FileTrail®

Matter Mobility Manager

Streamlining Matter Mobility and Client File Transfer

When new laterals are hired bringing new clients with them, is your firm equipped to accept their client files quickly and efficiently — while obtaining the required approvals? And when partners leave the firm or when clients request copies of their files, is your firm prepared to quickly assemble and review the transfer of client matter information?

Most firms today struggle to handle client file transfer requests quickly and efficiently, falling back on manually intensive and unstructured processes which could result in omitting documents or including the wrong files. With FileTrail GPS Matter Mobility Manager, we are enabling law firms to automate and manage the process of gathering, evaluating and approving client files — reducing operational costs and risks for the firm, while ensuring that clients receive efficient service.

Automate the Process

FileTrail Matter Mobility Manager streamlines the process of gathering and reviewing client files for transfer by automating workflows:

- Capturing a record of each request (lawyer onboarding, lawyer departure, or a client-initiated request)

- Tracking every action associated with each request and displaying status updates

- Identifying relevant documents across multiple information repositories and gathering them in a central location for reviews

- Identifying timekeepers associated with specific client matters as well as partners and other stakeholders

- Sending notifications and reminders to reviewers who are required to take action, tracking progress, and capturing a clear record of approvals

- Providing tools to perform tasks against individual documents or en masse