

# New-matter intake at Ravensworth Hale LLP

Pages from the Standard engagement deliverable: executive summary, current-state process map, bottleneck analysis, simulation forecast and sequenced recommendations.

DEMONSTRATION DOCUMENT · FICTIONAL CLIENT · FICTIONAL DATA

Prepared by

ClearFlow Consulting

Engagement type

Standard · Fixed scope

Process

New-matter intake

Excerpt of

28-page audit report

Status

Sample for prospective clients

|                                                                                                                                                                    |          |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| <b>Executive summary</b>                                                                                                                                           | <b>1</b> |
| New matters take a median 13 working days to open; three bottlenecks account for 72% of that time, and all three are fixable within 30 days without new headcount. |          |
| <b>Current state</b>                                                                                                                                               | <b>2</b> |
| Intake runs one step at a time across four teams; the longest waits are queues and sequencing, not the legal work itself.                                          |          |
| <b>Bottleneck analysis</b>                                                                                                                                         | <b>3</b> |
| Each bottleneck has a distinct root cause; none of the fixes needs new hires, and the biggest saving is a change of order that costs nothing.                      |          |
| <b>Simulation forecast</b>                                                                                                                                         | <b>4</b> |
| After the fixes the model forecasts a 5.6-day median, with the 10-day standard holding up to around 83 matters a month; today it is missed at any volume.          |          |
| <b>Recommendations</b>                                                                                                                                             | <b>5</b> |
| Sequence matters: the new letter pack carries the ID request, so the largest saving lands last but depends on the first two.                                       |          |
| <b>Method · About this document</b>                                                                                                                                | <b>6</b> |
| How a ClearFlow audit produces these pages                                                                                                                         |          |

New matters take a median 13 working days to open; three bottlenecks account for 72% of that time, and all three are fixable within 30 days without new headcount.

SITUATION

Ravensworth Hale is a 38-person commercial and private client firm opening around 46 new matters a month. Median time from first enquiry to an open matter is 13 working days; one in ten takes more than 20.

FINDING 1 · CONFLICT QUEUE

2.0

days waiting, twice-weekly batch

Every conflict search queues for one desk that clears them on Tuesdays and Fridays.

COMPLICATION

Partners tell referrers a matter opens within ten working days; over 85% of matters miss that. While prospects wait for terms, 8% of instructed enquiries go elsewhere, and fee earners start work before matters open.

FINDING 2 · ENGAGEMENT LETTER

31%

of letters go back

Letters drafted from scratch are queried, corrected and signed twice.

THE QUESTION THIS AUDIT ANSWERS

Where does the time go between enquiry and open matter, what does each delay cost, and which fixes are worth doing first?

