ACTIONABLE AI

presents

The Small Firm AI

Workflow Playbook

20 workflows built with software your firm may already use.

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Important Notice

This playbook is educational and informational. It is not legal advice, ethics counsel, or a substitute for professional judgment, and using it creates no attorney-client relationship.

Actionable AI is a consulting firm, not a law firm. Every prompt, template, checklist, and sample policy in these pages is a starting point, not a finished product. Have a Florida-licensed attorney review anything before you put it in front of a client or a court. Software named in these pages is a starting inventory, not an endorsement. Check the plans and data terms your firm actually has. Actionable AI takes no fees from any vendor and recommends no product.

A note on numbers. Every figure here falls into one of three buckets, and you can tell which from the sentence around it. Statutory amounts, deadlines, and case outcomes carry their own citation and can be checked at the source. Third-party statistics name the body that produced them. Anything else is an Actionable AI working assumption, offered to be stress-tested against your firm's own rates, volumes, and matter values rather than repeated as fact.

> **THE ONE RULE THAT RUNS THROUGH ALL OF IT**
>
> AI assists. A lawyer decides. Every workflow here keeps a human on the judgment calls: conflicts, advice, fees, privilege, and final filings. That is on purpose.

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Start Here: The Real Problem

The trick is not “AI strategy.” It is to stop letting humans retype, chase, summarize, sort, and babysit routine work.

These 20 workflows start with software your firm may use: Microsoft 365 or Google Workspace, Outlook or Gmail, Teams / Meet / Zoom, SharePoint or Drive, Word or Docs, Excel or Sheets, Forms, Adobe or DocuSign, your practice-management system (Clio, MyCase, PracticePanther, Filevine), Calendly or built-in booking, LawPay, QuickBooks, Canva, and a thin automation layer like Power Automate or Zapier. Check your exact plans, AI features, and connector rights before building.

> **KEY FINDING**
>
> The win is stitching, not shopping. Twelve new tools is how firms buy “efficiency” and then hire someone to manage the efficiency. Start with what you already own.

How to read this

Every workflow follows the same shape: the problem, the software you may already have, the workflow itself, where AI helps, and where a human stays in the loop. Pick the one that hurts most today and build that first.

A word on Florida ethics

Florida Bar Ethics Opinion 24-1 (January 19, 2024) green-lights generative AI in practice, but holds you to the duties you already had: protect client confidentiality (Rule 4-1.6), stay competent in the tools you use (Rule 4-1.1), bill honestly for AI-assisted work (Rule 4-1.5), and supervise AI like any nonlawyer assistant (Rule 4-5.3). That is exactly why every workflow below stops short of letting the machine make the call. Two specifics matter here. Opinion 24-1 recommends obtaining the client's informed consent before running their confidential information through a third-party AI tool, which describes most of what follows. And since June 15, 2026, Florida Rule of General Practice and Judicial Administration 2.515(d)(2) has required the signer of any filing in any Florida court to represent that every legal authority cited in it exists and is accurately cited (Opinion SC2026-0673). Anything a workflow below drafts for filing passes through that rule.

Part 1: Intake & Client Onboarding

1. New Lead Capture → Intake Triage → Consultation Booking

The problem. Leads arrive by phone, web form, email, referral, and voicemail. Nobody owns the first 15 minutes, and that is where revenue goes to die.

Software you likely have: Website form, Microsoft/Google Forms, Outlook/Gmail, Excel/Sheets, Teams/Slack, Calendly or built-in booking, Clio/MyCase/PracticePanther.

THE WORKFLOW

1. Every inquiry, web form or phoned-in, goes into the same intake form. No exceptions.
2. The form captures name, contact info and preferred method, practice area, opposing party, urgency, a brief description, preferred consult times, and how they found you.
3. Submission auto-fires an email alert to the intake owner, adds a row to the tracker, and drafts a contact in your practice-management system.
4. AI turns the raw intake into a 5-bullet matter summary, an urgency score, a missing-information list, a suggested practice area, and a good-fit / questionable-fit / refer-out call.
5. Intake staff review the summary and run a preliminary conflict screen. A lawyer resolves possible matches before staff send the booking link. If a generative AI chatbot communicates with the prospect, disclose that it is an AI program, not a lawyer or firm employee.
6. The calendar invite carries the intake summary and the documents you requested.
7. The tracker status updates: New, Contacted, Consultation booked, No response, Referred out, or Declined.

