ACTIONABLE AI

presents

Top 10 AI Workflows

for Small Law Firms

Ranked by value per unit of effort to build and maintain

Actionable AI · Prepared by Greg Yates - Updated September 29, 2026

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Important Notice

This guide is educational and operational, not legal advice, ethics counsel, or a substitute for professional judgment.

Actionable AI is a consulting firm, not a law firm. Every workflow, prompt, tool pick, and number here is a starting point to be calibrated to the specific firm and reviewed by a Florida-licensed attorney before anything touches a client matter or a filing.

The dollar and hour figures are conservative working estimates, not marketing projections. Plug in the firm's real rates, matter values, and volumes before quoting anything.

HOW TO USE THIS

This ranks workflows by return divided by effort, not by how impressive they sound.

Numbers tagged INDUSTRY are cited third-party figures. Numbers tagged ESTIMATE are conservative Actionable AI working assumptions. Stress-test them against the firm, don't repeat them blind.

Start Here: The Real Test

The question is never "what can AI do." It does almost everything badly enough to get a lawyer sanctioned and well enough to get one hooked. The question is which workflow returns the most for the least work to stand up and keep running.

So every workflow below is scored on one ratio: value (hours reclaimed, revenue recovered, or revenue generated) divided by effort to build and maintain. The winners are not the flashy ones. They pay back in one captured matter or one weekend of setup, then ask for almost nothing.

The ranking at a glance

#	Workflow	Primary value	Build	Upkeep	Payback
1	After-hours intake & lead qualification	Revenue generated	4–8 hrs	~1 hr/mo	First signed matter
2	First-draft documents & clauses	Hours reclaimed	6–10 hrs	Low	2–3 weeks
3	Record & document summarization	Hours reclaimed	2–4 hrs	Minimal	First big file
4	Time capture & billing narratives	Revenue recovered	2–6 hrs	Low	First billing cycle
5	Intake-to-document automation	Hours reclaimed	8–16 hrs	Low	3–4 weeks
6	Client communication drafting	Hours + retention	2–4 hrs	Low	2–3 weeks
7	Meeting / depo transcription	Hours + capture	1–3 hrs	Minimal	First week
8	Legal research + verification	Hours reclaimed	Setup + $$	Per-use verify	1–2 months
9	Firm knowledge base (RAG)	Hours, high ceiling	High	Ongoing	2–3 months
10	Marketing / content engine	Revenue-adjacent	Low	Steady cadence	Slow burn

WORKING ASSUMPTIONS (STATE THEM, THEN REPLACE THEM)

Attorney opportunity value: $250 per hour (conservative for a small Florida firm; many bill $250–$400).

Staff / paralegal loaded cost: ~$45 per hour. Working year: 48 weeks.

Figures are per attorney unless noted: multiply by headcount.

Average matter value is firm-specific. Where it appears, $1,500–$3,500 is a placeholder. Get the firm's real number before quoting.

"Hours reclaimed" is recovered capacity, not guaranteed new revenue. Only intake and billing

> generate or recover cash directly.

1. After-Hours Intake & Lead Qualification

The lead that calls at 9pm and hits voicemail hires the firm that answered. Small firms lose real money in the gap between an inquiry arriving and a human responding: nights, weekends, lunch, and any hour the phone is already ringing.

DISCOVERY: ASK THE FIRM

— **Where do leads arrive:** phone, web form, email, referral, voicemail? Which channel leaks most?

— **After-hours volume:** how many inquiries land outside staffed hours, and what happens to them now?

— **Average matter value:** by practice area: the single number that sizes this whole workflow.

— **Current response time:** how long until a live human follows up on a new lead?

— **Intake owner:** who owns the first 15 minutes today, and what's their tool stack?

BUILD: STEP BY STEP

1. Route every inquiry, web, phone, or email, into one intake form. No exceptions. One front door.
2. Add an AI intake assistant on the website that answers basic questions and qualifies 24/7 (practice area, urgency, conflict-relevant names, jurisdiction, brief description).
3. Have AI turn each raw intake into a five-bullet matter summary, an urgency score, a missing-information list, and a suggested practice area.
4. Auto-alert the intake owner and drop a row in the tracker (New, Contacted, Booked, No response, Referred, Declined).
5. Send a qualified lead straight to a booking link; route an unqualified or conflicted one to a referral or polite decline.

