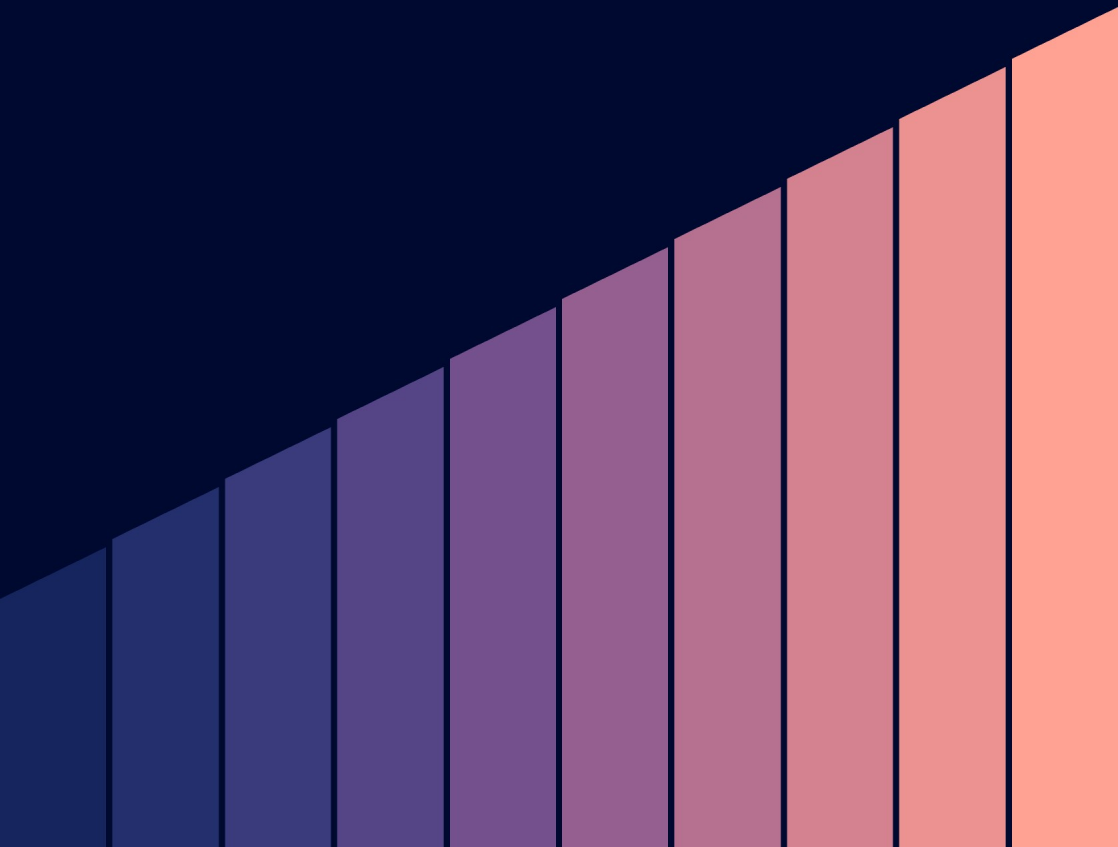


The Drafting *at Scale* Checklist

10 indicators of infrastructure readiness



AI tools accelerate document creation. *Scale* tests how those documents are governed, updated and aligned over time.

As drafting expands across practice groups and jurisdictions, structure determines whether clauses remain consistent, updates propagate cleanly and variation stays controlled.

Firm-wide drafting depends on shared logic, controlled change and clear ownership.

This checklist helps you assess whether your drafting environment operates as infrastructure.

How to use *this document*

- 1 Review each indicator against your current environment or the platform under consideration.
- 2 Confirm only what can be demonstrated today.
- 3 Exclude roadmap commitments and manual workarounds.

This is an assessment of structural readiness rather than feature depth.

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01 Structural decisions

These indicators assess whether drafting operates as a shared system rather than a collection of isolated documents and if your firm has the structural rigour to scale.

1 Structured logic

Drafting logic should be encoded into templates rather than recreated document by document, which creates inconsistency at scale.

- ☐ Templates operate on defined conditional logic, variables and shared components rather than relying solely on free-text generation.
- ☐ AI-generated output is anchored to approved template structure and does not bypass governed logic.
- ☐ Core logic and data fields are reusable across multiple document types rather than recreated independently.

2 Clause-level control

Clauses should be managed as shared components, not embedded text. Consistency depends on updating language once.

- ☐ Clauses exist as centrally managed components rather than static text within individual templates.
- ☐ A clause can be versioned, reviewed and approved independently of the documents in which it appears.
- ☐ Templates reference shared clause libraries instead of duplicating text across documents.

3 Controlled updates

Change should propagate predictably across templates. Manual updates introduce maintenance risk under volume.

- ☐ Updating a clause component propagates across all selected templates without document-by-document intervention.
- ☐ The system provides visibility into which templates are affected before changes are published.
- ☐ No external tracking is required to confirm updates have been applied consistently.

4 Structural transparency

Automation and AI should operate within approved precedents. Without defined boundaries, variation becomes difficult to manage.

- ☐ Drafting is constrained by pre-approved clause libraries and precedent sources.
- ☐ AI plays an additive role, enhancing drafting within the guardrails of pre-approved templates.
- ☐ New or external language cannot enter production templates without review.

02 Governance

How change and variation are controlled. These indicators assess whether drafting remains aligned, visible and defensible as it evolves.

5 Audit & traceability

Drafting activity should be transparent and attributable. At scale, traceability protects both quality and defensibility.

