

CUTTING THROUGH THE AI HYPE:

# How to Determine the Value of Legal Workflow Automation

# The Promise vs. Reality

Legal teams are sold on the promise of workflow automation: AI workflows that run effortlessly, resulting in fewer admin tasks, lower costs, and more strategic focus. It sounds like a no-brainer.

The reality: most workflows don't live up to the promise. Beyond a polished demo, most tools fail to deliver meaningful results. They aren't actually a win for the innovation and/or legal ops teams championing AI investments.

But why? Because the real impact of a workflow isn't simply saving a couple hours here and there. It needs to be meaningful – enabling lawyers to fully step away from routine tasks so they can take on more clients and new matters, even during the busiest periods. It means raising the quality of work: serving more clients at a higher standard, and equipping every junior associate with the power to produce work that matches the quality of a seasoned lawyer.

Getting to that level of impact takes more than just building a workflow. In fact, that's only half the battle.

What we've learned is that the real challenge lies in identifying the workflows that truly move the needle, and then embedding them into the fabric of the firm where it flexes with real logic, adapts to inconsistent inputs, and earns its place by increasing the quality of work and enabling your team to serve more clients while maintaining excellent client service.

That's the gap between deploying an AI tool and delivering measurable impact. Closing it is what separates yet another failed tech pilot from real, lasting operational change.



# Why Most Workflows Fall Short

Even the most well-intentioned AI initiatives can underdeliver once they hit the realities of practice. Why? Because most workflows can't handle the variability of the input, making them brittle. Or, they're so complex that their outputs are too narrow, limiting their usefulness across the firm.

## **Too Complex to Scale**

Over-engineered workflows struggle to adapt beyond a narrow use case. When every variation requires customization, adoption stalls and impact is limited.

## **Weak in Real-World Use**

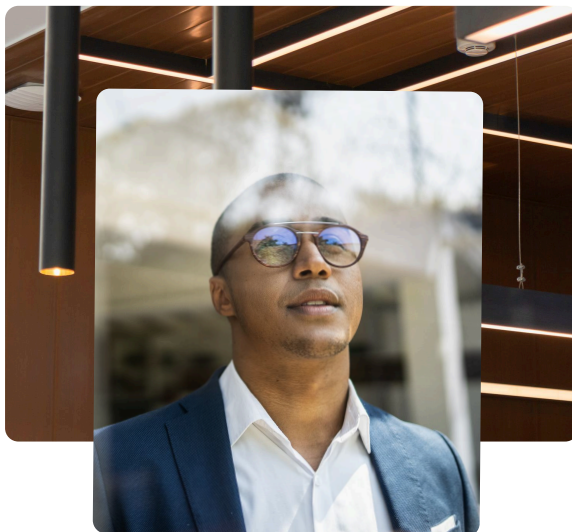
Legal work is messy. Complex workflows break when phrasing changes or inputs don't align perfectly. If a system can't handle the unpredictability of real data, it won't hold up in practice.

## **One-Size-Fits-None**

Workflows that aren't tailored to your firm's voice and way of working end up as little more than digital checklists. Legal practice is nuanced, and if a tool can't reflect how your lawyers actually write, reason, and deliver work, it won't drive real efficiency or meaningful adoption.

## **Lack of Firm-Wide Impact**

A workflow that's only run a couple of times isn't really helpful. The real ROI comes from automations that are high-volume, repeatable, and tuned to your firm's voice – enabling lawyers to serve more clients and deliver higher quality work.





# How Leading Firms Make Workflows Work

The best firms don't overcomplicate automation. They focus on the areas where it can truly scale. Success comes from embedding simple, repeatable workflows into everyday legal work, built in your firm's own voice, and measured by the tangible impact they create. Here's what drives success with workflows:

## **Targeting High-Volume, Repeatable Work**

Not every task needs automation. The biggest gains come from workflows that address common, repeatable matters, where volume is high and consistency matters most.

## **Keeping Things Simple**

Complexity kills adoption. The most effective workflows are simple by design: easy to use, easy to trust, and easy to apply across the firm.

