PROMPT WORKS STUDIO

Chaos to calm, built to be yours.

Merritt Lawyers

Workflow Audit

Prepared for Helen Merritt, Principal

Chad Maxwell · Prompt Works Studio · Toowoomba

October 2026

> **A made-up example.** Merritt Lawyers and its people aren't real. The software, prices, rules and pay rates in it are, as read on the dates shown.

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About me and this Audit

Who I am. I'm Chad, and I help small businesses work out where AI fits. I run my own business on Claude, so I've learned firsthand what it does well and where it needs someone checking.

What this Audit is for. To show you, job by job, what AI can take off your plate, what it can do with a person checking, and what should stay with your people. It's information for you to decide with.

How I work.

- You deal with me, start to finish.
- Privacy's part of every job. Client details only go into tools you've approved.
- A person in your firm checks everything AI does before it goes out.
- I'll tell you when the answer is not yet, or not AI at all.
- I'll show you the options I find, including ones that aren't mine. You choose.
- I only take on a Build that pays for itself within 12 months, counted job by job, with your time costed at the award minimum so the saving isn't overstated.
- When I report on the AI tools your people use, I name the tools and the jobs. I don't say who uses what.
- The report is yours. Take it to anyone you like.
- It's drafted with AI, and checked and signed off by me.

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Summary

What I did. A full day at your office on Tuesday 20 October. I sat with you and Mel (reception and accounts). I spent time with Josh and Anna (solicitors), Tara (law clerk) and Kerry and Leanne (legal secretaries). I looked at the five jobs that take the most time, four of them admin.

Your data and who checks. Once you have an AI use policy (section 9), client details only go into tools the firm has approved, and every piece of AI work is checked by a named person in the firm before it goes anywhere. **This isn't legal advice:** where it cites a rule, it's what that body publishes, and your own adviser has the last word.

What I found.

- **About 37.7 hours a week go on the five jobs I looked at.** 12.7 are admin AI can help with, including 1.7 for two new steps the Law Society asks for. The other 25 are advice and court documents.
- **Client details are going into the free ChatGPT on a personal phone.** That's the first thing to stop (Rule 9 of the conduct rules, and the Law Society's guidance).
- **You believe the firm is outside the anti-money laundering rules (AML/CTF), but nothing's written down,** and your intake form doesn't ask the questions that would catch covered work. The Law Society says to write it down, and suggests a flag at intake.
- **There's no AI use policy, and clients aren't told about AI** in your engagement letter, or warned about their own use of it.
- **Your mail and accounts have 3 gaps** (the page before section 10).

Fix now (section 7). Stop client details going into the free tool. Write down why you're outside the AML/CTF rules, and add ten screening questions to intake. Put an AI use policy in place, and tell clients about AI. None of it needs me.

Your options without me (section 8). The best option for each admin job costs $392 to set up and $300 a month (Smokeball's AutoTime add-on, for time entries). It gives back 5.1 to 6.1 hours a week, saves $381 to $513 a month at the award minimum, and pays for itself in about a month.

What I can do for you (section 10). A Build is me building a job in your own Claude account and training your staff on it. Time entries (job 2) is the one that passes my 12-month rule on its own: $4,500 and $195 a month, paying back in 11.0 to 13.1 months. AutoTime does about the same for less up front, so I'd try it first. Jobs 1, 3 and 4 don't pay for themselves. All four with me would cost $20,100 to start and $195 a month. The choice is yours.

1. The firm today

People	7: Helen (principal), Josh and Anna (solicitors), Tara (law clerk, estates), Kerry and Leanne (legal secretaries), Mel (reception and accounts)
Work	Wills and estate planning, estate administration, family law, traffic and minor criminal, employment advice. No conveyancing since June 2026 (referred out), and no company or trust set-ups
Clients	About 10 new matters a week, almost all private clients from Toowoomba and the Darling Downs
Billing	Family law and estate administration by time, in six-minute units. Wills, traffic and most criminal matters at a fixed fee
Software	Smokeball Grow (7 users), Microsoft 365 Business Standard (Outlook, Word, Teams), InfoTrack for searches
Busy times	Family law picks up after school holidays and in January. Estates are steady

Helen's goal for the Audit, in Helen's words: "I'd like the solicitors to stop rebuilding their day at five o'clock."

2. AI already in use

Helen agreed I could talk to each staff member on their own. As agreed, this section names tools and jobs. It doesn't say who uses what.

Tool	Paid for by the firm?	Used for	Client details going in?
ChatGPT, free version, on a personal phone	No	Rewording letters to clients into plainer English	Yes: names and what the matter's about
Microsoft Copilot Chat, in Microsoft 365	Included in the licence	Summarising long emails from the other side, pasted in	Sometimes
Archie, Smokeball's AI assistant	Not on your plan (an add-on, and Smokeball doesn't publish its price)	Not used	No

Nobody was doing anything they thought was wrong. The free tool was just the easiest thing to hand. But the free version isn't set up for client information, and the firm doesn't know what's gone into it.

