CASE MANAGEMENT MEETING CHECKLIST FOR LEGAL TEAMS

Ensure every case management meeting runs smoothly and no detail is overlooked with this comprehensive checklist. Designed for paralegals and legal team leaders, this tool will help you maintain a finely tuned legal operation.

BEFORE THE MEETING

1. **Agenda Preparation**
   - List all cases to be discussed, including new and ongoing cases.
   - Assign specific time slots for each case to manage meeting duration effectively.
   - Highlight priority cases or issues that require immediate attention.
2. **Communication**
   - Send the agenda to all team members at least 48 hours in advance.
   - Request updates from team members on their respective cases for inclusion in the meeting.
3. **Documentation**
   - Gather all relevant case documents and updates.
   - Ensure access to a shared digital workspace if the meeting is remote.

DURING THE MEETING

4. **Case Updates**
   - Review the status of each case, including recent developments and next steps.
   - Discuss any roadblocks or challenges and brainstorm solutions.
5. **Assignments and Deadlines**
   - Confirm assignments and responsibilities for each case.
   - Set clear deadlines for tasks and deliverables.
6. **Resource Allocation**
   - Assess the need for additional resources (e.g., research, people, etc.) for any case.
   - Plan for reallocation of resources among cases if necessary.
7. **Client Communication**
   - Discuss any client feedback or concerns related to specific cases.
   - Plan for upcoming client communications, including updates and meetings.

AFTER THE MEETING

8. **Meeting Minutes**
   - Compile and distribute meeting minutes within 24 hours.
   - Include a summary of discussions, decisions, assignments, and deadlines.
9. **Action Items**
   - Ensure all action items are clearly documented and assigned.
   - Update project management tools or task lists with new assignments and deadlines.
10. **Follow-Up**
    - Schedule follow-ups for specific discussions that require further attention.
    - Plan for one-on-one meetings if individual team members need additional support.

This checklist is designed to be adaptable to the specific needs and practices of your legal team. It can be used as a foundation to build upon and customize as you refine your case management processes.