9-Step Family Law Workflow Implementation Checklist

Use this checklist to evaluate, pilot, and implement new family law workflow tools with confidence — without overwhelming your team.

☐ Step 1 — Schedule a Focused Demo

- ☐ Validate state-specific support
- ☐ Review client data and document collection workflows
- ☐ Review financial statement generation
- ☐ Review child support and asset division capabilities
- ☐ Ask how tech stack and user experience aligns with modern best-practices over time

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☐ Step 2 — Select the Tool Based on Workflow Fit

- ☐ Addresses pain points identified in your workflow audit
- ☐ Reduces duplicate data entry and rework
- ☐ Supports your state’s financial statement
- ☐ Simplifies client data and document collection
- ☐ Provides a modern and easy user experience for your staff and clients
- ☐ Built on a modern, maintainable technology stack

☐ Step 3 — Start a Structured Free Trial

- ☐ Define trial start and end dates
- ☐ Identify what success looks like
- ☐ Confirm onboarding or trial support
- ☐ Plan to test **real client matters** (not hypotheticals)

☐ Step 4 — Appoint a Champion + Evaluators

- ☐ Select one internal champion
- ☐ Select 1–2 additional evaluators
- ☐ Ensure evaluators represent key roles (paralegal, attorney, case manager)
- ☐ Clarify responsibilities and feedback expectations

☐ Step 5 — Set Up Your Firm in the Tool

- ☐ Configure the firm
- ☐ Setup any integrations
- ☐ Add evaluators as users

☐ Step 6 — Train the Evaluation Group

- ☐ Schedule initial training session
- ☐ Review end-to-end workflow
- ☐ Provide access to help articles or videos
- ☐ Provide access to a sandbox (test) environment

☐ Step 7 — Test with 1–2 Real Client Matters

- ☐ Select one simple case
- ☐ Select one moderately complex case
- ☐ Test client data collection
- ☐ Test document collection and organization
- ☐ Try client reminders automation
- ☐ Try done tracking automation
- ☐ Generate financial statements
- ☐ Organize disclosure documents
- ☐ Create child support scenarios
- ☐ Create asset division scenarios
- ☐ Generate parenting time and property division scenario comparison reports
- ☐ Generate asset distribution Excel reports
- ☐ Generate itemized disclosure statement
- ☐ Capture feedback from evaluators

☐ Step 8 — Move All Active Clients into the New Workflow

- ☐ Confirm sufficient licenses / Client Matters are available
- ☐ Communicate change clearly to staff
- ☐ Transition all active cases at once
- ☐ Retire old workflows and tools

☐ Step 9 — Train the Entire Team

- ☐ Schedule firm-wide training
- ☐ Explain why the change is happening
- ☐ Share new workflows and expectations
- ☐ Provide quick-reference resources
- ☐ Schedule follow-up Q&A or office hours

✅ Final Review

- ☐ Champion confirms readiness
- ☐ Team confidence is high
- ☐ Old processes are fully retired
- ☐ Firm is ready for a smoother, more efficient year ahead

This checklist accompanies the Year-End Family Law Workflow Series by DivorceHelp123.