

PRACTICAL GUIDE | AUGUST 2026

Legal AI, without the hype

A practical guide for independent law firms in England and Wales.

The working rule

Start with one repeated workflow. Keep client data out until the tool, purpose and controls are approved. Verify every output before anyone relies on it.

Use this guide to

Choose a sensible use case, set data boundaries, test outputs and decide whether to fix the process, pilot AI or leave the work alone.

You will not need

Client names, matter details, contract text, privileged material, a software subscription or a sales call.

CLICKOAI LTD | clickoai.com/resources/

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01

The short answer

AI can be useful legal technology. It does not remove professional responsibility, turn uncertain material into fact or repair a broken workflow by itself.

Good at bounded assistance

Summarising supplied material, extracting fields, comparing text, classifying items, drafting from approved instructions and reorganising information.

Weak at owning the answer

Determining truth, resolving legal uncertainty, understanding unstated context, judging proportionality or deciding what a client should do.

Value appears when

The inputs are controlled, the task repeats, the expected output is defined, a reviewer is named and errors can be detected before release.

Risk grows when

People paste sensitive material into unapproved tools, accept fluent output without checking it or scale a process before its failure modes are understood.

A useful first question

What repeated piece of work takes enough time to measure, has a clear finish line and can be checked by a qualified person?

Accountability stays with the firm

The SRA says firms remain accountable for services delivered with AI assistance. Human review, scrutiny and professional judgement remain necessary.

02 Start with the workflow

Do not begin with a vendor demonstration. Describe one current process well enough that the firm can recognise improvement or harm.

Five gates

Gate	Pass when	Stop or fix first when
Repeated	The work occurs often enough to measure	It is rare, unique or selected only because it was memorable
Bounded	The trigger, finish line and expected output are clear	The task quietly expands into judgement or advice
Reviewable	A qualified reviewer can detect material errors	There is no reliable comparison or reviewer
Ownable	One named person can change the process	Responsibility is shared but ownership is absent
Measurable	Time, turnaround, rework and quality can be compared	The only success measure is that a demo looked fast

Worked example: first-pass review of supplier paper

- 1 Trigger: a customer contract arrives through the agreed intake channel.
- 2 Task: identify departures from the approved playbook and prepare a first-pass issue list.
- 3 Finish line: a named lawyer receives a traceable issue list linked to the source clauses.
- 4 Human control: the lawyer verifies every issue, decides materiality and owns the advice.
- 5 Measures: touch time, elapsed time, missed issues, false positives, rework and partner input.

Process before product

If the team has no playbook, inconsistent intake or unclear approval ownership, fix that first. AI will reproduce ambiguity faster.

03 Decide what data can enter

A tool being easy to access does not make it approved for client or personal data. Set the rule before anyone prompts.

Status	Typical material	Working rule
GREEN	Public, fictional or synthetic examples with no client or personal data	Suitable for early capability testing, subject to the tool's approved-use policy
AMBER	Internal know-how or non-public business material	Use only after the purpose, access, retention, supplier terms and security controls are approved
RED	Client-identifying, personal, privileged, confidential, special-category or live matter material	Do not enter into a public or unapproved tool

Before processing personal data

- Define the purpose and lawful basis before processing begins.
- Identify who is controller, processor and sub-processor.
- Apply data minimisation: use only what the task genuinely requires.
- Decide whether a data protection impact assessment is required and record the decision.
- Explain material uses of personal data and AI where transparency obligations apply.
- Set retention, deletion, access, incident and individual-rights procedures.

Do not rely on anonymisation by instinct

Removing names may not remove identity, privilege or commercial sensitivity. Treat de-identification as a control that needs its own review.

Safer early test

Create a fictional contract excerpt that contains the same clause patterns and formatting problems as the real work. Keep the expected answer separately, then compare the tool's output against it.

04 Prompt for a bounded task

A prompt is an instruction, not a control system. Make the task narrow, state the limits and require output that a reviewer can check.

The C-L-E-A-R pattern

Part	What to specify
Context	The role of the material and the intended user of the output
Limit	The supplied text only; no invented law, facts, clauses or assumptions
Expected task	One verb: extract, compare, classify, summarise or draft
Answer format	A table, issue list or marked comparison with source references
Review trigger	State uncertainty, missing information and every point requiring human judgement

FICTIONAL EXAMPLE - NO CLIENT DATA

Prompt	Using only the fictional clause below, list each departure from the supplied playbook. Quote the exact clause words, name the playbook rule and mark uncertainty. Do not give legal advice or invent missing terms. Return a three-column table: clause, issue, reviewer check.
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Then challenge the result

- Which conclusion is not supported by an exact source quote?
- Which playbook rule did you apply to each issue?
- What did you omit because the evidence was missing?
- What would change the answer?

Prompt quality cannot cure unsuitable use	A well-written prompt does not make an unapproved tool safe for confidential data, and it does not prove the output is correct.
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05

Verify and supervise the output

Fluent output can still be false. Build review around the source, the expected standard and the consequences of error.

