

SubAI Law Firm Automation Portfolio

37 opportunities to improve everyday work

Examples to explore with your firm. The work we agree to build depends on your priorities and what your systems can support.

SubAI builds and manages automation for your firm's daily work. We check existing software first, configure useful features, and build connections or automation where work falls between systems. We confirm what your systems can support before agreeing on a build. Each entry identifies its main value:

- Cost workflow: Reduce time spent on routine tasks, coordination, and correcting mistakes.
- ◆ Revenue workflow: Help more inquiries become clients and keep follow-up from being missed.
- Data foundation: Keep information accurate across systems so reports and automation can rely on it.

Intake and engagement

Help prospective clients get a response and keep new engagements moving.

01 Intake recovery

◆ Revenue workflow

What starts it: A call or inquiry goes unanswered, or someone is waiting for follow-up.

What it does: Check phone, email, and intake records for unanswered inquiries and missed handoffs. Confirm the person's current status and earlier contact, prepare appropriate follow-up for approval, and assign someone to handle it. Track the response through a recorded outcome.

What to measure: Follow-ups completed; correct follow-up lists; response time; conversations recovered; consultations booked; signed matters.

02 Consultation follow-up

◆ Revenue workflow

What starts it: A consultation is booked, missed, or ends without a next step.

What it does: Check consultation forms and scheduling details, and prepare a brief. After a missed or completed consultation, confirm the person's current status before drafting follow-up for approval. Flag or stop outdated reminders under your firm's rules and track the next step or final outcome.

What to measure: Consultations followed up; missing intake details; follow-up time; appointments rescheduled; consultations that become engagements.

03 Conflict check preparation

■ Cost workflow

What starts it: Intake receives a prospective client or the name of a new opposing party.

What it does: Collect names and aliases, search the sources your firm uses for conflict checks, and gather possible matches with links to the records. Flag uncertain identities and prepare the findings for the lawyer who makes the conflict decision.

What to measure: Review packets prepared; preparation time; relevant names or matches missed; reviewer corrections; time to a decision.

04 Engagement and matter setup

■ Cost workflow

What starts it: Your firm approves an engagement and receives a signature or required payment.

What it does: Create or update the matter record, document folder, and assigned tasks in the agreed systems. Check required approvals and documents, confirm that details match, and prepare the welcome package for approval. Track missing items until setup is complete.

What to measure: Engagements set up; setup time; incomplete or duplicate matters; staff follow-ups needed.

05 Referral follow-up

◆ Revenue workflow

What starts it: A referral arrives or your firm refers someone to another provider.

What it does: Link referrals to intake records and assign follow-up. Track acknowledgements, consultations, and engagement outcomes. Prepare referrer updates with information your firm permits sharing and send them for approval. Flag referrals with no response or recorded outcome.

What to measure: Referrals followed up; response time; referrals with nobody assigned; follow-ups completed; consultations and matters from referrals.

Matter coordination

Keep documents, responsibilities, and next steps clear as a matter progresses.

06 Matter readiness coordinator

■ Cost workflow

What starts it: A consultation, mediation, closing, or filing review is approaching.

What it does: Check required documents, signatures, payments, and tasks against your checklist. Investigate anything missing, outdated, or inconsistent. Assign follow-up to staff and prepare a packet showing what is ready, what is outstanding, and links to the records.

What to measure: Readiness packets prepared; preparation time; matters ready on time; missing items found in review; rework needed.

07 Missing document follow-up

■ Cost workflow

What starts it: A matter needs documents, such as financial records for family-law disclosures.

What it does: Compare received documents with your firm's approved checklist, including document type and period. Check file contents and email before marking an item missing. Flag uncertain matches, update the checklist, and combine remaining requests into one message for approval.

What to measure: Requests resolved; packet completion time; duplicate requests; staff follow-ups; items wrongly marked missing or complete.

08 Stalled matter investigator

■ Cost workflow

What starts it: A matter has no recent progress or misses an internal target date.

What it does: Review tasks, correspondence, documents, and matter history to explain a delay, such as a probate matter untouched for weeks. Distinguish an expected wait for a court or client from missed internal work. Identify who can act next, recommend a step with supporting records, and track completion.

What to measure: Investigations completed; time to find the cause; time spent investigating; age of unfinished tasks; next steps completed.

09 Deadline and commitment tracker

■ Cost workflow

What starts it: A notice, message, or meeting record contains a date or commitment.