Where AI Helps	Keep a Human in the Loop
Summarize the inquiry	Legal advice
Identify missing facts	The final acceptance decision
Classify matter type	Conflict judgment
Draft the response email	Any fee quote unless a lawyer approved it
Flag urgent deadlines	

> **GO DEEPER: SEE IT BUILT END TO END**
>
> The full build of this workflow, every prompt, email template, table, and a day-by-day implementation checklist, starts on page 22.

GET THE TOOLKIT

Want these workflows as copy-paste prompts and templates, plus new ones as they ship?

Join the Small Firm AI list and get the working files in your inbox.

Subscribe → actionable-ai-for-law.kit.com

2. Conflict Check

The problem. Small firms treat conflicts like archaeology. Everyone digs through old emails and hopes.

Software you likely have: Practice-management system, Outlook/Gmail, Excel/Sheets, SharePoint/Drive, contact lists.

THE WORKFLOW

1. The intake form requires the prospective client, related parties, opposing parties, companies, spouses and family members, and known aliases.
2. Those names enter your conflict-check spreadsheet or practice-management matter screen.
3. AI cleans the names and builds variant search terms: full name, maiden name, business-name variants, common misspellings.
4. Staff search practice-management contacts, email, document folders, the billing system, and old spreadsheets.
5. AI summarizes the results into exact matches, possible matches, prior-matter references, and risk notes.
6. The lawyer reviews and records the decision: Cleared, Waiver needed, Declined, or More review needed.
7. The result is saved to the matter file.

Where AI Helps	Keep a Human in the Loop
Normalize party names	The conflict decision
Create search strings	Waiver judgment
Summarize possible matches	Client-consent analysis
Draft the internal conflict memo	

3. Consultation Preparation

The problem. Lawyers walk into consultations cold, then spend half the meeting doing intake they should have already read.

Software you likely have: Outlook/Gmail, calendar, Word/Docs, Forms, practice-management system.

THE WORKFLOW

1. Booking a consultation triggers a confirmation email and a document/request checklist to the client.
2. Intake materials are saved to the client folder.
3. AI reviews the intake and uploaded documents and drafts a prep memo: client facts, timeline, key legal issues, questions to ask, missing documents, red flags, and suggested next steps.
4. The lawyer reviews the memo before the meeting.
5. A meeting agenda is generated from the memo, and a notes template is open during the consultation.
6. Afterward, notes are saved to the matter file.

Where AI Helps	Keep a Human in the Loop
Prepare the consultation brief	Any legal conclusion
Extract the timeline	Strategy recommendations without lawyer review
Generate the question list	The engagement decision
Identify missing documents	

4. Engagement Letter

The problem. Engagement letters get copied from old matters. That is how old mistakes reproduce, like rabbits, but billable.

Software you likely have: Word/Google Docs, Outlook/Gmail, Adobe Sign/DocuSign, practice-management system.

THE WORKFLOW

1. The lawyer approves the new matter and staff select the engagement template by matter type.
2. Matter data populates client name, scope, fee structure, retainer, responsible attorney, and billing contact.
3. AI drafts customized scope language from your approved clause bank.
4. AI flags missing scope limits, ambiguous fee terms, missing client responsibilities, and missing non-engagement language for excluded matters.
5. The lawyer reviews and approves.
6. The letter goes out through DocuSign or Adobe Sign; the signed copy saves automatically to the matter folder.
7. The system updates status to “Engaged” and creates the billing/retainer task.

Where AI Helps	Keep a Human in the Loop
Draft from approved templates	Scope approval
Compare against your checklist	Fee-agreement approval

Flag missing clauses	Ethics language
Draft the cover email	

5. New Matter Opening

The problem. New matters often start with chaos, then everyone pretends the mess is "moving fast."

Software you likely have: Clio/MyCase/PracticePanther, SharePoint/Drive, Outlook/Gmail, Teams, Word/Docs.

THE WORKFLOW

1. The signed engagement letter arrives and staff click "open matter."
2. The system creates the matter record, folder structure, calendar deadlines, billing setup, and task template.
3. AI drafts an opening summary: matter description, client goals, key deadlines, initial tasks, and responsible team members.
4. A standard folder structure is created: 01 Intake, 02 Correspondence, 03 Pleadings, 04 Discovery, 05 Research, 06 Drafts, 07 Final, 08 Billing.
5. A welcome email goes to the client and an internal kickoff note to the team.
6. The matter dashboard updates.

Where AI Helps	Keep a Human in the Loop
Draft the opening memo	Deadline calculation without verification
Generate the task list	Legal strategy
Draft the client welcome email	Staffing decisions
Identify deadlines from intake documents	

6. Client Welcome + Expectation Setting

The problem. Clients get anxious when they do not know what happens next. Then they email. Then they call. Then your day is gone.

