

Legal · Vertical playbook

Orchestrating the document, matter and human realities of legal work

How to cut document-heavy review time and rework while lawyers stay in control of every sign-off.



What this guide covers

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Why this context is distinct

02 Three challenges in legal work
Technical, business, human

03 Governed by architecture
The architecture is the proof

04 Accelerate matter & review cycles
The operational delta

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08 What good looks like
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The argument in one page

Legal teams operate under sustained document-heavy workload. Files arrive in mixed formats, contracts, emails, notes, scanned notices and filings, and each must be read, dated, reconciled and turned into something a lawyer can act on. When that work falls behind, strategy slips and rework consumes lawyer hours that cannot be recovered.

Black-box AI cannot pass a lawyer's sign-off bar. A model that produces a chronology or a redline without showing where each fact came from, and without pinning each statement to a source document, gives a lawyer no defensible basis to rely on it.



Deterministic execution

Document and matter systems hold the record, not the model.



Cited and auditable

Every output traces back to source.



Sovereign

Runs in cloud, VPC, or on-prem.

CreateOS runs AI as a coordination layer over deterministic tools. The model coordinates and drafts. Document and matter systems hold the authoritative documents, and every fact, date and clause is pinned to a specific document, page and line. The lawyer reviews, validates and signs, and every action is written to an immutable audit log.

This is an execution and governance layer, not a legal-judgment system. It deploys in cloud, VPC, or air-gapped on-prem, region-locked with zero retention, so confidentiality and privilege never force a trade-off between AI capability and data control.

01

Built for a signature that carries weight

Legal work sits where most software misreads the room: a high document load in every conceivable format, facts scattered across files never designed to be read together, and every consequential output carrying a lawyer's signature.

AI that cannot show its work is a liability here. When reliance carries professional, ethical and often privileged weight, a model output without a traceable chain back to the source documents leaves the lawyer two bad options: accept it on faith, or re-derive it from scratch.

This guide is for legal operations and senior practitioners weighing whether AI can cut review time and rework without adding risk. It can, under one condition: AI coordinates over the document and matter systems, never a black box producing legal conclusions. The lawyer is the decision authority at every sign-off.

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A legal position a model cannot explain is a position a lawyer cannot sign.

CreateOS keeps the lawyer in the loop and the reasoning on the record.

CreateOS positioning

02

Three pressures, three failure modes

Cutting review time and rework is not one problem. Solve only one of these and the other two still bite.



Technical

Mixed-format files

A matter file is rarely one clean dataset. It spans contracts, emails, notes, scanned notices and filings across a DMS, a matter system and shared drives, with near-zero tolerance for a fact that cannot be traced.



Business

Document-heavy load

Intake, document review, clause extraction and citation checking consume lawyer and paralegal hours. A review that misses a key fact triggers a rework cycle, and each cycle adds days to the matter.