Your clients use AI too. Twice this year a client has sent back your advice after running it through a free chatbot, asking why the two didn't match. That's what job 4 is about.

3. What the guidance says, and what I saw

This section sets out what the Law Society, the courts and government bodies have published about AI and the AML/CTF rules, next to what I saw on the day. **It isn't legal advice.** For what it means for your practice, talk to your own adviser or the Law Society.

Guidance	What it asks for, in short	What I saw
Queensland Law Society (QLS), Guidance Statement No. 37, Artificial Intelligence in Legal Practice, 31 May 2024 (listed as updated 24 October 2024)	AI use in legal work or on firm systems only with the firm's approval, on conditions it sets. Each piece of AI work checked by someone who knows that area of law. Suggests telling clients where feasible, and says doing so in the retainer or engagement letter may be enough. Read a tool's terms before any confidential data goes in. AI licence fees charged per user or by the year are an overhead you can't bill. Time entries stay accurate and are never adjusted upwards.	No approval or conditions in place. Client details in a free tool. Engagement letter doesn't mention AI.
Australian Solicitors' Conduct Rules 2023, version 2 (in Queensland from 25 September 2026), Rule 9	Confidential client information stays with the practice and the people it engages for the client's work, unless the client authorises it going out or the law allows it.	Client details going into a free tool on a personal phone.

Guidance	What it asks for, in short	What I saw
Seven law societies, AI selection and use checklist, February 2026	Before using a third-party AI tool, a privacy impact assessment. Check training on your data, where it's stored, security, client consent and privilege.	No tool has been assessed, Copilot included.
Queensland Law Society, Warning to Clients: Client use of AI and Confidential Information (template, April 2026)	Raise a client's own AI use at the earliest opportunity, ideally at the retainer, in writing and by speaking to them.	Not given. Two clients ran your advice through chatbots this year.
Supreme Court of Queensland, Practice Direction 5 of 2025, Accuracy of References in Submissions, 24 September 2025 (with matching directions in the District, Land and Planning and Environment Courts and QCAT)	The practitioner responsible must be named at the end of written submissions, and must verify every reference to legislation, cases and other sources. The same goes for whoever makes oral submissions.	References are checked by hand now. Keep it that way (section 6).
Federal Circuit and Family Court of Australia, Practice Direction: Use of Artificial Intelligence (PD-AI), issued 29 May 2026	Applies to all proceedings in the court, where your family law matters run. Anyone using AI must verify what it produces, check that every case, law, textbook or article it cites exists and says what it's cited for, and keep information confidential where that's required.	No AI is used on court documents now. If that changes, this direction applies to every family law filing.
AUSTRAC and the Law Society, AML/CTF rules for legal practitioners, from 1 July 2026	A firm that provides a designated service (one of the services listed in table 6 of the AML/CTF Act 2006, such as conveyancing or setting up a company or trust) enrols with AUSTRAC within 28 days. If you believe you're outside: write down why, date it, tell all staff, consider a flag at client onboarding, and review it at least once a year.	The firm believes it's outside. Nothing's written down. The intake form doesn't ask.
OAIC (privacy regulator), guidance on commercially available AI products, 21 October 2024, updated 17 January 2025	Look into a tool before choosing it. No personal or sensitive information in publicly available AI tools. Update your privacy policy to cover AI.	Privacy policy doesn't mention AI. Whether the Privacy Act covers the firm depends on its turnover (the small business exemption stops at $3 million a year), which I didn't ask.
OAIC, automated decisions in privacy policies, from 10 December 2026	A business under the Privacy Act that uses personal information in automated decisions that could reasonably be expected to significantly affect someone's rights or interests must say so in its privacy policy.	Nothing in this report decides anything about a person. The job 1 flag is about the work, and a solicitor decides. If the Act covers you, check this with your adviser before December.
National AI Centre, Guidance for AI adoption: foundations, first published October 2025 (current version 5 May 2026)	Someone senior accountable for AI. An AI policy. A register of the AI you use, including AI built into other software. Human review matched to the stakes.	No one named. No register.

None of this is hard to put right. Section 7 lists what to do.

4. The jobs and hours now

Hours are a typical week. Helen checked and signed off these figures on the day.

Job	Hours a week	Who does it	How I timed it
1. Flagging AML work at intake (opening about 10 new matters a week)	5	Mel, Kerry, Leanne	Watched on the day (two enquiries)
2. Time entries from the day	6	Helen, Josh, Anna, Tara	Your estimate (each fee earner's own)
3. Your yearly AML check	0.2 (about 10 hours a year)	Helen	Your estimate of the new step
4. Warning clients about their own AI use	1.5	Mel and the solicitor on the matter	Your estimate of the new step
5. Advice, affidavits and court documents	25	Helen, Josh, Anna	Your estimate
Total	**37.7**		

Jobs 3 and 4 aren't done yet. Their hours are what they'll take once you start them (section 7), so the hours back on them are time you won't have to add, not time you get back today.

