

AI-Automated Workflows for Lawyers

Complex Legal Work at a Fingertip
A Step-by-Step Guide

*“AI finds answers. Sometimes right, sometimes wrong.
Good lawyers find the right questions. Always.”*

What This Is About — And When It Makes Sense

What this video covers

- How to build a reusable AI workflow for complex legal tasks — without coding
- Example: supplier contract review against own contract template, standards and policies
- Downloads: slide deck, Sample workflow instructions and Sample Assessment Template at www.adrianschaub.com/ai

When a automated workflow makes sense

Recurring The task repeats often enough to justify building and refining an automated workflow

Structured The task follows a defined logic with clear steps

Reference-based You have documents that define your position — templates, playbooks, standards

You need an AI assistant with persistent context — upload instructions and reference documents once, reuse across sessions. Examples (March 2026): Claude (Projects) · ChatGPT (Projects) · Harvey (Vault + Workflows)

The Core Idea: Teach AI to Think Like a Lawyer

Generative AI is generative — but also generic

- Lawyers are educated professionals. They know the law, best practices and their client's needs and expectations. That knowledge sits in the back of their head — applied instinctively, without conscious awareness.
- AI on the other hand starts blank every time.

The solution: instructions that replicate your professional reasoning

- Define the role and expertise
- Load the reference documents that capture your position
- Set out the workflow step by step
- Define the output format

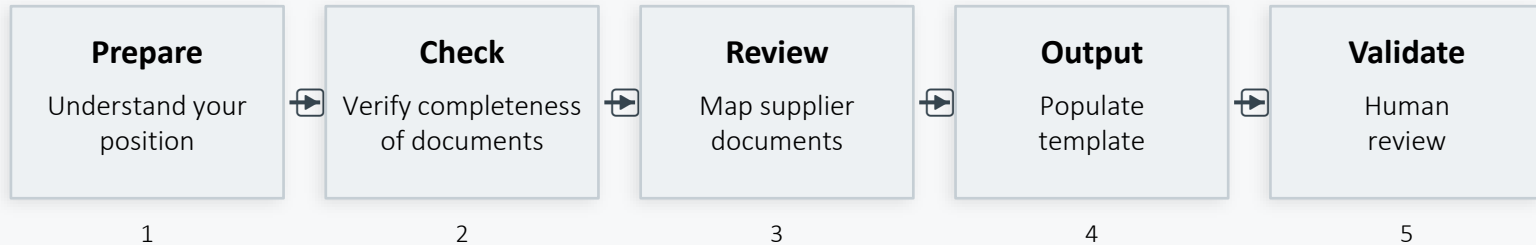
Instructions are built on the prompting principles from Basic AI Training for Lawyers

-> Video and cheat sheet at www.adrianschaub.com/ai

The goal: your workflow replicates the way you as a lawyer approach a problem — integrating the unconscious steps from the back of your head into the process.

How a Lawyer Thinks: The Workflow

An automated workflow therefore adds an explicit preparation step to feed that knowledge to the AI. Everything else follows the same reasoning a lawyer would apply. And because AI makes errors, a mandatory validation step closes the loop at the end.



Step 1: Internalise Your Position

Generic principle

- Load reference documents that define your position
- Instruct AI to read them and confirm understanding
- Require AI to summarise key positions before proceeding (3–5 bullets per document)
- This confirmation step forces early error detection — if AI misreads a document, you catch it before the review begins

Contract review — example

- Standard Supply Agreement
- Group Minimum Standards
- Supplier AI Code of Practice
- Assessment Template (pre-filled with Company positions)

A lawyer applies implicit knowledge — of the law, best practices and the client's position. AI starts blank every time. This step is what bridges that gap.

Step 2: Check Document Completeness

Generic principle

- List all documents uploaded before analysis begins
- Identify any document incorporated by reference e.g. via URL not yet provided
- For each missing document: ask the user explicitly to upload it or flag it as risk in the review
- If unavailable: proceed only on written confirmation; flag as unquantified risk

Contract review — example

- Supplier T&Cs often incorporate Service Specifications, DPA, Policies etc. — sometimes by URL only
- AI must ask for missing documents explicitly before proceeding
- Reviewing without incorporated documents gives a false sense of completeness
- URL documents must be version-pinned and attached to the contract to avoid unilateral changes by the supplier

*A contract is only as complete as the documents you actually read.
Missing incorporated terms are unquantified risk.*

Step 3: Review the Supplier Documents

Generic principle

- Read all documents in full before mapping against any template
- Produce a free-form document map: structure, hierarchy, order of precedence
- Flag cross-document interactions — provisions that change the practical effect of each other

Contract review — example

- Read main agreement + all annexes and referenced documents (incl URLs) before starting the analysis
- Identify the order of precedence between documents
- Example interaction: the return and deletion obligation in the confidentiality section may be partly overruled by the respective section of the DPA

Cross-document interactions are easily overlooked when processing documents in a linear way — therefore analyse the architecture first, then the individual clauses.

