

ILLUSTRATIVE SAMPLE REPORT**AI OPPORTUNITY ASSESSMENT**

Small Law Practice

A sample of the report you receive after your assessment.

MODELED ON

A composite 3–5 attorney general practice (family, estate planning, and small-business matters).

EXECUTIVE SUMMARY

Small firms lose billable hours to intake, drafting, and matter admin – and lose real revenue when time simply goes uncaptured. AI can carry first drafts and routine communication under your review, so attorneys spend more time on counsel and less on paperwork. Confidentiality, judgment, and final review stay firmly in human hands, and any tooling is chosen with professional responsibility in mind.

Where AI can help

Client intake & conflict triage

HIGH PRIORITY

Structured intake captures the details, organizes them into the matter file, and flags potential conflicts for an attorney to review and clear – so intake is consistent and nothing gets missed at the front door.

Estimated 3–5 hours/week reclaimed

First-draft documents from your templates

HIGH PRIORITY

Generate first drafts of routine documents – engagement letters, standard clauses, client correspondence – from your own templates and precedents, for attorney revision. The draft is a starting point, never the final word.

Estimated 3–6 hours/week reclaimed

Document & case-file summarization

HIGH PRIORITY

Long documents and dense case files get summarized into tight briefs, so review starts from a clear map instead of page one. Faster orientation, same rigor.

Estimated 2–4 hours/week reclaimed

Time capture & billing narratives

MEDIUM PRIORITY

Draft time-entry narratives from the day's activity so billable work is actually recorded. For most small firms, recovered billable time is the single largest dollar impact of the whole engagement.

Recovered billable time + 2–4 hours/week

Routine client status updates

MEDIUM PRIORITY

Matter-status updates get drafted from where each matter stands, ready for a quick attorney check – keeping clients informed without the time drain.

Estimated 1–3 hours/week reclaimed

Estimated impact

Roughly 10–20 hours a week of drafting and admin — plus billable time that used to slip away uncaptured.

For a small firm, better time capture often pays for the entire effort on its own. Everything configured with confidentiality first: privileged client information never goes into consumer AI tools – only into an appropriately private, compliant setup.

What should stay human

NOT ON THE AUTOMATION LIST — BY DESIGN

- Legal advice, strategy, and every judgment call
- Final review and approval of every document that leaves the office
- Client confidentiality and privilege – protected by design
- Court, negotiation, and the counsel clients are paying for

A 90-day roadmap

Days 1–30	Set up structured intake and time-capture assist – the fastest wins for both consistency and recovered revenue.
Days 31–60	Add first-draft document generation from your templates and case-file summarization. Confirm the confidentiality setup before anything sensitive is touched.
Days 61–90	Layer in status-update drafting, expand across matter types, and review tooling and safeguards together.

Curious what this looks like for your business?

Book your assessment · elevationops.co

This is an illustrative sample based on a composite business, created to show the format and thinking of an Elevation Ops AI Opportunity Assessment. It is not a real client report, and time-saving figures are planning estimates, not guarantees. Your assessment is built from your actual workflows.