Backdocket and Automation: A Guide to Reducing Your Workload

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As your law firm grows, success often comes with a surge of extra work and stress. Automation changes that. Backdocket takes over the repetitive, time-consuming tasks that slow down your day, so you can stay focused on your clients and move cases forward more efficiently.

In this guide, you'll learn where automation delivers the biggest impact, and how practice management software helps your firm increase productivity, bolster client relationships, and grow profitability.

DAILY TASKS THAT DRAIN PRODUCTIVITY

For many attorneys, the biggest time drains aren't in the courtroom or drafting arguments; they're in the day-to-day logistics.

Common productivity killers include:

- Collecting and re-entering client data across multiple systems
- Rescheduling meetings or tracking court and filing deadlines
- Assembling standard forms and double-checking information
- Reviewing time entries, sending invoices, and following up on payments
- Sorting emails, forwarding updates, and keeping clients informed

Lawyers lose 25–50% of the day to non-billable logistics. Automation gives that time back for advocacy and growth.

STREAMLINE CLIENT INTAKE AND ONBOARDING

Intake is where things often get backed up. Gathering information, running conflict checks, and updating clients can turn into hours of emails and phone calls.

With an automated system, you can:

- Send clients secure digital intake forms they can complete online
- Automatically add submitted details to new case records
- Run conflict checks and launch onboarding tasks instantly
- Send confirmations or welcome messages without manual follow-up

Simplified intake with backdocket helps you open new cases faster, build client trust, and keep information organized from the very first interaction.

SIMPLIFY APPOINTMENT SCHEDULING AND CALENDAR MANAGEMENT

Scheduling requires a lot of coordination. Between court dates, client meetings, and internal check-ins, it's easy to lose hours to emails and calendar conflicts.

Digital scheduling tools let you:

- Book client appointments through secure links tied to your real-time availability
- Send automatic confirmations and reminders to reduce no-shows
- Create calendar events for hearings, deadlines, and follow-ups automatically
- Maintain synced schedules for the entire team across cases and locations

Backdocket's synced calendars keep your team organized and cases on schedule.

AUTOMATE DOCUMENT GENERATION

Drafting legal documents takes up more time than it should. Even basic letters or pleadings become time-consuming when every field must be manually completed and double-checked for accuracy.

With a centralized document system, you can:

- Use built-in templates for pleadings, letters, and contracts
- Auto-populate each file with client and case details, like names, dates, and jurisdictions
- Eliminate duplicate entries and reduce typos or version errors
- Produce consistent, ready-to-send documents in minutes instead of hours

The result is a faster, more reliable drafting process that keeps your team productive and your firm's materials uniform across every case.

ACCELERATE BILLING AND INVOICING

Accurate billing is essential to getting paid, but when time isn't logged promptly or invoices are delayed, payments slow down, and revenue becomes unpredictable.

Backdocket's billing features streamline this process by:

- Creating ready-to-send invoices from recorded time entries and expense records
- Applying the correct billing codes and rates automatically
- Sending reminders and payment links to clients on a set schedule
- Tracking what's been billed, paid, or still pending in one place

Studies show that automated billing can reduce admin time by up to 90%. For law firms, this means more hours available for client work, faster cash flow, and fewer billing disputes.

FIND YOUR HIGHEST-IMPACT AUTOMATION OPPORTUNITIES

Some tasks take too long and offer little payoff. The best ones to automate are repetitive, easy to forget, or prone to delay.

Here's what to look for:

- Information entered in more than one place
- Tasks that require reminders or follow-up emails
- Work that bottlenecks when a key person isn't around
- Steps that clients wait on before their case can progress

These tasks waste time and reduce consistency. Automate them to speed up workflow and simplify case management.

TRACK METRICS THAT SHOW REAL EFFICIENCY GAINS

After automating workflows, measuring results shows the impact. Backdocket helps you track:

- **Turnaround Time:** How quickly everyday tasks and case milestones are completed
- **Billing Cycle Speed:** The time between completed work and payment received
- **Task Completion Rates:** How reliably staff meet internal deadlines
- **Workload Balance:** Whether time and tasks are spread evenly across your team

Tracking these metrics shows where efficiency is improving and where processes still need refinement.

REAL-WORLD EXAMPLES OF AUTOMATION IN ACTION

Automation isn't just a theory. Law firms of all sizes are using it to save time, reduce stress, and increase profitability.

Here's what it looks like in practice:

Firm A: Streamlined Billing & Revenue Recovery
A mid-sized business law firm automated time tracking, invoicing, and payment reminders by connecting its billing and accounting systems. This eliminated manual entry, reduced errors, and shortened the billing cycle.

Results:

- Recovered 10–20% of revenue previously lost to write-downs and missed billable time
- Saved 5–10 hours per billing cycle for administrative staff
- Freed support teams to focus on higher-value client work and collections follow-up

Firm B: Faster Client Onboarding
A family law firm digitized its client intake forms, allowing new cases to be created instantly and documents to be uploaded online. The system automatically organized client information and triggered onboarding tasks for the team.

Results:

- Reduced onboarding time by up to 8 days
- Fewer intake errors and follow-up emails
- Smoother first impressions and faster case openings

These examples demonstrate how automation facilitates the onboarding of clients, delivers exceptional service, and enhances revenue growth.

SCALE YOUR FIRM WITH AUTOMATED PRACTICE MANAGEMENT SOFTWARE

You've seen the impact automation can make. Now experience it for yourself.

Schedule a free backdocket demo to see how intake, billing, and case management become faster, simpler, and more profitable.

CONTACT US TODAY FOR A FREE DEMONSTRATION.

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