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The AI Handoff Map

Where AI belongs in your firm, where it does not, and what has to be true before you hand anything off.

AI can now handle a remarkable amount of legal operations work. So the question is no longer what AI can do. It is where, in your firm, it should. Point AI at a workflow that already has a clear source of truth and defined rules, and it saves real time. Point it at an ambiguous one, and you automate the confusion. You just build the wrong system faster. This map helps you tell the difference before you spend a dollar.

HOW TO READ THIS **Every workflow zone below sits in one of two states.**

- **Architecture-ready.** The workflow has a source of truth, defined rules, and a clear owner. AI can be handed real responsibility here.
- **Needs Blueprint work first.** The workflow is ambiguous, split across systems, or undefined. Handing it to AI now scales the problem instead of solving it.

For each zone, decide which state you are in. That single call is your AI Handoff Potential for that zone.

01 Intake and the First 24 Hours

Architecture-ready when: every new lead follows one defined path, "status" means the same thing to intake and marketing, and there are clear rules for who gets contacted first and how fast.

Needs Blueprint work first when: leads land in three places, no one owns speed-to-lead, and status means something different depending on who you ask.

WHAT AI CAN OWN
instant lead capture and routing, first-touch response drafting, data entry across systems, qualification scoring against defined criteria, and follow-up reminders.

WHERE JUDGMENT STAYS
the relationship, the borderline case call, and the empathy in a first conversation with a potential client.

☐ Architecture-ready here ☐ Needs Blueprint work first

02 Referral and Source Tracking

Architecture-ready when: every referral source is captured at intake, attribution follows the matter through to close, and your reporting can tell you which sources produced signed cases, not just leads.

Needs Blueprint work first when: referral source is a free-text field that no one checks consistently, and marketing and intake disagree on what a referral even means.

WHAT AI CAN OWN
matching inbound inquiries to referral sources, flagging missing attribution at intake, generating source performance summaries, and surfacing patterns across referral partners.

WHERE JUDGMENT STAYS
the relationship with the referral partner, the decision about which partnerships to grow, and any conversation where trust is the actual product.

☐ Architecture-ready here ☐ Needs Blueprint work first

03 Matter Operations

Architecture-ready when: matter stages have defined criteria, task ownership is clear, and the firm can answer "what is the status of this matter" without asking three people.

Needs Blueprint work first when: matter status lives in attorney heads, stages vary by practice group with no shared definition, and deadline tracking happens in email or personal calendars.

WHAT AI CAN OWN
task creation from templates, deadline tracking and escalation, status updates across systems, document assembly from defined inputs, and routine client updates.

WHERE JUDGMENT STAYS
legal strategy, case-specific risk assessment, client relationship management, and any decision with material legal consequences.

☐ Architecture-ready here ☐ Needs Blueprint work first

04 Client Communication

Architecture-ready when: there is a defined communication cadence, a clear owner for each touchpoint, and client-facing messages follow a template with defined variables.

Needs Blueprint work first when: communication happens ad hoc, clients hear from different people with different information, and no system tracks whether a client has been contacted this week.

WHAT AI CAN OWN
status update drafting from matter data, appointment confirmations, follow-up sequences, intake questionnaire processing, and satisfaction check-ins.

WHERE JUDGMENT STAYS
any conversation involving empathy, bad news, negotiation, or a decision that affects the client's case outcome.

☐ Architecture-ready here ☐ Needs Blueprint work first

05 Billing and Collections

Architecture-ready when: time entry follows a consistent format, billing codes are standardized, and the path from billable work to invoice to payment is defined and tracked in one place.

Needs Blueprint work first when: time entry is inconsistent or delayed, billing codes vary by attorney, and accounts receivable tracking requires manual reconciliation.

WHAT AI CAN OWN
time entry drafting from activity logs, invoice generation from defined templates, payment reminder sequences, and collections reporting.

WHERE JUDGMENT STAYS
billing disputes, write-off decisions, client-specific fee arrangements, and any conversation about money where a client relationship is on the line.

☐ Architecture-ready here ☐ Needs Blueprint work first

06 Reporting and Leadership Visibility

Architecture-ready when: leadership agrees on what the key numbers are, those numbers come from a single source of truth, and the definitions for lead, matter, referral, and conversion are locked and shared across the firm.

Needs Blueprint work first when: leadership pulls the same report and gets different numbers, definitions vary by department, and the dashboard exists but nobody trusts it.

WHAT AI CAN OWN
automated report generation, trend identification, anomaly flagging, pipeline forecasting from defined inputs, and performance summaries for leadership.

WHERE JUDGMENT STAYS
interpreting what the numbers mean for strategy, making resource allocation decisions, and communicating performance to partners.

☐ Architecture-ready here ☐ Needs Blueprint work first

SELF-SCORING WORKSHEET

Your AI Handoff Score

Count how many zones you marked architecture-ready. Write the number below.

My score _____ out of 6

WHAT YOUR SCORE MEANS

0 to 2

Expensive ambiguity, firm-wide.

AI will find the same confusion your team already has. The priority right now is not AI. It is designing the architecture those tools will run on. A Revenue Architecture Blueprint starts here.

3 to 4

Pockets of readiness.

You have zones where AI can deliver real value today. You also have zones where pointing AI at the problem will make it worse. A focused Blueprint identifies which is which and gives you a sequenced path forward.

5 to 6

Architecture-ready.

Your foundation is strong. The question now is sequencing: which handoffs create the most leverage, and in what order. An Architecture Partner engagement keeps your decision register current as you build.

What does your future-state actually look like?

The AI Handoff Map tells you where you stand. A Future Design Call tells you where to go. In 20 to 30 minutes, we will diagnose whether you have an architecture problem or a build problem and give you a clear read on where to start.

Book a Future Design Call

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Not ready for a call? The Future-State Decision Worksheet walks you through the same diagnostic at your own pace.

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