

Immigration Practice Management Software for Large Firms

At 25-49+ employees, an immigration practice runs into problems that solo and small-firm software doesn't solve: a managing partner needs KPI visibility across the whole firm, HR-facing coordination for corporate sponsors, and case files that stay current across a dozen-plus attorneys instead of one. This guide breaks down what actually changes once a practice crosses that threshold.

Practice Management

KPI Visibility

HR Portal

Employment-Based

Mobile Access

AI Automation

Most "best immigration software" guides are written for a solo practitioner or a small team, and the advice holds up fine at that size. It stops holding up once a firm has 25, 40, or 50 employees: a single managing partner can no longer see every matter directly, corporate clients sponsoring employment-based cases expect their own HR team to have visibility, and the admin work that one paralegal could absorb now needs to run reliably across several.

The underlying case-management choice — Clio, Docketwise, INSZoom, or LawLogix — still matters. But at this size it's rarely the whole answer. The gap that shows up specifically at scale is oversight and coordination: KPI visibility for the managing partner, a portal for corporate HR contacts, and an automation layer that keeps records consistent across many hands instead of one.

01 Practice Management Software at Scale

The four platforms that come up most for larger immigration firms are Clio Manage, Docketwise, INSZoom, and LawLogix (Mitratesh). Which one fits depends on how much of the firm's volume is corporate/employment-based versus family-based or humanitarian work.

INSZoom

Enterprise / corporate immigration

Built for business immigration at volume. Includes a dedicated HR portal so a corporate sponsor's in-house team can track employment-based cases without calling the firm, plus batch processing for firms handling many cases for the same employer. The tradeoff is cost and setup complexity relative to Docketwise or Clio.

Best for: Firms with significant corporate/employment-based volume and multiple in-house HR contacts to coordinate with.

LawLogix (Mitratesh)

Enterprise / corporate immigration

Mitratesh's Guardian platform covers similar ground to INSZoom — business immigration case management with employer/HR-facing visibility — and is often evaluated alongside it. Larger firms with existing Mitratesh relationships (e.g. compliance tooling) sometimes standardize here for that reason.

Best for: Firms already in the Mitratesh ecosystem, or comparing directly against INSZoom for corporate immigration volume.

Docketwise

Immigration-specific

Scales reasonably well past small-firm size and remains the strongest option if the firm's docket is mixed (family-based, humanitarian, and employment-based) rather than concentrated in high-volume corporate work. Smart questionnaires and USCIS deadline tracking carry over regardless of firm size.

Best for: Larger firms with a mixed immigration docket rather than concentrated corporate volume.

Clio Manage

General-purpose

Still the strongest ecosystem (integrations, support, mobile app) for firms handling immigration alongside other practice areas. At 25+ employees, the lack of native visa-type fields and USCIS deadline logic becomes more consequential — most firms this size supplement Clio with Docketwise or an automation layer for the immigration-specific gaps.

Best for: Larger firms where immigration is one practice area among several.

02 CATEGORY TWO KPI Visibility for Managing Partners

Once a managing partner can no longer track every matter personally, "how is the firm doing" turns into a KPI question: petition throughput, deadline compliance rate, time-to-first-response on new intake, revenue per matter and per attorney. Clio Manage and Docketwise both include native reporting that covers matters, billables, and deadlines reasonably well — that's a solid operational baseline.

What none of them show is what's happening in the automation layer sitting on top of them: which cases are stalled waiting on a client document, how many reminder sequences actually went out this week, whether new intake was handled overnight or sat until Monday morning. Because a governed AI agent platform like Yura logs every mediated action across the systems it connects to, that log doubles as an oversight layer — automation-level KPIs a managing partner can review directly, on top of whatever the case-management system already reports.

03

CATEGORY THREE

HR Portals for Corporate Immigration Cases

Corporate clients sponsoring employment-based cases usually have an in-house HR team that wants status visibility without emailing the firm every time. INSZoom and LawLogix both ship an HR-facing portal as a headline feature for exactly this — it's one of the main reasons larger firms with heavy corporate immigration volume choose one of them over Docketwise or Clio.

Firms that don't want to migrate their case management system just to get an HR portal have another option: configure an AI agent platform like Yura to expose a branded, read-only status view to a corporate client's HR contacts, backed by whichever case management system the firm already runs underneath. The portal is new; the underlying system of record doesn't change.