Software you likely have: Outlook/Gmail, Word/Docs, practice-management portal, Canva.

THE WORKFLOW

1. The matter opens and the client gets a welcome email covering who does what, how to reach the firm, expected response times, billing basics, upload instructions, and what happens next.
2. AI customizes the email by matter type.
3. The client receives a one-page "What to Expect" PDF and a portal invitation.
4. The first milestone task is created.

5. If the client does not upload documents, a follow-up reminder triggers.

Where AI Helps	Keep a Human in the Loop
Customize the welcome email	Promises about outcome
Draft a plain-English process guide	Deadlines not yet verified
Translate legal process into client-friendly language	Statements about legal rights
Build an FAQ	

Part 2: Documents, Email & Matter Management

7. Document Collection

The problem. "Please send us everything" is not a process. It is a prayer.

Software you likely have: SharePoint/Drive, Dropbox, client portal, Outlook/Gmail, Forms, practice-management system.

THE WORKFLOW

1. The matter type determines the document checklist, and the client gets a tailored upload request.
2. Documents land in a secure folder or portal.
3. AI reviews file names and suggests categories: contracts, emails, financial records, court documents, photos, medical records, government forms.
4. Staff approve the categorization and files are renamed using your firm convention.
5. AI builds a document index: file name, date, source, description, relevance, and a privilege/confidentiality flag.
6. Missing documents are identified and a follow-up request is drafted.

Where AI Helps	Keep a Human in the Loop
Categorize documents	Privilege calls
Extract dates	Relevance exclusions
Create the index	Destruction or deletion decisions
Draft the missing-document request	
Summarize large uploads	

8. Email-to-Matter Filing

The problem. The most important facts in the case are buried in someone's inbox under "Re: Re: Re: question."

Software you likely have: Outlook/Gmail, Clio/MyCase, SharePoint/Drive, Microsoft Copilot/Gemini, Power Automate/Zapier.

THE WORKFLOW

1. The firm sets a matter-specific email rule or category, and incoming matter emails are tagged.
2. Tagged emails are copied to the matter folder or practice-management system; attachments are saved separately.
3. AI summarizes long threads: main issue, client request, commitments made, deadlines mentioned, attachments included.
4. AI suggests a task when an email contains an action item; staff review before it is created.

5. The matter record updates, and a weekly AI digest summarizes key email developments.

Where AI Helps	Keep a Human in the Loop
Summarize threads	Sending substantive legal replies
Detect action items	Creating court deadlines without review
Extract deadlines	Filing privileged material into the wrong matter
Draft replies	
Flag client frustration	

9. Meeting Notes → Task List

The problem. Meetings produce "good discussion." Which means nothing happened.

Software you likely have: Teams/Zoom/Google Meet, Copilot/Gemini, Word/Docs, Planner/Tasks/Asana/Trello, practice-management tasks.

THE WORKFLOW

1. The meeting is recorded or transcribed, with consent where required.
2. AI generates a summary, decisions, open questions, and action items with owners and due dates.
3. The lawyer reviews; approved action items become tasks.
4. A client-facing summary is drafted, with internal-only notes kept separate.
5. The final summary is saved to the matter file and a follow-up email goes out.

Where AI Helps	Keep a Human in the Loop
Meeting summary	Sending a client summary without review
Action-item extraction	Recording without consent compliance
Draft follow-up email	Putting privileged strategy in a client-facing recap
Separate the client-safe summary from internal notes	

10. Matter Chronology

The problem. Every litigation, estate, family, employment, and business dispute needs a chronology. Most firms build it too late.

Software you likely have: Excel/Sheets, Word/Docs, SharePoint/Drive, Acrobat, Copilot/Gemini/ChatGPT/Claude.

THE WORKFLOW

1. Documents are collected, and AI extracts dates, actors, events, and source documents.

2. A draft chronology is built in a spreadsheet: date, event, source, person involved, legal significance, confidence level, and follow-up needed.
3. Staff review the source citations; the lawyer marks key events.
4. The chronology updates as new documents arrive.
5. AI drafts a narrative summary that feeds demand letters, pleadings, discovery responses, mediation statements, and client updates.

Where AI Helps	Keep a Human in the Loop
Date extraction	Factual certainty
Event summarization	Ranking legal significance without attorney review
Timeline drafting	Court-filing content without verification
Gap spotting	

11. First-Pass Client Updates

The problem. Clients do not need a law review article. They need to know what happened, what it means, and what happens next.

Software you likely have: Outlook/Gmail, Word/Docs, practice-management system, Copilot/Gemini.

