

# Document review and analysis

Automatically processes and analyzes legal documents uploaded to case management system, extracting key information, identifying risks, and generating review summaries. Reduces manual document review time by 70% while ensuring consistent analysis quality.

Download PDF

Get Your Blueprint

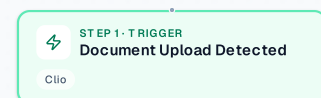


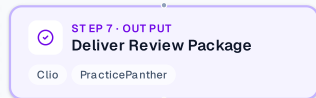
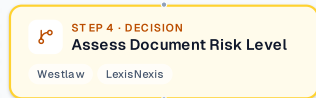
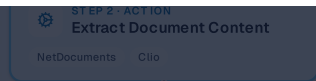
## WORKFLOW TRIGGER

New document uploaded to active case file in Clio

## Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





+  
-  
☐

## Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

### Document Upload Detected

New document is uploaded to an active case file in Clio case management system. System captures document metadata and file location for processing.

2

 ACTION

### Extract Document Content

Document is retrieved from NetDocuments storage and processed through OCR and text extraction. Content is parsed and prepared for legal analysis.

NetDocuments

Clio

3

 ACTION

### Perform Legal Research

Key terms and legal concepts from document are cross-referenced against Westlaw and LexisNexis databases. Relevant case law and statutes are identified for context.

Westlaw

LexisNexis

4

 DECISION

### Assess Document Risk Level

AI analyzes document content for potential legal risks, compliance issues, and critical clauses. Documents are categorized as high, medium, or low priority based on identified risks.

Westlaw

LexisNexis

5

 ACTION

### Generate Analysis Report

Comprehensive document analysis report is created including key findings, risk assessment, relevant precedents, and recommended actions. Report is

6

 ACTION


### Update Case Timeline

Case management system is updated with document analysis results and any critical deadlines identified. Task assignments are created for follow-up actions if needed.

Clio

PracticePanther

7

 OUTPUT

### Deliver Review Package

Complete document review package including analysis report, risk assessment, and recommended actions is delivered to assigned attorney. High-priority items trigger immediate notifications.

Clio

PracticePanther



### Outputs

- Document analysis report with key findings
- Risk assessment score and priority classification
- Updated case file with extracted metadata



## Key Metrics

- Document processing time reduction
- Analysis accuracy rate
- Attorney review time saved
- Number of risks identified



## Tools & Integrations

- Clio
- NetDocuments
- Westlaw
- LexisNexis
- PracticePanther

## AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

### COMPANY

[About](#)

[Industries](#)

### CONNECT

[MVP.dev](#)

[LinkedIn](#)

### RESOURCES

[Articles](#)