## **Embedding Into Real Work**

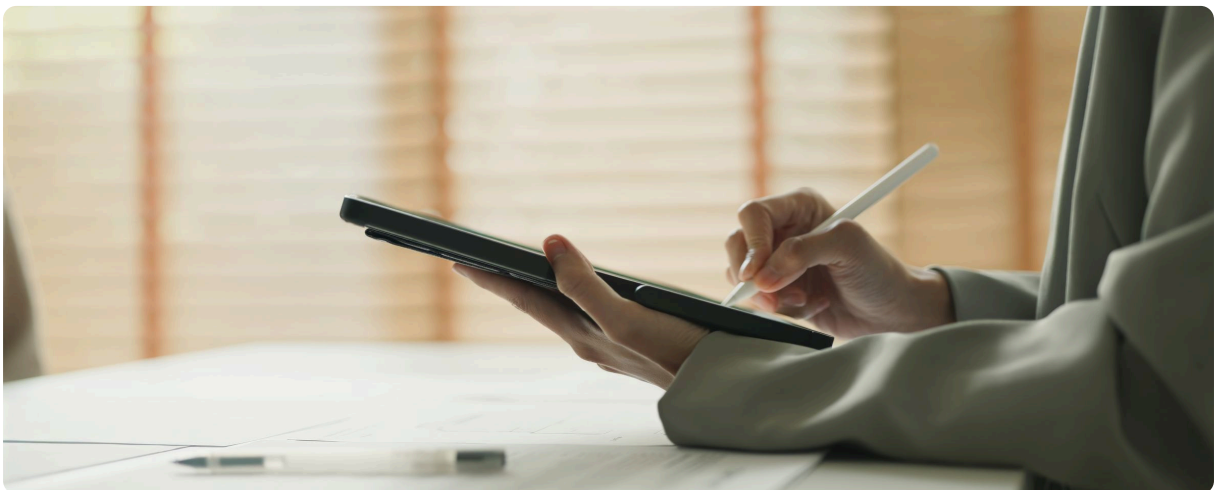
Workflows succeed when they're part of the daily flow, not layered on top. If they naturally fit into how lawyers already work, they stick.

## **Speaking in Your Voice**

Adoption happens when workflows reflect the firm's own language, tone, and reasoning. When the tool "thinks like your lawyers," it feels like an extension of them, not something they have to adjust to.

## **Measuring Real Impact**

The value must be clear. That means not just time saved, but measurable improvements in capacity, quality, and client service. Successful firms define success upfront and track it, making ROI impossible to ignore.





# A Framework for Impactful Workflows

So, how can your firm build workflows that actually drive impact? Here's a framework that'll set your workflows up for success.

## Identify the opportunity

The best task for a workflow is one that's routine and time-consuming – like file summaries and case chronologies.

*Consider:*

- **Volume** – How frequently does this task occur across the firm?
- **Complexity** – Is the task time-consuming, rules-based, or cognitively demanding?
- **Handoffs** – How many people or departments are involved? More handoffs mean more opportunity for delay, and automation can streamline these.

## Define success

At this stage, it's also important to define what success looks like. Which metrics will best capture the impact of the workflow? What does the ideal outcome look like – and how closely does the output align with the final work product?

For example, you might measure success by:

- **Adoption** – how often lawyers use the workflow over time.
- **Capacity** – the number of additional client files your team can handle.
- **Depth** – how comprehensively a single client file can be explored, analyzed, or reported on.
- **Quality** – how many revisions are needed before the output matches the final work product.
- **Client efficiency** – the number of iterations required with a client before arriving at a finished result.



# A Framework for Impactful Workflows Cont.

Setting clear goals from the outset ensures you'll know when the workflow is truly working.

## **Design around your firm's voice and logic**

Build workflows on your firm's own data, reasoning, and way of working. They should mirror not only your existing steps and decision-making, but also reflect your tone and voice, so the output feels like it came directly from your lawyers.

## **Deploy where your team already works**

Tools are far more likely to gain adoption when they integrate seamlessly into the systems your team already uses. With a tool like Alexi, everything runs securely within your firm's private environment, eliminating the need for platform switching or disrupting established workflows. The less friction, the more likely your team is to actually use it.

## **Measure what matters**

To understand the true impact of your workflows, focus on the metrics that reflect real value. Track adoption over time, added capacity in client files handled, the depth of analysis within a single file, the quality of outputs against the final work product, and the efficiency of client interactions.