Step 4: Populate the Output Template

Generic principle

- Define a fixed output structure — consistent across every review
- Four core fields per category: Your position / Opposite Party position / Gap / Risk
- Two action fields: proposed solution if negotiable vs internal mitigation if not
- Summary table: plain language for a business reader — practical consequence, not legal mechanism

Contract review — example

- Categories: IP · Confidentiality · Data Privacy · Compliance · Risk Governance · Warranty · Miscellaneous
- Counterparty position: precise legal analysis with document abbreviation and clause reference
- Risks: written for a business client — not a lawyer
- Summary: written for the business client with issues and risks
- Output: downloadable Word document

A fixed output structure makes every review consistent, comparable and reusable.

Download an example Assessment Template for a contract review at www.adrianschaub.com/ai

Step 5: Human Validation — Mandatory

AI output looks flawless — but always contains errors, regardless of the model. The result saves time. It is a first draft: not more, not less.

Predictable errors — manageable

- Cross-document interactions not flagged
- Concept confusion — e.g. personal data vs confidential information
- Failure to detect consequences of missing clauses
- → Detectable through targeted checklists

Unpredictable errors — structural

- Fabricated content — e.g. invented case law
- False positives or false negatives (phantom findings)
- Logical slips — correct analysis followed by unsupported conclusion
- Material omissions — failure to identify a critical gap
- → No pattern — spot checks insufficient

Human Review is mandatory professional responsibility, not optional. The extent of the review can vary on the work product. See Video and Checklists with Governance model: Dealing with AI Errors in Legal Practice — www.adrianschaub.com/ai

The Result: What the Workflow Produces

AI-Assisted Contract Review

Sample Output — Illustrative Example

All company names, supplier names and proprietary references have been removed or replaced with generic placeholders.

OVERVIEW	
Supplier	[Supplier Name]
Product / Service	[Product / Service description]
Reviewer / Date	[Reviewer name] [Date]
Disclaimer	This review covers AI-specific provisions and [Company]'s Group Minimum Standards only. It is NOT a full legal assessment of the agreement.

1. Summary of Issues and Risks

Area	Issue	Risk
Contract Documents & Structure	<ul style="list-style-type: none"> Supplier T&Cs incorporate external policy documents by URL, policies not version-pinned Order Form not reviewed — unqualified risk 	<ul style="list-style-type: none"> Changes to incorporated policies may alter contractual obligations without [Company]'s consent Unknown obligations in unreviewed Order Form
Intellectual Property	<ul style="list-style-type: none"> Output IP assigned to [Company] only to the extent permitted by applicable law No fallback licence if assignment legally impossible IP indemnification is sole and exclusive remedy 	<ul style="list-style-type: none"> Ownership of AI-generated output uncertain in key jurisdictions Exclusive remedy limitation restricts financial recourse for IP claims
Confidentiality	<ul style="list-style-type: none"> Security standard — reasonable measures' only — below [Company]'s Best Industry Practice requirement 	<ul style="list-style-type: none"> Supplier's security standard may not meet [Company]'s minimum requirements
Compliance	<ul style="list-style-type: none"> No explicit EU AI Act compliance warranty ([Company] Policies / Code) 	<ul style="list-style-type: none"> No contractual recourse if Supplier fails regulatory obligations

Data Privacy	<ul style="list-style-type: none"> No dedicated [Company] DP team review completed 	<ul style="list-style-type: none"> Full data privacy risk unqualified until DP review completed
Risk Governance	<ul style="list-style-type: none"> No obligation to share risk assessment or maintain AI risk log No obligation to explain AI operations or enable [Company] self-sufficiency No IT security review completed 	<ul style="list-style-type: none"> Exposure to undetected IT security risks Inability to demonstrate adequate AI governance to regulators Vendor lock-in risk
Warranty	<ul style="list-style-type: none"> AI use permitted as blanket disclaimer of service quality obligations No measurable service specifications attached to contract 	<ul style="list-style-type: none"> [Company] cannot enforce quality standards if Supplier attributes failures to AI tool performance
Miscellaneous	<ul style="list-style-type: none"> No convenience termination right for [Company] Liability cap applies to confidentiality and data privacy breaches Governing law deviates from [Company] standard 	<ul style="list-style-type: none"> [Company] locked in for full contract term without exit right Financial recourse for data breaches limited by liability cap Key protections may be interpreted differently under foreign law

