

Case Status Update Email Template

A standardized template for service businesses to communicate case progress, completed work and next steps to clients.

Important Notice: This email and any attachments are confidential and intended solely for the addressee. If you received this in error, please notify the sender and delete immediately. Maintain copies of all status updates in client files for documentation purposes.

1. Sender Information

Company/Firm Name*

ABC Legal Services

Sender Name*

John Smith

Sender Title/Role

Case Manager

Email Address*

john@company.com

Phone Number*

(555) 123-4567

Best Time to Reach

Mon-Fri, 9am-5pm EST

2. Client & Case Reference

Client Name*

Jane Doe

Client Email*

client@email.com

Case/Matter Number*

CASE-2024-0523

Date of Update*

mm/dd/yyyy



Case/Matter Name*

Smith v. Johnson or Estate Planning - Doe Family

3. Current Status Summary

Overall Case Status*

-- Select Status --



Date of Last Significant Activity

mm/dd/yyyy



Status Summary*

Brief 2-3 sentence summary of the current case status in plain language...

Tip: Write in plain language avoiding technical jargon. Clients should understand the status without specialized knowledge.

4. Work Completed Since Last Update

Reporting Period

March 1-15, 2024

Completed Tasks/Actions*

List key tasks completed in bullet points:

- Drafted and filed motion for extension
- Reviewed opposing party's response
- Conducted phone conference with expert witness

Key Documents Prepared or Filed

List any significant documents created or submitted...

5. Upcoming Activities & Timeline

Next Steps*

Describe upcoming actions in order:

1. File response by April 1
2. Schedule deposition for mid-April
3. Prepare for mediation session

Key Upcoming Deadline

mm/dd/yyyy



Deadline Description

Response due to court

Anticipated Timeline for Next Milestone

2-3 weeks or By end of April

Note: Timelines are estimates and may change based on factors outside our control, including court schedules and third-party responses.

6. Action Items Required from Client

Action Required?*

-- Select --



Client Action Items

Please provide the following:

- Signed authorization form (attached)
- Copies of recent bank statements
- Your availability for deposition in April

Response Needed By

mm/dd/yyyy



Important: Delays in providing requested information may affect case timelines.

7. Explanation of Delays or Changes (if applicable)

Are There Delays or Changes to Report?*

-- Select --



Explanation

Explain what changed, why it occurred and how it affects the case going forward...

Revised Timeline (if applicable)

New estimated completion: June 2024

8. Billing/Financial Update (Optional)

Include Billing Update?*

-- Select --



Current Balance/Retainer Status

\$2,500 remaining on retainer

Recent Charges Summary

Brief summary of charges this period...

Payment Action Needed

Please replenish retainer by April 1

9. Questions & Contact Information

Invitation for Questions*

Please don't hesitate to reach out if you have any questions about this update or your case. I'm happy to schedule a call to discuss any concerns.

Preferred Contact Method

-- Select --



Next Scheduled Update

Your next status update will be sent on or bef

10. Closing & Sign-Off

Closing Statement*

-- Select Closing --



Custom Closing (if selected above)

Enter custom closing message...

Sign-Off*

-- Select Sign-Off --



11. Email Signature Block

Complete your professional email signature information below.

Full Name*

Title/Position*

Company/Firm Name*

Phone Number*

Email Address*

Physical Address

Optional

Website

Optional

12. Legal/Compliance Notes

Confidentiality Notice: This email and any attachments are confidential and intended solely for the addressee. If you received this in error, please notify the sender and delete immediately.

- Include Attorney-Client Privilege Notice (if applicable)
- HIPAA/Privacy considerations apply — send via secure channels
- Copy saved to client file for record retention

Reminder: Status updates should not make promises about outcomes. Avoid language that could be construed as guaranteeing results.