

A practical workbook for lawyers and law firm teams.

Plan a Useful Law Firm Dashboard

Start with a decision your team needs to make. Choose a small set of signals, identify trustworthy data sources, and assign an owner before building a dashboard.

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1. Start with one decision

What decision should this dashboard help someone make? _____

Who will use it, and how often? _____

What action follows when a number changes? _____

What information is difficult to find today? _____

Examples to consider: follow up on unassigned inquiries; check whether an intake step is stalled; review website inquiry sources; check the status of an internal request. These are planning examples, not a claim that your systems already support them.

Pick a first audience and one review routine. Avoid putting every possible statistic on the opening screen.

2. Define a few useful signals

Choose three to five signals that support that decision. For each, write the definition, time period, source, and responsible person.

Possible signals: inquiries received; inquiries awaiting follow-up; consultation appointments scheduled; requests by workflow stage; website inquiry sources. Define what counts and how duplicates are handled.

Signal: _____

Definition and time period: _____

Source and owner: _____

Action or question it supports: _____

Separate website activity from confirmed inquiries and retained clients. A visitor count is not a count of new matters. Do not imply attribution that the source data cannot support.

3. Map the sources and freshness

For each signal, identify the source system and how access would work. A manual export may be enough for a first pilot. API access, integrations, and subscription requirements must be checked with the provider.

Source system / administrator: _____

Available method: export, approved API, or manual entry? _____

Refresh frequency and last-updated display: _____

How are missing records and duplicates handled? _____

What happens if the connection stops working? _____

Show the last update, reporting period, and source. Label missing or stale data instead of displaying it as zero. Compare sample records against the source before relying on totals.

4. Choose access and actions

Who should see each signal? Which details should remain in the source system? Start with the minimum information needed for the decision.

Audience and access owner: _____

Aggregate numbers or record-level details? _____

Information excluded from the dashboard: _____

Action: open the source system, assign a task, or make an approved update? _____

Who approves changes and checks failures? _____

A dashboard can start as read-only. Forms, request trackers, templates, and approved workflow tools may be added later if useful. Do not assume a dashboard includes automatic case-management updates or every integration.

5. Scope a first pilot

Sketch three to five cards or views. For each, name the user, the signal, its source, and the action it supports. Test with synthetic or approved data before connecting live information.

First view and intended user: _____

Pilot owner and reviewer: _____

Budget and review date: _____

Setup, hosting, usage, maintenance and integration questions: _____

Fallback if the dashboard is unavailable: _____

At review, check the numbers against the source, confirm access permissions, and ask whether someone can make the intended decision. Decide to continue, adjust, or stop. No promised savings or invented performance results.

Want help scoping a dashboard for your firm?

<https://www.legalsearchmarketing.com/contact?service=custom-tools>

Read the article and watch the explanation:

<https://www.legalsearchmarketing.com/blog/custom-law-firm-dashboard>

Dashboard development, integrations and ongoing maintenance are scoped separately.