



6 Sample Reports For Running Your Firm





review

Initial Offer

11

Files to Negotiation

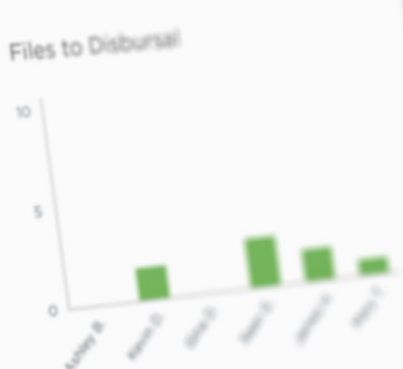
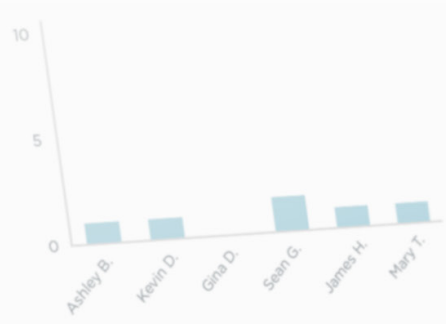
20

Files to Settlement

34

Files to Disbursal

8



“

GrowPath's reports help me make sure things are being done efficiently, on time, and how they should be.”

Dean Waite
Dean Waite & Associates



Managing your firm is easier when you have great reports. In most case management programs, reporting feels like an afterthought — not at GrowPath.

We took technology deployed by Nasdaq and paired it with decades of experience running successful firms, to create the best reporting experience in the market. Hands down.

GrowPath comes with an array of state-of-the-art reports and dashboards that spotlight how your firm is doing in real time. The reports can be further customized, to show you what you want to see, the way you want to see it.

Your data has never been more beautiful — or easier to understand.

Intake Analyzer

It's easy to see how to maximize your marketing spend.

The Intake Analyzer allows you to see where your calls, cases, and intakes are coming from.

You can then drill down into the granular details as necessary to make informed decisions on growing your firm.

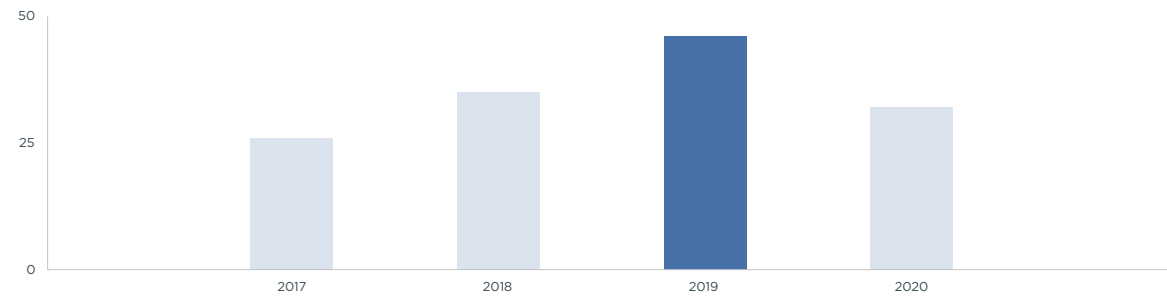
- 1 How do your new calls and cases compare year over year? Select a year and the corresponding data below changes in real time. See which marketing channels and DMAs are performing best.
- 2 Select a specific month to drill down even further. Find out if you're getting more auto accidents in the summer months, and which marketing channels are bringing them in.
- 3 Filter further by case type, DMA or marketing source. For example, if you clicked "workers' compensation" you would instantly see which DMAs and marketing channels are bringing in the most workers' compensation cases.

Or maybe you want more information about your medical provider relationships. If you selected "medical provider" under Marketing Source, you would see what types of cases medical providers are sending and which areas they are primarily coming from.

