

Client intake and conflict checks

Automates the client intake process by capturing lead information, performing comprehensive conflict checks across practice management and legal research systems, and routing approved clients to case setup or flagging conflicts for manual review.

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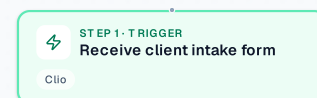


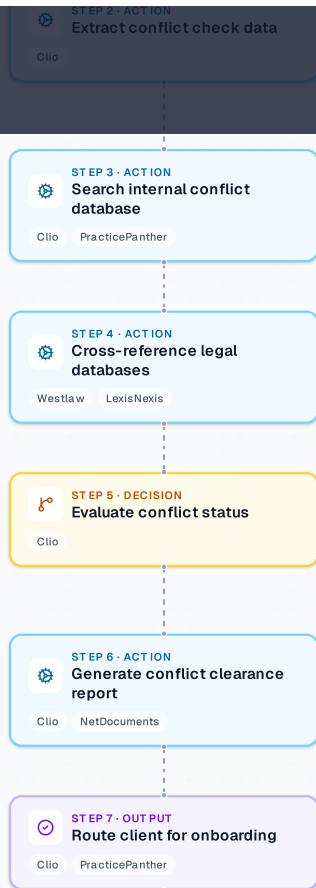
WORKFLOW TRIGGER

Potential client submits intake form through firm website or client portal

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Receive client intake form

Potential client completes and submits intake form with contact details, legal matter description, opposing parties, and relevant dates. Form data is automatically captured and validated for completeness.

2


 ACTION

Extract conflict check data

Parse intake form to identify key conflict elements including client name, opposing parties, case type, and related entities. Format data for systematic conflict database searches.

Clio

3

 ACTION

Search internal conflict database

Query practice management system for existing clients, matters, and parties that match or relate to the prospective client information. Generate comprehensive conflict report with match scores.

Clio

PracticePanther

4

 ACTION

Cross-reference legal databases

Search legal research platforms for additional conflict information including court records, opposing counsel history, and related litigation involving identified parties.

Westlaw

LexisNexis

5

 DECISION

Evaluate conflict status

Analyze conflict search results to determine if any actual or potential conflicts exist. Route based on conflict severity level and firm policies.

Clio

6

 ACTION

Generate conflict clearance report

Compile comprehensive conflict analysis report with recommendations for partner review. Include all search results, risk assessments, and proposed conflict waivers if applicable.

Clio

NetDocuments

7

 OUTPUT

Route client for onboarding

For cleared clients, automatically create matter in practice management system and trigger engagement letter workflow. For conflicts, flag for attorney review with detailed conflict report.

Clio

PracticePanther



Outputs

- Conflict clearance report
- New client matter file

- Engagement letter workflow trigger

AI Business OS



Key Metrics

- Average conflict check processing time
- Conflict identification accuracy rate
- Client intake conversion rate



Tools & Integrations

- Clio
- PracticePanther
- Westlaw
- LexisNexis
- NetDocuments

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