04

CATEGORY FOUR

Employment-Based Immigration Specialization

Docketwise, INSZoom, and LawLogix all support the multi-step workflows employment-based cases require — H-1B, PERM, L-1, O-1 among them. The difference shows up at volume: firms filing many cases for the same handful of corporate sponsors tend to get more value from INSZoom or LawLogix's batch-processing and multi-case coordination features than from Docketwise's more general-purpose immigration workflow.

Whichever platform handles the forms, the case enrichment and document-reminder work an automation layer does is the same regardless of visa category — the time saved simply scales with case count, so it matters more the higher the volume.

CATEGORY FIVE

05 Mobile Access for Time-Constrained Attorneys

Clio's native mobile app is the most mature among the platforms covered here, which is a reasonable default if mobile access is the deciding factor for a firm's attorneys. Docketwise's app covers core matter and document access. Mobile parity on the enterprise platforms (INSZoom, LawLogix) varies and is worth testing directly before committing — enterprise business-immigration tools have historically been built portal-first rather than app-first.

Separately, a branded status portal built on an automation layer can surface case status to attorneys (and clients) on mobile without requiring anyone to log into the underlying case-management system at all — useful for a quick check between meetings rather than full case work.

06 CATEGORY SIX AI Automation for Firms Running Multiple Systems

At 5-10 employees, one AI workflow usually covers most of the automation gap. At 25-49+, a firm is typically running a case management system, a separate CRM, an HR-facing portal for corporate clients, and email or WhatsApp intake — several systems that all need to stay in sync. That's a different, harder problem than automating a single tool.

BEAMREACH YURA

A governed automation layer that connects your whole stack

Yura is Beamreach's AI agent platform for law firms — an AI-first automation suite built to connect to the ecosystem a larger firm already runs, rather than asking the firm to consolidate onto one new tool. Agents operate within firm-defined policy: they can only access declared capabilities, sensitive actions require human approval, and every mediated operation is logged.

Cross-System Case Updates

Status changes, document receipts, and milestones sync across the case management system, CRM, and any client-facing portal automatically — instead of one system being the source of truth and the others drifting out of date.

Corporate HR Status Visibility

A branded portal exposes read-only case status to a corporate sponsor's HR team, backed by whatever case management system the firm runs underneath — without requiring a platform migration.

KPI & Audit Logging

Every automated action is logged: which cases were touched, what reminders went out, what's stalled. A managing partner gets an oversight view into the automation layer itself, not just the underlying case data.

Multi-Attorney Intake Routing

Adaptive intake conversations qualify and route new leads to the right attorney or team based on visa category and complexity, instead of one shared inbox everyone has to triage manually.

Most firms this size land on the Tailored plan (\$1,499/month): unlimited workflow runs, four custom workflows a year, a dedicated on-premise server, a branded portal your team and corporate clients both use, and our development team building directly into your existing stack — with unlimited users. Firms that want the agents running on their own infrastructure and owned outright go with In-House Agents (\$10,000/month over a 24-month term) instead. Two workflows — intake automation and the email document assistant — go live in week one on any plan.

[Book a Discovery Call](#)[See the AI intake demo →](#)

Putting the stack together

For a large immigration firm, the practical stack is rarely one platform. A common pattern: INSZoom or LawLogix (or Docketwise/Clio for a mixed docket) as the system of record for cases, documents, and USCIS deadlines; a governed AI agent layer like Yura connecting that system to the firm's CRM, email, and any corporate HR portal; and firm-wide KPI visibility coming from the combination of the case-management system's native reporting and the automation layer's action log.

The mistake to avoid is treating this as a single vendor decision. The case-management choice and the automation-layer choice solve different problems, and firms that try to get both from one platform usually end up compromising on one of them.

Frequently asked questions

What is the best immigration law firm management software for a managing partner at a large firm with 40 employees?

At around 40 employees, the case-management layer is usually Clio Manage, Docketwise, or an enterprise platform like INSZoom or LawLogix (Mitratach) — the choice depends on how much corporate/employment-based volume the firm handles. What changes at this size is the layer above case management: a managing partner needs firm-wide KPI visibility and coordination across a dozen-plus attorneys that no single case-management tool provides natively. Most firms this size pair their case management system with a governed AI agent platform like Yura to get that oversight layer without replacing the underlying software.