TOOLS: FAVOR WHAT THEY ALREADY OWN

— **Already own:** website chat widget, Microsoft/Google Forms, Outlook/Gmail rules, Calendly or built-in booking, the practice-management intake module (Clio Grow, MyCase, PracticePanther).

— **AI add-on:** an intake chatbot (Smith.ai, Gideon, or a configured assistant) for true 24/7 conversational qualification.

— **Cost:** intake bots commonly start around $39–$100+/mo; live-agent services more. Verify current pricing.

STARTER PROMPT

PROMPT 01: INTAKE SUMMARY · Intake

```
You are an intake assistant for a small law firm. From the intake text below,
produce:
1) A 5-bullet matter summary
2) Urgency: High / Medium / Low with one reason
3) Missing information needed before consultation
4) Suggested practice area
5) Names to run through a conflict check
Do not give legal advice or quote fees. Intake text: [PASTE]
```

THE MATH

ESTIMATE: a well-configured intake chatbot can plausibly recover $30K–$80K/yr for a small-to-mid firm, and conversational intake collects several times more qualifying detail than a static form. Size both against the firm's own matter value and after-hours volume before quoting them.

ESTIMATE: capturing just one extra signed matter per month at a $1,500–$3,500 average = $18K–$42K/yr. Two per month doubles it.

Build 4–8 hrs. Upkeep ~1 hr/mo. Payback: the first matter that would otherwise have died in voicemail.

VERDICT: highest ratio on the list. It generates revenue, and the payback is a single conversion.

WHERE A HUMAN STAYS

AI assists with intake; it must not give legal advice or quote fees. Tell visitors plainly that they are communicating with an AI program, not a lawyer or law-firm employee. Script it to collect and route information, give clear limits on the exchange, and hand legal questions to a human. A chatbot exchange may create prospective-client duties and, depending on the circumstances, a lawyer-client relationship despite the firm's intent. Run conflict-relevant names through a real conflict check before engagement.

2. First-Draft Documents & Clauses

Lawyers spend more time staring at a blank page than anyone admits. The first draft, whether the letter, the standard motion, the clause, or the memo, is where the hours vanish. A useful AI draft changes the economics only if the attorney can finish and verify it faster than drafting from scratch. Test that on the firm's recurring documents.

DISCOVERY: ASK THE FIRM

— **Document mix:** which routine documents recur most: letters, standard pleadings, agreements, memos?

— **Template state:** are there approved templates and a clause bank, or is everything copied from the last matter?

— **Drafting hours:** roughly how many hours a week per attorney go to first drafts?

— **Tools in hand:** Microsoft 365 with Copilot, Google Workspace with Gemini, or a standalone assistant?

— **Confidentiality posture:** is there a business-tier AI account, or are people pasting into consumer tools?

BUILD: STEP BY STEP

1. List the 8–15 documents the firm drafts most. Start there; ignore the long tail.
2. Build a prompt for each: role, the firm's format, the facts to insert, and the tone. Save them where staff can grab them.
3. Assemble an approved clause bank the AI draws from, so drafts pull the firm's language, not the internet's.
4. Draft inside the tool the firm already lives in (Word + Copilot, Docs + Gemini) so there's no new app to learn.
5. Set the rule: AI produces the first draft, the attorney edits and owns the final. Never the reverse.

TOOLS: FAVOR WHAT THEY ALREADY OWN

— **Already own:** Microsoft 365 Copilot inside Word/Outlook, discounted to $18/user/mo for firms under 300 seats through December 31, 2026 (annual commitment), reverting to $21/user/mo standard rate after that ($30 is the enterprise add-on rate for E3/E5 tenants). Confirm the current promo window before quoting; Microsoft has moved this date before. Alternatively, Gemini capabilities began rolling out in Workspace Business plans in January 2025 without a separate add-on. Existing-customer monthly pricing began changing March 17, 2025, or at annual-plan renewal if later. A firm already on eligible Business Standard has included Gemini capabilities; check the edition and admin settings. (Google Workspace announcement, Jan. 15, 2025.)

