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Legal Workflow Automation Explained

Map triggers, rules, exceptions, outputs and monitoring.

Use it when	a repeated step appears suitable for automation
Boundary	This guide does not approve software or remove qualified legal review.

Built for independent law firms in England and Wales

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1. Frame the decision

Automation fits only when a stable rule, exception route and owner already exist.

Specific focus

Describe the rule and exception route before selecting software.

Questions to answer

- For this guide: Describe the rule and exception route before selecting software.
- What triggers the step?
- Which inputs are mandatory?
- Which rule is stable?
- Where do exceptions go?

Avoid

- automating exceptions first
- encoding undocumented habits
- removing review without error evidence

2. Control sheet

Treat a blank evidence field as a reason to pause, not a reason to guess. Record sources and owners before changing the workflow.

Area	Evidence to collect	Pass condition
Trigger	Event and inputs	Incomplete work cannot enter
Rule	Logic and source	Rule is approved
Exception	Queue and escalation	Named person receives it
Output	Format and checks	Result is traceable
Monitor	Failures and overrides	Drift is detected

Fail closed

If an input, owner or approval is missing, record the gap and keep the affected step outside the proposed change.

3. Working record

Complete this page with counts, dates and named sources. Do not include client names, matter names, contract text or privileged material.

Field	Evidence or answer
Guide focus	Describe the rule and exception route before selecting software.
Step	
Volume	
Rule	
Exception rate	
Output check	
Owner and stop route	

Evidence quality check

- The source is named and dated.
- An estimate is labelled as an estimate.
- The owner can reproduce the measure.
- The same method can be used after a change.

4. Decision record

Select the outcome that the evidence supports. A stop or no-change decision is valid.

- Stop: a required source, owner or approval is missing.
- Fix: repair the underlying route before adding technology or cost.
- Test: run one bounded change with a baseline and review date.
- Proceed: adopt only the option supported by the recorded evidence.

Decision field	Record
Chosen outcome	
Reason and evidence	
Owner and approvers	
Review or expiry date	

Primary sources

[Law Society: How to use lawtech in your practice](#)

[Law Society: Buying new technology](#)

[SRA: Effective supervision](#)

[ICO: Information security checklist](#)

Source status

Links checked 18 August 2026. Confirm the current version and obtain appropriate professional advice before relying on regulated, contractual, privacy, security, insurance, financial or wellbeing conclusions.