Signed: Helen Merritt, 20 October 2026

5. The map

Each step of each job goes one of three ways:

- **Hand to AI:** AI does it or drafts it. A person reads it before it goes anywhere.
- **Hand over with a check:** AI does the work, and a named person checks it against the source every time. The checking time is shown, and it's already taken off the hours back in sections 8 and 10.
- **Keep human:** a person does it. AI doesn't touch it.

Job and step	Where it goes	Why
1. Intake: the file-opening note from the enquiry	Hand to AI	Drafting from the email and Mel's notes. Mel reads it first. Approved tools only (QLS 37).
1. Intake: the list of names for the conflict check	Hand over with a check, about 10 minutes a week	Mel runs every name through Smokeball's conflict check herself.
1. Intake: flagging anything that looks like a designated service	Hand over with a check, about 20 minutes a week	AI points to the words and the table 6 item. A solicitor reads every flag (QLS).
1. Intake: deciding whether it's covered work	**Keep human**	See section 6.
1. Intake: first draft of the costs disclosure	Hand over with a check, about 30 minutes a week	From your precedent. The solicitor sets the estimate and checks every line.
2. Time entries: draft entries from the diary and sent mail	Hand over with a check, about 4 minutes a day each	Each fee earner checks every entry. Accurate, never adjusted upwards (QLS 37).
3. AML check: the dated record and the staff note	Hand over with a check, about an hour a year	Drafted from Helen's answers. Helen checks every line against the Law Society's list.

Job and step	Where it goes	Why
3. AML check: deciding the firm is outside	**Keep human**	See section 6.
4. Client warning: fitting the hand-out to the type of matter	Hand to AI	From the Law Society's template. Helen approves each version once.
4. Client warning: keeping track of who's had it	Hand to AI	A list from the file notes. Mel follows up gaps.
4. Client warning: the spoken warning	**Keep human**	See section 6.
5. Advice and court documents	**Keep human**	See section 6.

6. What stays human, and why

- **The legal advice itself.** A solicitor gives it and stands behind it.
- **Checking every reference before written submissions go to a court.** Practice Direction 5 of 2025 puts that on the practitioner named on the submissions, and the family court's AI direction asks the same of anything AI produced. AI can produce cases that look real and aren't. A person reads each one at the source.
- **Deciding whether a matter is AML-covered work, and the firm's position that it's outside.** That's the principal's call, with your adviser where it's close.
- **Deciding to act after the conflict check.** AI can list the names to check. The decision to act is a solicitor's.
- **The spoken warning to a client about their own AI use.** The Law Society's template suggests saying it as well as handing it over.
- **Privileged or confidential material in any tool whose terms don't keep it confidential.** The Law Society's guidance says to be very hesitant before giving such a tool any access at all.

These stay human. The one that could change is drafting help for advice and court documents, once you have an approved tool, a policy and the checking rules in section 3.

7. Fix now

These are risks, so they don't wait for a choice between options. They're what the guidance asks, not legal advice. Each one comes from the guidance in section 3. None of them needs anything from me.

What to do	Why	Guidance
Stop client details going into the free ChatGPT on the personal phone	The free version isn't set up for client information	Rule 9, QLS 37, OAIC
Write down why the firm is outside the AML/CTF rules, date it, tell every staff member, and diary a yearly review (job 3)	It's the step the Law Society sets out for a firm that believes it's outside	QLS, AUSTRAC
Add ten screening questions to the file-opening checklist (job 1)	Nothing at intake catches covered work coming in	QLS
Put a written AI use policy in place, with the tools you approve and the conditions. Write your own from the Law Society's template, or use any provider's	AI use needs the firm's approval first, and you don't have one	QLS 37, National AI Centre
Add a line on AI to your engagement letter, and start giving the Law Society's client warning (job 4)	Clients aren't told, and two have already run your advice through a chatbot	QLS 37, QLS template

What to do	Why	Guidance
Assess Copilot Chat, and any tool, before client details go in: read its terms and do a privacy impact assessment	No tool has been assessed	Law societies' checklist, OAIC
Name who's accountable for AI, and keep a list of the AI you use	No one's named and there's no list	National AI Centre

8. Your options

For each of jobs 1 to 4 I've set out the options I found that don't involve me: what each does, what it costs, and how many hours a week it gives back after checking. Job 5 stays human (section 6), so it has none. What I'd do is in section 10, kept apart so you can weigh these on their own.

