

5 Automations Every Family Law Firm Should Have Running

A practical guide to saving 10+ hours a week with MyCase + Zapier.

Built for solo and small family law practices.

10+

HOURS SAVED PER WEEK

2-3X

FASTER CLIENT FOLLOW-UP

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EXTRA STAFF NEEDED

If you're still calling clients to confirm appointments, manually sending payment reminders, or chasing unsigned documents by hand — this guide is for you.

These five automations are running right now inside law firms just like yours. Each one connects MyCase (your practice management software) with Zapier (the automation layer that ties everything together). No coding. No IT vendor. Just set up once and let it run.

What's inside:

- New Lead Auto-Response
- Post-Consultation Follow-Up
- Invoice Paid → Google Review Request
- Appointment Confirmation + Reminder Sequence
- Document Collection + Persistent Follow-Up

AUTOMATION 1

New Lead Auto-Response

Saves: 3-5 hrs/week

A new lead fills out your intake form. Within 60 seconds, they get a text and email — before you've even seen the notification.

What it does

When a new contact submits your intake form (whether that's on your website, through Lawmatics, or directly in MyCase), Zapier fires immediately — sending a personalized SMS and email confirming their inquiry was received and letting them know what to expect next.

Why it matters

Speed-to-lead is the single biggest factor in whether a prospective client books with you or calls the next firm on the list. Studies show responding within 5 minutes increases conversion by over 300%. Most attorneys respond hours later — or the next morning.

HOW IT WORKS

TRIGGER	Intake form submitted (MyCase or Lawmatics)
STEP 1	Zapier detects new contact record
STEP 2	SMS sent via RingCentral: "Hi [Name], we received your inquiry and will be in touch within 1 business day..."
STEP 3	Email sent via Gmail: branded confirmation with next steps
STEP 4	Internal Slack or email notification sent to attorney

TOOLS USED

MyCase / Lawmatics	Zapier	RingCentral (SMS)	Gmail / Outlook
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AUTOMATION 2

Appointment Confirmation + Reminder Sequence

Saves: 2-4 hrs/week

Consultation booked. Confirmation sent automatically. Reminder sent 24 hours before. No-show? Follow-up ready to go.

What it does

When a consultation is scheduled in MyCase, Zapier triggers an immediate confirmation message (SMS + email). A second reminder fires 24 hours before the appointment. If the client doesn't show, a third message goes out 15 minutes after the missed start time offering a reschedule link.

Why it matters

No-shows cost family law firms an average of 1-2 billable hours per week. A simple reminder sequence cuts no-show rates by 40-60%. The reschedule follow-up saves the relationship instead of just losing the lead.

HOW IT WORKS

TRIGGER	New appointment created in MyCase
STEP 1	Immediate confirmation SMS + email sent to client
STEP 2	Zapier schedules a delayed step: 24-hr reminder
STEP 3	Reminder SMS fires: "Reminder: your consultation is tomorrow at [time]..."
STEP 4	(If no-show) 15-min delayed Zapier path: reschedule offer sent

TOOLS USED

MyCase	Zapier	RingCentral (SMS)	Gmail / Outlook
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AUTOMATION 3

Post-Consultation Follow-Up

Saves: 2-3 hrs/week

Consultation done. Client goes home. Your follow-up is already in their inbox.

What it does

When a consultation is marked complete in MyCase, Zapier sends a follow-up email within the hour — thanking the prospect, summarizing next steps, and including a link to sign the engagement agreement or schedule a follow-up call. A second touchpoint (SMS) fires 48 hours later if no action has been taken.

Why it matters

Most prospects consult 2-3 attorneys before hiring. The firm that follows up fastest and most professionally wins the engagement. A same-day follow-up email with a clear call-to-action converts significantly better than a phone call the next day.

HOW IT WORKS

TRIGGER	Consultation marked complete in MyCase
STEP 1	Zapier detects status change
STEP 2	Follow-up email sent within 60 minutes: summary + next steps + engagement link
STEP 3	Zapier checks 48 hrs later: has contact advanced in pipeline?
STEP 4	If no movement: SMS nudge sent — "Did you have any questions after our conversation?"

TOOLS USED

MyCase	Zapier	Gmail / Outlook	RingCentral (SMS)
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AUTOMATION 4

Document Collection + Persistent Follow-Up

Saves: 3-5 hrs/week

You need financial disclosures. The client hasn't uploaded them. Zapier follows up so you don't have to.

What it does

When a document request task is created in MyCase, Zapier sends the client a secure upload link with a clear deadline. Every 48 hours — up to three times — a follow-up reminder fires if the documents haven't been received. After three attempts, you get an internal alert to handle it directly.

Why it matters

Chasing documents is one of the most time-consuming non-billable activities in a family law practice. Attorneys routinely spend 30-60 minutes per client per week on document follow-up. Automating three follow-up attempts before it escalates saves that time and keeps cases moving.

HOW IT WORKS

TRIGGER	Document request task created in MyCase
STEP 1	Automated message sent: secure link + deadline
STEP 2	48 hrs later: Zapier checks if task is still open
STEP 3	If open: 2nd follow-up sent ("Just a reminder — we still need...")
STEP 4	After 3 attempts with no response: internal alert sent to attorney or coordinator

TOOLS USED

MyCase	Zapier	RingCentral (SMS)	Gmail / Outlook
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Invoice Paid → Google Review Request

Saves: 1–2 hrs/week

Client pays their invoice. 24 hours later, they get a review request while the experience is still fresh.

What it does

When an invoice is marked paid in MyCase, Zapier waits 24 hours and sends a personalized text message asking the client to leave a Google review — with a direct link to your Google Business profile. The message is warm and personal, not generic.

Why it matters

Google reviews are one of the top factors in local search ranking for attorneys. Most firms never ask for reviews systematically — and the ones that do ask at the wrong time. The moment after a client pays a resolved invoice is the highest-satisfaction point in the relationship. That's your window.

HOW IT WORKS

TRIGGER

Invoice marked paid in MyCase

STEP 1

Zapier waits 24 hours

STEP 2

SMS sent: "Hi [Name], it was a pleasure working with you. If you have a moment, an honest Google review means a lot to small firms like ours..." + link

STEP 3

(Optional) If no review in 7 days: second softer follow-up sent

TOOLS USED

MyCase

Zapier

RingCentral (SMS)

Google Business Profile

Ready to set these up?

ReliantByte Solutions sets up automations like these for family law firms in the Inland Empire. We handle the build, the testing, and the monitoring — so you can focus on cases.

Book a free 20-minute discovery call.

EMAIL

mark@reliantbyte.com

WEBSITE

reliantbyte.com

PHONE

909-333-6016