THE WORKFLOW

1. A trigger event occurs: a filing, hearing, discovery response, settlement offer, document received, or approaching deadline.
2. AI pulls recent matter notes, emails, and tasks.
3. AI drafts a plain-English update: what happened, why it matters, what we need from you, the next deadline, and the expected next step.
4. The lawyer reviews; staff send by email or portal.
5. The update is saved to the matter file, and a follow-up task is created if the client needs to act.

Where AI Helps	Keep a Human in the Loop
Draft updates	Settlement advice
Simplify legal language	Risk assessment
Build a client-specific next-step list	Sensitive or emotional communications
Convert internal notes into a client-safe message	

Part 3: Drafting & Litigation

> **IMPORTANT**
>
> No AI-generated citation, whether case, statute, rule, or quotation, goes into anything that leaves the firm until a lawyer has verified it against a primary source. Every workflow in this Part produces text that may end up in front of a court.

12. Demand / Position Letter

The problem. Lawyers spend too much time assembling facts before they even start arguing.

Software you likely have: Word/Docs, Outlook/Gmail, SharePoint/Drive, Acrobat, practice-management system.

THE WORKFLOW

1. The lawyer selects the letter type: demand, response, preservation, cure notice, insurance claim, or employment dispute.
2. AI reviews the approved matter summary, chronology, and key documents.
3. AI builds a first-pass outline: parties, background, key facts, legal position, damages/request, response deadline, and attachments.
4. The lawyer revises the legal argument.
5. AI checks tone: too aggressive, too soft, missing facts, undefined terms.
6. The final letter is prepared in Word, a PDF is sent, a copy saves to the matter folder, and the follow-up deadline is calendared.

Where AI Helps	Keep a Human in the Loop
Draft the factual background	Legal theory
Create the outline	Threats
Improve clarity	Settlement positions
Check consistency against the chronology	Final factual assertions

13. Discovery Request Drafting

The problem. Discovery drafting is half lawyering, half factory work. The factory part should not eat the lawyer.

Software you likely have: Word, document templates, practice-management system, SharePoint/Drive, Copilot/Claude/ChatGPT.

THE WORKFLOW

1. The lawyer selects a discovery template; AI reviews the pleadings and matter summary.

2. AI proposes interrogatories, requests for production, requests for admission, definitions, and instructions.
3. The lawyer edits for jurisdiction, judge, local rules, and strategy.
4. AI checks for duplicates, overbreadth, undefined terms, numbering errors, and inconsistent party names.
5. The final requests are formatted, the service email/letter is drafted, the response deadline is calendared, and the served copy is saved.

Where AI Helps	Keep a Human in the Loop
First-pass drafting	Scope strategy
Cleanup	Objection-sensitive phrasing
Consistency check	Local-rule compliance
Formatting review	

14. Discovery Response

The problem. Discovery responses are where time entries go to breed.

Software you likely have: Word, Excel/Sheets, SharePoint/Drive, Acrobat, practice-management system.

THE WORKFLOW

1. Discovery requests are saved to the matter folder.
2. AI converts the requests into a response table: request number, request text, assigned responder, needed documents, draft response, objection notes, and status.
3. The client receives a plain-English information request; documents are collected and indexed.
4. AI suggests draft factual responses from the client materials; the lawyer inserts objections and revises.
5. AI checks for missing responses, inconsistent defined terms, duplicates, and unanswered subparts.
6. Final responses are prepared for signature/service, the production set is organized, and the deadline is confirmed.

Where AI Helps	Keep a Human in the Loop
Convert requests into a tracking table	Objections
Draft the client questionnaire	Privilege determinations
Summarize responsive materials	Final response language
Quality-control completeness	

15. Contract Review Triage

The problem. Small firms often review contracts like every clause deserves equal attention. It does not.

Software you likely have: Word, Google Docs, Microsoft Copilot, Acrobat, SharePoint/Drive, email.

THE WORKFLOW

1. The client uploads the contract, and an intake form captures deal type, client role, business goal, must-have terms, and the deal deadline.
2. AI drafts a contract review memo: parties, term, payment obligations, termination rights, risk clauses, missing provisions, and unusual terms.
3. AI builds an issue list by severity: high, medium, low.
4. The lawyer reviews and edits.
5. AI drafts the client-facing summary; the lawyer prepares the redline or comments.
6. The final reviewed version is saved and a follow-up negotiation email is drafted.

Where AI Helps	Keep a Human in the Loop
Clause extraction	Legal risk rating without attorney review
Issue spotting	Negotiation strategy
Plain-English summary	The final redline
Comparison to your checklist	

Part 4: Practice-Area Workflows

16. Estate Planning Intake → Drafting Packet

The problem. Estate planning firms ask for the same information over and over, then retype it into documents by hand.

