

[OPEN WORKBOOK](#)

The Contract-Workflow Baseline Kit

A practical workbook for measuring one repeated law-firm workflow before you fix the process, buy a tool, run a small pilot or leave it alone.

This kit contains no software. It collects nothing, sends nothing and requires no confidential information. Counts, times and costs are enough.

CLICKOAI LTD | clickoai.com/resources

Version 2 | 15 August 2026

How to use this kit

Choose one recognisable workflow. Use a normal calendar month or the next twenty items in sequence. Do not pick memorable files. Label estimates, name their source and date the final baseline before any change begins.

The baseline does not need to be perfect. It needs to be honest enough to repeat after a change.

The working rule

- One named person owns the measurement.
- No client names, matter names, contract text or privileged material enter this workbook.
- Measure the sequence, not the highlights.
- Keep lawyer time spent separate from elapsed turnaround.
- Confirm the baseline before viewing a supplier result or running a pilot.

The five current numbers

Volume, lawyer time spent, turnaround, corrections and write-offs. Together they describe the work today without claiming that technology is the answer.

Worksheet 1: describe the workflow

Fill one page. A blank line is a finding, not a failure.

Field	Your answer
Workflow name	
Trigger: what arrives, from whom and through which channel	
Finish line: what leaves and what counts as done	
Named person responsible: one person who can change the workflow	
Roles touching the work, in order	
Where it waits and why	
Two or three recurring failure modes	
Fee basis and who feels an overrun	
Plain-language burden hypothesis	

Complete this sentence

This workflow may be creating avoidable _____ because _____.

Worksheet 2: the five current numbers

Use a defined period. Record each source and assumption beside the figure.

Number	Definition	How to get it	Your figure	Source or assumption
Volume	Items entering each month	Inbox, matter or intake count		
Lawyer time spent	Hands-on time across all roles	Time records plus a short tally		
Turnaround	Elapsed time from arrival to first output	Received and sent timestamps		
Corrections	Reopened points or extra review cycles	Correction log or sampled file review		
Write-off	Recorded time not recovered or fixed-fee overrun	Billing report checked by finance		

Measurement notes

Date	What was measured or learned	Evidence source	Confidence

Worked example: fictional and illustrative

A fictional 40-fee-earner firm measures first-pass review of customer contracts arriving on the customer's standard terms. The firm acts for the supplier. Every number below is invented and is not a benchmark or client result.

Measure	Made-up figure	What it suggests
Volume	26 contracts a month	Enough recurrence to observe a stable pattern
Lawyer time spent	3.1 hours per contract	Partner supervision is included, not hidden
Turnaround	Typical 6 working days	The work waits longer than it is actively handled
Corrections	7 of the last 20	Supervisor corrections need a written standard
Write-off	About GBP 2,900 a month	The commercial burden can be tested against a change

The fictional reading is process first. Queue and supervision changes compete seriously with buying software or running a pilot.

What a real firm would still need

- A retained source for each figure.
- A named person who accepts the baseline.
- Finance validation for any write-off figure.
- A date and a written limitation note.

Worksheet 3: supervision and safeguards

Answer yes, partly or not yet. Write the next action for every answer that is not yes.

Check	Yes, partly or not yet	Next action and person responsible
A named person reviews every AI-assisted output before it leaves the firm		
The review standard states what is checked and against which source		
The reviewer is competent to produce the work themselves		
Review time is counted in the workflow cost		
Corrections are recorded so the error pattern is visible		
Approved tools and permitted uses are written and owned		
Client confidential material stays out of unapproved tools		
Data location, retention and model-training terms are understood		
The firm has decided when client disclosure is required		
The firm's AI-use position has a responsible person and a review date		

Worksheet 4: recovery checklist

This is not a second readiness score. Use it to identify the next missing foundation.

Foundation	Ready or not yet	Next action if not yet
The workflow repeats often enough to observe		Count one month or choose a more repeated workflow
One named person can change it		Name a provisional person responsible before measuring
A leader can state the burden hypothesis		Write one sentence about time, delay, corrections or write-off
The five numbers can be obtained safely		Find the system owner and define a non-confidential sample
The output quality standard can be stated		Write the current supervision checklist
The roles that sign off are known		Map commercial, risk, IT and finance roles
The firm could act on an unfavourable result		Define fix, buy, pilot or leave it alone in advance

Your next three actions

1	
2	
3	

Confirm the baseline

Complete this page only when the figures, sources and limitations have been reviewed.

Field	Record
Workflow	
Measurement window	
Named person responsible	
Accountable sponsor	
Roles that must sign off	
Main limitation	
Baseline confirmed on	
Next decision date	

A finished baseline supports a decision. It does not prove that software is the answer.

Continue

Use the Contract-Workflow Readiness Score at clickoai.com/readiness. If the workflow has a named person responsible, clear sign-off and sufficient evidence, request a 20-minute fit call.

CLICKOAI LTD, company number 17322603. Registered in England and Wales. Registered office: 66 Paul Street, London, England, EC2A 4NA.