

CLICKOAI LAW FIRM GUIDE 23 OF 63

Future of Legal Consultancy Workbook

Test a flexible service idea against buyer need and boundaries.

Use it when

a lawyer-led consultancy model is being considered

Boundary

This is not financial, employment, valuation or investment advice.

Built for independent law firms in England and Wales

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1. Frame the decision

Separate demand, work time, elapsed time, rework and collected value. A full diary does not prove useful capacity.

Specific focus

Define client problem, regulated boundary, delivery capacity and evidence.

Questions to answer

- For this guide: Define client problem, regulated boundary, delivery capacity and evidence.
- Which work is wanted?
- Where does work wait?
- Which role is the constraint?
- What work is repeated?

Avoid

- using revenue alone
- targets without owners
- buying software for a demand problem

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
Demand	Enquiries and accepted matters	Desired work is explicit
Flow	Volume, queues and rework	Constraint is visible
Quality	Corrections and complaints	Quality loss cannot hide
People	Skill and review capacity	Supervision route exists
Value	Cost, collection and effort	Current sources used

Fail closed

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

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	Define client problem, regulated boundary, delivery capacity and evidence.
Work type	
Volume	
Constraint	
Rework time	
Thirty-day measure	
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: Client care letters](#)

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.