

Goals and challenges of the matter lifecycle stages

ELM Solutions

Legal matter management involves tasks performed by many contributors. In order to be successful, the entire legal operations team should have a common understanding of each matter phase, the work associated with it, and the obstacles that can make that work more difficult. Below are the four phases of the matter management lifecycle with some key tasks and common challenges.

Phase 1: Matter intake

Tasks

- **Gather Information:** Reduce excessive back and forth requests for information
- **Perform case assessment:** Inform matter strategy with an understanding of risk, legal needs, and potential for early resolution



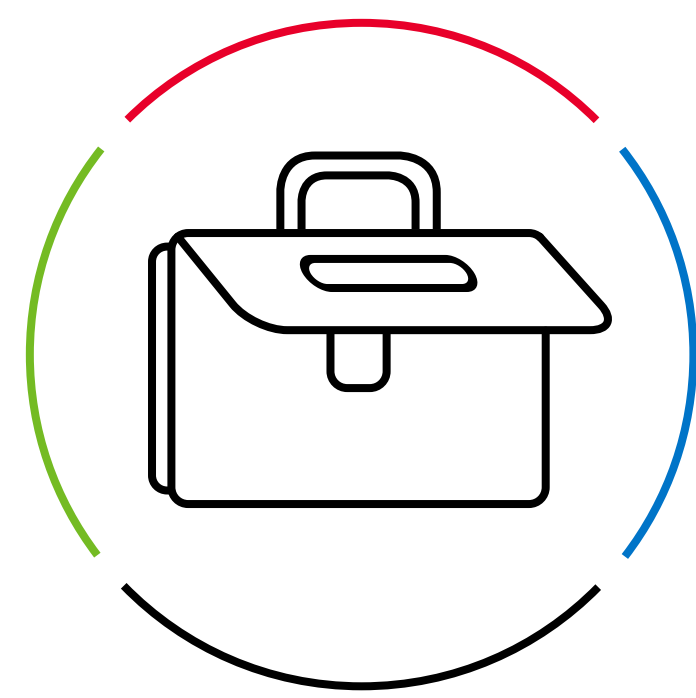
Challenges

- Lack of a common intake process leads to inconsistent practices, with information scattered across emails, phone calls, and in-person requests.
- Lack of early-stage planning can lead to teams playing catch-up later in the matter process.

Phase 2: Opening of new matters

Tasks

- **Establish work and staffing plan:** Consolidate and disseminate critical matter information to in-house or outside counsel
- **Define budget:** Open the matter and establish billing expectations



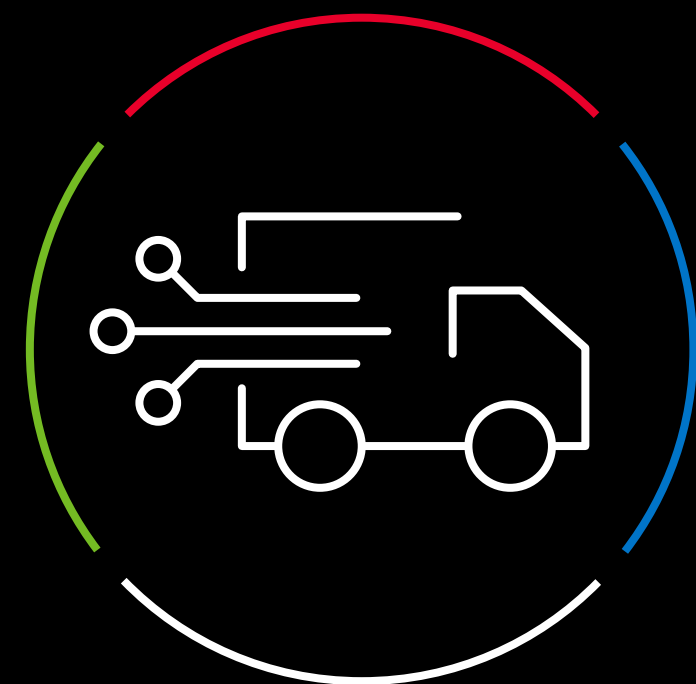
Challenges

- Lack of law firm performance data (on budgets, cycle times, etc.) and other missing matter data can prevent teams from developing an adequate matter plan.
- Decentralized internal and external communication reduces efficiency and productivity while raising costs.

Phase 3: Delivery of work

Tasks

- **Manage documents and email:** Adhere to defined matter timelines and budget
- **Manage spend and budgets:** Appropriately document all matter activity



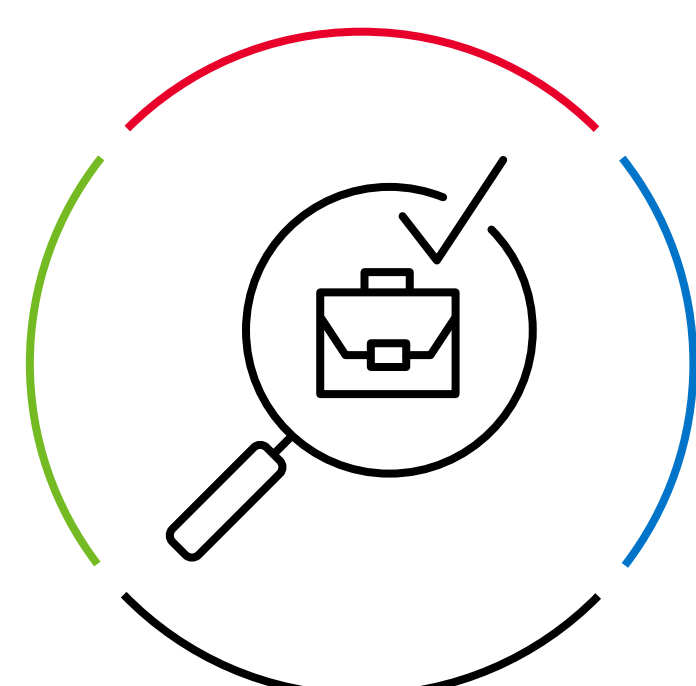
Challenges

- Decentralized collaboration results in scattered emails, phone calls, etc., difficulty collaborating on documents, and negative impacts on calendar and schedule coordination.
- Siloed data storage necessitates pulling reports from multiple systems with less visibility into and control over matter spend.

Phase 4: Matter completion

Tasks

- **Assuring payments:** Expedite billing processes
- **Retaining records, including firm performance data:** Capture matter and firm information for future analysis



Challenges

- Manual billing processes are time-consuming and make it more difficult to catch nonadherence to billing guidelines and alternative fee arrangements.
- A lack of complete data can impede tracking of price and firm performance, making data-driven decisions on future matters more difficult.

For more on attaining phase-based and overall matter goals, as well as addressing the common challenges of each stage, download our free eBook [The challenges of matter lifecycle management: Common hurdles and the legal technology to address them.](#)