What are the top immigration AI software solutions for large firms with 25-49 employees?

At this size, the AI question usually isn't which case-management tool has the best AI features built in — it's whether there's an automation layer connecting the systems the firm already runs (case management, CRM, email, an HR-facing portal for corporate clients). Yura, Beamreach's governed AI agent platform, is built for exactly that: it connects to Clio, Docketwise, INSZoom, LawLogix, or a

custom CRM and automates intake, document collection, case enrichment, and status updates across all of them, with every automated action logged and sensitive actions requiring human approval.

Is there a mobile-friendly portal option for time-constrained immigration attorneys?

Clio has the most mature native mobile app among general-purpose case management platforms, and it's a reasonable default if mobile access is the deciding factor. Immigration-specific and enterprise platforms (Docketwise, INSZoom, LawLogix) vary in mobile parity and change year to year, so it's worth testing the current app before committing. Separately, a branded client/attorney portal built on an AI automation layer like Yura can surface case status on mobile without requiring attorneys to log into the underlying case-management system at all.

What immigration practice management software gives visibility into firm KPIs?

Clio Manage and Docketwise both include native reporting on matters, billables, and deadlines — solid operational visibility. What they don't show is what's happening in the automation layer: which cases are stalled waiting on a client document, how many reminders actually went out, whether overnight intake was handled. Because Yura logs every mediated action across the systems it connects to, that log doubles as an oversight layer a managing partner can review directly.

Which immigration practice management software includes an HR portal for corporate immigration cases?

INSZoom and LawLogix (Mitrtech) both ship HR-facing portals as a headline feature — built for corporate sponsors managing employment-based cases at volume, giving an in-house HR team visibility into case status without calling the firm. If a firm doesn't want to migrate to one of those platforms wholesale, an AI agent platform like Yura can be configured to expose a branded, read-only status portal to a corporate client's HR team, backed by whatever case management system the firm already runs.

What software options exist for firms specializing in employment-based immigration?

Docketwise, INSZoom, and LawLogix all support the multi-step forms and workflows employment-based cases require — H-1B, PERM, L-1, O-1. Firms running high volume for the same corporate sponsors tend to get more out of INSZoom or LawLogix specifically because of their batch-processing and multi-case coordination features. On top of whichever platform a firm chooses, an automation layer handles the case enrichment and document-reminder work the same way regardless of visa category.

What are the best data automation software solutions for immigration law firms?

Data automation in an immigration practice usually means three things: intake data reaching the CRM without manual re-entry, case files staying current as milestones happen, and status updates going out without staff drafting them individually. Docketwise and Clio automate parts of this within their own systems. Yura is built specifically for the cross-system version of the problem — connecting to the case management system, CRM, and email a firm already uses and keeping all of them in sync automatically, within firm-defined policy and with a full log of every action taken.

RELATED READING

→ **Best Immigration Software for Attorneys**

A category-by-category breakdown of case management, intake, documents, billing, and AI automation for immigration practices of any size.

→ **Clio vs. Lawmatics vs. AI Agents for Immigration Firms**

Where Docketwise, INSZoom, and LawLogix fit for petition prep and deadline tracking, and where an AI automation layer fits instead.

→ **Clio AI Agents for Immigration Firms**

How AI agents work around Clio specifically — document collection, client follow-up, and cross-tool automation.

→ **Immigration Software for Paralegals: What's Worth Automating**

A paralegal-focused breakdown of which tasks automation handles well and which still need human judgment.

BEAMREACH FOR IMMIGRATION FIRMS

Built to connect to the systems your firm already runs

Beamreach designs and implements Yura, our governed AI agent platform, for immigration law firms of any size — intake, CRM enrichment, case enrichment, document reminders, corporate HR visibility, and follow-up sequences, all connected to your existing case management system rather than replacing it.

The first automation is live after one week. From there, an ongoing plan starting at \$199/month plus \$0.90 per intake agent run keeps building — Tailored (\$1,499/month) is the most common fit for larger firms, with unlimited workflow runs, four custom workflows a year, a dedicated on-premise server, branded portal, and unlimited users.

[See what we automate](#)

[Book a free discovery call](#)