ACROSS THE TABLE

BUSINESS CONSULTING

INDUSTRY STACK 06 · LAW OFFICE

The Law Office Stack

Seven systems for a practice where the compliance layer is not an add-on — it is the architecture.

Knowledge Article I06

AI Stack Series · acrossthetable.biz

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WHO THIS IS FOR

You run a small or solo practice. You bill time, you manage matters, and you carry professional obligations that do not bend for convenience.

This guide is for the lawyer or practice manager deciding what to automate and where the line is. It assumes you know the law and need the technology explained, not the other way around.

Read the governance section first. In this industry it is not a footnote.

START WITH THE WORK, NOT WITH THE APPS

These are not twenty lists of AI apps. Each stack starts with the jobs a particular business performs, then matches AI and conventional software to those jobs. Treat it as a menu to evaluate, not a shopping list.

For this kind of business the work runs in one line, start to finish:

> **THE PATH THE WORK TAKES**
> Client → Matter → Documents → Billing → Records

Broken into the steps a customer actually moves through:

- Prospect
- Intake
- Matter
- Documents
- Legal work
- Billing
- Records

Read that line left to right. A prospect becomes a client, a client becomes a matter, the matter produces documents and work, the work produces a bill, and the whole thing produces a record you must keep.

The money leaks in two places in most small firms. The first is unbilled time — work done and never captured. The second is intake, where prospects wait for a callback that comes too late.

THE STACK, PIECE BY PIECE

Every tool below is matched to one of those steps. You do not need all of them, and you should not buy all of them at once. Read the “What it is” column first and find the step where your business is losing the most time or money.

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Tool	The step it covers	What it is	Price
Clio	Legal practice management	Matters, time, billing and client intake for law firms.	Per user/month.
CoCounsel	Legal research workflows	Thomson Reuters' AI legal assistant for research and review.	Per user/month.
Spellbook	Contract assistance	AI contract drafting and review inside Word.	Per seat/year.
DocuSign	Signatures	Electronic signature and agreement management.	Per user/month.
Microsoft 365	Productivity	Office apps, Teams, SharePoint and admin controls.	Per user/month.
QuickBooks	Accounting	The small-business accounting standard — books, invoicing, reporting.	Per month by plan.
Calendly	Consultations	Shared booking links tied to your calendar.	Free tier; paid per user/month.

Practice management is the one row that is not optional. Everything else can be added when the firm feels the specific pain it solves.

What to watch out for in each one

None of these are reasons not to buy. They are the things owners tell us they wish they had known first.

- Clio — Add-ons for payments and intake.
- CoCounsel — Priced for legal professionals.
- Spellbook — Assists your attorney — it doesn't replace one.
- DocuSign — Envelope limits on lower plans.
- Microsoft 365 — Licensing tiers get confusing.
- QuickBooks — Only as clean as your categorization habits.
- Calendly — Set buffers or your day disappears.

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WHERE AI ACTUALLY FITS IN THIS BUSINESS

Document review, research assistance, summarization, chronology development, drafting assistance.

In plain terms, that means:

- Reading a long production and pulling out every document that mentions a specific date or party, so review starts from a short list.
- Producing a first-pass chronology from the file, which a person then corrects.
- Summarizing a deposition or a long contract so you know where to read closely.
- Drafting the routine correspondence — the status letter, the scheduling email — that eats hours and bills poorly.
- Flagging the clauses in a contract that differ from your firm's standard position, as a starting point for your own review.

Every one of those is a draft, a shortlist or a starting point. None is a work product you file. The professional obligation to verify does not move to the vendor, and courts have had little patience for lawyers who assumed otherwise.

GOVERNANCE CHECK

Privilege → confidentiality → data security → jurisdiction → attorney review → records retention. This layer is the stack, not an add-on.

In practical terms: use legal-specific tools with real confidentiality terms for anything touching client matter. Keep general consumer AI for work that contains no client information at all — your own marketing copy, an internal process document, a plain-English explanation of something you already know.

WHAT TO SET UP FIRST

Do these in order. Finish one before you start the next. Most owners who try to do all of it in one month end up using none of it.

1. **Practice management first, and completely** Matters, time, billing and documents in one system. A half-migrated practice management system is worse than none, because nobody knows which copy is current.
2. **Capture time where the work happens** The single largest revenue recovery in most small firms is time that was worked and never recorded. Timers inside the matter, not a note to reconstruct on Friday.
3. **Fix intake** A booking link and a defined intake process. A prospect who cannot reach you calls the next firm on the list.

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4. **Move signatures and client documents into the system** Findable, dated, retained. This is a records obligation, not an efficiency project.
5. **Then evaluate AI, carefully and with the terms in front of you** Start with one defined use — contract review, or research — and one approved tool. Write the firm policy before anyone starts, not after.