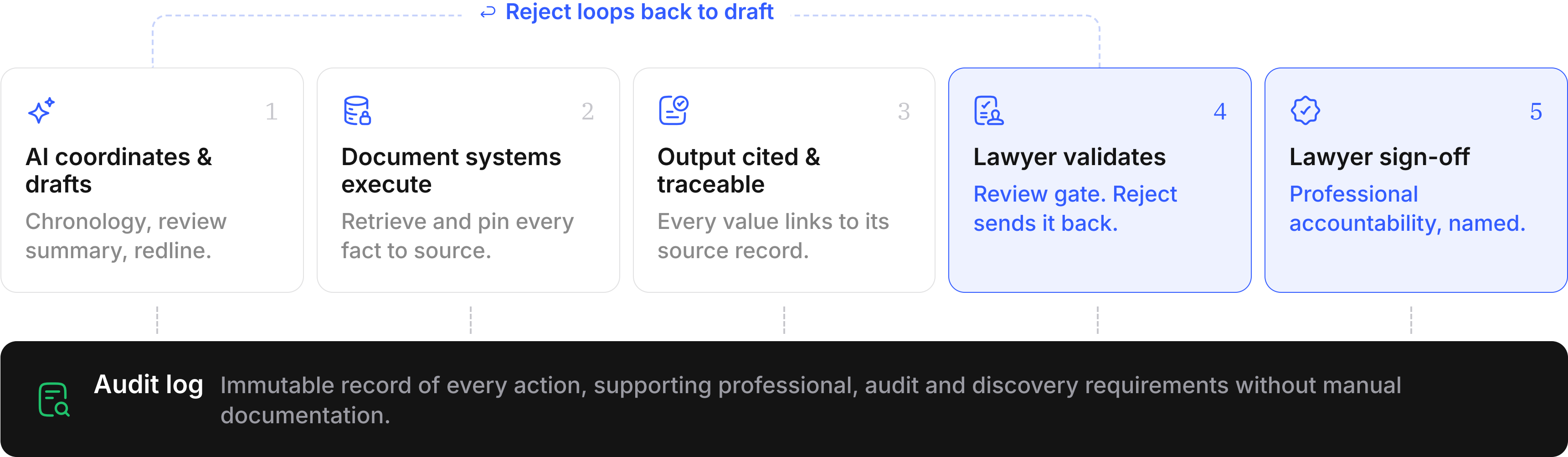
Human

Trust and privilege

Lawyers will not adopt AI whose output they cannot verify, and accountability cannot be delegated to a model. Privileged, sensitive documents cannot be retained, leaked or mixed across matters.

03

The deterministic core executes. AI only coordinates.



04

Review a proposal, do not assemble one

Matter intake & timeline reconstruction

Reading a mixed-format file end to end and building a dated chronology becomes a drafted timeline in a fraction of the time. The lawyer validates; the mechanical read-and-date work is gone, not the legal judgment.

Litigation document review

Drafted and pre-checked before it reaches the lawyer. The AI layer surfaces relevant documents, flags evidentiary gaps, and pins every extracted fact to its source. Material that would be found late gets caught at drafting.

Contract review & redlining

Run against the document set, not memory. Each non-standard or missing clause arrives cited to the specific document and location, so the lawyer reviews a finding with its source attached.



05

Each pillar answers a challenge

1



Answers Technical

Orchestrate, do not replace

Document and matter systems stay the authoritative record. CreateOS sends each task to the right tool and assembles results into a proposal. Coordination speed, no new source of error.

2



Answers Business

Govern every action

Every tool call logged, every proposal tied to its source records, every review decision recorded. Structural, not process discipline. It cannot be bypassed.

3



Answers Human

Keep the lawyer in control

The lawyer is the decision authority at every sign-off. The AI does the mechanical reading and assembly, never the legal decision. New associates learn from a complete audit trail.

06

Value before overhead

1



Orchestration mindset

Connects to the document and matter systems already in use. Only the coordination layer is new.

2



Human-in-the-loop

Review and sign-off are the point, not overhead. Lawyer time goes to judgment.

3



Sovereignty

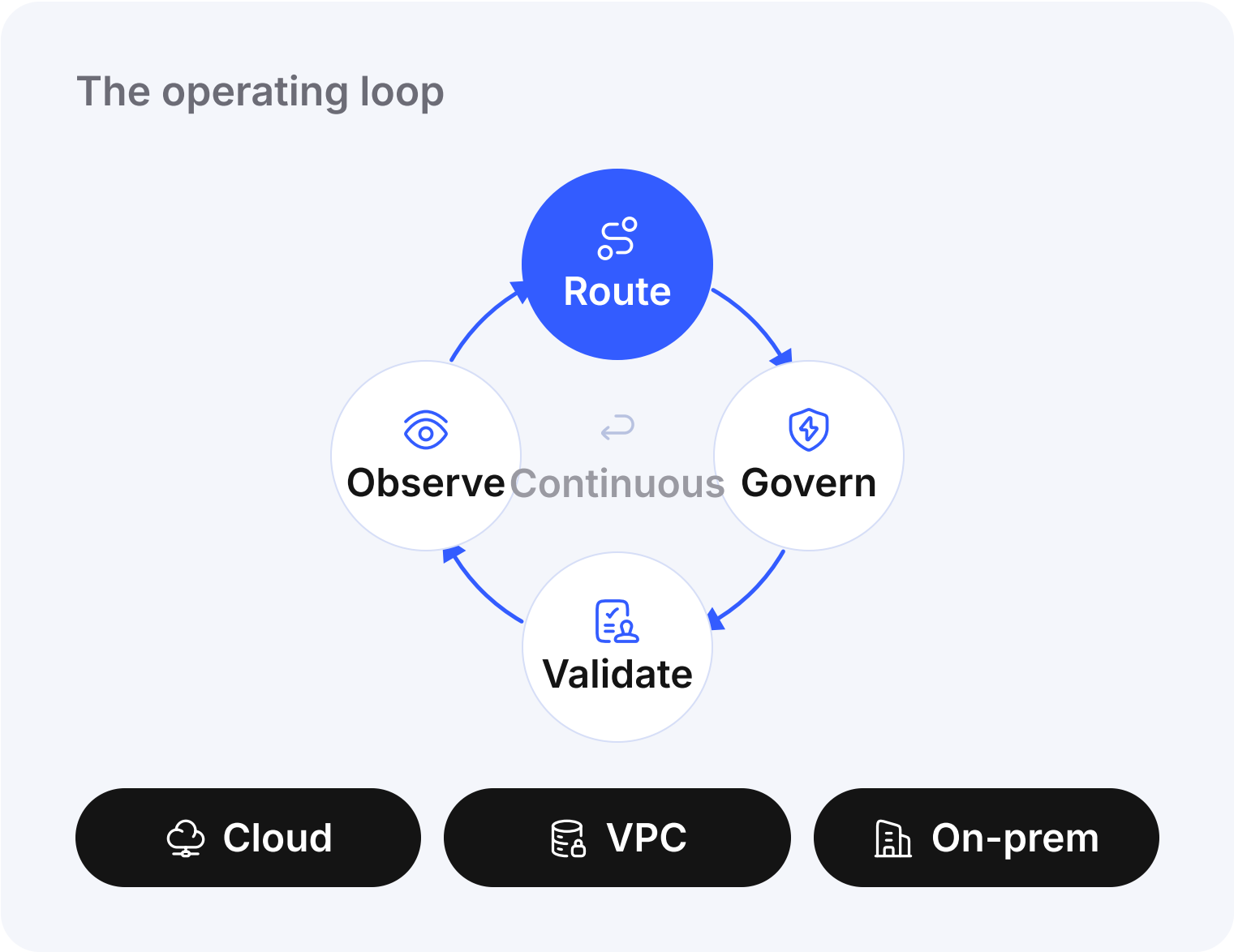
Cloud, VPC, or air-gapped on-prem, region-locked with zero retention.