What it does: Compare dates and commitments with tasks and calendars, such as Clio and Outlook. Flag missing entries, conflicting details, or absent meeting links, with links to the source. Send legal deadline questions to the responsible lawyer. Once confirmed, maintain reminders and completion records.

What to measure: Commitments tracked; accurate dates and tasks; missed or duplicate obligations; calendar corrections; time to confirm.

10 Client update coordinator

■ Cost workflow

What starts it: An update is due or a client asks about matter status.

What it does: Gather confirmed progress and outstanding items from matter records, check for conflicting information, and draft an update with the next expected step. Put drafts in a review queue so staff can check sources, edit, and approve them. Route unanswered questions to the right person and record the approved communication.

What to measure: Updates prepared; preparation time; edits needed; overdue updates; repeat requests for status.

Documents and evidence

Spend less time sorting and checking documents, with references your team can verify.

11 Incoming document sorting

■ Cost workflow

What starts it: Mail, attachments, scans, or portal documents arrive.

What it does: Identify the matter and document type, check for duplicates, and file and name documents using your rules. Create any related internal task. Ask for review before filing a document when the matter match is uncertain.

What to measure: Documents filed; filing and staff handling time; wrong matter assignments; duplicates; documents sent to the right place.

12 Chronology and evidence index

■ Cost workflow

What starts it: New evidence arrives or the team needs a matter chronology.

What it does: Build a timeline with document and page references. Combine repeated mentions, distinguish allegations from documented events, and flag contradictions. Update the chronology as material arrives and identify gaps for the legal team to review.

What to measure: Evidence indexes prepared; preparation time; correct source references; missing or inaccurate events; reviewer corrections.

13 Records request coordinator

■ Cost workflow

What starts it: Your team authorizes a request to a records custodian or vendor.

What it does: Prepare the request and required authorization. Track acknowledgements and partial responses, then compare the records received with what was requested. Prepare follow-up for approval and keep the list of outstanding records current.

What to measure: Requests fulfilled; staff follow-up time; age of open requests; incomplete responses found; time to index received records.

14 Production readiness checker

■ Cost workflow

What starts it: A document production or disclosure packet is ready for review.

What it does: Check page counts, order, duplicates, Bates numbers, redactions, and the required index. List problems for correction and identify documents needing a privilege or disclosure decision. Check the approved packet again before release.

What to measure: Production sets checked; checking time; numbering errors; missing pages; redaction errors; rework before release.

15 Matter packet assembler

■ Cost workflow

What starts it: A recurring matter stage requires standard documents and exhibits.

What it does: Gather approved document versions and confirmed matter details. Fill in agreed templates, check that names and dates match, and assemble the index and attachments. Flag missing or inconsistent material and send the packet for review.

What to measure: Matter packets assembled; assembly time; incorrect fields; missing attachments; packets accepted without rework.

Billing and firm operations

Resolve billing questions, complete routine administration, and keep matter records accurate.

16 Prebill review

■ Cost workflow

What starts it: Prebills are ready or a time or expense entry needs review.

What it does: Compare time and expenses with matter billing rules and work records. Find duplicates, missing codes, unclear descriptions, and entries that do not agree. Suggest corrections or questions for the timekeeper and track their resolution.

What to measure: Prebills reviewed; review time; age of open billing questions; reviewer corrections; bills returned for avoidable errors.

17 Collection follow-up

■ Cost workflow

What starts it: An invoice is overdue or a payment cannot be matched to it.

What it does: Check invoices against payments, disputes, and earlier correspondence. Identify the next step and prepare follow-up for approval. Send proposed discounts, write-offs, or changes to payment terms to the person authorized to decide.

What to measure: Accounts followed up; accurate account status; staff follow-up time; age of disputes; overdue balances; payments collected.

18 Keep client and matter records consistent

□ Data foundation

What starts it: A record changes or a scheduled check compares information across your systems.

What it does: Find conflicting contact details, duplicate matters, missing staff assignments, and incorrect document links across your systems. Check against your firm's designated source record, make agreed corrections, and request review before combining uncertain matches. Confirm that the records agree afterward.

What to measure: Records corrected; unresolved differences; incorrect matter links; correction time; delayed or failed updates.

19 Matter closing coordinator

■ Cost workflow

What starts it: The responsible lawyer marks a matter ready to close.

What it does: Check final documents, unfinished tasks, billing, client property, and archive requirements against your checklist. Complete approved internal steps, prepare remaining messages for approval, and track outstanding items until administrative closure is complete.

