

Legal Workflow Catalog – 9 Flows for Law Firms

Ranked by hours-recovered-per-risk, with starting trust setting and supervision protocol for each. Pick from this catalog. Don't reinvent.

From HitLai Institute – Module L2: “AI Workflows for Legal Operations”

HOW TO USE THIS CATALOG

For each flow: - **What it does** – one-line summary - **Hours recovered/month** – typical small-to-mid firm range - **Risk class** – Low / Medium / High under ABA 512 framework - **Starting trust setting** – never higher than these defaults - **Supervision protocol** – minimum required oversight under ABA 512 - **Privilege considerations** – what to watch for

These flows assume the firm is using a HitLai/AICtrlNet deployment configured for law firms – including self-hosted or local-AI options for privileged material. Public AI tools alone are NOT appropriate for substantive legal work.

TIER 1 – START HERE (LOW RISK, HIGH TIME SAVINGS)

Flow 1: Conflict-check pre-screen

What it does: New matter intake form arrives. AI cross-references the new client's parties and counterparties against the firm's matter list, flagging potential conflicts before the conflicts officer sees the file. Conflicts officer makes the final call.

Hours recovered/month: 8-15 **Risk class:** Low (pre-screen only – final decision stays with conflicts officer) **Starting setting:** AI suggests, conflicts officer writes **Supervision:** Conflicts officer reviews every AI flag; partner approves any “potential conflict” before client engagement **Privilege:** Run on internal firm data only. Self-hosted deployment recommended.

Flow 2: Calendar entries from contracts

What it does: Signed contract uploaded. AI extracts effective date, term, renewal date, auto-renewal yes/no, key obligations, expiration. Calendar entries created automatically (60-day renewal warnings, expiration dates, milestone obligations).

Hours recovered/month: 6-12 **Risk class:** Low (calendar reminders are not legal advice) **Starting setting:** AI acts, you approve (paralegal or associate verifies dates before calendar entries created) **Supervision:** Associate or senior paralegal verifies extracted dates against the original document **Privilege:** Same. Self-hosted preferred for sensitive contract types.

Flow 3: Legal research summarization

What it does: Associate runs research in Lexis/Westlaw, gets 30 cases. AI summarizes each, identifies the controlling cases, flags splits or recent overturning, prepares a digest for the partner.

Hours recovered/month: 10-20 (per researching associate) **Risk class:** Low — summarization only; no AI generation of legal positions **Starting setting:** AI suggests, associate writes **Supervision:** Partner reviews the digest; associate must read each underlying case before final use **Privilege:** Public legal databases — no privilege concern at this step. Output may incorporate matter facts, which is privileged — handle accordingly.

TIER 2 — DRAFTING ASSIST (MEDIUM RISK, HIGH TIME SAVINGS, STRICT SUPERVISION)

Flow 4: Document drafting starter (transactional)

What it does: Standard transactional document (NDA, basic services agreement, simple employment agreement) drafted from a deal-term sheet. Output is a STARTING POINT for an associate's drafting work — not a final document.

Hours recovered/month: 8-16 **Risk class:** Medium (drafting is substantive legal work) **Starting setting:** AI suggests, associate writes **Supervision:** Associate revises substantively; partner reviews; client receives only attorney-finalized document **Privilege:** Self-hosted deployment required for any matter facts. Anonymize or redact before any external AI use.

Flow 5: Discovery document review pre-screen

What it does: Large discovery production. AI tags documents for relevance (responsive / non-responsive / privileged / hot). Attorney review focuses on flagged documents and validates AI's tags on a sample.

Hours recovered/month: 30-100+ (matter-dependent) **Risk class:** Medium-to-High (discovery errors can be sanctionable) **Starting setting:** AI suggests; reviewing attorneys make all final calls **Supervision:** Partner approves the AI tagging methodology before production; attorneys re-review a statistically significant sample to validate AI accuracy **Privilege:** ABSOLUTE — privileged material must never reach a public AI service. Self-hosted only. Document the deployment in your discovery protocol.

Flow 6: Contract abstraction (post-signing)

What it does: After a contract is signed, AI extracts key terms — parties, term, payment, renewal, indemnification, termination, governing law — into a structured database for the firm's client-management system.

Hours recovered/month: 4-10 **Risk class:** Medium (extraction errors can lead to missed obligations) **Starting setting:** AI suggests, paralegal or associate writes **Supervision:** Associate verifies extraction against the original document; partner reviews for unusual terms **Privilege:** Self-hosted deployment for client agreements. Public AI not appropriate.