- ☐ The system records who drafted, modified or approved each template and clause.
- ☐ Version history captures structural logic changes, not just document text edits.
- ☐ AI-assisted drafting activity is identifiable within the audit history.

6 Defined ownership

Templates and clause libraries require defined ownership. Without ownership, governance degrades over time.

- ☐ Each template family has a named owner responsible for its structure and content.
- ☐ Approval workflows are embedded within the system rather than managed externally.
- ☐ Publishing controls prevent unreviewed or duplicate templates from entering firm-wide use.

7 Controlled variation

Firm-wide drafting should reinforce alignment as adoption expands.

- ☐ Jurisdictional or practice-specific variations are implemented within shared structure rather than through duplicated templates.
- ☐ Clauses can be updated across all templates or limited to specific ones.
- ☐ The system encourages template consolidation by design.

03 Scale behaviour

How the system performs under firm-wide use. These indicators assess whether drafting strengthens or fragments as adoption expands.

8 Operational integration

Scale introduces operational complexity. Drafting infrastructure should operate within the firm's existing workflows.

- ☐ The system integrates with core platforms such as DMS, SSO and e-signature without requiring manual workarounds.
- ☐ API supports custom connections to internal or external systems.
- ☐ Drafting activity operates within standard document and approval workflows rather than creating parallel processes.

9 Role & permission scaling

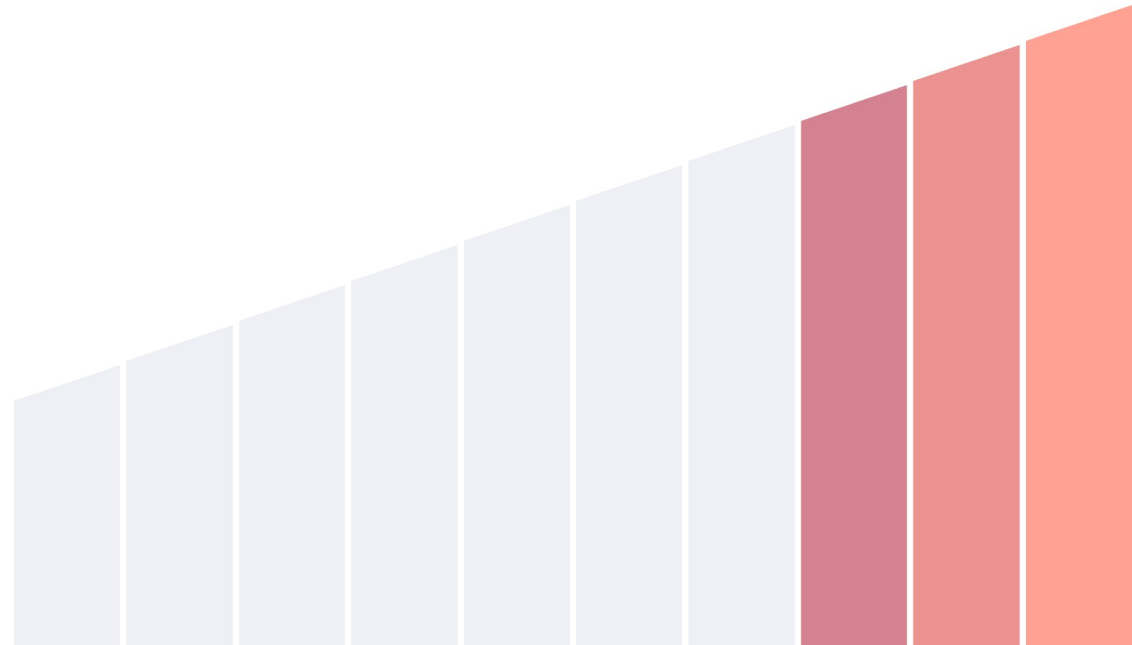
Different users require different levels of control. Builder and user experiences should be intentionally separated.

- ☐ Template builders have access to structural configuration without exposing complexity to fee-earners.
- ☐ Fee-earners interact with governed questionnaires rather than automation logic.
- ☐ Permissions scale across practice groups without manual administration.

10 System learning & improvement

Infrastructure should strengthen over time. Scale generates data that should inform refinement.

- ☐ Clause usage, fallback positions and negotiated deviations can be analysed centrally.
- ☐ Improvements can be implemented once and propagated consistently across templates.
- ☐ It's possible to track team activity and monitor adoption firm-wide.



04 Interpreting your results

Count the indicators you can confirm today. This is a diagnostic, not a certification: the pattern of gaps matters as much as the total score.

8–10



The structural foundations for firm-wide drafting are largely in place: shared logic, controlled change and governance mechanisms. At this stage, the focus shifts from architecture to discipline: consistency of use and ongoing refinement. Even well-designed systems require deliberate oversight as scale increases.

5–7



Core pieces exist, but the missing checkpoints represent real operational risk at firm-wide scale. These gaps often remain manageable in limited use. They become more visible as adoption expands and templates multiply. Identify which gaps sit on the critical path and close them before committing to further rollout.

0–4



The current environment may support drafting in contained contexts, but expansion is likely to introduce great structural strain. Where shared logic is limited and change must be managed manually, maintenance burden compounds. Before scaling, it is worth addressing the underlying architecture.

Next *steps*

Where gaps sit within Architecture, more tooling rarely resolves the issue. A properly designed foundation determines whether scale strengthens consistency.

Download Drafting at Scale

The structural framework behind scalable drafting systems.

[Download the guide →](#)

Request a Drafting at Scale Benchmark

A structured review of your current environment and scale readiness.

[Book a discussion →](#)



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