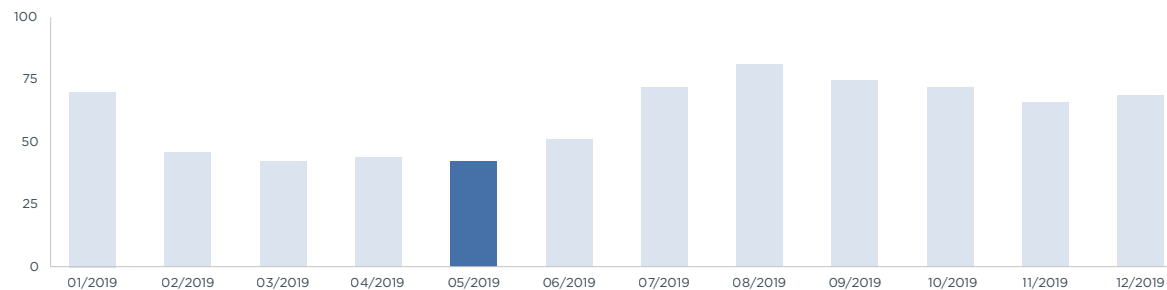
All Intakes

56

Year Created

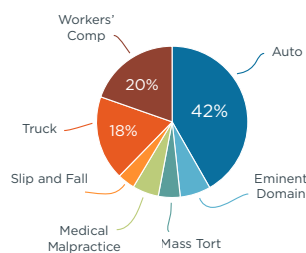


Months Created

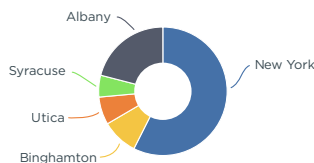


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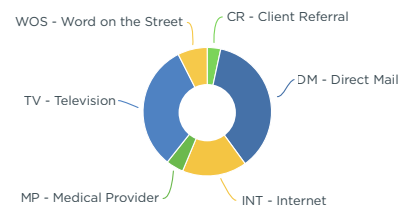
Types



DMA



Marketing Source



"GrowPath puts critical marketing information at my fingertips. It removes the mystery of what is and isn't working. It's the clear visibility every law firm must have to market well."


David Chamberlin
Vice President of Marketing

Case Needs Attention Spotter

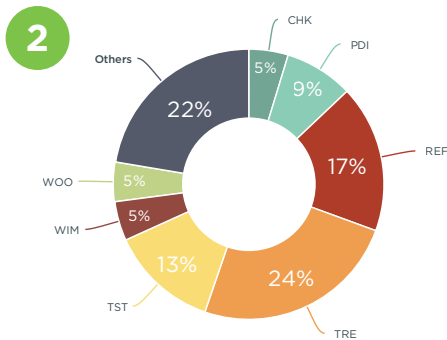
Get alerted if any cases are being neglected.

One of the most common complaints from clients is that they haven't heard from their attorney. Are all of your cases receiving consistent attention?

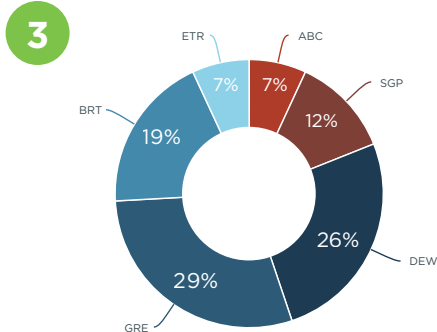
With the Case Needs Attention Spotter, assess which staff members may be in the weeds and solve bottlenecks before they become complaints.

- 
- 1 This list shows you which cases have been untouched over whatever time frame you choose (in this case 30+ days). Sort by any of the headers, or open the case to see the last note entered.
 - 2 From this graph, you can quickly see the status of cases that may be getting neglected. With another click, review the case to see what's up.
 - 3 At a glance, see which staff member might be overwhelmed or underperforming. Click to investigate each paralegal's workload further.

Statuses



Paralegal



1 Last Note +30 Days

Case No. ▾	Type	Status	Client	Paralegal	Last Note	Days Since Last Note
12506	AA	TRE	Jones	ABC	5/29/18	726
12619	AA	TST	Smith	SGP	9/12/18	620
13008	AU	WOO	Ramirez	KOE	3/12/19	439
13056	REF	WOO	Thomas	GRE	3/14/20	71
13145	AA	NEG	Garcia	BRT	8/4/19	294
13189	AA	PDI	Williams	BRT	5/21/19	369
13207	REF	PDI	Johnson	ABC	7/10/19	319
13229	REF	TRE	Thompson	DEW	7/25/18	669
13276	AU	REF	Franklin	ETR	1/20/18	855
13284	AA	WOO	Anderson	ABC	9/19/19	248
13312	AA	CHK	Sanchez	EGJ	11/27/19	179
12619	AA	TST	Smith	SGP	9/12/18	620
13008	AU	WOO	Ramirez	KOE	3/12/19	439
13056	REF	WOO	Thomas	GRE	3/14/20	71
13145	AA	NEG	Garcia	BRT	8/4/19	294
13189	AA	PDI	Williams	BRT	5/21/19	369
13207	REF	PDI	Johnson	ABC	7/10/19	319
13229	REF	TRE	Thompson	DEW	7/25/18	669
13276	AU	REF	Franklin	ETR	1/20/18	855
13284	AA	WOO	Anderson	ABC	9/19/19	248
13312	AA	CHK	Sanchez	EGJ	11/27/19	179

"At our firm, I expect every file to have some attention given to it at least every 30 days. This report allows me to see at a glance if there are any cases where that standard is not being met."

