ROKT

AI Playbook

Legal

How Legal turned high-volume workflows into automated systems

Built by the people who lived it.

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LEGAL OPS AUTOMATION

Automated Contract Filing

The Context / Challenge

Once a contract is fully executed, someone has to download the signed PDF, rename it, navigate to the right folder, and file it — then confirm the filing on the ticket or email thread. Contracts arrive from multiple sources (Jira tickets, DocuSign emails, forwarded PDFs) and the manual work is identical for each. For teams processing dozens of contracts weekly, this leads to unfiled documents, inconsistent naming, duplicate folders, and no audit trail.

Our Approach

Two Google Apps Scripts share a single filing vault, naming convention, and AI-powered routing engine. No servers required. Everything runs on timed triggers. The Jira Auto-Filer runs every 15 minutes, scanning open legal tickets, identifying executed PDFs, OCRing the document, extracting metadata via AI (with regex fallback), renaming and routing the file, and posting a confirmation comment. The Email Auto-Filer monitors Gmail for DocuSign completion emails and PDFs forwarded to a dedicated filing inbox.

1. **Define filing taxonomy** — Map top-level folders by agreement category (Advertiser, Partner, Vendor, NDA, Referral), with subfolders by region then client.
2. **Build the Jira filer** — Apps Script with Jira API token. Configure project key, monitored statuses, and custom field IDs.
3. **Build the email filer** — Gmail search for DocuSign completion emails filtered by sender whitelist.
4. **Add AI metadata extraction** — OCR each PDF, send to AI for client name, agreement type, signature date, and region.
5. **Implement folder routing** — Map agreement types to folders with priority-ordered keywords. Normalize folder names to prevent near-duplicates.
6. **Add notifications and deploy** — Post confirmation comments with filename, path, Drive link, and confidence warnings. Set timed triggers.

Results

Eliminated repetitive contract filing work while maintaining permission safeguards. Contracts from both Jira and DocuSign emails are automatically classified, renamed, filed to the correct Drive folder, and confirmed back to the source. Filing errors dropped to near zero. The team reclaimed significant time for higher-value legal work.

Automated NDA Triage

The Context / Challenge

Every legal team knows the pattern: an NDA lands in the queue, a team member reads it, classifies it, drafts redlines, and posts the analysis back to the ticket. For standard mutual NDAs with boilerplate terms, this is repetitive work that consumes time without requiring real legal judgment. The costs are turnaround delays, inconsistent classification across reviewers, and context-switching overhead.

Our Approach

The workflow runs on a schedule (every 30 minutes), picks up new NDA tickets, and processes each one through a classification and redline pipeline. An LLM reads the NDA alongside the team's playbook and classifies it using a traffic-light system. For YELLOW/RED classifications, a second LLM pass generates clause-specific redlines with exact quotes, replacement language, and playbook citations. Applied as tracked changes to the .docx.

1. Intake — Query the ticketing system for un-triaged NDAs. Download the attachment, convert to .docx if needed, and extract text.

2. Classification — LLM reads the NDA alongside the playbook. GREEN = standard terms, YELLOW = minor deviations, RED = significant deviations.

3. Redlines — For YELLOW/RED, a second LLM pass generates clause-specific redlines with exact quotes and replacement language.

4. Post and mark — Classification, summary, and redlined doc posted as an internal comment. Ticket labeled to prevent reprocessing.

Results

Eliminated reviewing and redlining all new NDAs on the legal service desk. The team now spends more time reviewing redlines rather than formulating them. Classification consistency improved across the team, and turnaround time on standard NDAs dropped substantially.

LEGAL / GTM STRATEGY

Partner Call Intelligence Briefs

The Context / Challenge

Before every partner call, the Legal team needed to prepare positioning briefs covering the partner's agreement history, outstanding redlines, negotiation positions, and potential pushback points. Each brief took over 60 minutes to prepare. With dozens of partner calls per month, the prep time was substantial, and the quality varied depending on who did the work and how much time they had.

60+
Minutes saved per brief

Dozens
Calls per month

Our Approach

This is a custom Claude skill backed by a structured reference playbook and a defined source hierarchy. The system uses verified legal positions, the negotiation playbook for initial and fallback positions, and the partner's own redlines for behavioral signals. Claude loads the playbook, maps the deal structure, mines the redlines for anticipatory signals, cross-references against positions from prior negotiations, and generates a structured positioning document. A scheduled shortcut scans Google Calendar for upcoming partner calls and automatically distributes briefs to attendees.

> **SAMPLE PROMPT**
> "Prep me for the [partner name] call. Here's their executed agreement and their latest markup with our responses. Cross-reference our playbook positions and flag anything where the partner's redline behavior suggests they'll push back. I need topic ownership, talk tracks, and a pre-call prep checklist with items that need pre-approval before we walk in."

Results

Replaced 60+ minutes of manual pre-call prep with automated briefs. The briefs anticipate partner pushback based on redline behavior, provide topic ownership assignments, fallback positions, and pre-approval flags. Distributed automatically to call attendees via a Google Calendar shortcut. The team walks into every partner call better prepared, with consistent quality regardless of who prepared the brief.