— **AI add-on:** Claude or ChatGPT business tier at roughly $20–$25/user/mo for general drafting; Spellbook in Word for transactional or contract firms.

— **Cost:** included Gemini on an eligible existing Workspace Business Standard plan has no separate add-on seat charge. Microsoft Copilot may require a paid seat if the firm does not already license it; price Claude, ChatGPT, and Spellbook separately. Verify current pricing and entitlements.

STARTER PROMPT

PROMPT 02: ROUTINE LETTER / MEMO FIRST DRAFT · Drafting

```
Draft a [DOCUMENT TYPE] for a [PRACTICE AREA] matter in [JURISDICTION]. Use these facts: [PASTE]. Match this firm format and tone: [PASTE SAMPLE]. Pull standard language from this clause bank where relevant: [PASTE]. Flag anything you assumed or that needs attorney input. This is a first draft for attorney review.
```

THE MATH

INDUSTRY: drafting can consume up to ~56% of a lawyer's time, with 15+ minutes lost just finding a starting point (Thomson Reuters).

ESTIMATE: reclaim 2–4 hrs/week per attorney = ~96–192 hrs/year. That's capacity worth ~$24K–$48K at $250/hr if rebilled.

Build 6–10 hrs to assemble prompts + templates. Upkeep low. Payback 2–3 weeks.

VERDICT: touches more hours per day than anything else here, at near-zero marginal cost on tools they own.

WHERE A HUMAN STAYS

Every AI draft is a starting point, not a final. The attorney verifies facts, law, citations, and tone before it leaves the building. Use a business-tier account with data protections. Never paste client-confidential material into a consumer free tool (Rule 4-1.6).

3. Record & Document Summarization

A 100-page record set can consume hours of lawyer time. AI can produce a first-pass summary quickly, but that is not the same as reviewed work. Medical records, depo transcripts, leases, discovery dumps, the 60-page contract a client forwards at 4:55pm: the task and file quality matter. Time preparation, upload or OCR, output, and attorney verification on representative files before quoting a savings figure.

DISCOVERY: ASK THE FIRM

— **Record-heavy work:** which matters drown the firm in documents: PI, litigation, estate, real estate, business?

— **Volume:** how many large document sets land per week, and who reviews them now?

— **Sensitivity:** what's in them: PHI, financials, and what protections does the AI account carry?

— **Output needed:** summary, chronology, issue list, risk flags, or all four?

BUILD: STEP BY STEP

1. Standardize one summarization prompt per document type (records, transcript, contract) with a fixed output shape.
2. Pick the destination: where the summary saves in the matter file and who reviews it.
3. Run the set through a business-tier tool that keeps the data private; output a summary, a chronology, and a flagged-issues list.
4. Have the attorney spot-check the summary against the source on anything that drives a decision.

TOOLS: FAVOR WHAT THEY ALREADY OWN

— **Already own:** Copilot or Gemini for documents inside the firm's existing suite; NotebookLM (low cost) for grounded summaries with citations back to the source.

— **AI add-on:** CoCounsel or a practice-management AI (Clio Duo, Smokeball, MyCase IQ) for review built into the matter.

— **Cost:** Gemini may be included in an eligible Workspace plan. Microsoft Copilot may require a paid seat; specialized legal platforms add their own per-seat cost. Verify current pricing and entitlements.

STARTER PROMPT

PROMPT 03: DOCUMENT SET SUMMARY · Review

```
Summarize the document(s) below for a [PRACTICE AREA] matter. Produce:
1) A plain-English summary (max 10 bullets)
2) A dated chronology of key events
3) Issues, risks, or inconsistencies to flag
4) Open questions for the attorney
Quote the source page or section for each key fact. Do not infer facts that aren't
in the text. Documents: [PASTE]
```

THE MATH

ESTIMATE: a defined 100-page set may take a human 1–4 hours for a first-pass review. AI processing may take minutes on suitable files, but preparation, upload or OCR, and attorney verification must be timed separately. Measure the full workflow on the firm's own files.

ESTIMATE: 1–3 hrs net saved per significant set after preparation and verification; at 3–5 sets/week that's 3–15 hrs/week on record-heavy practices. Measure the net time before quoting it.