Software you likely have: Forms, Word, Excel/Sheets, a document-automation tool, Outlook/Gmail, practice-management system.

THE WORKFLOW

1. The client completes an estate-planning intake form capturing family members, assets, fiduciaries, beneficiaries, special concerns, and health-care wishes.
2. AI reviews the intake for gaps: missing successor fiduciaries, inconsistent names, unequal distributions, minor beneficiaries, special-needs concerns.
3. Staff send clarification questions; the lawyer reviews the planning memo.
4. A drafting checklist is generated and documents are drafted from templates: will, revocable trust, POA, health-care directive, HIPAA authorization.
5. AI drafts a client explanation letter and a signing-meeting checklist.
6. Final documents are stored and indexed.

Where AI Helps	Keep a Human in the Loop
Intake review	Estate-tax advice
Gap spotting	Fiduciary suitability
Draft the planning summary	Distribution recommendations
Generate the signing checklist	The final documents

17. Family Law Financial Disclosure

The problem. Financial affidavits are document chaos with math attached. A perfect storm. Bring snacks.

Software you likely have: Excel/Sheets, Acrobat, SharePoint/Drive, Outlook/Gmail, practice-management system.

THE WORKFLOW

1. The client gets a financial-disclosure checklist and uploads bank statements, pay stubs, tax returns, retirement statements, credit-card statements, and mortgage documents.
2. AI categorizes the documents and extracts income, expenses, assets, debts, account names, and statement dates.
3. A spreadsheet is populated for review; staff check the extracted data.
4. AI flags missing months or statements.
5. The lawyer reviews the financial picture; a draft affidavit/disclosure is prepared.

6. A client-review version is sent, and the final signed version is stored.

Where AI Helps	Keep a Human in the Loop
Document sorting	The final financial affidavit
Data extraction	Legal characterization of marital vs. nonmarital assets
Missing-document detection	Support calculations without review
Drafting client questions	

18. Personal Injury Medical-Records Summary

The problem. Medical records arrive as 700-page PDFs. Somewhere inside is the answer. Also seventeen pages about parking.

Software you likely have: Acrobat, SharePoint/Drive, Word, Excel, case-management system.

THE WORKFLOW

1. Medical records are uploaded to the matter folder and renamed by provider and date.
2. AI builds a medical-record index: provider, date range, type of record, key diagnoses, treatment notes, bills. Use only a tool covered by a signed data-protection agreement. Medical and mental-health records are the most sensitive data the firm holds, and they do not go into a consumer-tier tool.
3. AI drafts a treatment timeline and extracts complaints, diagnoses, procedures, restrictions, referrals, and causation-related notes.
4. Staff verify source pages; the lawyer reviews for the demand package.
5. AI drafts the medical summary section, the demand packet is assembled, and a missing-records list is generated.

Where AI Helps	Keep a Human in the Loop
Summarize records	Medical causation conclusions
Create the treatment chronology	Damage valuation
Extract bills and providers	Expert opinions
Identify missing date ranges	

Part 5: Calendar & Billing

19. Court Deadline Tracking

The problem. Deadline systems fail when deadlines live in emails, pleadings, sticky notes, and somebody's head.

Software you likely have: Outlook/Google Calendar, practice-management calendar, Excel/Sheets, Acrobat, Power Automate/Zapier.

THE WORKFLOW

1. A new pleading, order, or notice is saved to the matter folder.
2. AI scans for hearing dates, response deadlines, discovery deadlines, court-imposed dates, and filing dates.
3. AI proposes calendar entries; staff or the lawyer verify against the rules and the order.
4. Calendar entries are created with the main deadline, an internal draft deadline, a review deadline, and reminder dates.
5. The source document is linked, a responsible person is assigned, and a weekly deadline report is generated.
6. Missed-task escalation triggers automatically.

Where AI Helps	Keep a Human in the Loop
Extract dates	Calculating rule-based deadlines without human verification
Draft calendar entries	Removing deadlines
Create the reminder schedule	Court-filing decisions
Generate the weekly deadline digest	

20. Monthly Billing Narrative Cleanup

The problem. Lawyers write time entries like hostage notes. Clients notice.

Software you likely have: Practice-management billing, LawPay, QuickBooks, Excel, Word, Outlook/Gmail.

THE WORKFLOW

1. Time entries accumulate through the month.
2. Before billing, AI reviews narratives for vague entries, block billing, internal shorthand, duplicative language, excessive detail, and privileged strategy.
3. AI suggests clearer descriptions; the lawyer or staff approve edits.
4. AI flags unbilled tasks, missing time, no-charge entries, and stale WIP.
5. A pre-bill report is generated and the responsible attorney reviews.