Mike Shepherd
Department Leader

High Value Case Tracker

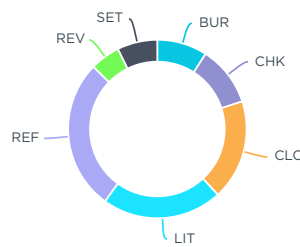
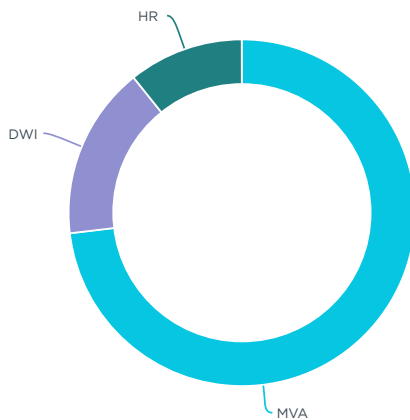
Keep an eye on your big cases.

The old adage that 80% of your revenue comes from 20% of your cases is true. It actually may be more than that.

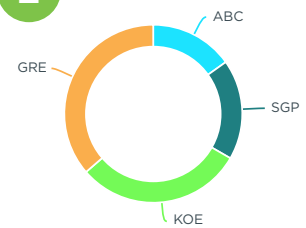
This report allows you to quickly get up to speed on cases you've deemed high-priority. It can be customized to show as many or few as you want.

- 1 At a glance, see all your big cases. What are their total projected values?
- 2 Who's working on your big cases? What do their caseloads look like?
- 3 The Quick Note table shows the most recent activity in each of your big cases. Track at a glance what's going on.

1

Cases: **183**Value: **\$1,203,458**

2



3

GrowPath ID	Case Type	Value	Case Status	Opened	Client Last Name	Client First Name	Quick Note
12506	MVA	180200	LIT	2/4/14	Smith	Frank	
12619	MVA	120352	LIT	6/10/16	Miller	Bob	LIT REVIEW
13008	MVA	100000	REF	10/23/18	Thomas	Mary	Filed: 9/25/2019
13056	DWI	100000	CLO	9/8/18	Jones	Jill	
13145	MVA	90500	LIT	5/12/19	Franklin	John	
13189	HR	75320	LIT	1/30/16	Garcia	Carl	DEMAND OUT
13207	MVA	54300	BUR	11/27/16	Harrison	Bill	
13229	DWI	51650	REF	5/22/18	Johnston	Joseph	
13276	DWI	50300	CLO	4/6/17	Williams	Tina	
13284	HR	50000	LIT	12/24/17	Anderson	Jane	
13312	MVA	50000	SET	6/18/16	Sanchez	Anne	

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"Since implementing GrowPath, I sleep better knowing my high-value cases are properly attended to."

James S. Farrin
Law Offices of James Scott Farrin

Settlement Posture Dashboard

The “Show Me the Money” report gives you a bird’s-eye view of your revenue streams.

This report spotlights cases that appear close to resolution or disbursal, allowing you see what money is coming in and when.

How do your final settlements compare to their initial offers? Compare offers and settlements against special damages. Which of your attorney negotiators are getting the most added value?

- 1 How many cases are close to settlement? What is your projected cash flow?
- 2 How are your attorneys and negotiators performing against initial offers? What’s the ratio of settlements to special damages?
- 3 What can you expect from specific insurance carriers?

