Matter Stages Best Practices Guide

Matter Stages

Matter stages are work-in-progress boards that make it easy to visually track the status of cases across your firm. By tapping into matter stages, you can identify blockers, prevent bottlenecks, and take action on matters that need attention.

Matter stages is available on Advanced and Complete plans.

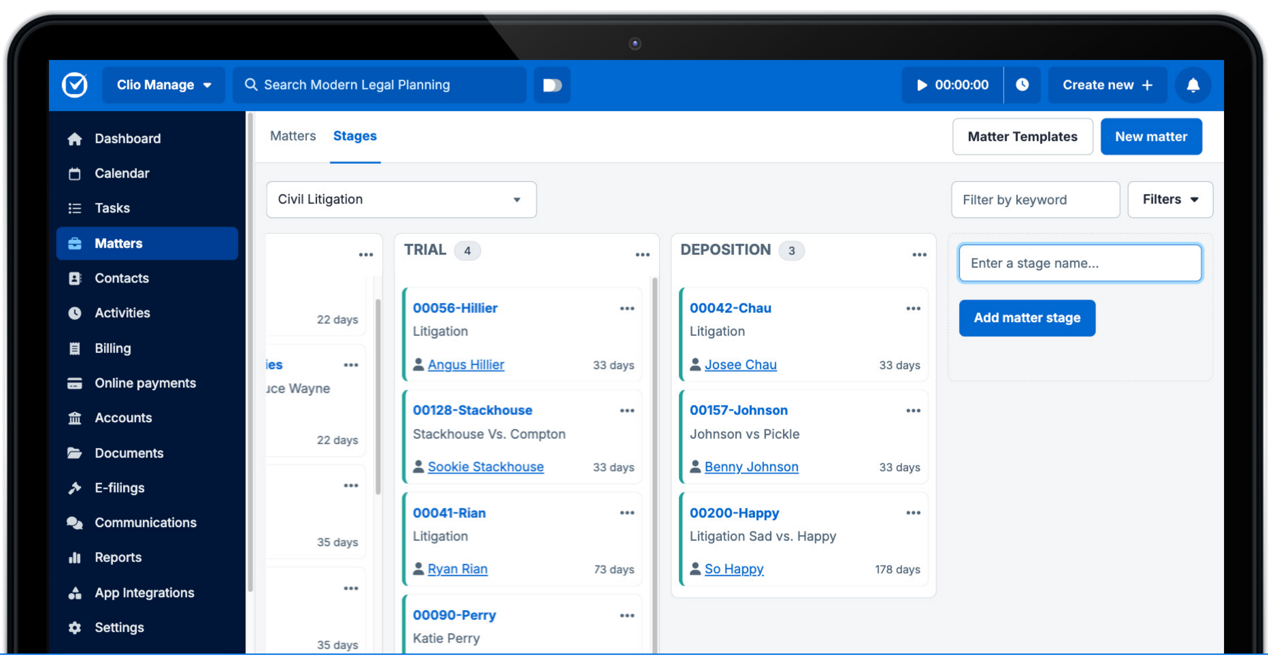
Matter stages is a game changer!

Alison Dunlap, Minick Law, P.C.

With matter stages, you can easily create stages for the different practice areas your firm serves and track the progression of every case at a glance.

Here's how matter stages keep your cases moving efficiently:

