Walk this map from first contact to closed matter. Find the steps your team does by hand today. Those are your first builds.

1. The playbook from the client's side

The process playbook in the book classifies ten core firm processes by track and risk. This map runs the same ground from a different angle: the client's experience, stage by stage, from the moment they find you to the moment the matter closes.

The view matters because automation built from the inside out tends to optimize what is easy to see - internal workflows, billing runs, folder structures. Automation built from the client's path out tends to find the friction points that cost you clients before you even notice: the missed acknowledgment, the retype that errors, the invoice that arrives late. Both views are right. This one is complementary.

Each row below shows what moves by hand today, what Track A automation carries instead, and which firm process or tool from the inventory applies. Legal judgment stays off this map entirely. Every item here is structured data moving on a defined rule - no AI reading content, no model making a call.

2. The client journey

Stage	What moves by hand today	What Track A carries instead	Relevant process or tool
Inquiry The client finds your firm and reaches out.	Staff reads the web form, decides who handles it, and forwards it manually. Leads sit in inboxes. No record until someone acts.	The submitted form loads into the CRM. The client or matter type field routes the inquiry to the right practice group. An acknowledgment goes to the client the same moment. Nothing waits in an inbox.	Lead capture and assignment; inbound inquiry routing (Track A when fixed category fields map to the group); inbound acknowledgment
Intake The client provides information so the firm can open a matter.	Staff retypes data from the intake form into the practice management system. Custom rate fields agreed to during intake are keyed in by hand. Mistakes in that transcription propagate to every downstream record.	The intake form submission creates the matter record, the client contact, and the folder structure with no retyping. Custom rate and fee fields move straight from the intake platform to the matter fields. A practice-specific questionnaire goes to the client and the returned answers load as structured fields.	Intake form to matter record; signed engagement letter to matter fields; intake questionnaire load
Engagement The firm and client formalize the relationship.	Someone opens last week's engagement letter, saves a copy, finds and replaces the names, sends it manually, and then retypes the signed fields back into the matter record after the client returns it.	The system merges client and matter fields into the engagement letter template and sends it for e-signature. When the letter is signed, the signed field values populate the matter fields with no retyping. The welcome email, client portal invite, and first set of required forms go out on the same trigger.	Engagement letter generation; signed engagement letter to matter fields; new-client welcome sequence; identity and document collection

Stage	What moves by hand today	What Track A carries instead	Relevant process or tool
Matter open The firm creates the matter and sets up the working environment.	Someone builds the folder structure by hand. Someone creates the opening task list. Someone adds the matter to the tracking sheet. Three separate manual steps, every matter, every time - each a chance to skip a folder or miss a task.	A matter created in the practice management system builds the full folder structure for that matter type, creates the opening task list, writes the matter to the tracking sheet, and draws the next matter number in sequence - all in one motion. The conflicts index gains the new client, adverse parties, and related entities.	Matter number and naming; folder and permission build; status sync across systems; conflicts index update
Active work The firm works the matter. Deadlines run, documents move, filings go out.	Filing deadlines are calculated from court rules by hand. Docket dates are entered into calendars manually. Court orders are read and dates are transcribed. Documents are named however the person saving them decides. Filing packages are assembled and checked against court formatting rules by a person.	Deadlines are calculated from a trigger date using stored court rules. A new docket entry pushes dates and reminders to responsible attorneys' calendars. Court electronic feed entries create docket entries on their own. Documents are routed to the right matter folder by naming convention. Filing packages are assembled and checked against court formatting rules before submission. Filed-stamp confirmations are captured and filed to the matter.	Deadline calculation; docket-to-calendar sync; tiered deadline reminders; court feed monitoring; auto-filing by rule; filing package assembly; filed-stamp capture

