

CLICKOAI LAW FIRM GUIDE 35 OF 63

AI for Lawyers Foundations Guide

A safe start for terminology, task selection and review.

Use it when	lawyers need an introduction before trying an AI workflow
Boundary	This guide does not approve an AI product or permit client data to be used. Professional duties and firm controls continue to apply.

Built for independent law firms in England and Wales

Original ClickoAI edition | Version 1 | 18 August 2026 | clickoai.com/law-firm-guides

1. Frame the decision

Start with one task, a named owner and a representative test set. Speed is not evidence that legal work is safe or useful.

Specific focus

Use an approved example to teach limits, source checking and escalation.

Questions to answer

- For this guide: Use an approved example to teach limits, source checking and escalation.
- What exact task is in scope?
- What material may enter the tool?
- Which errors matter?
- Who checks output against sources?

Avoid

- starting with client data
- counting output rather than corrected outcome
- letting a model make the final legal decision

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
Scope	Task, users and exclusions	Boundary is written
Data	Inputs, retention and access	Route is approved
Test	Examples and error labels	Threshold is frozen
Review	Reviewer and source checks	Every output is scrutinised
Stop	Error and incident triggers	Named owner can halt use

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	Use an approved example to teach limits, source checking and escalation.
Task	
Tool and version	
Approved test data	
Baseline	
Pass and stop rule	
Reviewer and date	

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

[SRA: Compliance tips for AI and technology](#)

[SRA: Effective supervision](#)

[SRA: Confidentiality of client information](#)

[ICO: Guidance on AI and data protection](#)

[Law Society: How AI tools hallucinate](#)

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.