

Law Firm Workflow Automation: Real Examples

Concrete, safe-to-automate workflows for legal practices — with human sign-off kept where it matters

Direct answer: what workflows can a law firm actually automate?

A law firm can safely automate the preparation and admin around legal work — not the legal judgement itself. The workflows that automate well are: client and matter intake, conflict-check preparation, document assembly from your own templates, billing and time-entry preparation, matter status updates and client-communication drafts, and deadline and limitation tracking. In every case the AI prepares, drafts, and tracks; the lawyer keeps the judgement and signs off. Anything that goes to a client or a court is reviewed by a person before it leaves.

1. Client and matter intake

The manual pain: new-enquiry details arrive by phone, email, and web form in inconsistent shapes. Someone re-keys them into the practice system, chases missing fields, and opens the matter — all before a lawyer has looked at whether it is worth taking.

What the AI prepares	What stays with the lawyer
Collates enquiry details from email/forms into a consistent intake summary	Decides whether to accept the matter
Flags missing information and drafts the follow-up to request it	Approves and sends the follow-up
Drafts the matter-opening record and a proposed engagement letter from your template	Reviews and signs the engagement letter
Notes potential parties for the conflict check (see below)	Confirms scope, fees, and terms

2. Conflict-check preparation

The manual pain: conflict checks are easy to run late or run shallow. Names get typed slightly differently across matters, related entities are missed, and the search relies on someone remembering every party.

What the AI prepares	What stays with the lawyer
Extracts every named party, related entity, and alias from the enquiry	Makes the conflict determination
Searches your existing matters and clients for matches and near-matches	Decides whether a match is an actual, potential, or non-conflict
Assembles a conflict-check report listing what was searched and what it found	Records the decision and any information barrier required

The AI never clears a conflict on its own — it surfaces candidates and shows its working so the lawyer can make the call and keep the record.

3. Document assembly from templates

The manual pain: lawyers rebuild routine documents from an old matter, and copy-paste leaves the wrong client name or a stale clause. Template versions drift across the firm.

- **What the AI prepares:** a first draft assembled from your approved template, populated with matter data — engagement letters, standard correspondence, routine forms, and letters that follow a fixed structure.
- **What stays with the lawyer:** the legal content and advice, any non-standard clause, and the sign-off. Nothing goes out on the firm's letterhead until a lawyer has read it.

Automation is safest where the document is a known template with variable fields — not where the drafting is the legal work itself.

4. Billing and time-entry preparation

The manual pain: time gets reconstructed from memory at month-end, entries read “research — attendances”, and invoicing slips because narratives take time to write.

What the AI prepares	What stays with the lawyer
Drafts clear, client-appropriate time-entry narratives from your notes and activity	Confirms the time recorded is accurate
Assembles a draft pre-bill grouped by matter for review	Adjusts, writes down, or approves the bill
Flags entries that look vague, duplicated, or inconsistent	Decides what is billed and what the client sees

The AI prepares the draft; the responsible lawyer remains accountable for what is billed.

5. Matter status updates and client communication drafts

The manual pain: clients ring to ask “what’s happening with my matter?”, updates are reactive, and status emails keep dropping to the bottom of the list.

- **What the AI prepares:** a draft status update from recent activity on the matter, a draft reply to a routine client query, and a reminder when a matter has gone quiet.
- **What stays with the lawyer:** whether the update is accurate and appropriate to send, and any advice it contains. Client communications are reviewed before they go out.

6. Deadline and limitation tracking

The manual pain: missed dates are the classic malpractice risk. Dates are calculated by hand, live in one person’s diary, and have no early-warning layer.

What the AI prepares	What stays with the lawyer
Extracts key dates from correspondence and court documents into a tracked list	Verifies each date and the applicable limitation period
Drafts reminder schedules and flags matters approaching a deadline	Owens the deadline and the diarised responsibility for meeting it
Surfaces dates it is unsure about instead of guessing	Confirms or corrects anything the AI has flagged as uncertain

A calculated date is always a prompt for a lawyer to confirm — never a substitute for the lawyer holding the deadline.

Professional responsibility and confidentiality

Two things stay fixed across every workflow above. First, **confidentiality**: your data stays inside your own Microsoft 365 tenant, the AI runs on private Azure infrastructure, and your matter information is never used to train the AI or anyone else's model — consistent with your duty of confidentiality under your state bar rules. Second, **human review**: the AI drafts and prepares, but a lawyer reviews anything that goes to a client or a court before it leaves. That keeps the professional judgement, and the accountability under your state bar's rules of professional conduct, with the practitioner.

What makes these examples safe to automate

- **Human-in-the-loop sign-off** on anything consequential — the AI stops and hands to a person.
- **An audit trail** of what the AI prepared, when, and what a lawyer approved.
- **Your data stays in your tenant** — the AI works inside your Microsoft 365 environment rather than copying matter records out.
- **Private Azure AI, never trained on your data** — your client information is not used to train models.
- **A scoped pilot against your baseline** — prove it on one workflow, measured against how your firm works today, before going wider.

Where to start

Pick one workflow above where the pain is highest and the legal judgement is lowest — intake or billing preparation are common first steps — and run it as a scoped pilot with sign-off kept in place.