



Suhas Bhairav

AI Legal Intake Triage Blueprint

A practical triage playbook to classify and route legal requests efficiently.

Turn incoming legal requests into categorized, assignable tasks with measurable control.

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Matter, Urgency, & Jurisdiction Profiling

Define how requests enter the system and how they are initially categorized. This page maps the data fields and decision points used by AI triage to classify legal matters.

Key move Start with 3 representative matter types to pilot the triage model.

PRACTICAL CHECKLIST

- 01** Classify requests by matter type: contracts, IP, compliance, litigation, or employment.
- 02** Assess urgency: urgent (same-day), high (24-72h), normal (3-5 days), or low.
- 03** Capture jurisdiction: determine governing law and locale to apply regulations.
- 04** Evaluate risk level: financial, regulatory, reputational, or strategic.
- 05** List required documents: attachments, approvals, NDAs, or precedent templates.
- 06** Assign owner: designate business line lead or legal counsel responsible.
- 07** Set escalation path: define when to loop partners or escalate to partners.

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What to Automate vs Human Review

Outline the automation boundaries and where human judgment remains essential. This page links data, tools, and decision rules for triage.

Key move Document every rule change to preserve auditability.

PRACTICAL CHECKLIST

- 01** Automate intake routing: auto-fill matter type, urgency, jurisdiction, and owner from inputs.
- 02** Auto-attach standard documents: intake checklist, NDAs, and template agreements.
- 03** Human review for risk signals: unusual clauses, conflicting jurisdictions, or high financial exposure.
- 04** Maintain decision logs: track triage decisions and rationale.
- 05** Data sources: DMS, CMS, contracts repository, and prior matter histories.
- 06** Tools: LLM-assisted triage, workflow automation, and secure sharing.
- 07** Guardrails: privacy, data minimization, and access controls.

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Implementation Plan & Metrics

Provide a practical rollout with ownership, approvals, and success metrics. Propose weekly increments to embed adoption.

Key move Establish a weekly retro to capture learnings and tighten controls.

PRACTICAL CHECKLIST

- 01** Adopt weekly pilots: start with 2–3 representative matter types.
- 02** Define ownership: legal ops lead, IT liaison, and business-owner sponsor.
- 03** Approval gates: triage criteria, escalation thresholds, and data retention rules.
- 04** Measurement: track cycle time, accuracy, and user satisfaction.
- 05** Data governance: classify data, retention, and allowed model access.
- 06** Security: encryption, access logs, and least-privilege policies.
- 07** Weekly adoption steps: run a 1-hour sync, adjust based on feedback.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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