

# Matter readiness gap check for firms that already have systems.

A synthetic one-page checklist for feedback only. No live firm access, no client data, no automatic sending, and no assumption that the firm has a gap to solve.

## WHY I AM ASKING

I am sanity-checking whether exceptions, handoffs, stale follow-ups, ownerless tasks, and review gates still fall between practice-management systems, document systems, teams, and matter types.

**3**

gap or unclear

**2**

stale / urgent

**2**

drafts for review

**1**

already solved

## VALID ANSWER

If Actionstep, NetDocuments, Clio, Smokeball, Mary, or internal process already handles this well, that is useful feedback. The goal is to find what is useful, redundant, missing, or already solved.

## WHERE THIS FITS

This is workflow support around existing systems, not a replacement platform.

- Actionstep / Clio / Smokeball: broad practice management.
- NetDocuments: document and email management.
- Mary: fact management, chronologies, evidence review.
- Lennox wedge: small gap audit and no-login proof.

## DRAFT GAP-CHECK SHAPE

GAP	STATUS	WHY IT MATTERS	NEXT STEP	REVIEW GATE
Signed authority follow-up	Review-gated	A third party will not release records until authority is confirmed.	Prepare internal draft for approval.	Lawyer review before send.
Document status unclear	Unclear	The file exists, but the trail does not show whether it satisfies the request.	Ask owner to confirm purpose.	Escalate if disputed.
Review bundle readiness	Ownerless	A deadline exists, but readiness ownership is unclear.	Assign readiness owner.	Solicitor decides sufficiency.
Standard workflow already tracks this	Already solved	PMS/DMS already tracks owner, status, date, and review gate.	No extra layer needed.	No prototype needed.

## WHAT TO CRITIQUE

- Is this a real post-system workflow gap, or too generic?
- What is already handled by Actionstep, NetDocuments, Clio, Smokeball, Mary, or process design?
- What language is naive, redundant, or wrong?
- What would a practice manager remove, rename, or tighten?

## WHAT AI DOES NOT DECIDE

- No legal advice to clients.
- No client-facing email sent automatically.
- No live inbox, DMS, or PMS connection in the proof.
- No replacement for solicitor, paralegal, or operational ownership.

Synthetic proof only. No private claim facts, medical details, identifiers, settlement information, or live firm-system access are included.