What to measure: Matters closed; time to close; staff follow-ups; missed checklist items; closure work that must be reopened.

20 Firm procedure assistant

■ Cost workflow

What starts it: A staff member needs to complete a recurring internal procedure.

What it does: Find the current approved procedure and explain the steps, linking to written instructions or a relevant video walkthrough, such as a Loom or Teams recording. Create a checklist or task, track completion, and flag outdated or contradictory guidance for the person responsible.

What to measure: Answers delivered; time to find and complete a procedure; inaccurate answers; requests for help; checklists completed.

Document automation and voice

Prepare document productions, handle intake calls, and file consultation recordings.

21 Automated Bates labeling

■ Cost workflow

What starts it: Selected PDFs in your document system need continuous Bates numbering while remaining separate files.

What it does: Process PDFs directly from your document system without staff downloading and re-uploading them. Preview numbering for approval, continue the client's sequence, and keep each document separate. Save stamped copies with the original subfolders, leaving originals intact. Produce a log of each document's first and last number; failed files retry within the same reserved ranges.

What to measure: Production sets completed; staff labeling time; pages processed; numbering errors; rework; time to prepare the set.

22 Automated document redaction

■ Cost workflow

What starts it: Staff specify sensitive text to remove from PDFs in your system.

What it does: Process selected PDFs directly from your document system. Remove specified text, including common spacing and formatting variations, and search again to verify removal. Save redacted copies in a separate folder and preserve originals. Scanned pages that cannot be searched require a named reviewer to confirm a manual check before the job is marked complete.

What to measure: Documents checked and reviewed; processing and review time; missed or incorrect redactions; pages needing manual review; rework.

23 AI phone intake assistant

◆ Revenue workflow

What starts it: A caller reaches the phone line assigned to your AI assistant.

What it does: Identify itself as an AI assistant, answer from firm information you approve, and record the inquiry. Follow rules you approve in advance to send requested information or a booking link, save a callback request, or brief and connect an available staff member.

What to measure: Calls handled; correct contact details; inquiries recorded; next steps completed; successful transfers; caller experience.

24 Intake call review and coaching

◆ Revenue workflow

What starts it: An intake call recording is available from a supported phone system.

What it does: Review the recording and transcript against your intake standards, including tone, pacing, interruptions, questions asked, and clarity of next steps. Provide coaching examples linked to moments in the call. Where results are available, examine how call handling relates to consultations and signed matters.

What to measure: Calls reviewed; agreement with manager reviews; required steps covered; review time; missed opportunities; consultation and signed-matter trends.

25 Zoom recording filing

■ Cost workflow

What starts it: Zoom finishes processing a cloud recording.

What it does: File the video, audio, transcript, and chat separately in the document folder assigned to the meeting host. Flag missing folder assignments or incomplete downloads. Record the outcome for each file and retry failed transfers.

What to measure: Recording files saved; manual filing time; correct destinations; time to file; completed transfers; unresolved problems.

Document intake and case analysis

Organize incoming material and prepare summaries and analysis for your legal team to review.

26 ZIP extraction and filing

■ Cost workflow

What starts it: A ZIP file arrives in a designated document folder or staff select one.

What it does: Extract files into the approved folder and preserve subfolders. Check that every file in the ZIP was uploaded. Flag incomplete transfers, protected files, or unreadable content for review. Keep the original ZIP and prevent duplicate uploads when a transfer is retried.

What to measure: ZIP contents fully filed; staff handling time; files accounted for; correct destinations; duplicate uploads; unresolved problems.

27 Matter document review and summaries

■ Cost workflow

What starts it: Documents arrive or someone asks a question about a matter they may access.

What it does: Review selected documents and answer the question with a summary that cites sources and pages. Flag conflicting statements, missing context, and unreadable documents. Limit the review to the authorized matter and send the result to the legal team for review.

What to measure: Reviews and summaries delivered; accurate summaries and citations; relevant information missed; review time; substantive corrections.

28 Consultation and client call briefs

■ Cost workflow

What starts it: A transcript is available from a case evaluation or client conversation.

What it does: Summarize what was said, the client's goals, commitments, and unanswered questions. Include speaker and timestamp references where available, and distinguish reported statements from independently verified facts. Prepare an internal brief and suggested follow-up tasks for the team to review.

What to measure: Call briefs delivered; accurate facts and speakers; commitments recorded; missing details; preparation and review time.