Stage	What moves by hand today	What Track A carries instead	Relevant process or tool
Billing The firm captures time, prepares invoices, and collects payment.	Time is reconstructed from memory at month-end. Invoices are built by hand from posted entries. Billing guidelines are checked manually. Reminders to overdue accounts go out when someone remembers to send them. Payments are matched to invoices by staff.	Activity from the calendar, email, and document systems is captured into draft time entries for each timekeeper. Draft invoices are built from posted time and cost entries on the billing cycle. Each draft is checked against the client's rate table and billing rules, with violations flagged before send. Pre-bills route to the billing attorney with guideline flags already marked. Reminders go out by invoice age and escalate to a call list automatically. Incoming payments are matched to open invoices and ledgers are updated.	Time capture (Track A baseline); draft invoice generation; billing-guideline checks; pre-bill narrative review (Track A baseline); collections reminders; payment reconciliation
Close The matter ends and the firm wraps up its obligations.	The close-out checklist runs if someone remembers to run it. Final billing is done by hand. Retention dates are calculated manually and written somewhere no one checks again. Access to matter files is not restricted until someone thinks to do it. The client gets no formal close-out communication unless someone drafts one.	When a matter is marked closed, the close-out checklist runs: final bill, retention date set, and file access changes are applied. The retention clock starts from the close date and flags files as they come due for review or disposition. Every disposition is logged so there is a defensible record of what happened and when.	Close-out checklist; records retention (retention clock and disposition log); trust balance and disbursement settlement posting where applicable

Stage	What moves by hand today	What Track A carries instead	Relevant process or tool
Retention The firm stays in contact and the former client becomes a source of future work.	Follow-up with closed-matter clients depends on individual attorney initiative. Matter outcomes are not captured in a form usable for pitches or referrals. Relationship touchpoints happen ad hoc or not at all.	Closed matters feed an experience database with client, practice area, and outcome fields - structured data that supports future pitches and referrals without relying on memory. Nurture sequences route former clients into scheduled communications based on service type and relationship history.	Experience and pitch database (Track A baseline); nurture sequences; matter lessons capture

3. What this map does not cover

Legal judgment is off this map on purpose. The steps above do not interpret client facts, assess legal exposure, draft substantive positions, or decide anything about how the matter is handled. Those decisions belong to the attorney. Automation on this map carries the structured data so attorneys have more time for the work only they can do.

Some processes in the inventory have a Track B version: an AI step reads content and produces an output a person relies on. Inquiry routing by AI reading free text. AI-drafted time narratives. AI-written status updates. Those are separate decisions - each one a step up you make on purpose, with the full five-duty discipline attached. None of them appear on this map because this map is Track A territory only.

> **Note.** The platform floor for every row on this map is business tier. Consumer-grade tools are not appropriate for any stage of the client journey. The book covers the tier definitions in full, but the floor does not move regardless of track.

4. Where to start

The automation inventory at the back of the book lists the ten lowest-risk, fastest Track A builds across these stages. Nine of them map directly onto this journey:

- ☐ **Intake form to matter record.** Submitted form creates the matter record, the client contact, and folder structure with no retyping.

- ☐ **Matter number and naming.** A new matter draws the next number in sequence and applies the firm's naming convention across every system.
- ☐ **Folder and permission build.** Opening a matter builds the standard folder tree and sets access for the assigned team.
- ☐ **Conflicts index update.** Opening a matter adds the client, adverse parties, and related entities to the conflicts index.
- ☐ **Docket-to-calendar sync.** A new docket entry pushes the date and reminders to responsible attorneys' calendars.
- ☐ **Tiered deadline reminders.** Reminders go out on a set schedule before each deadline and escalate if the task is not marked done.
- ☐ **Auto-filing by rule.** Documents are routed to the right matter folder by naming convention - no manual sorting, no misfiled documents.
- ☐ **Draft invoice generation.** Draft invoices are built from posted time and cost entries on the billing cycle.
- ☐ **Appointment reminders.** Reminders and intake links go out before each client meeting and update when the time changes.

Each one is structured data in, structured data out. No AI step reads content. No legal judgment is involved. These are the builds that give you the fastest time-to-value and the lowest compliance exposure - which is the whole argument for starting on Track A.

> **Note.** Every win on this map is Track A: no AI judgment, no five-duty discipline, no Opinion 512 obligations. Vendor diligence and data-protection duties apply to the platforms you use, but the AI-specific ethical obligations do not attach until you add an AI step and cross to Track B. That is why the client journey map is the safest place to start building.

How to use this. This is a thinking tool, built to help you reason about your own firm. It is not a compliance guarantee and it is not legal advice. Where it states a rule, it states the rule as of July 18, 2026, and the law moves, so confirm the current rules in your jurisdiction with your own counsel before you rely on anything here.

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