CHAIRING YOUR AI STEERING GROUP • STRATEGY CONTINUITY & GOVERNANCE

The Active Intelligence Retainer

Every conveyancing practice has a different case management system, risk profile, and bespoke 12 Month AI Strategy. Yet the biggest threat to your strategy is identical: Monday morning caseload pressure. Without dedicated leadership, fee earners slip back into manual habits, internal reviews get postponed, and your roadmap sits on a shelf. UtterConnection chairs your quarterly AI Steering Group and acts as your external Frontier Team: ensuring the bespoke strategy you planned and paid for remains in place and comes to fruition.

£1,200/mo + VAT

Billed quarterly (£3,600 + VAT) or monthly Direct Debit • Clean quarterly break clause

EXTERNAL STEERING GROUP CHAIR & STRATEGY LOCK

The Day-22 Trap: Why Internal Strategies Drift

Nobody in an independent conveyancing practice has "AI Strategy Implementation" as their full-time job. The Managing Partner is running the firm, the COLP carries a live caseload, and fee earners are juggling 110+ active files.

Meanwhile, governed AI accuracy **decays from 95% to 65% within four weeks if unmaintained** (Anthropic, 2026). When internal steering meetings get bumped for completion crises, habits slip and partner supervision exposure returns under ***Munir [2026] UKUT 81***.

We Chair the Steering Group & Keep It in Place

Instead of hiring a **£120,000/year internal Head of Legal Ops**, you appoint Paul Oxley to chair your quarterly AI Steering Group and lead your external Frontier Team for less than a junior clerk's salary.

Because every firm's roadmap is bespoke, we do not force generic templates onto your team. We hold the calendar discipline, review live **Marked Draft** files with your COLP, unblock staff resistance, and guide each phase of your specific strategy into daily practice.

Four Pillars That Keep Your Bespoke AI Strategy in Place

PILLAR 01 • CADENCE

Boardroom Discipline

Internal AI reviews never get bumped for client emergencies. We **chair your quarterly Steering Group**, keeping partners and fee earners accountable to your agreed milestones.

PILLAR 02 • HABITS

Adoption & Drift Control

Prevents post-installation relapse. Every 90 days we **sample three live Marked Draft files** with the COLP, fix model drift, and run team calibration clinics so habits stick.

PILLAR 03 • CONTINUITY

Locum & Staff Shield

Protects your standards during staff turnover. Every new conveyancer or summer locum completes our **recorded Marked Draft onboarding** before touching AI on live matters.

PILLAR 04 • EVOLUTION

Bespoke Roadmap Rollout

Adapts to your firm's exact priorities. We guide **Phases 2 and 3 of your specific strategy**, vetting CMS updates and vendor EULAs so your plan never becomes obsolete.

Protecting Your £5,500 Installation Investment: Zero daily management drag for partners. We require just 60 minutes of your leadership team's time once per quarter to review adoption, sign your supervision certificate, and advance your bespoke roadmap.

QUARTERLY FEE
£3,600 + VAT

What Your Practice Receives Every Month & Every Quarter

ENGINE 01 • STEERING GROUP

Accountability & Fruition

Function 01: Chaired Quarterly Steering Group

Paul Oxley chairs a structured 60 minute Steering Group every 90 days with the Managing Partner and COLP. We review casework adoption, unblock staff resistance, and mobilise the next milestone on your bespoke 12 Month Roadmap.

Function 02: Quarterly Team Calibration Clinic

A focused 35 minute recorded or live lunchtime session aligned to your practice's current roadmap priority: reinforcing safe Microsoft 365 habits, correcting workflow drift, and issuing Continuing Competence records.

Output to Practice: Your bespoke strategy actually happens on schedule.

ENGINE 02 • COLP SHIELD

Holding the Standard

Function 03: Live Marked Draft File Sampling & 3-Tier Scorecard

Every quarter we inspect three anonymised AI-assisted matter files with your COLP against the four supervision rules, classify active fee earners on the **3-Tier Supervision Scorecard** (Dormant / Unverified / Verified) with zero new software, update your Central AI Decision Log, and issue your signed **Quarterly Supervision & Strategy Review Certificate**.

Function 04: Vendor & EULA Gatekeeper (2/Qtr)

Protects your strategy from unvetted software distractions. Before partners trial any new PropTech or CMS add-on, we deliver a 48 hour regulatory and vendor liability risk verdict (up to two reviews per quarter).

Output to the COLP: Unbroken 90 day evidence trail satisfying SRA Code 7.2 & *Munir*.

ENGINE 03 • FRONTIER LAB

Adapting to Change

Function 05: Monthly Frontier & Vendor Pulse

Delivered on the first Friday of every month: a concise two page digest and five minute video walkthrough filtering frontier model updates (Claude, OpenAI, M365 Copilot) and CMS changes so your strategy stays current without chasing hype.

Function 06: PII Refresh & Locum Continuity

Semi-annual updates to your PII Broker Dossier and UK Finance Lender Panel Attestation at Months 6 and 12, plus instant Marked Draft onboarding packs whenever new fee earners or locums join your practice.

Output to Partners: Zero compliance gaps during staff turnover or insurer renewals.

WHY INDEPENDENT CONVEYANCING PRACTICES RETAIN UTTERCONNECTION

1. From Symbolic to Cultural Maturity

A static policy binder degrades after 90 days (Rosenberg & Polonetsky, 2026). Quarterly file sampling proves active supervision is embedded in daily culture.

2. Defending Fixed-Fee Margins

PE-backed groups use central tech teams to compress completion times. We give independent firms the same Microsoft 365 workflow edge without enterprise overhead.

3. Zero Technical Support Drag

We never install black-box software or alter your CMS database. Every workflow runs natively inside your existing Microsoft 365 Word and Outlook boundary.

Ensure Your AI Strategy Comes to Fruition

Retainer fee: **£1,200 / month + VAT** (billed quarterly at **£3,600 + VAT** or via monthly Direct Debit). Commences on Day 21 upon completion of your AI Strategy Installation, with a clean 30 day quarterly break clause prior to each roadmap phase.

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