WHAT IT COSTS TO START

Almost everything in a legal stack is priced per user per month, and legal-specific tools carry a premium over general business software. That premium is largely what you are paying for confidentiality terms, jurisdiction handling and support that understands a matter.

The right way to judge the cost is against recovered time. A tool that recovers an hour a week of billable work pays for itself many times over at any realistic rate. A tool that saves administrative time that was never billable saves you evenings, which is also worth something, but it is a different calculation.

Be wary of per-seat tools nobody opens. In small firms the single largest waste is software bought for a workflow that never changed.

The price column in the table above tells you how each one charges — per user, per location, per contact, or a percentage of every sale — not what you will pay. That is deliberate. The charging model is what decides whether a tool stays affordable as you grow, and it is the part that does not change every quarter. Get the current dollar figure from the vendor's own pricing page before you budget.

THE RULES UNDERNEATH ALL OF IT

Legal · Privacy · Data protection · Security · Compliance · Records · Audit · Risk · Human oversight — underneath every one of the twenty stacks, not an afterthought.

Privilege and confidentiality come first, and they govern tool selection. Before any client information goes into any system, you need to know where it is stored, who can access it, and whether the vendor trains on it.

Conflicts checking happens in your practice management system and cannot be outsourced to a tool that does not know your full client list.

Verification is your duty. Anything a model produces that will be filed, served or relied on must be checked against the actual source.

Records retention periods are set by your jurisdiction and your rules of professional conduct. Choose systems with an export you can actually use, so you are not locked into a vendor for the length of a retention period.

Tell clients how you use these tools if your engagement terms or your bar guidance require it. More jurisdictions are addressing this every year.

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MISTAKES THAT COST THE MOST

- Pasting client material into a free consumer AI tier because the paid plan looked like an expense.
- Treating an AI research result as authority rather than as a lead to verify.
- Running practice management and billing in two systems that disagree.
- Reconstructing time at the end of the week and losing a third of it.
- Buying legal AI before writing the firm policy for who may use it and on what.

THE CEO DECISION

- How much worked time went unbilled last month? If you cannot answer, that is the first project.
- Does every tool holding client data have terms you have actually read?
- How long does a prospect wait before a human responds?
- Is there one place that knows every matter, or several places that each know some?
- If you left this vendor, could you get your records out in a usable form?

YOUR QUICK REVIEW

- ☐ Matters, time and billing live in one system.
- ☐ Time is captured as the work happens.
- ☐ Every AI tool touching client material has reviewed confidentiality terms.
- ☐ The firm has a written policy on what AI may be used for.
- ☐ Anything produced by AI is verified against source before it is relied on.

ADDITIONAL RESOURCES

Tool	Where to find it	What it is for
Clio	www.clio.com	Small firms running the practice in one system.
CoCounsel	www.thomsonreuters.com/en/products/cocounsel	Firms wanting AI tied to legal research sources.
Spellbook	www.spellbook.legal	Reviewing routine agreements faster.
DocuSign	www.docusign.com	Getting documents signed and

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Tool	Where to find it	What it is for
		stored properly.
Microsoft 365	www.microsoft.com/en-us/microsoft-365	Microsoft-centered companies running the whole business on one suite.
QuickBooks	quickbooks.intuit.com	Clean books your accountant already knows how to read.
Calendly	calendly.com	Ending the back-and-forth on meeting times.
Across the Table AI Assessment	acrossthetable.biz/#assessment	Fifteen minutes. Tells you which job to start with before you buy anything.
The Scaling Edge	acrossthetablebiz.substack.com	Weekly newsletter for owners without a business background.

Go deeper on the pieces

Each of these is a full guide comparing the three tools that do that job:

- Handle contracts — acrossthetable.biz/knowledge-articles/handle-contracts/ (covers Spellbook, CoCounsel)
- Manage the money — acrossthetable.biz/knowledge-articles/manage-the-money/ (covers QuickBooks)

CONTINUE LEARNING

The Across the Table AI Assessment takes fifteen minutes and starts from the work the practice performs.

The guides above compare the specific tools for any one of these jobs in plain language.

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Across the Table website: https://acrossthetable.biz

The Scaling Edge newsletter: https://acrossthetablebiz.substack.com

YouTube: https://www.youtube.com/@AcrossTheTableConnie

LinkedIn: https://www.linkedin.com/in/connie-jacobo-ramirez

Questions: info@acrossthetable.biz · 480-582-4716

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ACROSS THE TABLE BUSINESS CONSULTING

101 N First Ave, Suite 2325-1495, Phoenix, AZ 85003

info@acrossthetable.biz · 480-582-4716 · acrossthetable.biz