2. Illustrative Category: Intellectual Property

INTELLECTUAL PROPERTY	
[Company] standard	IP Ownership: <ul style="list-style-type: none"> All IP in deliverables owned by [Company] (ISA s. 5.1) Ownership applies irrespective of creation by employees, subcontractors or AI (ISA s. 5.1, [CoP] s. 3.1) Where transfer is not possible, licensed to [Company] on royalty-free, exclusive, irrevocable, perpetual, transferable, sublicensable, worldwide basis (ISA s. 5.2) Pre-existing IP excluded but licensed to [Company] for use with the deliverables (ISA s. 5.5) IP Indemnification: <ul style="list-style-type: none"> Supplier indemnifies [Company] against all third-party IP infringement claims, including claims arising from AI-generated content (ISA s. 6.6, [CoP] s. 3.1) Covers all damages, costs, expenses, court charges and attorney fees (ISA s. 6.6) Supplier's liability for IP indemnification is uncapped (ISA s. 6.6)

	<ul style="list-style-type: none"> Output IP assigned to [Company] only to the extent permitted by applicable law ([Supplier T&C] s. [X]) No fallback licence provided if assignment is legally impossible Supplier retains all rights in pre-existing IP and in the AI model itself ([Supplier T&C] s. [X]) IP Indemnification: <ul style="list-style-type: none"> Supplier indemnification for IP claims is subject to: (a) [Company] notifying promptly; (b) Supplier controlling the defence; (c) [Company] providing reasonable assistance ([Supplier T&C] s. [X]) Indemnification is sole and exclusive remedy for third-party IP claims ([Supplier T&C] s. [X])
Gap	<ul style="list-style-type: none"> Gap 1 — Conditional IP Assignment: [Company]'s standard requires full ownership of all IP in deliverables. Supplier conditions assignment on legal permissibility, with no fallback licence if assignment fails. In jurisdictions where AI-generated output is not protectable (e.g. US, EU, UK, CH), [Company] may acquire no rights at all. Gap 2 — Exclusive Remedy: [Company]'s standard provides uncapped IP indemnification. Supplier limits this to sole and exclusive remedy, restricting [Company]'s right to pursue additional claims (e.g. direct damages, breach of contract).
Risks	<ul style="list-style-type: none"> Ownership of AI-generated content is uncertain in key jurisdictions — [Company] may not own its own work product No fallback licence means [Company] may be unable to use outputs at all in jurisdictions where assignment fails Exclusive remedy clause limits financial recourse if Supplier's AI tools infringe third-party IP
Proposed solutions — If negotiable	<ul style="list-style-type: none"> Request unconditional IP assignment with express fallback: where assignment is not legally possible, Supplier to grant [Company] a royalty-free, exclusive, irrevocable, perpetual, worldwide licence including right to sublicense and create derivative works Request deletion of 'sole and exclusive remedy' limitation; reinstate uncapped indemnification for IP claims
Proposed solutions — If not negotiable	<ul style="list-style-type: none"> Conduct jurisdiction-by-jurisdiction IP ownership analysis before deployment in key markets Implement internal policy requiring human authorship contribution to all AI-assisted deliverables to improve ownership position Obtain third-party IP insurance to cover residual indemnification gap
Note on remaining categories	<p>This sample document illustrates the output format using the Intellectual Property category. A complete review would include the same table structure for each of the following categories: Confidentiality, Compliance with Laws & Policies, Data Privacy, Risk Governance, Warranty, and Miscellaneous. The summary table above (Section 1) reflects how findings from all categories are consolidated for a business reader.</p>

Structured · Consistent · Reusable across every review

Assessment Template and example instructions available for download at www.adrianschaub.com/ai

Resources & Downloads

For this video

Slide Deck

This presentation — download and use as reference

Workflow Instructions Template

Instructions example — ready to adapt to your use case

Assessment Template

Blank structured review template for contract review (with example company position)

Earlier videos in this series

Basic AI Training for Lawyers

Video · Cheat sheet with sample prompts

Dealing with AI Errors in Legal Practice

Video · Governance Model for risk-based handling of AI errors

All materials: www.adrianschaub.com/ai