Build 2–4 hrs to standardize. Upkeep minimal. Payback: the first big file.

VERDICT: a strong candidate for record-heavy practices if the measured net time savings holds. Setup is light; verification is not optional.

WHERE A HUMAN STAYS

AI summaries miss and occasionally invent. The attorney verifies any fact, date, or quote that drives a decision against the source document, especially before it goes in a filing or a demand letter.

4. Time Capture & Billing Narratives

This one isn't savings. It's stopping a leak. The billable six minutes nobody wrote down is money already earned and thrown away. Small firms quietly lose 10–20% of billable time to bad capture, then wonder why realization is soft.

DISCOVERY: ASK THE FIRM

— **Capture method:** how is time recorded now: contemporaneous, end-of-day, or reconstructed Friday from memory?

— **Billing system:** Clio, Smokeball, MyCase, PracticePanther, or spreadsheets?

— **Leakage signs:** gaps between calendar/email activity and recorded time; thin or vague narratives.

— **Narrative quality:** are invoice descriptions getting written down or written off?

BUILD: STEP BY STEP

1. Turn on passive/assisted time capture from calendar, email, and document activity if the practice-management system offers it.
2. Have AI draft clean, specific billing narratives from the activity log, then the attorney approves.
3. Run a weekly five-minute review: confirm captured entries, fix narratives, release to billing.
4. Track realization before and after so the recovered revenue is visible and defensible.

TOOLS: FAVOR WHAT THEY ALREADY OWN

— **Already own:** Smokeball (automatic capture), Clio (time tracking + Clio Duo narratives), MyCase, PracticePanther.

— **AI add-on:** the AI billing-narrative feature inside the practice-management suite, if not already enabled.

— **Cost:** usually a feature of software the firm already pays for, often a toggle, not a purchase.

THE MATH

ESTIMATE: passive capture recovers billable time that otherwise goes unrecorded; a 10–20% leak is a reasonable working assumption for a small firm until the firm's own realization data says otherwise.

ESTIMATE: recover 2–4 billable hrs/week per attorney = ~$24K–$48K/yr per attorney at $250/hr, caveat collectibility.

Build 2–6 hrs. Upkeep low (the weekly review). Payback: the first billing cycle.

VERDICT: pure margin on tools they already own. The recovered hours were always billable. They just weren't billed.

WHERE A HUMAN STAYS

AI cannot decide what is billable, reasonable, or ethically chargeable. The attorney does, every cycle (Rule 4-1.5). Don't bill AI-saved time as if a human spent it. Narratives must reflect work actually done.

5. Intake-to-Document Automation

Engagement letters get copied from the last matter, which is how last matter's mistakes reproduce. Build the templates once and every new matter spits out a clean draft from the intake data. The work is in the build; after that it runs itself.

DISCOVERY: ASK THE FIRM

— **Repeatable documents:** which docs follow the same shape every matter: engagement letters, retainers, standard forms, disclosures?

— **Data source:** where does matter data live so it can populate fields automatically?

— **Matter volume:** how many new matters per month feed this?

— **Approval path:** who reviews and signs before anything goes to a client?

BUILD: STEP BY STEP

1. Pick the 3–5 highest-volume repeatable documents. Don't try to automate everything.
2. Build a clean template for each with merge fields mapped to intake/matter data.
3. Add an approved clause bank so AI customizes scope language from the firm's own library.
4. Have AI flag missing scope limits, ambiguous fee terms, or absent client-responsibility language.
5. Route to e-signature; the executed copy saves itself to the matter folder.

TOOLS: FAVOR WHAT THEY ALREADY OWN

— **Already own:** Word/Docs templates + mail merge; the practice-management document module (Clio Draft, MyCase, PracticePanther); DocuSign/Adobe Sign.

— **AI add-on:** document automation with AI clause customization (Clio Draft, Gavel, or similar).

— **Cost:** often inside the practice-management subscription; standalone automation tools add a modest seat cost.

THE MATH

ESTIMATE: 20–40 min saved per matter opened; at 10–30 matters/month that's ~3–20 hrs/month reclaimed.

Build 8–16 hrs (templates + field mapping + clause bank). Upkeep low once stable.