How I worked out the figures. I didn't ask what anyone's paid. I cost each person's time at their award minimum, under the Legal Services Award 2020 at its rates from 1 July 2026. Mel is Level 2 ($29.45 an hour), Kerry and Leanne are Level 3 ($31.11) and Tara is a law clerk, Level 6 ($36.03). Helen, Josh and Anna are admitted solicitors, and the award doesn't cover them, so their hours take the lowest rate in your firm, $29.45. Where people share a job I've used the mix: job 1 is $30.45 an hour (Mel 2 hours, Kerry and Leanne 3), job 2 is $31.10 (the three solicitors and Tara, a quarter each), and jobs 3 and 4 are $29.45. These are the least the time is worth.

Check any figure yourself, or any quote you get. Months to pay back = cost to start ÷ (hours back a week × the job's hourly rate × 4.33 weeks, less any cost a month).

Hours back are my estimates from what I saw, after checking time is taken off. Your real figures go in your records.

These are the options I found. There may be others. I looked at what Smokeball and Microsoft 365 already do, the makers' own pages and prices, and products built for law firms. Prices were read on 31 October 2026. Smokeball's prices are before GST on its page, so I've added GST.

Every job below has the same table, in the same order, so you can compare them. "Hours still spent" is what the job still takes each week with that option in place.

Job 1. Flagging AML work at intake (5 hours a week)

How it's done now. An enquiry comes in by phone, email or the website. Mel takes the caller's name, the names of anyone else involved, and what it's about. Every name goes through Smokeball's conflict check before a solicitor agrees to act. The solicitor decides, then sends the costs disclosure the Legal Profession Act 2007 asks for. For larger matters it's in writing. For smaller ones it can be spoken, then confirmed in writing, and the smallest need none. A costs agreement usually goes with it for the client to sign. Family law matters also need a costs notice before each court event (job 2). Kerry or Leanne sights ID, as the firm does for every new client, and opens the matter in Smokeball. Since 1 July 2026 there's one more step the Law Society suggests, and it isn't on your form yet: does anything point to covered AML work? For a firm like yours that's mostly a property changing hands other than under a court order, a family trust or company being set up, or a client wanting you to hold money for a deal. AUSTRAC says being trustee or executor of a testamentary trust isn't one of the covered roles, and drafting a binding financial agreement isn't covered, though conveying a property under one would be. Estate work has its own edge. AUSTRAC excludes a transfer from a deceased estate following a grant of probate, but selling an estate's property to a buyer, or holding estate money in trust for a sale, is worth a

question every time. Anything that looks covered goes to Helen before work starts. It's about 30 minutes a matter, for about 10 matters a week.

	Fix without AI: screening questions	What you already have: Copilot Chat	Smokeball Intake add-on
What it does	Ten yes or no questions on the file-opening checklist: one for each designated service on the Law Society's list, and one for selling estate property or holding estate money in trust. Any yes goes to Helen, and the answer goes in the "Designated service(s)?" field on the matter's AML/CTF tab in Smokeball	Turns an enquiry email into the file-opening note and lists the names for the conflict check, when someone pastes it in	Online intake forms the client fills in from a link, your client portal or email. Their answers go straight into Smokeball. Ready-made forms by practice area, and you can add your own questions
What's left for your staff	Asking the questions, the conflict check, the costs disclosure and opening the file, as now	Asking the screening questions, the conflict check, the costs disclosure and opening the file	The conflict check, deciding any flag, the costs disclosure and opening the matter
Setting it up (my estimate)	About 3 hours: write the questions and brief everyone	About an hour: a saved prompt	About 6 hours: build your forms, with the screening questions, and set up the link
Where client details are kept	Smokeball, as now	Microsoft 365, under your business licence	Smokeball, on Amazon Web Services (Smokeball's security page doesn't name the region)
Who checks	Mel asks. Helen decides every yes	Mel reads each note against the email	Mel reads each form. Helen decides every yes
Limits	Only as good as what the client tells you. It doesn't catch a matter that grows into covered work later	One email at a time, and nothing's tracked. Needs approving in your AI policy first	Only for clients who fill in a form. Phone and walk-in enquiries still need Mel
Cost to start	$91 (3 hours)	$30 (1 hour)	$183 (6 hours)
Cost a month	Nothing	Nothing (in your licence)	$454 ($59 a user before GST on Grow, for 7 users, if it's charged per user like the plan)
Hours back a week (my estimate)	0.5 to 0.75	0.25 to 0.5	1 to 1.5
Hours still spent a week	4.25 to 4.5	4.5 to 4.75	3.5 to 4
Saves a month, after costs	$66 to $99	$33 to $66	Costs $257 to $322 a month more than it saves
Pays back in	About a month	Under a month	Doesn't, at these hours

Smokeball's AML tab also has ID and risk fields and an AML report, ready if you ever do covered work. LEAP's AML page lists intake forms with risk assessments among the features it's adding, at no extra subscription fee. InfoTrack's AML checks are pay per use, for firms that are in the AML/CTF rules. None of these is needed while you're outside.

What I'd take from this: put the ten questions on your checklist this week. It costs three hours, and it's the step the Law Society suggests.

