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Law Firm Growth Expense Review

Trace proposed spend to a bottleneck and measurable benefit.

Use it when	a cost is called an investment without an operating case

Boundary	This is not accounting, tax, pricing or investment advice. Use qualified advisers for financial decisions.

Built for independent law firms in England and Wales

Original ClickoAI edition | Version 1 | 18 August 2026 | clickoai.com/law-firm-guides

1. Frame the decision

Trace cost and value to a defined workflow. Separate cash, records, lawyer time and client-facing price information.

Specific focus	Record constraint, full cost, expected change, owner and stop rule.

Questions to answer

- For this guide: Record constraint, full cost, expected change, owner and stop rule.
- Which decision is being made?
- What is the baseline?
- Which costs are avoidable?
- What client wording changes?

Avoid

- headline figure without period
- mixing client and business money
- assuming lower cost means better value

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
Scope	Matter type and period	Like-for-like
Cost	Source and allocation	Reproducible
Price	Method and inclusions	Information is accurate
Control	Approval and exception	Authority is clear
Review	Outcome and collection	Result is measured

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	Record constraint, full cost, expected change, owner and stop rule.
Decision	
Current cost	
Denominator	
Client effect	
Approval	
Review measure	

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

SRA: Transparency in price and service

SRA: Accounts Rules

SRA: Accurate client accounting records

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.