Payback 3–4 weeks. The ratio improves every month as volume runs through the same templates.

VERDICT: real build cost, near-zero marginal cost after. It compounds with Workflow 1.

WHERE A HUMAN STAYS

Templates encode judgment, so a Florida-licensed attorney approves every template and clause before it goes live, and reviews each generated draft before it's sent. Automated does not mean unreviewed.

6. Client Communication Drafting

Clients don't get anxious because their case is slow. They get anxious because nobody told them what's happening. Then they email. Then they call. Then the day is gone. Routine updates and explainer letters are a daily time sink and a retention lever at the same time.

DISCOVERY: ASK THE FIRM

- **Communication load:** how much time goes to status updates, routine replies, and explainer letters?
- **Recurring questions:** which client questions repeat across matters?
- **Voice:** what tone does the firm want: and whose sample emails define it?
- **Channel:** email, portal, or both?

BUILD: STEP BY STEP

1. Identify the recurring message types: status update, document request, next-steps explainer, scheduling.
2. Build a saved prompt for each, tuned to the firm's voice from real sample emails.
3. Draft inside Outlook/Gmail with the firm's AI assistant; attorney edits and sends.
4. For matters that stall, set a cadence so updates go out before the client has to ask.

TOOLS: FAVOR WHAT THEY ALREADY OWN

- **Already own:** Copilot in Outlook or Gemini in Gmail; the practice-management client portal.
- **AI add-on:** none needed for most firms: this runs on the suite they already pay for.
- **Cost:** no separate Gemini add-on seat charge on an eligible existing Workspace plan; Copilot cost depends on the firm's Microsoft license.

THE MATH

ESTIMATE: 2–3 hrs/week per attorney reclaimed, plus fewer "where's my case" calls that eat staff time.

Build 2–4 hrs. Upkeep low. Payback 2–3 weeks.

Retention value is real but hard to price. Don't put a dollar figure on it; describe it as fewer status calls and steadier clients.

VERDICT: tiny effort, daily payoff, and it quietly raises client satisfaction.

WHERE A HUMAN STAYS

Routine and administrative messages only. Anything conveying legal advice, strategy, or a substantive position gets attorney review before it sends (Rule 4-1.4). The AI drafts the update; the lawyer owns the message.

7. Meeting, Call & Deposition Transcription

Half the notes from a client call never make it to the file, and the billable time for the call sometimes doesn't either. Automatic transcription and summary captures both the record and the time entry, with no extra effort from anyone.

DISCOVERY: ASK THE FIRM

- **Meeting volume:** how many client calls, consultations, and depositions per week?
- **Note habit:** who takes notes now, and how much makes it to the matter file?
- **Consent:** what's the firm's recording-consent practice, and is it Florida-compliant?
- **Existing platform:** Teams, Zoom, or Meet: each has native recording and summary.

BUILD: STEP BY STEP

1. Turn on recording + AI summary in the meeting platform the firm already uses (with proper consent).
2. Auto-generate notes, action items, and a summary; save to the matter file.
3. Pull a draft time entry from the meeting length and topic.
4. Attorney reviews the summary and confirms action items.

TOOLS: FAVOR WHAT THEY ALREADY OWN

- **Already own:** Teams or Zoom AI summaries, Google Meet notes: native to the platform the firm already pays for.
- **AI add-on:** Otter or Fireflies for richer transcripts and search across meetings.
- **Cost:** native summaries are often included; standalone transcribers run ~$10–$20/user/mo.

THE MATH

ESTIMATE: 1–3 hrs/week reclaimed on note-writing, plus recovered billable time from calls that would've gone unrecorded.

Build 1–3 hrs (turn it on, set the save-to-file habit). Upkeep minimal. Payback: first week.

VERDICT: plug-and-play. Unglamorous, steady, and it pays for itself in captured time entries alone.

WHERE A HUMAN STAYS

Florida is a two-party-consent state. Confirm consent before recording. AI summaries miss nuance and misattribute; the attorney verifies anything that matters before relying on it, and confidential recordings stay in a protected, firm-controlled tool (Rule 4-1.6).