Job 2. Time entries from the day (6 hours a week)

How it's done now. Helen, Josh, Anna and Tara record time on family law and estate matters, in six-minute units. During the day the work happens in Outlook, Word, Smokeball, on the phone and at court, and most of it isn't timed as it happens. At the end of the day each of them goes back through their diary, sent mail and the files they worked on, and writes the entries in Smokeball, with a description the client will read on the bill. A client who gets a lump sum bill can ask for an itemised one, and the firm has 28 days to give it. The Law Society says entries must stay accurate and can't be adjusted upwards. In family law, the court's rules (Family Law Rules 2021, r 12.06) say that at least a day before each court event the lawyer gives the client a written notice of their costs so far and the costs expected ahead, then files and serves a copy, so the entries have to be up to date. Helen reads them at the monthly bill run. It's about 18 minutes a day for each of the four.

	Fix without AI: time as you go	What you already have: Smokeball's email filing	Smokeball AutoTime add-on
What it does	Each fee earner starts Smokeball's timer when they start a task, and takes five minutes at lunch and at close to fill gaps from the diary	Each email is filed to its matter from Outlook (Smokeball's email management, in your Grow plan), so the day's emails sit under each matter when entries are written	Records activity in Word, Outlook and Smokeball against the right matter as you work, and turns it into billable entries you can change before they're billed
What's left for your staff	Writing every entry and its description	Working out the time, and writing every entry	Checking each entry and its description, and adding time away from the computer
Setting it up (my estimate)	About an hour: agree the habit as a team	About 2 hours: show each person	About 4 hours: turn it on and show each person
Where client details are kept	Smokeball, as now	Smokeball and Microsoft 365, as now	Smokeball, on Amazon Web Services
Who checks	Each fee earner, and Helen at the bill run	Each fee earner, and Helen at the bill run	Each fee earner before the bill, and Helen at the bill run
Limits	Depends on habit. Calls on a mobile and time at court still come from memory	Covers email only, and doesn't record time	Smokeball's page names Word, Outlook and Smokeball. Court and phone time away from your desk still need entering
Cost to start	$31 (1 hour)	$62 (2 hours)	$124 (4 hours)
Cost a month	Nothing	Nothing (in your plan)	$300 ($39 a user before GST, for 7 users. $172 if Smokeball sells it for just the four who record time)
Hours back a week (my estimate)	1.5 to 2	1 to 1.5	4 to 4.5
Hours still spent a week	4 to 4.5	4.5 to 5	1.5 to 2

	Fix without AI: time as you go	What you already have: Smokeball's email filing	Smokeball AutoTime add-on
Saves a month, after costs	$202 to $269	$135 to $202	$238 to $306
Pays back in	Under a month	Under a month	Under a month

AutoTime is an add-on for your Grow plan (it comes with Smokeball's top plan, Prosper+). Actionstep sells passive time capture across Outlook, Word and desktop tools too, priced on request, but changing practice software for time entries alone wouldn't pay.

What I'd take from this: add AutoTime. It's an add-on to the Smokeball you already have, and it does most of this job for about $300 a month. Time as you go until it's on.

Job 3. Your yearly AML check (about 10 hours a year)

How it's done now. It isn't, yet. The Law Society sets out what a firm that believes it's outside should do. Go through the designated services in table 6 of the Act and write down why you don't provide each one. Date the record. Tell every staff member, not just the solicitors, so nobody takes on covered work by accident. Look at it again at least once a year, and straight away if you add a service, such as taking conveyancing back. Write down each review. Helen expects about 10 hours a year once it's running.

	Fix without AI: a one-page record	What you already have: Copilot Chat
What it does	One page with each table 6 item, whether you do it, why not, the date and who signed. A staff note. A yearly diary entry to review it	Drafts the record and the staff note from Helen's answers
What's left for your staff	Writing and reviewing it each year, from the template	Helen's answers, the decision, and signing
Setting it up (my estimate)	About 3 hours: the template, from the Law Society's steps	Nothing to set up
Where client details are kept	Your files. No client details needed	Microsoft 365. No client details needed
Who checks	Helen signs and dates it	Helen checks every line against the Law Society's list
Limits	Only works if the diary entry is kept	It can get the law wrong, so every line is checked at the source
Cost to start	$88 (3 hours)	Nothing
Cost a month	Nothing	Nothing (in your licence)
Hours back a week (my estimate)	0.1 (about 5 hours a year)	0.05 to 0.1
Hours still spent a week	0.1	0.1 to 0.15
Saves a month, after costs	$13	$6 to $13
Pays back in	About 7 months	At once

I didn't find a product made for the record a firm keeps when it believes it's outside. InfoTrack's Compliance Centre and the AML features in LEAP and Smokeball are built for firms that are in.

What I'd take from this: do it by hand, now. It's a few hours a year, and no product or Build is worth it, mine included.