6. The invoice is finalized with a client-friendly cover email and a payment link; follow-up reminders are scheduled.

Where AI Helps	Keep a Human in the Loop
Rewrite billing entries	Time-reduction decisions
Spot vague narratives	Privilege review
Draft the invoice cover email	Final invoice approval
Identify stale WIP	

The Small Firm Software Map

This map is a starting inventory. Check the firm's plans, AI access, data terms, and connector rights before building; some features require another license. Here is where each tool earns its keep.

Workflow Area	Software to Check	Where AI Helps
Intake	Forms, Outlook/Gmail, Calendar	Summaries, triage, draft replies
Conflicts	Practice management, email, contacts	Name normalization, possible-match summaries
Documents	SharePoint, Drive, Dropbox, Acrobat	Sorting, indexing, summaries
Drafting	Word, Google Docs	First drafts, rewrites, checklists
Email	Outlook/Gmail	Thread summaries, action items
Meetings	Teams, Zoom, Meet	Transcripts, notes, tasks
Calendar	Outlook/Google Calendar	Deadline extraction, reminders
Billing	Clio/MyCase/LawPay/QuickBooks	Narrative cleanup, WIP review
Client Updates	Email, portal, Word/Docs	Plain-English status updates
Marketing	Canva, LinkedIn, email platform	Repurposing, client education content

Worked Example: Build Workflow #1 End to End

Theory is cheap. Here is the first workflow, new-lead intake, built step by step with the actual prompts and templates. It is the best place to start because it touches money fast: a firm may argue about AI drafting, but nobody argues about missed calls, slow follow-up, and leads disappearing into inbox fog.

The objective

Turn every new lead into a controlled process: capture, qualify, conflict-screen, book, prepare the lawyer, and track conversion. No mystery. No sticky notes. No "I thought Susan called them back."

Workflow summary

Stage	Purpose	Primary Owner	Software to Check
Lead capture	Get all inquiries into one system	Reception/intake	Website form, Microsoft Forms, Google Forms
Intake triage	Decide urgency and fit	Intake staff	Outlook/Gmail, Excel/Sheets, Copilot/Gemini
Conflict pre-check	Catch obvious issues early	Intake/lawyer	Practice management, email, contacts
Consultation booking	Get qualified leads on calendar	Intake staff	Calendly, Google Calendar, Outlook Bookings
Consult prep	Give lawyer useful facts before call	Intake/lawyer	Word/Docs, Copilot/Gemini/ChatGPT
Follow-up tracking	Prevent leads from going cold	Intake/admin	Excel/Sheets, CRM/practice management

The build, step by step

1. LEAD COMES IN

Common entry points: website contact form, phone call, email, referral, chat widget, Google Business Profile message, walk-in, existing-client referral.

Rule: every lead goes into the same intake form. Not "send me an email." Not "put it on my desk." Not "I'll remember." That is not a system. That is a malpractice-themed escape room.

2. INTAKE FORM CAPTURES CORE INFORMATION

Use Microsoft Forms, Google Forms, Clio Grow, Lawmatics, MyCase intake, PracticePanther forms, or a simple spreadsheet-backed form.

Field	Reason
Full name	Contact and conflict check
Email	Follow-up
Phone	Fast contact
Preferred contact method	Reduces missed connections
Practice area	Routing
Opposing party	Conflict check
Other involved parties	Conflict check
County/state	Jurisdiction
Brief description	Initial triage
Urgency	Deadline risk
How they found firm	Marketing attribution
Existing court date/deadline	Risk flag
Documents available?	Preparation
Consultation preference	Booking

3. AUTOMATIC INTAKE TRACKER ENTRY

Every submission creates a row in Excel or Google Sheets. This sheet becomes the firm's lead dashboard. Small firms do not need Salesforce cosplay.

Column	Example
Date received	May 8, 2026
Lead name	Jane Smith
Practice area	Probate
Source	Referral
Urgency	High
Status	New
Assigned to	Intake Coordinator
Conflict status	Pending

Consult booked?	No
Follow-up date	May 9, 2026
Notes	Has court deadline next week

4. AI CREATES THE INTAKE SUMMARY

Before putting intake facts into AI, confirm the firm-approved service and account, its data-retention and sharing terms, confidentiality settings, and the firm's consent decision. Do not paste real intake details into a personal or unapproved account. Use the approved service to generate a structured summary with Prompt 01 below.