8. Legal Research with Citation Verification

Real value, lower ratio, and the reason it's not in the top tier is the verification tax. AI research is fast and occasionally fabricates a case that does not exist. Every cite gets checked before it goes near a brief. The firms that skipped that step are in the sanctions opinions.

DISCOVERY: ASK THE FIRM

— **Research load:** which matters are research-heavy, and how many hours go to them?

— **Current tools:** Westlaw, Lexis, Fastcase/vLex already in the stack?

— **Risk tolerance:** who verifies cites today, and how disciplined is it?

— **Budget:** legal-grade research AI is a real line item: what's the appetite?

BUILD: STEP BY STEP

1. Use research AI built on a real legal database, not a general chatbot, for anything cite-bearing.
2. Require a good-law check on every citation (built-in citator or manual) before it enters a draft.
3. Keep a verification log so the discipline is visible and auditable.
4. Treat AI research as a head start on the analysis, never the final word.

TOOLS: FAVOR WHAT THEY ALREADY OWN

— **Already own:** Westlaw or Lexis with their AI layer (CoCounsel, Lexis+ with Protégé) if the firm subscribes.

— **AI add-on:** Paxton AI or vLex for standalone legal research with citation verification and confidence flags.

— **Cost:** the highest-cost category here: per-seat legal platforms. Verify current pricing and contract terms.

THE MATH

INDUSTRY: AI research tools cut hours off research but carry hallucination risk; verification is non-negotiable.

ESTIMATE: net 2–5 hrs/week reclaimed on research-heavy matters after the verification tax.

Build = setup + subscription cost. Upkeep = per-use verification. Payback 1–2 months on research-heavy practices.

VERDICT: worth it where research volume justifies the cost, but the verification overhead is why it sits at 8, not 3.

WHERE A HUMAN STAYS

This is the workflow that gets lawyers sanctioned. Never file or rely on an AI-found citation without confirming the case exists, says what the AI claims, and is still good law (Rule 4-1.1 competence; Rule 4-3.3 candor). The attorney owns every cite.

9. Firm Knowledge Base (Chat Your Own Files)

The highest ceiling on the list, and the most work. Point an AI at the firm's own briefs, templates, and closed matters and let lawyers ask it questions in plain English. The payoff is enormous for a firm with real document equity. The build and upkeep are why it's a Phase 2 project, not a week-one win.

DISCOVERY: ASK THE FIRM

— **Document equity:** does the firm have a deep, organized library of past work worth searching?

— **Organization:** is it structured and clean, or scattered across drives and inboxes?

— **Permissions:** who should and shouldn't see what: and how is that enforced today?

— **Maintenance owner:** who keeps the knowledge base current after launch?

BUILD: STEP BY STEP

1. Start small: one practice area's templates and model briefs, not the whole firm at once.
2. Stand up a grounded tool (NotebookLM for a light start; SharePoint/Copilot or a private RAG setup for more).
3. Set permissions so confidential and ethically-walled material is gated correctly.
4. Assign an owner to add new work product and retire stale documents on a schedule.
5. Pilot with one or two attorneys, measure, then expand.

TOOLS: FAVOR WHAT THEY ALREADY OWN

— **Already own:** NotebookLM (low cost, fast start); Microsoft 365 + SharePoint + Copilot if the firm is on M365.

— **AI add-on:** a private/RAG knowledge tool for larger or more sensitive libraries.

— **Cost:** NotebookLM is cheap to pilot; an enterprise SharePoint/Copilot build is a real project with real cost.

THE MATH

ESTIMATE: high ceiling, meaning hours saved hunting for the right precedent or template, but realized value depends entirely on document quality.

Build HIGH (ingestion, permissions, structure). Upkeep ONGOING (someone keeps it current). Payback 2–3 months.

Lower ratio than 1–7 because the effort is real and continuous, not because the value is low.

VERDICT: Phase 2. Earn trust with the fast wins first, then build this once the firm believes.

WHERE A HUMAN STAYS

Confidentiality and ethical walls are the whole ballgame here. Permissions must be enforced before launch, conflicts data must stay walled, and an attorney verifies that anything surfaced is current and correct (Rules 4-1.6, 4-1.7). A knowledge base that leaks across a wall is worse than none.