Job 4. Warning clients about their own AI use (1.5 hours a week)

How it's done now. It isn't, yet. The Law Society's template hand-out tells clients what free AI tools can do to confidentiality and privilege, and says not to use free AI for anything to do with their matter. It suggests raising it at the start, ideally at the retainer, in writing and by speaking to them. Here that means Mel adds the hand-out to the welcome letter, the solicitor gives the spoken warning at the first meeting, and a file note records it. With about 10 new matters a week, it's about nine minutes a matter.

	Fix without AI: the template, as it is	**What you already have: a version for each practice area**
What it does	The Law Society's hand-out goes in every welcome letter. A Smokeball task reminds the solicitor to give the spoken warning and make a file note	Copilot Chat writes a version of the hand-out for each of your practice areas once, from the Law Society's template, kept as Smokeball precedents that fill in the client's name from the matter. Mel picks the right one
What's left for your staff	Adding it, the spoken warning, and the file note	Picking the version, the spoken warning, and the file note
Setting it up (my estimate)	About 2 hours	About 3 hours, with Helen reading each version against the template
Where client details are kept	Smokeball, as now	Smokeball. No client details go into Copilot to write the versions
Who checks	The solicitor on the matter	Helen approves each version once. The solicitor on the matter after that
Limits	One version for every kind of matter	The versions need updating when the Law Society updates its template
Cost to start	$59 (2 hours)	$88 (3 hours)
Cost a month	Nothing	Nothing (in your licence)
Hours back a week (my estimate)	0.25 to 0.5	0.5 to 0.75
Hours still spent a week	1 to 1.25	0.75 to 1
Saves a month, after costs	$32 to $64	$64 to $96
Pays back in	1 to 2 months	About a month

I didn't find a product built for this.

What I'd take from this: start handing it out this week. It's the Law Society's own wording.

All four jobs, without me

If you took the option that saves you the most each month for each job, this is the total.

	1. Intake flag	2. Time entries	3. Yearly AML check	4. Client warning	Total
Option	Screening questions	AutoTime	One-page record	Area versions	
Cost to start	$91	$124	$88	$88	**$392**
Cost a month	Nothing	$300	Nothing	Nothing	**$300**
Hours back a week (my estimate)	0.5 to 0.75	4 to 4.5	0.1	0.5 to 0.75	**5.1 to 6.1**
Hours still spent a week	4.25 to 4.5	1.5 to 2	0.1	0.75 to 1	**6.6 to 7.6**
Saves a month, after costs	$66 to $99	$238 to $306	$13	$64 to $96	**$381 to $513**

The four jobs take 12.7 hours a week now. Without me, 6.6 to 7.6 of those hours are still spent each week.

9. Policy and staff

You need a written AI use policy (section 7). The Law Society has a template. It should cover four things:

- what staff can and can't put into AI tools, and that privileged or confidential material only goes into tools whose terms keep it confidential
- which tools the firm has approved, and on what conditions
- who checks AI work, and how that's recorded. For legal work, someone who knows that area of law
- who's accountable (the principal)

Staff. Everyone I spoke to was keen, and nobody had been shown how to use AI safely. A short session once the policy's in place would cover what's allowed, how to check AI work, where client details can and can't go, and the AML screening questions, since the Law Society says every staff member needs to know the firm's position.

PROMPT WORKS STUDIO

Your mail and accounts

Your email, your domain name and who can get into them sit under everything else in this report, so they get a page of their own. Your domain's public records were read from outside. On the day, you logged in and we went through the admin screens together. I didn't log in or take a password, nothing was changed, and no client mail or client files were opened.

What I looked at	What I found	Where it stands
Your domain name	It's in the firm's name, you can log in, and it renews in May 2028	OK
Where your mail goes	To Microsoft 365, on your own domain	OK
Proof your mail is really from you	SPF and DKIM are right. DMARC is set to its first step and hasn't been moved on, so it reports on fake mail and doesn't stop it	Gap 1
Other things that send as you	We didn't find anything else sending with your address on the day	OK
Who looks after it	Nobody outside the firm. The firm signed up direct, so the account is yours	OK
Plan and licences	Business Standard, seven licences, all in use	OK
Getting back in	Two admin accounts, and one's kept apart from everyday use	OK
Two-step sign-in	Microsoft's security defaults are off. Some of you told me you use a code and some don't	Gap 2
Mail protection	The built-in protection is on. Microsoft's Standard settings, a tighter set against spam, malware and phishing, are off	Gap 3
Mail forwarded out	Set to Off, so automatic forwarding outside the firm is blocked	OK
One login a person	One account a person, and reception@ is a shared mailbox. Nobody said they share a login	OK
People who've left	No old accounts can sign in. The steps for when someone leaves are written down	OK
Where the screen says your data sits	Australia. That's as far as this page goes	Noted
Backup	Nothing keeps a copy of your mail outside Microsoft	Your call

What this means for your security. Microsoft's own list for a small business starts with two-step sign-in and looking after admin accounts. Your admin accounts cover the second. Gap 2 is the first, and your mail holds what clients have told you in confidence. Keeping a copy of your mail is your call. I haven't picked a backup product, so I don't recommend one.

