

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.

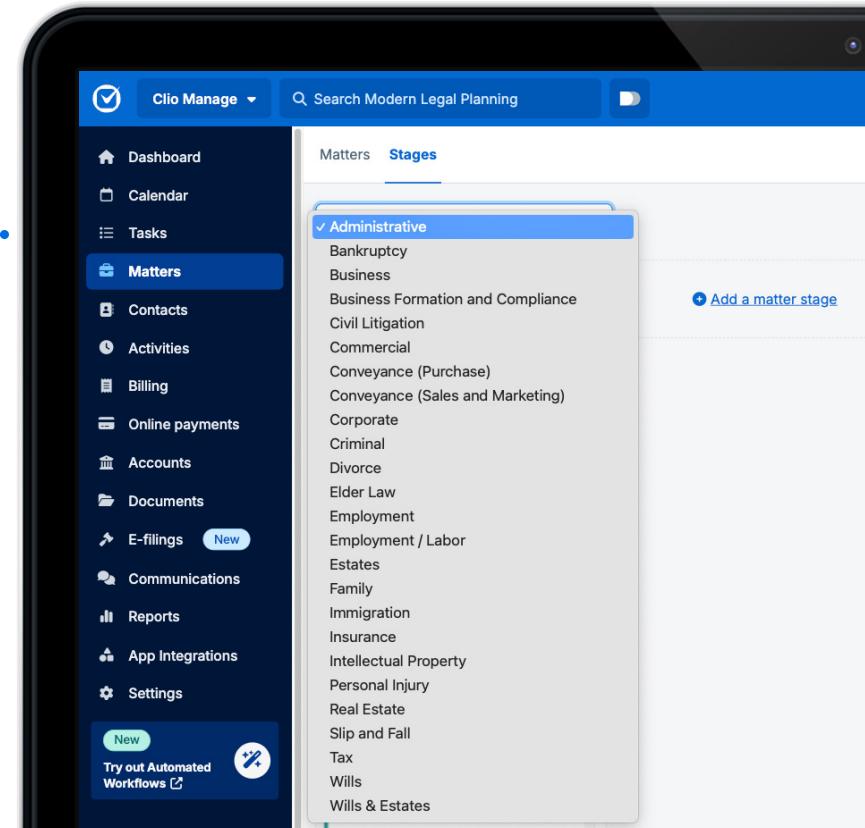
The screenshot shows the Clio Manage software interface. The left sidebar has a dark theme with various tabs: Dashboard, Calendar, Tasks, Matters (which is selected and highlighted in blue), Contacts, Activities, Billing, Online payments, Accounts, Documents, E-filings, Communications, Reports, App Integrations, and Settings. The main area has a blue header with the text 'Clio Manage', a search bar 'Q. Search Modern Legal Planning', a timer '00:00:00', and a 'Create new' button. Below the header, there are two tabs: 'Matters' and 'Stages', with 'Stages' being the active tab. A dropdown menu shows 'Civil Litigation'. The main content area displays a list of cases. On the left, there are two sections: 'TRIAL' (4 cases) and 'DEPOSITION' (3 cases). Each case card includes the matter number, name, stage, and duration. For example, in the 'TRIAL' section, there are cases for '00056-Hillier' (Litigation, 33 days), '00128-Stackhouse' (Stackhouse Vs. Compton, 33 days), '00041-Rian' (Litigation, 73 days), and '00090-Perry' (Katie Perry, 35 days). In the 'DEPOSITION' section, there are cases for '00042-Chau' (Litigation, 33 days), '00157-Johnson' (Johnson vs Pickle, 33 days), and '00200-Happy' (Litigation Sad vs. Happy, 178 days). To the right of the case list, there is a search bar 'Enter a stage name...', a 'Filters' button, and a 'Add matter stage' button.



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.