4



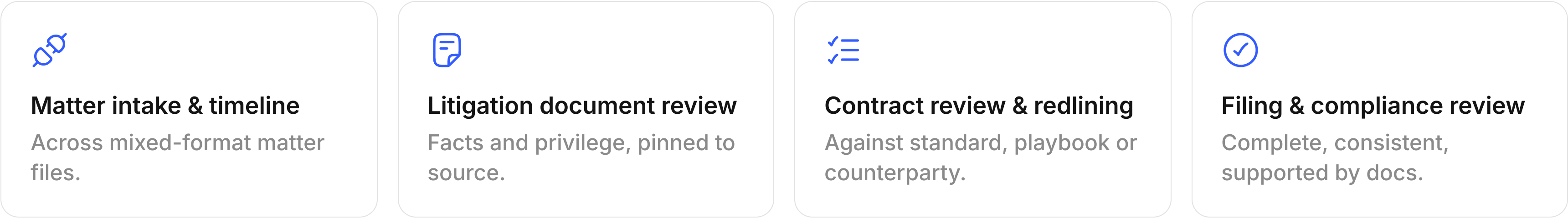
Observability

Every action and rejection is logged, becoming data that improves the workflow.

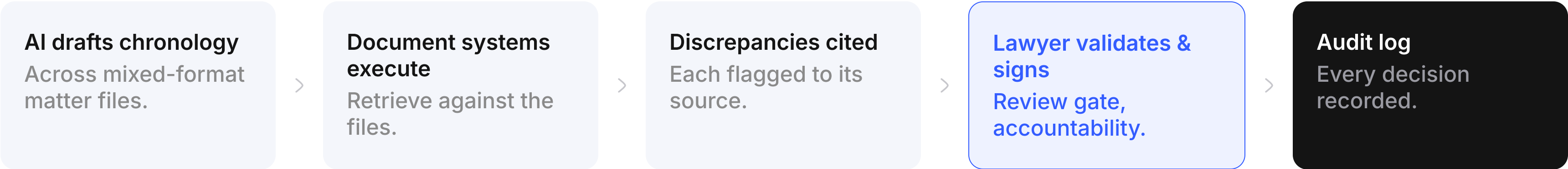


07

One skeleton, four workflows



Worked example · Matter intake & timeline reconstruction



08

Five guarantees, structural by design



Deterministic execution
Every fact retrieved from the source documents, never the model alone.



Every output cited
Every statement traces to a source document, page and line.



Lawyer sign-off
A human review gate before any output leaves, named and timestamped.



Complete audit trail
Every action logged. Immutable, automatic, discovery-ready.



Cloud, VPC, or air-gapped on-prem
Region-locked, zero retention, no capability penalty.

✔ An execution and governance layer, not a legal-judgment system. The lawyer makes the legal decision.

Ready to see it in your environment?

The unified AI execution layer for the enterprise.

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Scan to explore
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Illustrative architecture.