TIER 3 – INTERNAL EFFICIENCY (LOW-TO-MEDIUM RISK, INTERNAL-FACING)

Flow 7: Matter-status updates from associate timesheets and email

What it does: AI summarizes the past two weeks of activity on each open matter into a 1-paragraph status update for partners and clients. Pulls from billing time entries, email threads (with privilege filters), and task systems.

Hours recovered/month: 6-12 **Risk class:** Medium (client communication; risk of including privileged or wrong information) **Starting setting:** AI suggests; partner writes the client-facing version **Supervision:** Partner finalizes any update sent to the client; associate verifies AI's facts before partner review **Privilege:** Self-hosted deployment; matter data stays inside the firm.

Flow 8: Intake form auto-completion from prior records

What it does: Returning client fills out only the changed fields; AI pre-populates the rest from the firm's existing client/matter records.

Hours recovered/month: 4-8 **Risk class:** Low (administrative) **Starting setting:** AI acts, paralegal approves **Supervision:** Intake paralegal verifies; client confirms accuracy at intake call **Privilege:** Self-hosted; client data only.

Flow 9: Billing review and clarification drafting

What it does: Before bills go out, AI reviews time entries for ambiguity (vague descriptions, duplicate-looking entries, unusual hours), drafts clarification questions for the timekeeper.

Hours recovered/month: 4-8 **Risk class:** Low (internal review) **Starting setting:** AI acts, you approve **Supervision:** Billing partner approves any client-facing edits **Privilege:** Internal billing data; self-hosted.

FLOWS TO AVOID (OR RUN ONLY WITH EXTREME CAUTION)

✗ AI generating final court filings. Mata v. Avianca is the cautionary tale. Drafting starters with rigorous citation verification are acceptable; AI producing final-form filings without sentence-by-sentence attorney verification is not.

✗ AI giving substantive legal advice to clients directly. Communication-rule and competence-rule violation territory.

✗ AI signing or executing documents. No autonomy authority for legally binding actions, ever.

✗ AI setting fees, settlement amounts, or making strategic litigation decisions. Lawyer judgment, not AI judgment.

✗ AI use on opted-out clients' matters. Once a client elects out, the firm respects it across the matter.

THE SUPERVISION RHYTHM

Every law firm running these flows should have:

- **Daily:** Reviewing attorney verifies AI output before any external use.
- **Weekly (5 minutes):** Practice-group leader reviews the audit log for AI-assisted matters — what flows ran, what was caught, anything off.
- **Monthly:** Managing partner reviews aggregate AI use across the firm — graduations, demotions, errors caught.
- **Quarterly:** Update the firm's AI policy if needed. Review with general counsel or ethics counsel.
- **Annually:** Mandatory re-training for every attorney and paralegal.

This is the supervision practice ABA 512 implies. It is also the practice that protects the firm from sanctions and panel-disqualification risk.

THE TRUST JOURNEY FOR LEGAL WORK — STRICTER CEILINGS

Setting	Maximum use case in legal
AI watches	Always available
AI suggests	Default for any AI-assisted substantive legal work
AI acts, you approve	Only for administrative work — calendar, intake, billing review
AI handles routine	NEVER for substantive legal work. Limited to administrative tasks (intake auto-fill, calendar reminders) after extensive proven track record.

There is no “AI handles routine” for filings, advice, signed documents, or substantive matter work. That ceiling is not configurable. Your supervision protocol is the floor; ABA 512 is the ceiling.

THE HITLAI / AICTRLNET ANSWER, IN ONE LINE

AI tools, your team, your systems — running together, safely.

For a law firm: associates and paralegals do the work AI can't. Partners supervise. Citations verified before any external use. Privileged material stays inside the firm — self-hosted or local AI via Ollama/vLLM, air-gapped if your matter requires. Your DMS, billing, conflict, and calendar systems take what's been verified. Every step auditable for state-bar inquiries, partner reviews, or panel/RFP defenses.

Want to set up these flows live with your firm's specific practice areas? That's Module L2 — the 120-minute live-build session for legal operations. → hitlai.net/institute

This catalog is not legal advice. It is operational guidance based on ABA Formal Opinion 512 and is intended for firm-internal planning under the supervision of general counsel or ethics counsel.

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