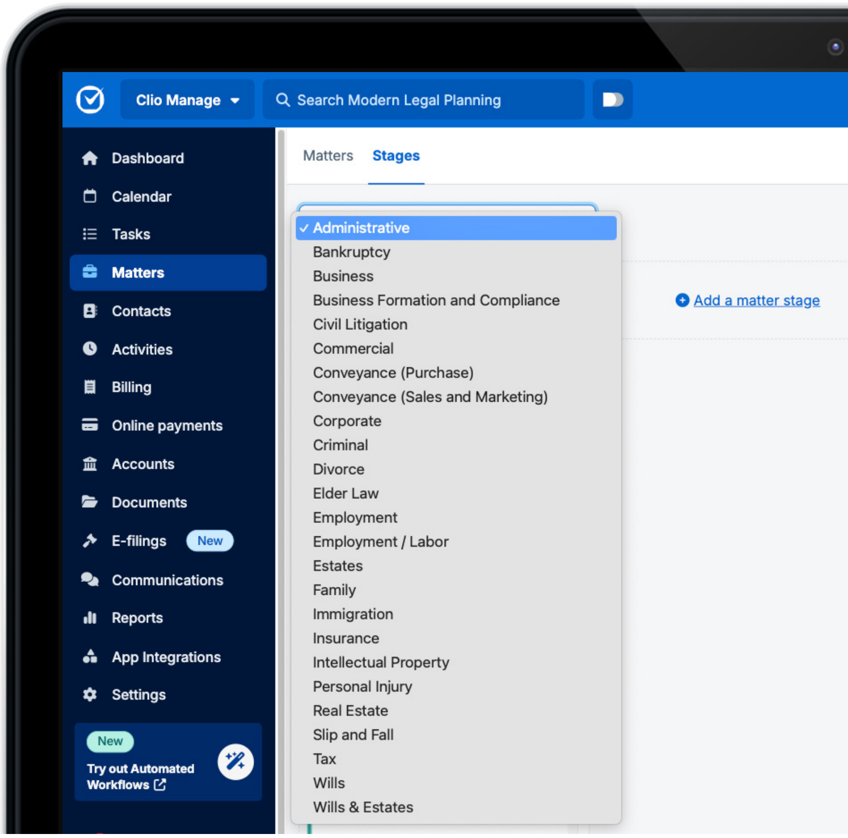
- **Stay focused on your top priorities.** Easily monitor how long each matter has been in a stage so you can take action on the cases that need your attention.
- **Keep cases moving forward.** Proactively identify and resolve blockers throughout the case lifecycle, preventing delays.
- **Keep everyone on the same page.** Centralize every case status across your firm, giving your team access to updates at a glance.



Getting Started

Step 1

To get started, head to the matters tab and click **stages**. Here you can select a practice area from the dropdown. If you don't see the practice area you're looking for, you can add a new practice area from your settings.



Step 2

Add stages for the selected practice area. You can add up to 15 stages.

Step 3

Easily drag and drop your matters across stages. Matters with the selected practice area will appear under the **no stage assigned** column. This column will disappear once all of your matters have been assigned to a stage.

For a quick tour, watch this short video.

Pro Tip

To monitor case status from the **matters** page, select **matter stage** from the **columns** dropdown. Once added, the stage will also appear when you export your matters into a CSV or PDF report.