Total Open Cases
1,435

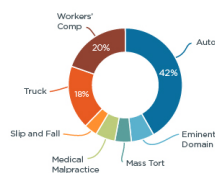
1

Total Initial Offers
\$21.77M

Total Settlements
\$22.30M

Total Settlements
\$8.53M

Types

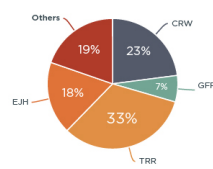


Case Status

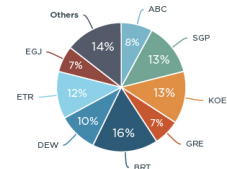
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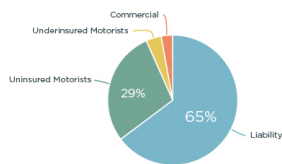
Attorney



Paralegal

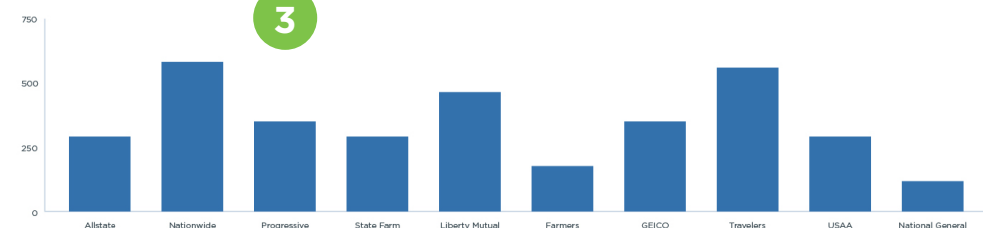


Policy Type



Carriers

3



Auto - Significant Injury (IO) Total Initial Offer: \$20.32M	Hit and Run (IO) Total Initial Offer: \$102,657.30	Motorcycle (IO) Total Initial Offer: \$122,320.68	Trucking (IO) Total Initial Offer: \$1.23M
Auto - Significant Injury (SET) Total Settlement: \$20.32M	Hit and Run (SET) Total Settlement: \$234,000.00	Motorcycle (SET) Total Settlement: \$186,490.00	Trucking (SET) Total Settlement: \$1.56M
Auto - Significant Injury (FEE) Total Fees: \$8.04M	Hit and Run (FEE) Total Fees: \$54,320.93	Motorcycle (FEE) Total Fees: \$34,243.90	Trucking (FEE) Total Fees: \$401,456.43

"If a particular carrier appears motivated to settle a case (often at year's end), I can identify all cases with that carrier and push negotiations. I can compare offers and settlements against special damages instantly."

Stacie Monahan
Vice President of Operations

Litigation Watchdog

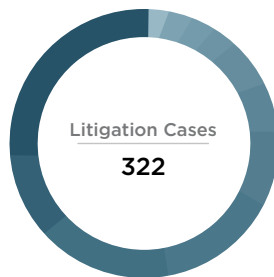
See how many cases are in litigation, where they're filed, and what stage they're in.

Monitor pending litigation closely to make sure nothing falls through the cracks. This report answers common questions for litigation-focused practices.

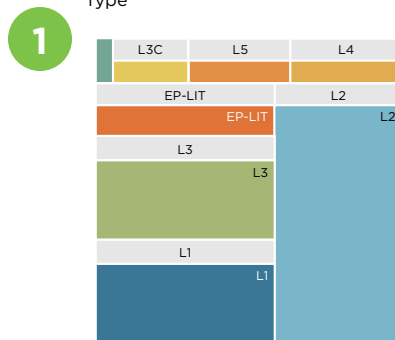
GrowPath's business analytics help ensure that the right follow-up action is taken and that your workflows are executed smoothly.

- 1 What kind of cases have you filed in the last week, month, quarter, or year, and what's their current status?
- 2 Always be in the loop on how many trials are scheduled and when, who the cases are assigned to, and any other data points you choose.
- 3 Open any case to see the most recent action.

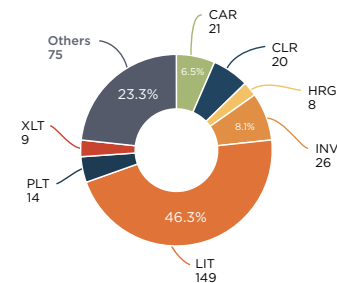
Indicator



Type



Status



LITIGATION BENCHMARKS Prior 30 Days

Complaints Filed

Case No.	Type	Status	Client	Attorney	Paralegal
12506	L2	LIT	Jones	CRW	ABC
12619	L3	LIT	Smith	GFR	SGP
13008	L3C	XLT	Ramirez	TRR	KOE
13056	L1	PLT	Thomas	ARD	GRE
13145	L1	LIT	Garcia	EJH	BRT
13189	L2	LIT	Williams	HNJ	BRT
13207	L3C	CLR	Johnson	ECE	ABC
13229	L2	LIT	Thompson	TRR	DEW
13276	L1	CLR	Franklin	GEA	ETR
13284	L2	INV	Anderson	MIL	ABC
13312	L3	INV	Sanchez	EWR	EGJ