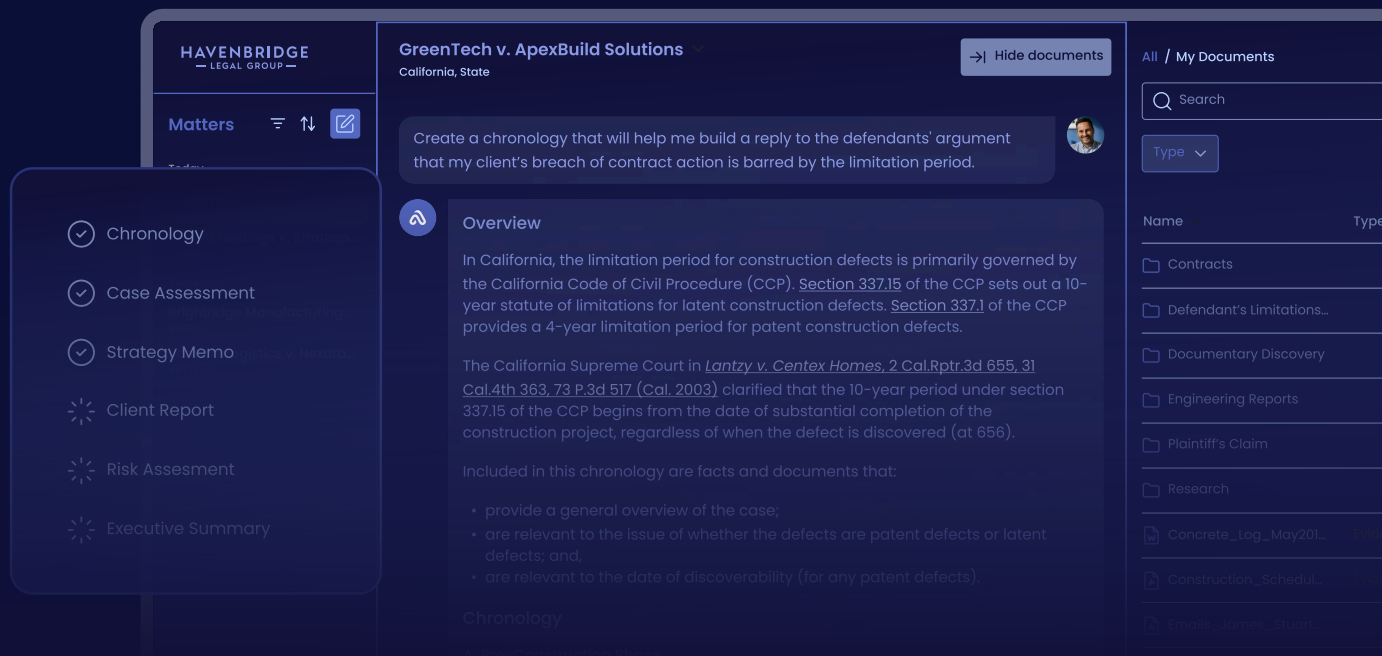
# How Alexi Builds Differently

We know that getting started is often the hardest part. That's why we've created a growing library of proven, pre-built workflows] designed to deliver quick wins in the areas of highest impact. These workflows give your firm a head start, helping you see results right away.

But we don't stop there. Every firm works differently, so we co-design with your team to extend and adapt those workflows, tailoring them to your firm's voice and processes and/or building something unique to your needs.

Once launched, we stay involved: monitoring usage, iterating based on feedback, and ensuring each workflow remains resilient, effective, and genuinely valuable over time.

With Alexi, AI is just the engine. The real story is how we help your lawyers start strong, keep momentum, and scale impact across the firm.





# Workflow Examples by Practice Area

## LITIGATION TEAMS

**Before:** A junior associate spends days manually reviewing 200 pages of medical records to create a chronology for a personal injury case.

**After:** The Build a Chronology workflow organizes the same records into a clear, structured timeline in under an hour. The associate can then review, validate, and refine the chronology, focusing attention on strategy, analysis, and case preparation rather than data extraction.

## TRANSACTIONAL TEAMS

**Before:** An associate spends hours reviewing a 47-page vendor contract line by line.

**After:** The Contract Analysis workflow reviews the same contract in minutes, generating a structured report that highlights liability caps, indemnification terms, termination clauses, and procurement policy alignment. The associate can then quickly validate the analysis, focus on nuanced judgment calls, and move on to higher-value matters.

## IN-HOUSE COUNSEL

**Before:** The legal team spends hours manually comparing a new supplier agreement against their standard template.

**After:** The Contract Analysis workflow reviews the agreement in minutes, flagging deviations and surfacing potential risk areas in a structured report. The team can then review the flagged issues with confidence, apply judgment where it matters most, and keep deals moving.



# Next Steps

Ready to build workflows that drive real impact? Take the next step with one of the options below.



## Explore the Alexi Workflow Library

Preview our library of pre-built workflows. →



## Request a Private Consultation

Get tailored advice on how Alexi can fit into your firm's specific systems, teams, and goals. →

