

LICENSING PROJECT CLIENT ROADMAP

Recreated example · based on my work at Holt Law

Example offering: Adult Rehabilitative Mental Health Services (ARMHS) licensing

INTAKE & SALES

LEGAL ASSISTANT

PARALEGAL

ATTORNEY

CLIENT

All stages, owners, and client communication tracked in ClickUp

1

Consultation

INTAKE & SALES

- Consultation with the intake specialist
- Follow-up email with a summary of the consultation

2

Onboarding

INTAKE & SALES

CLIENT

- Intake follows up until the invoice is paid, the representation agreement is signed, and the practice area questionnaire is complete

Gate: all three complete before work begins

3

Formation and filings

LEGAL ASSISTANT

- Create the organization
- Complete all federal and state filings

4

Review and kickoff call

PARALEGAL

CLIENT

- Review client information and quality-check final filings
- Kickoff call: client goals, expectations, timeline, and licensing requirements

5

Application preparation

LEGAL ASSISTANT

PARALEGAL

ATTORNEY

- Legal assistant completes application documents and forms for paralegal review
- Paralegal customizes policies and procedures for attorney review

Gate: paralegal and attorney review before submission

6

Submission

LEGAL ASSISTANT

PARALEGAL

- Legal assistant prepares the application in the government portal
- Paralegal reviews and submits

7

Compliance review with client

ATTORNEY

CLIENT

- Paralegal prompts legal assistant to send the attorney call link
- Attorney reviews policies, procedures, and compliance guidelines with the client

8

Agency review

status monitored, client updated regularly

PARALEGAL

IF RETURNED

Paralegal reviews, makes updates with the client, and resubmits

IF APPROVED

Paralegal notifies the client and starts offboarding

9

Offboarding

LEGAL ASSISTANT

INTAKE & SALES

- Answer remaining client questions and transfer all documents to the client
- Move files to past-client storage and close all tasks in ClickUp
- Intake and sales offer the fractional legal counsel (FLC) program

10

Close or continue

PARALEGAL

- Close the project, or move it into the FLC space in ClickUp and begin the ongoing FLC workflow