Automation Maturity

OPERATIONAL GAP ANALYSIS • 2026

Alpodo

Identify value leakage in your legal stack. A "No" indicates a manual friction point that should be automated to ensure long-term ROI and retention.

- [ ] INTAKE TRIAGE
  Does your intake system automatically route 'high-risk' matters to counsel while diverting 'low-risk' requests to self-serve resources?

- [ ] CONTRACTS
  Can business users generate, sign, and store standard NDAs without direct Legal intervention?

- [ ] SPEND CONTROL
  Do you enforce Outside Counsel Guidelines (OCG) automatically via invoice scanning (e.g., rejecting block billing) prior to human review?

- [ ] INTAKE TRIAGE
  Is there a centralized 'Legal Front Door' that captures structured data (budget, urgency, counterparty) before a lawyer is emailed?

- [ ] DATA SECURITY
  Are renewal dates and termination notice periods automatically extracted from signed contracts and synced to a calendar?

- [ ] ROI AUDIT
  Does your system flag 'ghost' licenses for legal tech tools that have not been accessed in the last 90 days?

- [ ] UX / ADOPTION
  Can sales teams trigger standard Order Forms directly from the CRM (Salesforce/HubSpot) without leaving their native platform?

- [ ] SPEND CONTROL
  Is Outside Counsel WIP (Work In Progress) visible in real-time, or do you wait for the monthly invoice to see accruals?

- [ ] CONTRACTS
  Are fallback clauses for negotiations (e.g., liability caps) pre-approved and accessible to non-legal negotiators via a playbook tool?

- [ ] DATA SECURITY
  Does your knowledge management system auto-tag precedent documents by practice area and success outcome?

- [ ] SECURITY
  Do you have a 'kill switch' workflow to instantly revoke vendor access to data upon contract termination?

EVALUATED BY ______________________

DATE ______________________