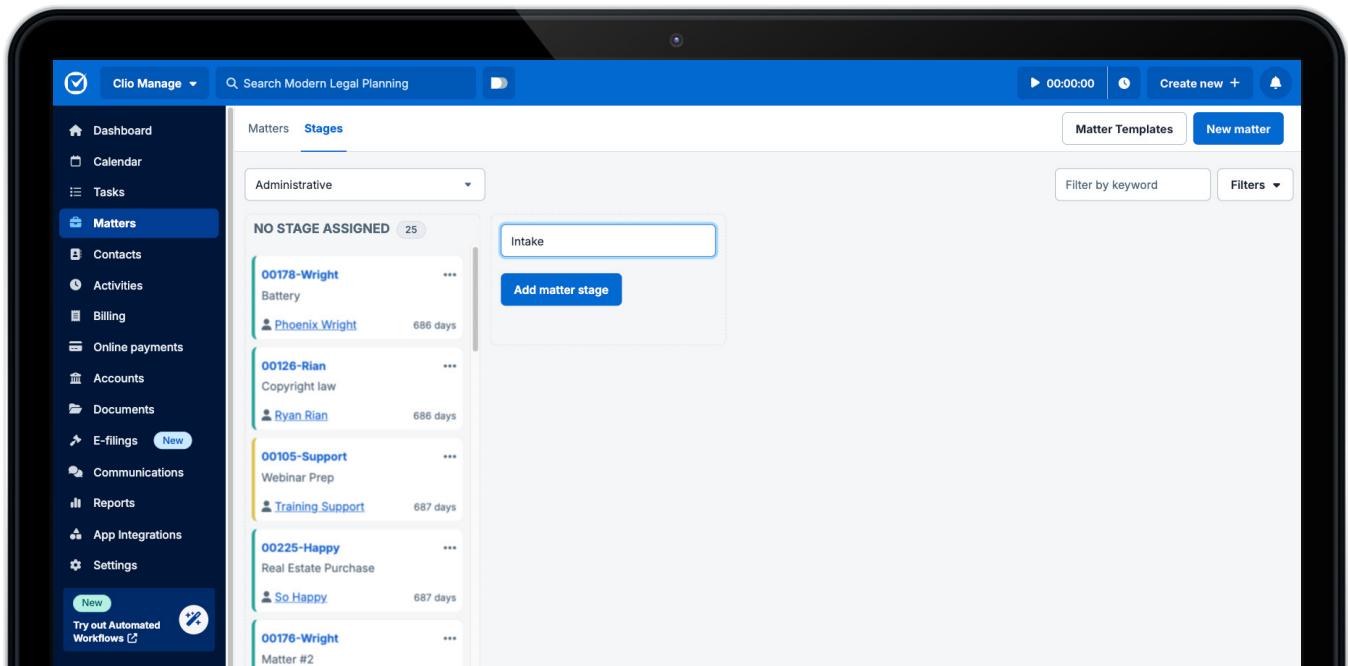
Make sure each matter is assigned to a responsible attorney. This ensures accountability and helps everyone know who is in charge of each case.

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	Employment	Estate planning	Civil litigation	Family
<ul style="list-style-type: none">• <i>Intake</i>• <i>Treating</i>• <i>Discovery</i>• <i>Demand</i>• <i>Negotiations</i>• <i>Settlement</i>• <i>Trial</i>	<ul style="list-style-type: none">• <i>Discovery</i>• <i>Mediation</i>• <i>Demand</i>• <i>Settlement</i>• <i>Trial</i> <p>Administrative</p> <ul style="list-style-type: none">• <i>Intake</i>• <i>Pleadings</i>• <i>Discovery</i>• <i>Mediation</i>• <i>Trial</i>	<ul style="list-style-type: none">• <i>Intake</i>• <i>Drafting</i>• <i>Client review</i>• <i>Ready to sign</i>• <i>Signing</i>• <i>Funding</i>• <i>Completed</i>	<ul style="list-style-type: none">• <i>Pre-filing</i>• <i>Filed pleadings</i>• <i>Discovery</i>• <i>Mediation</i>• <i>Pre-trial</i>• <i>Settlement</i>• <i>Trial</i>• <i>Ready to close</i>	<ul style="list-style-type: none">• <i>Pre-filing</i>• <i>Filed pleadings</i>• <i>Discovery</i>• <i>Mediation</i>• <i>Pre-trial</i>• <i>Settlement</i>• <i>Trial</i>• <i>Ready to close</i>
Criminal				
<ul style="list-style-type: none">• <i>Pre-trial</i>• <i>Discovery</i>• <i>Sentencing</i>• <i>Trial</i>				

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.

The screenshot shows a software interface for managing legal matters. The top navigation bar includes a search bar and a magnifying glass icon. The main area is divided into two tabs: 'Matters' and 'Stages', with 'Stages' currently selected. A sidebar on the left features icons for home, calendar, list, user, and settings. A dropdown menu 'Select a practice area' is open, showing 'Discovery' (4 matters), 'Pre-trial' (3 matters), and 'Trial' (2 matters). The main content area displays a grid of matter cards. Each card contains the matter ID and name, followed by a progress bar and a small circular icon with a checkmark. The 'Discovery' section includes cards for '01532 - Smith', '00391 - Brown', '02468 - Miller', and '08899 - Davis'. The 'Pre-trial' section includes cards for '07783 - Williams', '08181 - Durham', and '02583 - Jones'. The 'Trial' section includes cards for '04877 - Sim' and '09975 - Mc'. The progress bars are mostly at the beginning of the scale, indicating initial stages of the process.

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.