What I didn't look at. Your computers, phones, network, antivirus, firewall, files and folders. This isn't a security audit, and a clean row doesn't mean nothing can go wrong.

What I can't do. I don't work on a domain or account someone else holds, or on the things I didn't look at. If you think someone's already got into your accounts, you need an IT security firm. I'm not one.

What it costs to close these: with a real report, a separate quote comes with it. You don't need me for any of them. This page is yours, so you can take it to anyone you like, including an IT provider.

10. What I can do for you

This is what doing it with me would look like: all four jobs built in your own Claude account, as one Build. A Build is my service of building a job in Claude with you and training your people on it. Each job is priced by its Tier. The Tier comes from the kind of work: drafting, summarising or pulling details out is Tier 1, and reviewing or weighing something up is Tier 2. A job goes up one Tier if its output carries a figure the client relies on, and one more if it sits close to a legal duty, up to Tier 3. All prices include GST.

My solution, job by job

	1. Intake flag	2. Time entries	3. Yearly AML check	4. Client warning
What Claude does	When Mel starts it for a new enquiry, reads the enquiry email and her notes. Drafts the file-opening note, lists every name for the conflict check, flags anything that looks like a designated service with the reason, and drafts the costs disclosure from your precedent	When each fee earner starts it at the end of the day, reads their calendar and sent mail, and drafts their time entries by matter, in six-minute units, with a description the client can read	When Helen starts it once a year, drafts the dated record and the staff note from her answers and the year's flagged enquiries	When Mel starts it for a new matter, picks the right version of the hand-out, adds it to the welcome letter draft, and lists matters with no file note of the spoken warning
Who checks	Mel runs the conflict check in Smokeball herself. The solicitor sets the costs estimate and checks the disclosure. Helen decides every flag	Each fee earner checks every entry, changes what's wrong and enters it in Smokeball. Nothing's rounded up	Helen checks every line and signs	Mel reads every letter before it goes. The solicitor gives the spoken warning
Tier, and why	Tier 3: it reviews each enquiry, and it sits next to your AML duty	Tier 2: it drafts, and the time it carries is what the client pays for	Tier 2: it drafts, and it's your AML record	Tier 1: it drafts from the Law Society's template
Build	$5,500	$4,500 ($4,200, and $300 because it runs in four people's seats, two more than the plan's first two)	$4,200	$3,400
Hours back a week (my estimate)	2 to 2.5	4 to 4.5	0.1 to 0.15	0.75 to 1
Hours still spent a week	2.5 to 3	1.5 to 2	0.05 to 0.1	0.5 to 0.75

Client details stay in your firm's own Claude account and your Microsoft 365, apart from what's below. I build it with you, train your staff on it, come back for a short follow-up session two to three weeks after

go-live, answer your questions free for 30 days, and check in at 3, 6 and 12 months. All of that is in the Build price.

What a Build needs

A Build runs in a Claude plan in your firm's name, under Anthropic's business terms. For a firm your size that's the Team plan: US$25 a seat a month billed monthly, for 2 to 150 seats. Anthropic's prices don't include tax. I couldn't find an Australian price on Anthropic's pages. This Build needs five seats: one each for Helen, Josh, Anna and Tara, since job 2 reads each person's own diary and mail, and one for Mel, who runs jobs 1 and 4. That came to about $178 a month before tax at the Reserve Bank's 30 October exchange rate, about $195 with GST on top, and that's the figure in the tables below. Kerry and Leanne don't need a seat, since nothing in the Build runs in their names.

Every job here handles your clients' details, so a named person starts every run. It can run in a Claude chat, in Cowork or in Claude Code, and I'll pick whichever suits the job. In Cowork I set it to stop and ask before each action. Nothing runs on its own in the background. A scheduled run only suits work with the names taken out, or with no personal information in it.

Why a business plan rather than a free or Pro one: on Anthropic's personal plans (Free, Pro, Max and Ultra), Anthropic may use what you type to train its models unless each person turns that off in their own settings, and I've found no firm-level setting that lets you check they have. On Team and Enterprise it doesn't, by default.

No one at the firm has a Claude plan now. Setting one up properly, with the privacy settings, your firm's context and your AI use policy inside it, is my Set-up and Onboarding service: $2,500 for a firm of 6 to 10 people. It's in the totals below, but not in each job's payback, since the set-up is yours to keep whether or not a Build follows.