29 Financial record analysis

■ Cost workflow

What starts it: A matter receives bank statements, pay records, tax returns, or other financial records.

What it does: Put figures into a spreadsheet with references to the original records. Check totals, identify transfers that could be counted twice, and flag missing periods or inconsistent amounts. Prepare questions and a list of discrepancies for the legal team to assess.

What to measure: Analyses delivered; correctly extracted figures; matching totals; missing periods found; duplicate amounts; preparation and review time.

30 Legal research support

■ Cost workflow

What starts it: An attorney assigns a research question, jurisdiction, and scope.

What it does: Use your firm's approved research tools and accessible sources to prepare a cited brief. Check quotations and citations against the sources. Flag conflicting or unavailable authorities and checks still needed on whether an authority remains current. Send the brief for attorney review.

What to measure: Research briefs delivered; valid citations; relevant authorities; accurate quotations; outstanding authority checks; research and review time.

Drafting and firm management

Prepare drafts for review and use firm records to investigate issues that need attention.

31 Motion and brief drafting support

■ Cost workflow

What starts it: An attorney approves a drafting assignment and its supporting material.

What it does: Use suitable drafting tools and your firm's approved facts, authorities, and templates to prepare an editable draft. Link statements to their sources, flag unsupported claims, and compare revisions. Send the draft and outstanding questions to the attorney for review and approval.

What to measure: Drafts delivered; statements supported by sources; drafting and review time; substantive corrections; rounds of revision.

32 Intake follow-through review

◆ Revenue workflow

What starts it: An intake review is due or patterns change in inquiries, consultations, or signed matters.

What it does: Follow inquiries from the first call through consultation and engagement using supported phone and intake systems, such as RingCentral, CallRail, Lawmatics, and Clio. Identify unanswered inquiries, missed handoffs, and follow-up that stopped. Flag duplicate or unmatched records, show where prospects drop out, and recommend actions supported by the records.

What to measure: Reviews completed; correct record matches; missed calls; response time; inquiries with a known source; consultation and engagement trends.

33 Firm performance and priorities

□ Data foundation

What starts it: A regular review is due or matter progress, workload, or collections change.

What it does: Investigate questions such as: Which matters are falling behind? Where is work piling up? Why have collections changed? Compare approved intake, matter, billing, and workload records on a consistent basis. Show sources and update dates, flag gaps or uncertainty, and deliver a brief and dashboard with assigned follow-up.

What to measure: Reports delivered; findings the firm confirms; complete and current information; accurate combined records; report preparation time; follow-up completed.

34 Policy and procedure development

■ Cost workflow

What starts it: A process changes, a procedure is missing, or a policy needs review.

What it does: Turn staff explanations, recorded walkthroughs, and approved reference material into clear procedures. Link to relevant Loom or Teams videos where useful. Flag contradictions and decisions still needed, send drafts for approval, and maintain the approved version and change history.

What to measure: Procedures approved or updated; drafting and review time; unresolved decisions; outdated procedures; time to complete revisions.

Evidence changes and drafting resources

These proposed workflows would start with a small pilot. We would agree on what to test and use the results to decide whether they are useful for your firm.

35 Evidence change review

■ Cost workflow

What starts it: New or revised matter documents arrive, or staff request a comparison.

What it does: Compare new material with the agreed earlier documents. Identify changed amounts, dates, or statements and missing support, with references. Show which summaries, chronologies, or preparation tasks may need review. Separate confirmed changes from uncertain comparisons and send the findings to the legal team.

What to measure: Change reports delivered; important changes missed; false alerts; correct references; reviewer corrections; review effort where useful.

36 Agreement review against firm guidelines

■ Cost workflow

What starts it: A proposed agreement or revised draft is ready for review.

What it does: Compare the draft with the firm's approved negotiating positions and fallback language. Identify departures, missing terms, or inconsistent provisions with references. Prepare an issues list and suggested wording for attorney review. The attorney decides which positions apply and what to propose or accept.

What to measure: Drafts reviewed; important departures missed; unsupported alerts; consistency with firm guidelines; attorney corrections; review effort where useful.

37 Approved clauses and precedents

□ Data foundation

What starts it: An attorney approves reusable wording, guidance changes, or staff need an example.

What it does: Keep approved clauses and precedents with the responsible person, version, intended use, and access permissions. Find examples for a drafting task with links to their sources. Flag outdated or conflicting guidance. Require approval before adding reusable wording and preserve restrictions on access to matter records.