FINDING 3 · ID AFTER SIGNATURE

3.5

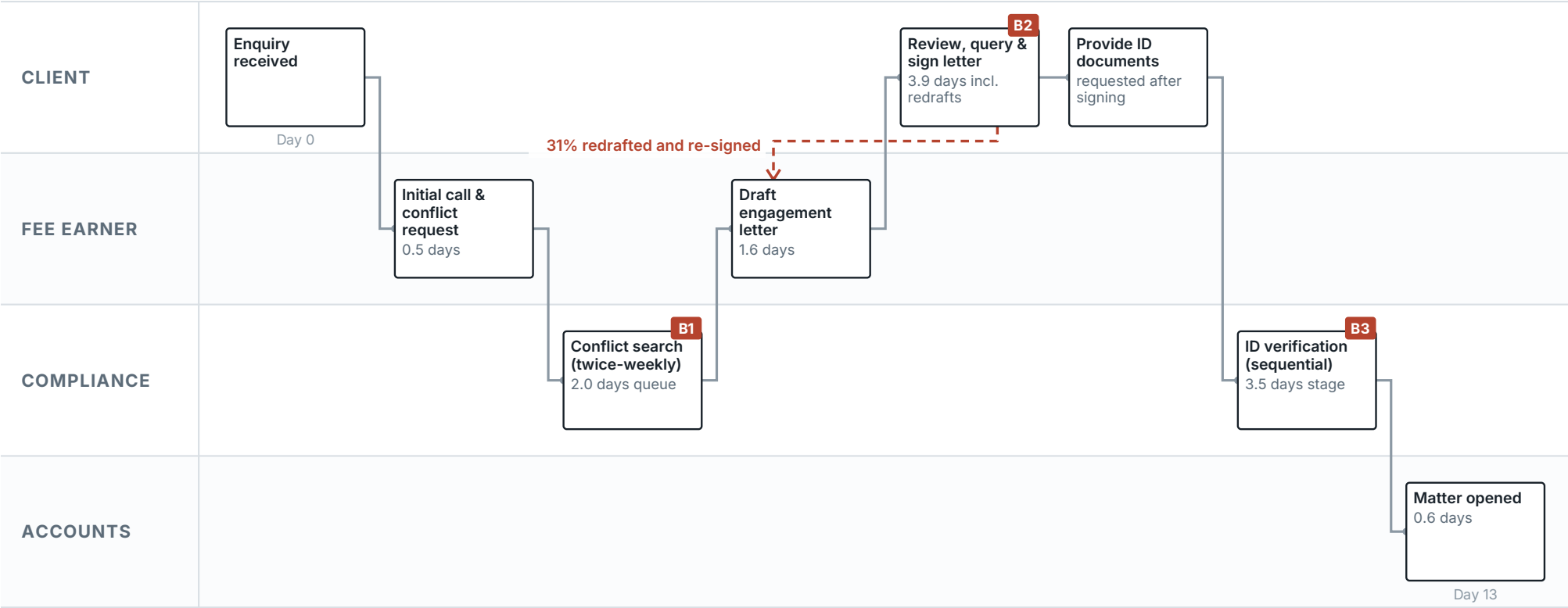
days added in sequence

Client ID is only requested once the engagement letter is signed.

**The answer:** Fix the three bottlenecks in sequence and the simulation forecasts a median of 5.6 working days to open (57% faster), matters missing the 10-day standard falling from over 85% to under 6%, and around 25 more instructions a year kept rather than lost to faster firms.

# Intake runs one step at a time across four teams; the longest waits are queues and sequencing, not the legal work itself.

EXHIBIT 1 · NEW-MATTER INTAKE, CURRENT STATE (MEDIAN WORKING DAYS PER STAGE)



Source: Fictional demonstration data. In a live engagement every stage duration is fitted from six months of matter records and practice management timestamps; simulated effects come from a discrete-event model of the mapped workflow, 5,000 matters per scenario, fixed seed.

Each bottleneck has a distinct root cause; none of the fixes needs new hires, and the biggest saving is a change of order that costs nothing.

EXHIBIT 2 · THE THREE BOTTLENECKS: COST, ROOT CAUSE AND SIMULATED EFFECT OF THE FIX

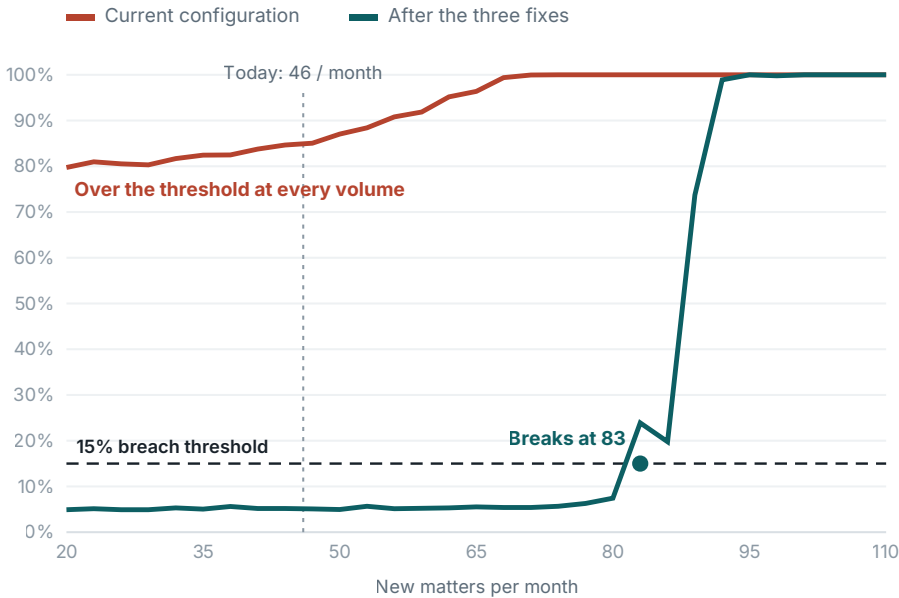
| BOTTLENECK                  | DELAY ADDED                                   | ROOT CAUSE                                                                                                                              | RECOMMENDED FIX                                                                                                                                                                   | SIMULATED EFFECT |
|-----------------------------|-----------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| B1 Conflict search queue    | 2.0 days queue time, all matters              | One person runs every search, clean or not, on two fixed days; partner clearance for potential conflicts has no owner on any given day. | Daily, self-serve searches: Fee earners run their own searches; clean results clear at once and potential conflicts go to compliance, with a duty partner for clearance each day. | –2.1 days median |
| B2 Engagement letter rework | 3.9 days letter sent to signed; 31% redrafted | No templates by matter type, so scope and fee wording is rewritten every time; letters go out as PDFs to print, sign and scan.          | Template letters, e-signature: Pre-approved templates for the six highest-volume matter types; letters sent for electronic signature.                                             | –2.0 days median |
| B3 ID after signature       | 3.5 days added in sequence; 24% re-requested  | Habit, not rule: nothing stops ID being requested at the first call, but the intake checklist lists it after the signed letter.         | Run ID in parallel: The ID request goes out with the letter pack; individual clients are verified electronically.                                                                 | –3.4 days median |