10. Marketing & Content Engine

Last on the list, not because it's low value, but because attribution is fuzzy and it's a slow burn rather than a same-week win. Drawn from the firm's own expertise, an AI content engine feeds the top of the funnel cheaply and steadily. It compounds over months, not days.

DISCOVERY: ASK THE FIRM

- **Expertise to mine:** what does the firm actually know that prospects search for?
- **Channels:** where do clients come from: referrals, search, LinkedIn, local presence?
- **Capacity:** who can spend even an hour a week feeding and approving content?
- **Compliance:** what does the Florida Bar require on lawyer advertising and disclaimers?

BUILD: STEP BY STEP

1. Pick one channel and one cadence the firm can actually sustain (one post or article a week beats a burst that dies).
2. Build prompts that turn the firm's expertise into blog posts, newsletters, and short social pieces.
3. Keep an attorney in the loop for accuracy and bar-advertising compliance before anything publishes.
4. Repurpose: one strong piece becomes a post, a newsletter section, and a few social snippets.

TOOLS: FAVOR WHAT THEY ALREADY OWN

- **Already own:** the firm's existing AI assistant (Copilot, Gemini, Claude, ChatGPT) plus whatever publishing tools they have.
- **AI add-on:** a newsletter platform and a design tool (Canva) if they want polish.
- **Cost:** low: mostly time, not money.

THE MATH

ESTIMATE: revenue-adjacent and real, but attribution is fuzzy. Don't promise a lead number. Describe it as steady top-of-funnel presence.

Build low. Upkeep = a sustained cadence (the actual hard part).

Payback: slow burn over months, not a same-week return.

VERDICT: cheap and worthwhile, but the return is least certain and slowest, which is why it ranks last.

WHERE A HUMAN STAYS

Lawyer advertising rules apply to AI-generated content (Florida Bar Rules 4-7.x). An attorney reviews for accuracy, unwarranted promises, and required disclaimers before anything publishes. No fabricated results, testimonials, or guarantees.

Vendor Comparison: Map the Job to a Tool

Lead with what the firm already pays for. Most of these workflows run on Microsoft 365 or Google Workspace plus the practice-management system already in place. Reach for a new subscription only when an owned tool can't do the job. Pricing is approximate and moves. Verify before quoting.

The job	If they already have…	AI add-on option	Approx. cost*
After-hours intake	Website chat, Forms, Calendly, Clio Grow	Smith.ai, Gideon, configured assistant	$39–$100+/mo
First-draft documents	M365 Copilot in Word; Gemini bundled in Workspace	Claude, ChatGPT Business (formerly ChatGPT Team), Spellbook (Word)	$0 bundled Gemini; paid seats vary*
Record summarization	Copilot / Gemini / NotebookLM	CoCounsel, Clio Duo, Smokeball, MyCase IQ	$0 bundled → paid seat/platform
Time capture & billing	Clio, Smokeball, MyCase, PracticePanther	Built-in AI narratives / auto-capture	Usually included
Intake-to-document	Word merge, Clio Draft, DocuSign	Gavel, Clio Draft AI	In PMS → modest
Client communication	Copilot in Outlook / Gemini in Gmail	— (runs on owned suite)	~$0 marginal
Transcription	Teams / Zoom / Meet AI summaries	Otter, Fireflies	$0–$20/user/mo
Legal research	Westlaw / Lexis (if subscribed)	CoCounsel, Lexis+ with Protégé, Paxton, vLex	Per-seat platform $$
Knowledge base	NotebookLM, SharePoint + Copilot	Private / RAG knowledge tool	Pilot cheap → build $$
Marketing engine	Existing AI assistant + Canva	Newsletter platform (Kit, etc.)	Low

*Pricing verified August 1, 2026, approximate, per user unless noted. Confirm current rates and data-handling terms directly with each vendor before relying on these figures in a proposal.

The Florida Ethics Floor

Florida's core duties predate generative AI and apply to it anyway. Florida Bar Ethics Opinion 24-1 (January 19, 2024) permits generative AI in practice while holding lawyers to the duties they already had. Four rules govern every workflow above, and since June 15, 2026 one court rule sits underneath all of them: Rule of General Practice and Judicial Administration 2.515(d)(2) makes the signer of any filing in any Florida court represent that every legal authority cited in it exists and is accurately cited (Opinion SC2026-0673).