PROMPT 01: INTAKE TRIAGE · Intake

```
You are assisting a small law firm with intake triage.

Review the intake information below and create:

1. Matter type
2. One-paragraph factual summary
3. Key parties
4. Potential urgency issues
5. Missing information
6. Suggested follow-up questions
7. Possible documents to request
8. Suggested status: good fit, possible fit, refer out, or decline

Do not provide legal advice.
Do not make a final conflict decision.
Do not promise representation.

Intake information:
[PASTE INTAKE DETAILS]
```

5. INTAKE STAFF REVIEW THE SUMMARY

AI does the first pass. A human owns the decision. Staff check: Is this a practice area the firm handles? Is the location/jurisdiction right? Is there an urgent deadline? Is the lead coherent and reachable? Are key parties listed? Is this obviously not a fit?

Status	Meaning
New	Not reviewed

Needs more info	Missing essentials
Conflict check	Potential fit
Book consult	Ready
Refer out	Not firm’s area
Decline	Not appropriate
No response	Lead went cold

6. PRELIMINARY CONFLICT SCREEN

Before booking anything substantive, run a basic conflict check across practice-management contacts, email, Outlook/Gmail contacts, the prior-matter list, billing records, shared-drive folders, and old spreadsheets. AI can help search. AI does not clear conflicts.

PROMPT 02: CONFLICT NAME VARIANTS · Conflicts

```
Create search variations for conflict checking based on these names.

Include:
- Full names
- Last names only
- Business name variants
- Common abbreviations
- Possible spelling variations

Names:
[INSERT PARTY LIST]
```

7. LEAD QUALIFICATION DECISION

Category	Action
Strong fit	Send booking link
Possible fit	Ask follow-up questions
Urgent	Escalate to attorney same day
Not a fit	Send polite decline/referral
Conflict concern	Lawyer review before response

Bad lead	Close intake

8. AI DRAFTS THE RESPONSE EMAIL

Email Template · **STRONG FIT**

```
Subject: Next Step, Schedule a Consultation

Hi [Name],

Thank you for reaching out to [Firm Name].

Based on the information you provided, the next step is to schedule a consultation with one of our attorneys. You can choose a time here:
[BOOKING LINK]

Before the consultation, please upload or email any documents related to the matter: court papers, contracts, correspondence, notices, or deadlines.

Please note that contacting us does not create an attorney-client relationship. We can only represent you after completing our review and signing an engagement agreement.

Best,
[Firm Name]
```

Email Template · NEED MORE INFORMATION

```
Subject: A Few Questions Before We Schedule

Hi [Name],

Thank you for contacting [Firm Name].

Before we determine the next step, could you please provide the following:
1. [Question 1]
2. [Question 2]
3. [Question 3]

Once we have that information, we can let you know whether a consultation makes
sense.

Best,
[Firm Name]
```

Email Template · NOT A FIT

```
Subject: Your Inquiry to [Firm Name]

Hi [Name],

Thank you for reaching out.

Based on the information provided, this does not appear to be a matter our firm
can assist with. You may want to contact your local bar association's lawyer
referral service for help finding an attorney who handles this type of matter.

We wish you the best.

Best,
[Firm Name]
```

9. CONSULTATION BOOKING

Use Calendly, Google Calendar appointment schedules, Microsoft Bookings, or practice-management scheduling. The booking page should include the attorney or consultation type, available times, fee (if any), meeting format, required documents, a disclaimer, and a cancellation policy. The confirmation should include date/time, Zoom/Teams/phone details, a document upload link, a payment link (if paid), and a short "what to expect" paragraph.

10. PAYMENT FOR PAID CONSULTS

If the firm charges for consultations, collect payment before or immediately after booking using LawPay, Clio Payments, MyCase Payments, PracticePanther payments, Square, or Stripe. The lead books, a payment link is sent automatically, a reminder goes out if payment is not received within a set window, and the appointment is confirmed only after payment.

11. DOCUMENT REQUEST

Send a document checklist based on practice area. AI can generate the checklist by matter type, but the firm should use approved templates.

— **Probate:** death certificate, will or trust, list of heirs, asset list, deeds, bank statements, prior court filings

— **Divorce:** petition or court papers, financial affidavit, pay stubs, tax returns, bank statements, parenting plan if any

— **Business dispute:** contract, emails/texts, invoices, payment records, demand letters, corporate documents

12. CONSULTATION PREP MEMO

PROMPT 03: CONSULTATION PREP MEMO · Consult Prep

```
Prepare a consultation briefing memo for the attorney. Use the intake information
below.

Include:
1. Prospective client name
2. Matter type
3. Key facts
4. Timeline
5. Parties involved
6. Urgency/deadlines
7. Documents received
8. Documents missing
9. Questions the attorney should ask
10. Issues requiring attorney judgment
11. Suggested next steps after consultation

Do not provide legal advice.
Do not make conclusions about representation.
Do not assume facts not provided.

Intake information:
[PASTE]

Documents summary:
[PASTE]
```

13. LAWYER CONDUCTS THE CONSULTATION

Use a structured note template during the meeting.

