

[OPEN CANVAS](#)

Strategic Intake Canvas

A four-part worksheet for testing the operating foundations around one proposed law-firm AI workflow.

Use process information, counts and properly approved examples. Do not place client names, matter details, contract text or privileged material in this worksheet.

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The four-part canvas

Complete the quadrants in order. A blank answer is evidence that the foundation needs work.

1. Administrative bottlenecks	2. Data readiness
Name the trigger, finish line, people, queues, duplicate entry, manual handoffs and non-billable steps. Mark what can be counted today.	Score 1 to 10. Record where documents live, how they are named, which fields are reliable, who owns the source and how a representative set is retrieved.
3. Security and compliance	4. Value recovery
Map data classes, approved tools, external processors, retention, training use, locations, deletion, human review and the person who can pause the work.	Use the firm's own volume, lawyer time, turnaround, correction and write-off data. Count supervision and support costs before comparing any option.

One-sentence working hypothesis

This workflow may be creating avoidable _____ because _____.

Do not turn the hypothesis into a claim. The remaining pages show what evidence would support or reject it.

Evidence prompts

Use the lowest score you can support. A high score is not approval to deploy.

Data readiness score

Score	Observed condition
1 to 3	Documents are scattered, naming varies and retrieval depends on individual memory.
4 to 6	A central system exists, but filing, ownership or metadata are inconsistent.
7 to 8	The source is controlled and a representative set can be retrieved using agreed fields.
9 to 10	Ownership, schema, access, quality checks and change control are documented and tested.

Security and processor matrix

Question	Evidence or gap
Which data classes may enter the proposed route?	
Which suppliers and subprocessors touch them?	
Where are prompts, uploads, outputs and logs retained?	
Can any content train a model or improve a shared service?	
Who reviews the output and who can stop the process?	
How are data and derived records returned or deleted on exit?	

Decision record

Turn the canvas into one bounded next step rather than a broad technology programme.

Field	Working answer
Proposed workflow	
Named workflow owner	
Current monthly volume	
Current hands-on lawyer time	
Current elapsed turnaround	
Current correction or rework evidence	
Current write-off or under-recovery evidence	
Approved data route	
Written human review standard	
Decision and reason	Fix the process / buy / run a controlled pilot / stop
Reopening or review condition	

A complete canvas does not make the decision. It makes unsupported assumptions visible enough for the responsible people to decide what evidence is still needed.

Next: use the Contract-Workflow Readiness Score at clickoai.com/readiness or retain this page with the firm's decision record.