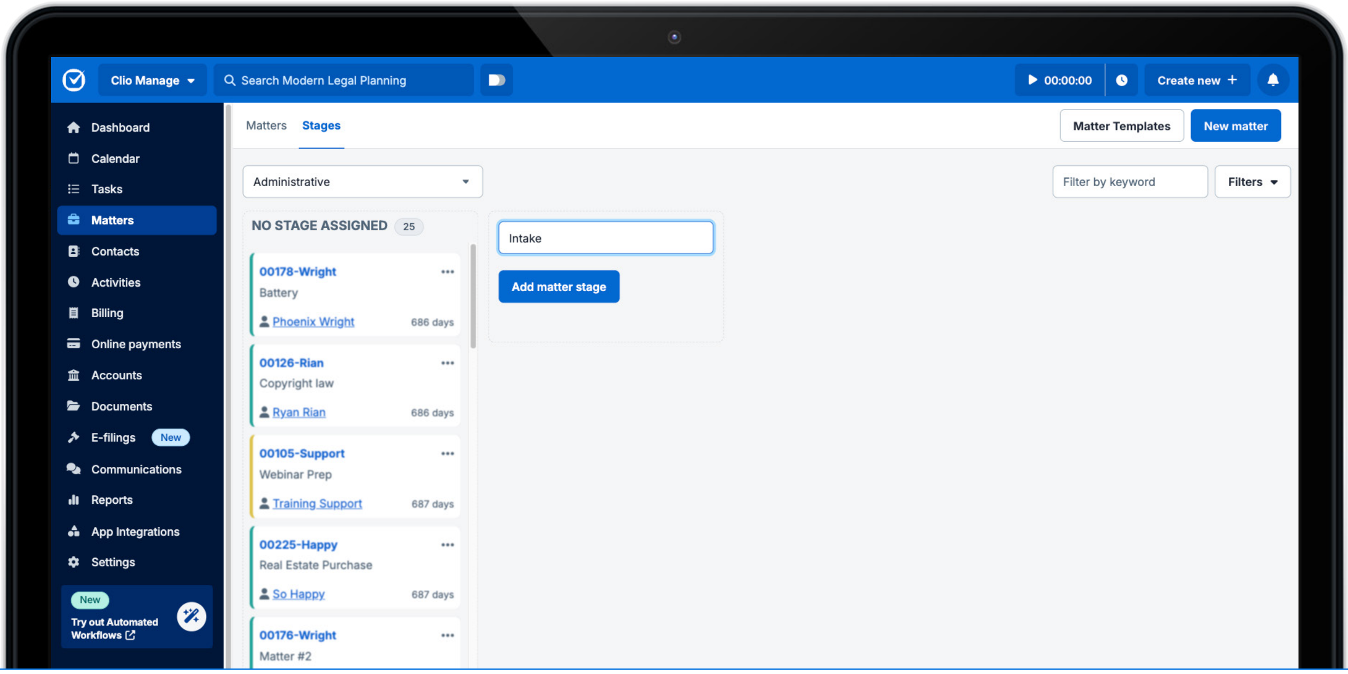
Best Practices

Before creating matter stages:

- ☐ **Set up practice areas** in Clio Manage to keep your matters organized and ensure the right stages are created for each case type.
- ☐ **Assign practice areas to all matters**. Without a practice area, matters will not appear in your matter stages, making them harder to track.
- ☐ **Make sure each matter is assigned to a responsible attorney**. This ensures accountability and helps everyone know who is in charge of each case.
- ☐ **Keep the case status up to date** to show where each matter is in the process. This helps you easily spot matters that need attention or follow up.

When creating matter stages:

- ☐ **Add stages reflecting key milestones in your cases** to improve tracking and visibility. For example, discovery or mediation.
- ☐ **Name your stages clearly and consistently** across all practice areas to ensure easy navigation and clarity across your team.



To help you get started, here are some of the most-used stages by practice area:

Personal injury
- *Intake*
- *Treating*
- *Discovery*
- *Demand*
- *Negotiations*
- *Settlement*
- *Trial*

Criminal
- *Pre-trial*
- *Discovery*
- *Sentencing*
- *Trial*

Employment
- *Discovery*
- *Mediation*
- *Demand*
- *Settlement*
- *Trial*

Administrative
- *Intake*
- *Pleadings*
- *Discovery*
- *Mediation*
- *Trial*

Estate planning
- *Intake*
- *Drafting*
- *Client review*
- *Ready to sign*
- *Signing*
- *Funding*
- *Completed*

