OPERATIONAL REVIEW FOR RESIDENTIAL CONVEYANCING PRACTICES

The Conveyancing AI Strategy & Governance Blueprint

A dedicated working review for equity partners and practice owners. In one focused 60 minute session, we establish where your practice sits with AI today, define where you want to get to, and show you the art of the possible inside your live conveyancing workflow, with SRA or CLC governance built in from the start.

£995 + VAT Fixed investment: 60 minute partner session plus full four asset dossier

100% CREDITED AGAINST IMPLEMENTATION

The Practice Reality: Administrative Gridlock

Conveyancing teams are overwhelmed by administrative burdens: heightened AML obligations, new Land Registry reporting rules, complex leasehold forms, and endless client email chasers.

Fee earners spend their daytime hours managing administrative friction, **forcing them to carry out title investigation and contract checks in the evenings**. Meanwhile, expensive case management systems are frequently underused, leaving teams stuck in manual workarounds.

The Commercial Solution: Reclaiming Fee Earner Hours

Sensible AI strategy is not about replacing lawyers or buying unvetted tools that create negligence liability. It is about **automating repetitive client updates, intake collation, and routine enquiry drafting**.

We map where your practice stands today, show you the art of the possible using the case management and Microsoft 365 tools you already pay for, and bring safe AI directly into your daily workflow whilst keeping partners in full supervisory control.

How We Deliver the Blueprint

STEP 01: PRE-SESSION

Practice Snapshot & Staff Pulse

A brief practice intake on your volumes and software, paired with an unattributed 90-second staff pulse (no names, emails, or logins). This lets Paul understand your business beforehand so the session focuses strictly on your team's priorities.

STEP 02: 60 MINUTES

Executive Strategy Session

A direct working session with Paul Oxley to map where you are with AI today and where you want to get to. We show the art of the possible and how to bring safe, practical AI directly into your conveyancing workflow.

STEP 03: SAME DAY

Blueprint Report & 12-Month Roadmap

You receive your bespoke 4-page Blueprint PDF containing your Workflow Review, Staff Tooling Findings, COLP Governance Register, and prioritised 12-Month AI Roadmap for your board and insurer.

The Commercial Bridge: The Blueprint gives practice owners complete clarity on what to automate, what to avoid, and what to buy. If you instruct UtterConnection to install your policies and team workflows, your full **£995 fee is credited 100%** against the £5,500 fixed cost.

NET IMPLEMENTATION COST
£4,505 + VAT

What Your Practice Receives: The Four Blueprint Assets

ASSET 01: WORKFLOW REVIEW

Conveyancing Workflow & CMS Review

- **Casework Bottleneck Review:** Pinpoints where fee earners lose unbillable time across onboarding, enquiries, management packs, and completion.
- **Case Management Value Check:** Reviews how your case management system (LEAP, Clio, Hoowla, Redbrick) is deployed compared to manual workarounds.
- **Targeted Time Recovery:** Identifies two or three safe administrative workflows to cut repetitive email chasing and status enquiries.

Commercial Outcome: Reclaims lost fee earner hours and stops unbillable overtime.

ASSET 02: STAFF FEEDBACK

Fee Earner Workload & Tooling Report

- **The Practice Reality Check:** Compares partner assumptions against the everyday tools and shortcuts fee earners use on personal devices.
- **Workload Friction Insights:** Highlights the specific administrative chasers draining your team's energy during business hours.
- **Constructive Protection:** Surfaces shadow AI safely so partners can provide approved, secure firm tools without disciplinary conflict.

Commercial Outcome: Eliminates hidden malpractice risk without staff friction.

ASSET 03: INSURER & SRA SHIELD

COLP AI Governance & PII Underwriter Register

- **Adversarial Stress-Test (Trap-Pack #1):** Tests your AI tools against synthetic leasehold defects and 4-cluster SDLT/lender traps to build your **Empirical Latent-Omission Scorecard**.
- **Compliance Readiness & Boundaries:** Benchmarks your firm against SRA or CLC rules and defines mandatory lawyer verification gates.
- **PII Renewal Wording:** Completed disclosure wording and risk rationale ready for your annual professional indemnity insurance proposal form.

Commercial Outcome: Gives the COLP and partners complete peace of mind with insurers and regulators.

ASSET 04: ONE YEAR ROADMAP

Bespoke 12 Month AI Roadmap & Credit Voucher

- **Phase 1 (Months 1 to 3) Foundation:** Bespoke SRA or CLC practice policy, client retainer terms, practical Outlook administrative shortcuts, and the Marked Draft Standard in Word.
- **Phases 2 & 3 (Months 4 to 12) Tailored Progression:** A sequenced adoption plan customised to your exact CMS, staff bottlenecks, and risk appetite.
- **Steering Group Continuity:** Designed so your partners can govern it internally or retain UtterConnection to chair your quarterly AI Steering Group so the strategy sticks.

Commercial Outcome: A bespoke board roadmap plus a formal £995 credit voucher.

THREE GUIDING COMMITMENTS FOR YOUR PRACTICE

1. Grounded in Your File Volumes
We assess potential time savings based on your firm's live transaction numbers and email traffic, never speculative marketing claims.

2. Zero Client Data Intrusion
We review systems, workflows, and templates. We never inspect live client confidential files, avoiding all GDPR friction.

3. Respecting Your Existing CMS
We do not sell competing software. We help you extract maximum commercial value from the case management system you already pay for.

Book Your Firm's Strategy and Governance Blueprint

Fixed fee: **£995 + VAT**. Includes the pre-session practice snapshot and unattributed 90-second staff pulse, 60 minute partner session, full four-asset Blueprint dossier, and a 100% credit guarantee against implementation.

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