Check	Reviewer action	Evidence to retain
Source fidelity	Trace every factual statement and quotation to supplied material	Source reference and quoted span
Legal accuracy	Verify every authority, citation, date and proposition independently	Authoritative source and access date
Completeness	Compare against an approved checklist or expected-answer set	Missed and extra items
Bias and consistency	Test comparable inputs and material edge cases	Test set and observed differences
Confidentiality	Check inputs, outputs, logs, access and unintended disclosure	Data record and incident path
Professional judgement	Name the authorised person who approves use of the output	Approval, corrections and final version

Stop conditions

- A fabricated source, authority, quotation or clause.
- A material issue that the reviewer cannot trace to source evidence.
- Sensitive information entered outside the approved boundary.
- Error rates or review time worse than the current process.
- The output cannot be supervised at the speed the system produces it.

Do not ask the model to grade itself

Self-critique can help surface questions, but it is not independent verification. A qualified person remains responsible for the final work.

06

Question the supplier

Do not buy a confident demonstration. Ask for the operating facts needed to approve the real use case.

Area	Questions to answer before approval
Purpose	What exact task is the system designed to perform, and what is outside scope?
Data use	Are prompts, uploads or outputs used for training, evaluation or product improvement? Can this be disabled contractually?
Storage	Where is data stored, for how long, and how is deletion verified?
Access	Who can access content and logs? What role, authentication and audit controls exist?
Processors	Which sub-processors are involved, where do they operate and how are changes notified?
Security	What assurance, encryption, vulnerability, incident and recovery evidence is available?
Output	How are sources exposed? What known limitations and tested failure modes apply?
Change	How are model, feature and policy changes communicated and revalidated?
Exit	Can the firm export its data, logs and configurations and confirm deletion?
Responsibility	What indemnity, liability, insurance and support terms apply to the intended use?

Evidence, not a questionnaire alone

Retain the contract terms, data-flow diagram, processor list, security evidence, approved use case and named internal owner together.

07 Run a bounded pilot

A pilot should answer a decision, not merely prove that the software can produce output.

- 1 Freeze the current baseline before using the tool.
- 2 Choose a representative test set, including ordinary work and known edge cases.
- 3 Write the expected output and material-error definition before viewing results.
- 4 Run the current and proposed processes on the same safe test set.
- 5 Have a qualified reviewer record corrections, uncertainty and review time.
- 6 Apply the pre-agreed stop conditions and write the decision.

Measure both speed and completed quality

Measure	Baseline	Pilot	What changed?
Hands-on lawyer time			
Elapsed turnaround			
Material issues missed			
False positives			
Correction or rework cycles			
Partner or senior input			
Write-off or fixed-fee overrun			

The review burden counts

A system that drafts in seconds but adds twenty minutes of checking may not improve the workflow. Measure the completed, supervised result.

08

Write the decision

A valid outcome may be to fix the process, run a narrower test, buy a tool or leave the workflow alone.

Decision test	Answer and evidence
What problem were we trying to reduce?	
Did completed quality improve?	
Did total review time fall?	
Were confidentiality and data controls satisfied?	
Can the output be supervised at expected volume?	
What new failure modes appeared?	
Who owns the process after the pilot?	
What is the next review date?	

FIX THE PROCESS	TEST AI	LEAVE IT ALONE
Use when intake, playbooks, ownership or approval are the real constraint.	Use when the task is bounded, measurable, reviewable and safe to test. Buy only after the evidence supports it.	Use when recurrence, value, evidence or supervision cannot justify change.

Decision: _____

Owner: _____ Review date: _____

09 Official sources and next step

This guide is a practical starting point. Recheck current regulatory, professional, data-protection and security guidance for the intended use.

Solicitors Regulation Authority

AI Risk Outlook: opportunities, accuracy, bias, confidentiality and accountability
<https://www.sra.org.uk/sra/research-publications/artificial-intelligence-legal-market/>

Solicitors Regulation Authority

Effective supervision, including AI-assisted or AI-generated work
<https://www.sra.org.uk/solicitors/guidance/effective-supervision-guidance/>

The Law Society

Generative AI - the essentials
<https://www.lawsociety.org.uk/topics/ai-and-lawtech/generative-ai-the-essentials>

The Law Society

How AI tools hallucinate and why it matters in law
<https://www.lawsociety.org.uk/topics/ai-and-lawtech/how-ai-tools-hallucinate-and-why-it-matters-in-law>

Information Commissioner's Office

Guidance on AI and data protection
<https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/artificial-intelligence/guidance-on-ai-and-data-protection/>

National Cyber Security Centre

Guidelines for secure AI system development
<https://www.ncsc.gov.uk/collection/guidelines-secure-ai-system-development>

Important limitation

This resource is general operational guidance, not legal, regulatory, information-security or data-protection advice. Requirements depend on the firm, tool, data, client terms, jurisdiction and intended use. ICO AI guidance is currently under review and should be rechecked before publication or reliance.

Start with one workflow

Use ClickoAI's open Contract-Workflow Baseline Kit to record the current process before changing it.

clickoai.com/contract-workflow-kit/

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