

CLICKOAI LAW FIRM GUIDE 13 OF 63

Legal Document Automation Guide

A route from source facts to an approved document.

Use it when	the firm is considering templates, questionnaires or automated assembly
Boundary	This is operational guidance, not legal drafting advice. A qualified lawyer remains responsible for the final document.

Built for independent law firms in England and Wales

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1. Frame the decision

Map facts, precedent, drafting, review and approval as one route. The file is only one part of the workflow.

Specific focus

Separate factual input, clause logic, legal review, approvals and release.

Questions to answer

- For this guide: Separate factual input, clause logic, legal review, approvals and release.
- What starts the document?
- Which facts are copied or re-keyed?
- Which checks require legal judgment?
- Where is the final record stored?

Avoid

- automating broken intake
- mixing formatting and legal errors
- removing review without naming its purpose

2. Control sheet

Treat a blank evidence field as a reason to pause, not a reason to guess. Record sources and owners before changing the workflow.

Area	Evidence to collect	Pass condition
Trigger	Source and required facts	Complete input is identifiable
Assembly	Templates, clauses and versions	Every source has an owner
Review	Legal, factual and format checks	Reviewer and check are explicit
Approval	Authority and exceptions	Decision is recorded
Record	Final version and retention	Authoritative copy is clear

Fail closed	If an input, owner or approval is missing, record the gap and keep the affected step outside the proposed change.
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3. Working record

Complete this page with counts, dates and named sources. Do not include client names, matter names, contract text or privileged material.

Field	Evidence or answer
Guide focus	Separate factual input, clause logic, legal review, approvals and release.
Document type	
Monthly volume	
Lawyer time	
Correction reason	
Longest wait	
Owner and date	

Evidence quality check

- The source is named and dated.
- An estimate is labelled as an estimate.
- The owner can reproduce the measure.
- The same method can be used after a change.

4. Decision record

Select the outcome that the evidence supports. A stop or no-change decision is valid.

- Stop: a required source, owner or approval is missing.
- Fix: repair the underlying route before adding technology or cost.
- Test: run one bounded change with a baseline and review date.
- Proceed: adopt only the option supported by the recorded evidence.

Decision field	Record
Chosen outcome	
Reason and evidence	
Owner and approvers	
Review or expiry date	

Primary sources

[Law Society: How to use lawtech in your practice](#)

[Law Society: Buying new technology](#)

[SRA: Effective supervision](#)

[SRA: Confidentiality of client information](#)

Source status

Links checked 18 August 2026. Confirm the current version and obtain appropriate professional advice before relying on regulated, contractual, privacy, security, insurance, financial or wellbeing conclusions.