Template · **CONSULTATION NOTES**

```
Client:                 Date:
Attorney:               Matter type:

Client goals:

Key facts:

Important dates:

Opposing parties:

Documents reviewed:

Legal issues discussed:

Risks / concerns:

Information still needed:

Potential scope of representation:

Fee discussion:

Next steps:

Engagement decision:  [ ] Engage   [ ] Decline   [ ] Refer out   [ ] More
information needed
```

14. POST-CONSULTATION FOLLOW-UP

Outcome	Next Action
Engage	Send engagement letter
Needs more info	Send document/info request
Decline	Send non-engagement letter
Refer out	Send referral/resource email
Follow up later	Create follow-up task

15. AI DRAFTS THE FOLLOW-UP EMAIL

Email Template · ENGAGEMENT FOLLOW-UP

```
Subject: Next Steps After Our Consultation

Hi [Name],

Thank you for speaking with us today.

The next step is for us to send an engagement agreement outlining the scope of work, fee terms, and responsibilities. Once that agreement is signed and any required retainer is received, we can begin work.

We will send the agreement separately.

Best,
[Firm Name]
```

Email Template · NON-ENGAGEMENT FOLLOW-UP

```
Subject: Follow-Up to Consultation

Hi [Name],

Thank you for speaking with us.

After reviewing the matter, we are not able to represent you in this case. We are not taking any action on your behalf, and you should not rely on us to protect any rights, claims, deadlines, or defenses.

You may want to contact another attorney promptly, especially if there are upcoming deadlines.

Best,
[Firm Name]
```

Recommended automation level

Step	Automation Level
Form submission	High
Tracker update	High

Intake summary	Medium
Conflict search support	Medium
Conflict decision	None
Booking link	High
Payment reminder	High
Document checklist	Medium
Consultation prep memo	Medium
Engagement decision	None
Follow-up email draft	Medium
Final send	Human review

Key metrics to track

Metric	Why It Matters
Lead response time	Speed wins business
Consultation booking rate	Measures intake effectiveness
No-show rate	Shows process weakness
Paid consult conversion	Shows lead quality
Consult-to-engagement rate	Core revenue metric
Average time from inquiry to booking	Friction score
Source of best clients	Marketing ROI
Decline/refer-out rate	Practice fit

Implementation checklist

DAY 1

- Pick one intake form.
- Create the required fields.
- Create the lead tracker.

— Assign one intake owner.

WEEK 1

— Add the AI intake summary prompt.
— Add the conflict pre-check process.
— Create the booking link; send it only after the preliminary conflict screen.
— Create standard response emails.
— Build document-request checklists.

WEEK 2

— Add the consultation prep memo.
— Add follow-up templates.
— Track lead source and conversion.

MONTH 1

— Review the metrics.
— Identify dropped leads.
— Tighten form questions.
— Improve email templates.
— Add automation where staff keep repeating the same task.

GET THE TOOLKIT

Want these workflows as copy-paste prompts and templates, plus new ones as they ship?

Join the Small Firm AI list and get the working files in your inbox.

Subscribe → actionable-ai-for-law.kit.com

About Actionable AI

Greg Yates is a former Big Law corporate equity partner at Steptoe (NYC Managing Partner) and Seyfarth Shaw who now helps small Florida law firms put AI to work starting with software they already use. No theory. No hype. Just workflows that capture more leads, cut the busywork, and keep a lawyer on every decision that matters.

If your firm is drowning in intake, documents, and deadlines, the fix usually is not another tool. It is stitching the tools already in place into a process that runs itself, with a human on the judgment calls.

GET IN TOUCH

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Actionable AI

Download the free Florida AI Starter Playbook.

Eight practical resources for managing partners and firm administrators: a readiness checklist, five pilot workflows, a tool-approval scorecard, a lawyer verification checklist, and a 90-day plan. It is free, and the button below downloads it directly.

Scan to download the Starter Playbook

Download the Starter Playbook (PDF)

Direct download: Florida AI Starter Playbook (PDF)

Want a second set of eyes on which workflow to pick?

I take 15-minute calls with managing partners and administrators. I will tell you whether there is a fit. No deck.

Book a 15-minute introductory call

Book a 15-minute introductory call