What to measure: Approved items maintained; examples found or reused; current source material; relevant examples returned; outdated guidance corrected.

Choosing and managing the right automation

We help your firm decide what is worth automating, choose suitable tools, and put them to work. Ongoing service can include setup, help for staff, quality checks, and improvements as your needs change.

Choosing tools and checking the cost

We start with the work you want to improve and what it costs today. We compare your existing software with specialist legal products, general AI tools, and custom automation. That comparison includes licenses, setup, connections to other systems, staff review time, and ongoing costs. Before wider use, we agree on a small pilot and what it must achieve.

Deciding what information each tool can use

We help you select and set up tools for research, drafting, and document analysis. With your designated reviewers, we agree which tools may use matter documents, prospective client communications, or public content. Before connecting information, we check who can access it, how each provider may use it, how long it is kept, which other services receive it, and what your team must review.

If the agreed work involves health information or personnel records, we confirm any additional handling requirements with your firm before including those records.

Testing before launch and as the service changes

We agree on what a good result looks like and test each workflow with examples that reflect your firm's work. We check that the software works correctly and compare AI results with answers your team has reviewed. We also agree on when the system must stop and ask for review. The workflow checks its results every time it runs.

When the AI, its instructions, a connected system, or the workflow changes, we repeat the relevant tests. We record errors and use them in future tests so the same problems are checked again. Your reports show the quality results that matter to your firm.

Keeping the service useful

We set up the agreed tools and connections and help staff use them. We regularly review results and staff feedback, including work that creates extra checking or corrections. We also check for software changes that could affect the service. We keep a list of improvements, agree on priorities, and test changes before release. Reports and dashboards show what needs attention and who will follow up.

Deciding what needs your approval

When several workflows need review, we can bring their drafts and outstanding questions into one queue. Your team can open supporting records, edit or approve an item, or return it for correction. The workflow records who approved it. Your firm agrees in advance what an AI phone assistant may say or do during a call, including sending information the caller requests. Other client messages go to your designated reviewer before sending. Legal decisions remain with your lawyers. Each workflow follows the approval steps agreed with your team.

How we report value

Your report shows what the automation completed, how well it worked, and what needs attention. Ongoing custom engagements receive weekly reports, or monthly if you prefer. When an engagement uses an existing SubAI automation without a custom build, reports are monthly by default, with weekly available on request.

Choosing useful measures

The "What to measure" column gives examples. We choose a few that fit the work, such as documents correctly filed, preparation completed on time, or follow-ups resolved. We review whether the combined results justify the fee for the work we manage. Every workflow can contribute without needing its own dollar estimate.

Showing what was completed

Reports count completed work, such as production sets prepared or documents filed. Repeat attempts, failures, incomplete work, and items awaiting review appear separately where relevant. A report also distinguishes work delivered from work your team has accepted. Automation that works in the background is counted through successful results, even when nobody opens an app.

We include relevant quality checks, explain significant problems, and show what we are doing about them. For work that happens infrequently, we can report by matter, quarter, or season alongside the current period. Completion times appear when they help you judge the service.

Estimating time saved and its value

Where we have an agreed starting point, we compare the staff time the work used to take with the handling, review, and corrections still needed. We apply that difference to the matching work completed and use your agreed hourly staff cost to estimate its value. Reports show the assumptions and calculation. We report confirmed reductions in spending and revenue results separately from the value of staff time freed up.

If we have not estimated the time or cost for a workflow, we report its use and results without assigning a dollar figure. Time saved means staff effort avoided; the time software spends running is a different measure. We update estimates when the work changes significantly and avoid counting the same benefit twice.

Adding work as the relationship grows

At the start, we establish whether the work justifies the engagement. Once it is underway, you can approve a list of priorities and let us work through it. Each addition needs a clear purpose and quality checks. We can reuse a suitable time and cost estimate, or report useful work without one. We need supporting figures for a new savings estimate, but you do not need to reassess staff time and costs for every workflow we add.

We check new requests against the agreed work, connected systems, service commitments, and time available to build. Adding a measure does not automatically add a fee. If a request would expand the scope or change the fee, we agree on that before work starts. Each report closes with improvements made, issues needing attention, and the next priority.

Where to start

Pick a few examples that would help your team. We will ask how the work happens today, how often it comes up, where staff spend time, and what tends to go wrong. Then we will check what your systems can support and agree on a useful first pilot.