Case List

Case No.	Type	Status	Client
12506	L2	LIT	Jones
12619	L3	LIT	Smith
13008	L3C	XLT	Ramirez
13056	L1	PLT	Thomas
13145	L1	LIT	Garcia
13189	L2	LIT	Williams
13207	L3C	CLR	Johnson
13229	L2	LIT	Thompson
13276	L1	CLR	Franklin
13284	L2	INV	Anderson
13312	L3	INV	Sanchez
13405	L2	LIT	Harris
13421	L3C	CLR	Daniels
13426	L2	LIT	Perry

"Growpath has helped me easily keep up with the status of hundreds of litigation cases among multiple attorneys and offices across the state."

J. Brett Davis
Litigation Attorney

Settled Cases Report

The “Make It Rain” dashboard.

To know how effective your firm is, you need to measure performance and review the results instantly.

This report highlights and details the sources of your success to help you review and evaluate how your recent cases have resolved.

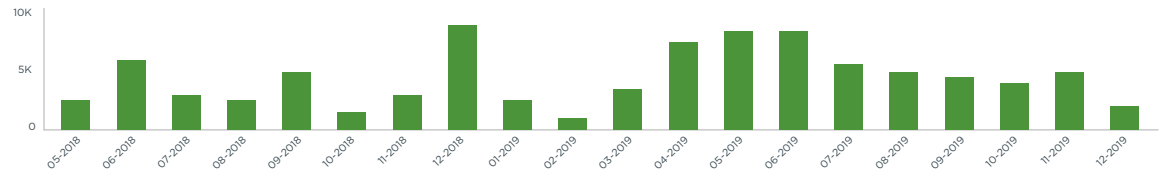
- 1 Are your fees consistent by month, or are there ebbs and flows to account for?
- 2 Hover to discover your success by case type, policy type, or insurance carrier.
- 3 Correlate settlements with marketing sources. Track the ROI of various marketing sources to spend smarter.

Total Closed Cases: **190**

1

Fees by Month

\$65,346

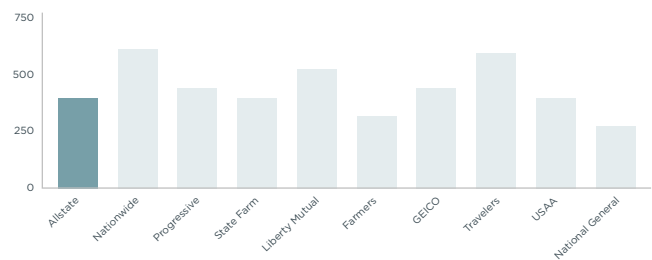
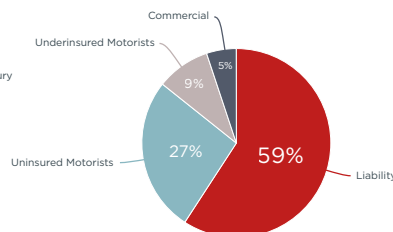
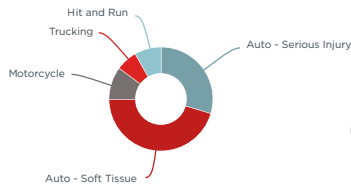


Case Type

2

Policy Type

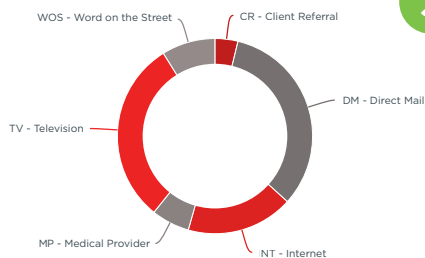
Carriers



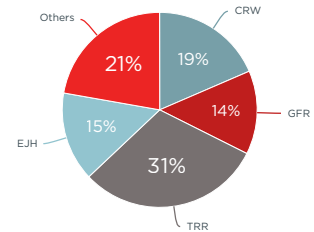
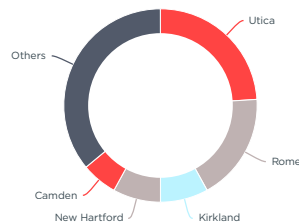
Case Referral Source

Case Referral Source

Attorney



3



"GrowPath gives me the data I need to see what our best people do and use that to build best practices."

J. Michael Mackay
Department Leader

Information is power.

Ready to explore and engage with your data in a simple, beautiful, and secure environment? Visit growpath.com/demo.



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