OPERATIONAL PRACTICE DELIVERY • RESIDENTIAL CONVEYANCING SECTOR

The Conveyancing AI Strategy Installation

A three week operational delivery that equips your conveyancing practice with deep workplace AI understanding, a confirmed practice AI strategy, and working administrative shortcuts inside Microsoft Outlook and Word. We reclaim four or more hours of fee earner time every week, end evening overtime, and install the permanent supervision foundations that protect partners from regulatory and insurer liability.

£5,500 + VAT

Fixed implementation fee • Three week delivery • Ten practice assets

£995 BLUEPRINT CREDITED 100% • NET BALANCE £4,505 + VAT

The Practice Reality: Unpaid Admin Drag & Evening Hours

Conveyancers face relentless administrative mission creep: TA6 updates, Building Safety Act declarations, 155 day leasehold management pack delays, and dozens of daily status chasers from agents and clients.

Homebuyers now use ChatGPT to send 40 point unverified enquiries. Overworked fee earners **push legal title scrutiny to 7:00 PM at home**, risking costly omissions and partner tribunal liability.

The Practice Output: Reclaimed Hours & Supervisory Protection

We do not sell software or ask you to change case management systems. We install practical shortcuts directly into **Microsoft Outlook and Word**: the screens your fee earners already use.

For your fee earners: Inbound chasers answered in seconds, and leasehold pack delays cut short. **For practice owners:** Visible lawyer verification on every file, protecting your practising certificate and insurance terms (*Munir [2026]*).

The Three Week Implementation Schedule

WEEK 01 • EXECUTIVE SESSION

Policy & Client Retainers

A 45 minute working session with the COLP and Managing Partner. We approve your **SRA or CLC AI Policy**, provide the IT provider instructions, and insert the client retainer protection clause.

WEEK 02 • CASEWORK FLOOR

Workflows & Team Training

A 60 minute live interactive workshop for all conveyancers. We install the **three Outlook administrative shortcuts**, demonstrate title checking under the Marked Draft Standard, designate your internal **Practice Catalyst** (desk validator), and issue the desk guide.

WEEK 03 • BOARDROOM PROTECTION

Supervision Binder & Handoff

Deliver your pre-filled **Central AI Decision Log**, complete COLP Evidence Binder, and signed PII and Lender Panel Pack. Authorise Phase 1 on your 12 Month Roadmap and review ongoing governance.

The Financial Bridge & Zero IT Drag: Built directly on your £995 Blueprint findings or automated pre-kickoff survey. No custom coding, no software subscriptions, and delivery is never delayed by external IT providers.

NET FEE BALANCE
£4,505 + VAT

The Ten Practice Assets: Your Practice AI Governance Vault & Confirmed Strategy

PILLAR 01 • HOURS RECOVERED

Outlook Administrative Shortcuts

Asset 01: Three Casework Shortcuts
Pre-formatted Outlook templates: Inbound agent updates drafted in five seconds, three stage leasehold escalation letters, and client onboarding document deficit schedules.

Asset 02: Safe AI Conveyancer Desk Guide
A single page desktop reference card containing exact Outlook drafting shortcuts and the Marked Draft verification checklist for daily use.

Asset 03: Team Training Masterclass Pack
60 minute recorded team training session, complete masterclass slide deck, and practical casework demonstrations. Builds deep workforce understanding of AI capabilities, prompting principles, and strict boundaries in legal practice.

Output to Fee Earners: Four hours saved weekly; deep workplace understanding of safe AI capability.

PILLAR 02 • PARTNER SHIELD

SRA & CLC Regulatory Defence

Asset 04: SRA/CLC Compliant AI Policy
Tailored operating rules governing approved office tools, matter boundaries, and mandatory human checks. Solidifies a confirmed, board approved AI strategy adopted across the practice.

Asset 05: Protective Client Retainer Terms
Client care wording disclosing your firm's AI standards, with contractual terms allowing you to bill hourly fees for investigating unverified AI queries sent by buyers.

Asset 06: Marked Draft Word Precedent
Enforces the four supervision rules: ban on blind acceptance, mandatory title deed cross referencing, three point supervisor review, and active compliance footer stamp.

Asset 07: SRA Competence Certificate
Co-signed training register satisfying SRA Code 3.5, CLC principles, and Lexcel continuing competence review requirements.

Output to Owners: A confirmed practice AI strategy and complete personal regulatory defence (*Munir [2026]*).

PILLAR 03 • INSURER ASSET

Supervision Binder & Future Plan

Asset 08: Pre-Filled AI Decision Log
Central compliance register pre-populated with five approved office tools, regulatory risk rationales, and review dates. Ready for immediate regulatory inspection.

Asset 09: PII & Lender Panel Schedule
Pre-drafted insurer proposal disclosures and UK Finance Lenders Handbook compliance attestation to protect insurance terms and lender panel standing.

Asset 10: 12 Month AI Practice Roadmap
Formal sign off of Phase 1 foundation and transition to our Active Intelligence Retainer (£1,200/mo), where UtterConnection chairs your quarterly AI Steering Group to ensure your bespoke strategy remains in place and comes to fruition.

Output to Practice: Permanent foundations for the future, protected PII terms, and secure lender panels.

THREE NON-NEGOTIABLE OPERATIONAL PRINCIPLES

1. Built Inside Microsoft Office
We work where conveyancers already spend their day: Outlook and Word. No new software systems to buy or learn.

2. Evidenced on the Casework File
An intranet policy is only an intention. The Marked Draft Standard proves active lawyer scrutiny was exercised on live transactions.

3. Absolute Client Confidentiality
All drafting models run strictly within your firm's private enterprise perimeters. Client data never trains external public models.

Instruct The AI Strategy Installation

Fixed fee: **£5,500 + VAT** (Net balance **£4,505 + VAT** after £995 Blueprint credit). Scheduled backwards from your PII renewal or target completion date. Includes all ten completed practice assets, your Practice AI Governance Vault, and six hours of Paul Oxley's direct advisory time.

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