

CLICKOAI LAW FIRM GUIDE 36 OF 63

Lawyer Wellbeing and Workload Check-In

A non-clinical work-design worksheet with support routes.

Use it when	repeated workload pressure needs a structured conversation
Boundary	This is not clinical guidance or a diagnostic tool. Take urgent or personal concerns to appropriate professional support.

Built for independent law firms in England and Wales

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1. Frame the decision

Identify work-design pressure and signpost support. Do not turn wellbeing into individual performance scoring.

Specific focus

Identify work patterns the firm can change and signpost confidential help.

Questions to answer

- For this guide: Identify work patterns the firm can change and signpost confidential help.
- Which patterns create pressure?
- Are priorities and supervision clear?
- Can concerns be raised safely?
- Where is confidential support?

Avoid

- diagnosing colleagues
- unnecessary health data
- mindfulness instead of workload action

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
Demand	Volume and peaks	Pressure described
Control	Priorities and escalation	Conflict route exists
Support	Supervision and help	Options visible
Change	Work-design action	Owner named
Review	Date and feedback	Follow-up planned

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	Identify work patterns the firm can change and signpost confidential help.
Work pattern	
Pressure point	
Support	
Work-design action	
Owner	
Review 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

[LawCare: Support for the legal sector](#)

[NHS Every Mind Matters: Mindfulness](#)

[SRA: Effective supervision](#)

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.