Where your client files go

A common worry is client files going off to a server overseas, so here's the straight answer. Anthropic runs Claude on several cloud providers. It says it may route your firm's traffic through the United States, Europe, Asia and Australia, and that the data is stored in the United States. Anything the Build reads goes there. On a Team plan, Anthropic doesn't use it to train its models by default, and your firm controls the account. Your clients' files don't come to me. I work inside your account with your named person present. My data handling addendum comes with the Build agreement and sets out what can reach me and what never does. At most, that's file names in the reports your person sends, and only if you choose. File names can carry clients' names, so for a law firm I'd suggest you don't, given Rule 9. If the Privacy Act covers you (section 3), your privacy policy has to say that personal information goes overseas. The Queensland Law Society's guidance statement on AI (No. 37, 31 May 2024) asks you to assess the risk to confidentiality and privilege before you use a tool, and to tell clients in the retainer. This report doesn't say privilege is safe; that's your call under that guidance, with the plan's terms in front of you. Before a Build starts, I sit with you and we read Anthropic's terms for your plan together. The decision to put client details in is then yours, once your policy has approved the tool (section 7).

Your mail and accounts. With a real report, a separate quote for any gaps I can close comes with it. None of it counts in the 12-month test or the totals below.

Each job, counted on its own

I only take on a Build that pays for itself within 12 months, counted job by job. The $1,500 Build fee, which I charge once for preparing a Build, is fully covered by the $1,500 Audit fee if you go ahead within 90 days, so it adds nothing below.

Job 2 on its own is the one that passes. Built alone, carrying the whole $195 a month plan, it costs $4,500 and saves $343 to $411 a month, so it pays back in 11.0 to 13.1 months. That's inside my rule at

the better end. AutoTime gives about the same hours back for $124 to start and $300 a month, and needs no Claude plan. Over three years AutoTime leaves you $8,453 to $10,877 ahead, and my Build $7,857 to $10,281. They're close. AutoTime is simpler, so I'd start there. If it doesn't suit how your fee earners work, job 2 is the one Build I'd take on.

If all four were built together, each job would carry its Build price plus a quarter of the plan:

Job	Cost	Saves a month, after its share of the plan	Pays back in
1. Intake flag	$5,500	$215 to $281	19.6 to 25.6 months
2. Time entries	$4,500	$490 to $557	8.1 to 9.2 months
3. Yearly AML check	$4,200	Costs $30 to $36 more	Doesn't
4. Client warning	$3,400	$47 to $79	43.2 to 72.6 months

Jobs 1, 3 and 4 don't pay for themselves even then, so I won't take those on until they would. Do the fixes in section 8 for them instead.

These are the least the time is worth, at the award minimum. If your people are paid more than that, every job pays back sooner than shown.

The two totals side by side

	All four jobs, without me (section 8)	All four jobs, with me
Cost to start	$392	$20,100: four Builds ($17,300), two more Claude seats for job 2 ($300), Set-up and Onboarding ($2,500), and the $1,500 Build fee less the $1,500 Audit fee
Cost a month	$300 (AutoTime)	$195 (Claude Team plan, five seats)
Hours back a week (my estimate)	5.1 to 6.1	6.85 to 8.15
Hours still spent a week (of 12.7 now)	6.6 to 7.6	4.55 to 5.85
Saves a month, after costs	$381 to $513	$715 to $887
Pays back in	About a month	22.7 to 28.1 months
With me catches up with "without me" after		52.7 to 58.9 months
Ahead after three years, after all costs	$13,312 to $18,070	$5,651 to $11,825

All four jobs are in the "with me" total so you can see the whole picture. I wouldn't take on jobs 1, 3 and 4 (above).

What I'd do. The fixes for jobs 1, 3 and 4, and AutoTime for job 2. If AutoTime doesn't suit, my Build for job 2 passes my rule on its own. If you'd like help with the AI use policy in section 7, that's the part of my work that fits your firm now.

Both totals are at the award minimum, as above. Neither counts what freed hours are worth if they go on billable work, or time you'd find you'd missed recording.

Prices

A Build, per job	$3,400 (Tier 1), $4,200 (Tier 2) or $5,500 (Tier 3), with the follow-up session, 30 days of questions and check-ins at 3, 6 and 12 months included. A job that runs in more than two people's Claude seats is $150 for each seat past two
Build fee	$1,500, once per Build, however many jobs are in it
The Audit fee	$1,500 for a firm of 6 to 10 people. It comes off the Build fee if you go ahead within 90 days of this report
Claude Set-up and Onboarding	$2,500 for 6 to 10 people. You pay Anthropic for your Claude plan on top
An AI use policy	$750. You don't have to use mine. The Law Society's template will do, or any provider's, or you can write your own
Monthly tune-up (optional)	$750 a month, for up to 4 hours of checks and fixes to what's built

To start, reply to this report or call me, and we'll go through it together.

When I hand this over, I'll book a 20-minute call for about 30 days on: what you've done, what's stuck. It's part of the Audit, whatever you choose.

This report is yours. Keep it, share it, take it to any provider.

It was drafted with AI (Claude) from my notes on the day, then checked and finalised by Chad Maxwell.