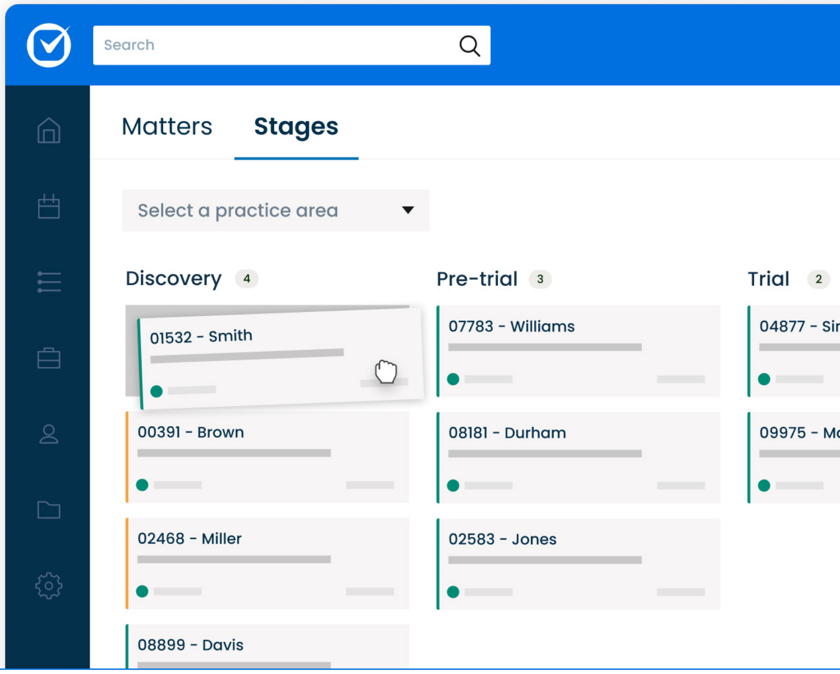
Civil litigation
- *Prefiling*
- *Filed pleadings*
- *Discovery*
- *Mediation*
- *Pre-trial*
- *Settlement*
- *Trial*
- *Ready to close*

Family
- *Prefiling*
- *Filed pleadings*
- *Discovery*
- *Mediation*
- *Pre-trial*
- *Settlement*
- *Trial*
- *Ready to close*

- [ ] Use the **no stage assigned** column to easily identify matters that still need to be categorized.

After creating matter stages:

- [ ] **Regularly update the matter status** to ensure all cases are progressing through the right stages.
- [ ] **Review stages periodically** to ensure they align with changes in your practice areas or case handling processes.



See how this employment attorney uses matter stages to stay on track.

> The ability to see matters in separate stages of litigation is incredibly helpful and reduces matters being lost in the shuffle.
>
> **Joe Gibson**
> Executive Director & General Counsel,
> Employment Law Center of Maryland

Joe Gibson's tips to help you with matter stages

- Joe uses the following matter stages at his employment firm:
  - *Demand*
  - *Pleading*
  - *Service*
  - *Discovery*
  - *Summary judgment*
  - *Trial*
- When using matter stages, the cases move from left to right as the cases progress.
- Filter your matter stages from oldest to newest to make sure no cases are falling through the cracks and receive proper attention.

Why Joe loves using matter stages

- **It increases visibility**. It is entirely possible for a lawyer to put a case on the back burner then realize it has been weeks or months since they've advanced the case. This leads to ethical risk and client distrust. Having a visual of caseload, along with the ability to track how long a matter has been in a stage, helps to avoid this.
- **It puts clients at the center**. Part of being a client-centered law firm is considering the client experience at each stage of the process. At the demand letter stage, there's a great deal of anxiety around what happens next, whereas in discovery, clients are anxious about cost—and the trial stage is just pure anxiety. Client-centered firms tailor the tone, frequency, and type of communications they have with clients at each stage.
- **It increases efficiency**. Keep your firm on track by creating task lists for each stage. For example, when a matter moves into the demand stage, you can automatically assign a task list for drafting, proofing, and a client review—and auto-generate documents from templates—using automated workflows. This is huge for efficiency.

Want more tips? Here are some helpful resources:

Join the community
Connect with other legal professionals using Clio through our forum.

Power up with Clio
Join us in a monthly webinar diving into best practices.

See what's new
Join our quarterly webinar featuring our latest product updates.

Have questions?
Visit the Help Center or contact customer support at 1-888-858-2546.