After the fixes the model forecasts a 5.6-day median, with the 10-day standard holding up to around 83 matters a month; today it is missed at any volume.

EXHIBIT 3 · WHERE THE DAYS COME FROM (MEDIAN WORKING DAYS, SEQUENTIAL ATTRIBUTION)



EXHIBIT 4 · SHARE OF MATTERS BREACHING THE 10-DAY STANDARD, BY MONTHLY INTAKE



Source: ClearFlow forecast engine, discrete-event simulation; 5,000 cases per scenario, 300 warm-up, fixed seed. Fictional demonstration data; live models are fitted from client case timestamps.

# Sequence matters: the new letter pack carries the ID request, so the largest saving lands last but depends on the first two.

EXHIBIT 5 · IMPLEMENTATION SEQUENCE, OWNER AND MEASURED TARGET PER STEP

DAYS 1-10 · CLEAR THE QUEUE

Run conflict searches daily, with a named duty partner for clearance each day.  
Owner: Compliance Officer. **Conflict result within one working day.**

Give fee earners self-serve conflict search; clean results clear automatically.  
Owner: Compliance Officer. **Most searches cleared without the compliance desk.**

Start a weekly intake report: every open enquiry and days at its current stage.  
Owner: Managing Partner. **Report live by day 10.**

DAYS 11-20 · FIX THE LETTER

Issue template engagement letters for the six highest-volume matter types, with pre-approved scope and fee wording.  
Owner: Managing Partner. **Redraft rate below 15%.**

Send engagement letters for electronic signature rather than print and scan.  
Owner: Practice Manager. **Median signature turnaround under 3 days.**

DAYS 21-30 · RUN IN PARALLEL

Send the ID request with the letter pack, not after signature.  
Owner: Practice Manager. **No matter waiting on ID once the letter is signed.**

Verify individual clients electronically; corporate clients stay on the manual route.  
Owner: Compliance Officer. **Re-requested ID packs below 15%.**

# How a ClearFlow audit produces these pages

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## 1 Map what actually happens

The map is built from the client's own materials: procedures, screenshots, system exports and case data, cross-checked against timestamps from their systems. Where the documented process and the real one diverge, an optional short structured Q&A captures the workarounds nobody wrote down. No discovery calls, no workshops.

## 2 Measure the delays

Every stage gets a duration distribution from case history, not an estimate from memory. Queue time is separated from work time.

## 3 Simulate the fixes

The mapped workflow becomes a discrete-event model loaded with real volumes, durations and rework rates. If a fix does not move the numbers, it does not make the report.

## 4 Sequence and hand over

Recommendations arrive as a phased sequence with owners and measured targets, so the report converts to a plan on the day it lands.

### ABOUT THIS SAMPLE

This document is a demonstration excerpt showing the structure, depth and standard of a live Standard report. **Ravenworth Hale LLP is a fictional firm and every figure in this document is fictional.** No client data was used. Live engagement reports are built exclusively from the client's own measured data.

Fictional demonstration data. In a live engagement every stage duration is fitted from six months of matter records and practice management timestamps; simulated effects come from a discrete-event model of the mapped workflow, 5,000 matters per scenario, fixed seed.