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Law Firm Workflow Assessment Sample

Preparation for repeat-client transactional matters

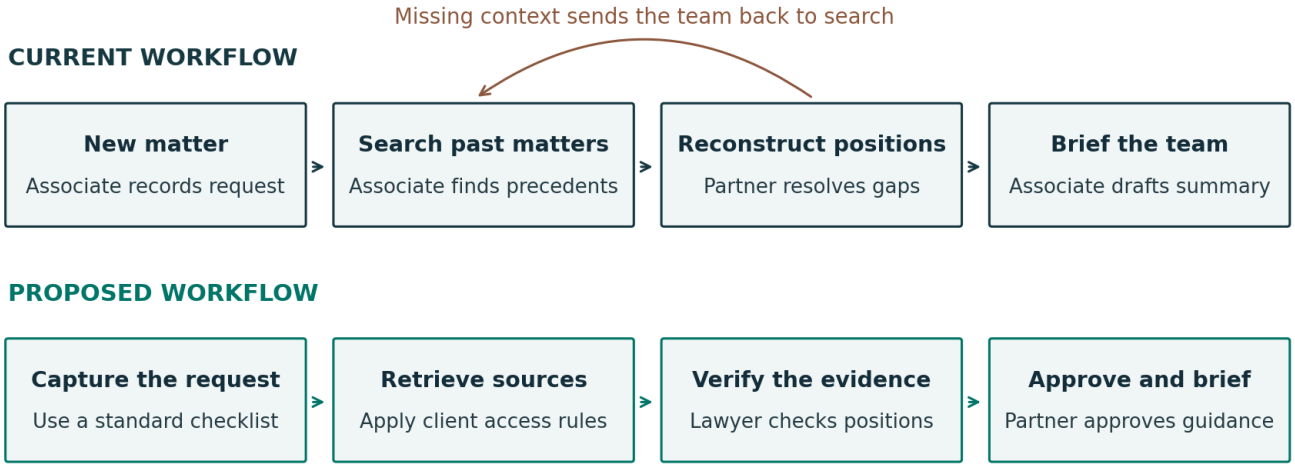
Illustrative engagement for a fictional law firm. The workflow, volumes, effort estimates, and targets below are assumptions for demonstration, not client results.

Recommended starting point

Test a structured matter briefing process using approved prior matters and a standard checklist. Establish a reliable source record before introducing AI retrieval. The immediate objective is to reduce the effort spent reconstructing client preferences while keeping lawyers responsible for interpreting and approving the guidance.

Scope	Illustrative baseline
Workflow boundary	From receipt of a new client instruction to an approved internal kickoff brief.
Participants	One transactional practice group; responsible partner, senior associate, and knowledge lead.
Volume and effort	30 comparable matters per year; 3.5 combined lawyer-hours per briefing. Estimates require validation.
Recurring friction	Repeated searches, inconsistent version selection, and partner corrections when prior context is missing.

Current and proposed workflows



Opportunities and evidence

The following priorities reflect the assumed workflow. Actual recommendations would depend on interviews, representative matters, and the firm’s systems and access rules.

Priority	Proposed change	Reason and prerequisite
1	Create a standard briefing checklist and source log.	Reduces omissions and captures context. Practice leader agrees required fields and assigns ownership.
2	Curate a small set of approved precedents and client positions.	Reduces searching and version uncertainty. Lawyers confirm relevance, dates, permissions, and exceptions.
3	Test retrieval and draft briefing assistance using an approved AI tool.	May reduce preparation effort. Requires accessible sources, suitable controls, and citations that a lawyer can verify.
4	Capture corrections after each matter.	Makes later briefings more reliable. Matter owner records changes and a knowledge lead maintains the resource.

What the briefing should contain

Record the client and matter, the issue or clause, the prior position, the source document and location, the date, the reason for any exception, and the reviewing lawyer. Distinguish a historical concession from a current standing instruction. Where sources conflict or are missing, flag the issue for the partner.

Where human judgment remains

A lawyer checks that each cited source supports the statement and applies to the current matter. The partner decides how prior positions should influence new advice. AI output is a draft; it does not become client guidance or a firm precedent without approval.

Evidence to collect before a pilot

Review five recent comparable matters and record combined lawyer effort, elapsed turnaround, repeated searches, and substantive partner corrections. Confirm which sources may be reused and who may access them. This small baseline helps shape the pilot; it cannot establish firm-wide results.

Pilot plan and commercial implications

When	Work and proposed owner	Decision or evidence
Week 1	Practice leader and knowledge lead agree the checklist, approved sources, and five pilot matters.	Confirm access and completion of baseline measurements.
Week 2	Senior associate prepares briefs using the checklist and curated sources.	Record effort by role, corrections, and gaps. Establish whether process changes alone are sufficient.
Week 3	Knowledge lead coordinates optional AI assistance, if approved; partner reviews every brief.	Record retrieval errors, unsupported statements, and verification time as well as drafting time.
Week 4	Practice leader and operations sponsor review the evidence.	Continue, revise, or stop. Assign maintenance ownership before expanding.

Illustrative capacity scenario

Assume preparation effort falls from 3.5 to 2.0 combined lawyer-hours per matter. Across 30 comparable matters, that would release 45 lawyer-hours annually: 30 × 1.5 hours. This is a scenario to test, not a forecast or a measured saving. Record time by role before applying any cost or billing assumptions.

Fee arrangement	How to evaluate the change
Hourly matters	Consider client value, billing expectations, realization, and whether released capacity can be redeployed. Fewer hours do not automatically increase firm revenue.
Fixed-fee matters	Compare effort at the relevant internal cost by role while holding the fee and quality requirements constant. Deduct tool costs, setup effort, and ongoing maintenance.
All matters	Evaluate turnaround and review quality alongside effort. Capacity has financial value only when the firm can use it or avoid a real cost.

Proposed decision criteria

Aim to reduce median combined lawyer effort by 25% across the pilot matters, with no increase in substantive corrections. Every factual statement about a prior position must have a verified source. Any unauthorized disclosure or use of restricted material pauses the pilot for review. With only five matters, treat findings as directional and validate them on a larger set before expansion.

Next decision: approve the pilot scope, name the practice sponsor and knowledge owner, and confirm how the firm will measure effort and quality. Technology implementation would follow a separate scope.