RULE 4-1.1: COMPETENCE

Technological competence is part of competence. Know what the tool does, where it fails, and verify its output. This is the rule behind the verification habit in every workflow.

RULE 4-1.6: CONFIDENTIALITY

Client-confidential information does not go into consumer-tier tools that may train on it. Use business/enterprise accounts with data protections, and confirm the vendor's data-handling terms before anything sensitive touches the tool.

RULE 4-5.3: SUPERVISION OF NONLAWYER ASSISTANTS

Supervise AI the way you'd supervise a new paralegal: it does the first pass, a lawyer checks the work, and the lawyer owns the result. Delegation is fine; abdication is not.

RULE 4-1.5: FEES

Bill for value and work actually done. Don't charge a client for an hour of human work the AI did in a minute. AI efficiency should show up honestly in the bill.

IMPORTANT

The single rule that ties these together: anything that produces a filing, an advice communication, or a client deliverable needs a human signature on the verification, not just on the document. That line is the difference between a workflow that scales the firm and one that ends up in a bar complaint. Florida has the case: in Capital Standard, LLC v. U.S. Bank National Association, No. 2D2024-1392, 2026 WL 2450571 (Fla. 2d DCA Aug. 21, 2026), the amended initial brief contained at least 31 AI hallucinations, including misattributed propositions and nonexistent quotations; the reply added 15, including a fake case. The court fined counsel $1,000 for AI misuse and $500 for a belated response to its order to show cause. It also ordered him personally to pay U.S. Bank's fees for preparing its answer brief in response to the amended initial brief and referred him to The Florida Bar.

The 90-Day Sequence

Don't roll out ten workflows at once. That's how adoption dies. Find one bottleneck, match one workflow, prove it, then climb. ESTIMATE: in our experience the first workflow shows measurable time savings inside 30 days, and a revenue workflow pays for the stack inside a quarter.

DAYS 1–30: PROVE IT WITH MONEY AND HOURS

— **Pick one revenue workflow:** Workflow 1 (intake) or Workflow 4 (billing capture). Stand it up first, since it pays for everything else.

— **Pick one time workflow:** Workflow 2 (drafting) or Workflow 3 (summarization). Assemble the prompt library.

— **Measure baseline:** capture before-numbers so the win is provable, not anecdotal.

DAYS 31–60: BUILD THE COMPOUNDING PIECES

— **Add automation:** Workflow 5 (intake-to-document): build the templates and clause bank.

— **Add the easy wins:** Workflow 6 (client comms) and Workflow 7 (transcription), both near-zero effort.

— **Lock the verification habit:** make attorney sign-off non-negotiable before anything ships.

DAYS 61–90: EXTEND WHERE IT PAYS

— **Add research:** Workflow 8 only if the firm's research volume justifies the cost and the verification discipline holds.

— **Pilot the knowledge base:** Workflow 9 only if document equity justifies it: small, one practice area.

— **Start the content cadence:** Workflow 10 as a steady habit, not a launch.

Sources: Florida Bar Ethics Opinion 24-1 (Jan. 19, 2024); Fla. R. Gen. Prac. & Jud. Admin. 2.515(d)(2), eff. June 15, 2026 (Opinion SC2026-0673); Capital Standard, LLC v. U.S. Bank National Association, No. 2D2024-1392, 2026 WL 2450571 (Fla. 2d DCA Aug. 21, 2026); Thomson Reuters research on legal drafting time; Google Workspace Blog, "Google Workspace enables the future of AI-powered work for every business" (Jan. 15, 2025). Vendor pricing verified August 1, 2026 and subject to change. Figures tagged ESTIMATE are Actionable AI working assumptions, not third-party data.

About Actionable AI

Actionable AI helps small law firms evaluate, adopt, and implement practical AI: the simplest tool that does the job, implementable by a managing partner with no technical background and no IT department.

Greg Yates is a former Big Law corporate equity partner at Steptoe (NYC Managing Partner) and Seyfarth Shaw who now consults full-time on AI adoption for small firms. The work is plain: diagnose the real bottleneck, recommend what actually fits, put numbers behind it, and stand by them.

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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.

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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

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