

## Jylo Playbook Success

We often hear that legal professionals are too swamped to consider alternative approaches. This is entirely understandable—the time spent exploring a different solution could be wasted if it proves unsuitable.

Jylo was built to automate the very workflows occupying your time. Rather than waste time building bespoke solutions for individual professionals, our team built something with the potential to automate a massive variety of workflows. Organisations completely outside the legal profession are now utilising our platform and seeing incredible gains in productivity.

What's great about AI is that computers can now be instructed using natural language. There's an element of skill involved, but what we've found is that lawyers are already incredible wordsmiths, making them prime candidates to leverage the benefits of AI before many other professions.

Without professional expertise, AI can be a fun tool. With it, it turns into a productivity machine. AI isn't skilful enough to instruct itself—it needs to be guided by an expert. If you're ready to save countless hours on manual tasks, perhaps that expert is you. The success stories below showcase real-world implementations across different industries and departments, demonstrating the diversity of solutions you can build using Jylo.

### Success Stories

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Each success story focuses on a different industry or department, demonstrating the diversity of solutions you can build using Jylo Playbooks.

#### Note

All use cases featured in this guide are based on real-world implementations with genuine results. However, details have been altered and anonymised to protect client intellectual property and maintain confidentiality.

## Chronologies

### The Challenge

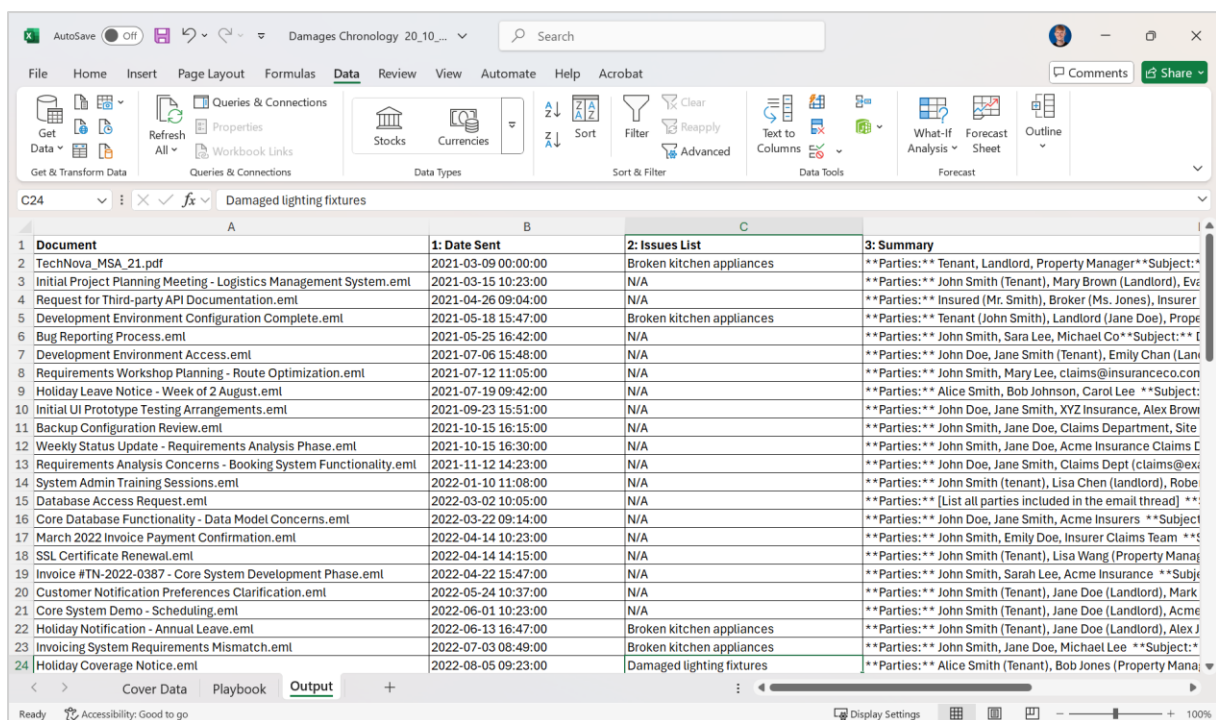
Chronologically order an entire email dataset and filter down to files containing evidence of damages from an issues list.

### The Solution

The playbook uses three prompts to systematically process your email dataset. First, it identifies the date of the earliest email sent in each file. Second, it uses the list to identify evidence of issues in the thread and allocates suitable issue labels. Finally, it produces a summary of the content with focus on issues identified.

### The Result

Once executed, responses export to Excel with each prompt populating a separate column—dates, issue labels, and email summaries. Sort the date column chronologically to create your master chronology. Filter by issue labels to generate sub-chronologies instantly. All files receive summaries to facilitate further interrogation.



Document	1: Date Sent	2: Issues List	3: Summary
TechNova_MSA_21.pdf	2021-03-09 00:00:00	Broken kitchen appliances	**Parties:** Tenant, Landlord, Property Manager**Subject:**
Initial Project Planning Meeting - Logistics Management System.eml	2021-03-15 10:23:00	N/A	**Parties:** John Smith (Tenant), Mary Brown (Landlord), Eve
Request for Third-party API Documentation.eml	2021-04-26 09:04:00	N/A	**Parties:** Insured (Mr. Smith), Broker (Ms. Jones), Insurer
Development Environment Configuration Complete.eml	2021-05-18 15:47:00	Broken kitchen appliances	**Parties:** Tenant (John Smith), Landlord (Jane Doe), Prop
Bug Reporting Process.eml	2021-05-25 16:42:00	N/A	**Parties:** John Smith, Sara Lee, Michael Co**Subject:** [
Development Environment Access.eml	2021-07-06 15:48:00	N/A	**Parties:** John Doe, Jane Smith (Tenant), Emily Chan (Land
Requirements Workshop Planning - Route Optimization.eml	2021-07-12 11:05:00	N/A	**Parties:** John Smith, Mary Lee, claims@insuranceco.com
Holiday Leave Notice - Week of 2 August.eml	2021-07-19 09:42:00	N/A	**Parties:** Alice Smith, Bob Johnson, Carol Lee **Subject:
Initial UI Prototype Testing Arrangements.eml	2021-09-23 15:51:00	N/A	**Parties:** John Doe, Jane Smith, XYZ Insurance, Alex Brow
Backup Configuration Review.eml	2021-10-15 16:15:00	N/A	**Parties:** John Smith, Jane Doe, Claims Department, Site
Weekly Status Update - Requirements Analysis Phase.eml	2021-10-15 16:30:00	N/A	**Parties:** John Smith, Jane Doe, Acme Insurance Claims D
Requirements Analysis Concerns - Booking System Functionality.eml	2021-11-12 14:23:00	N/A	**Parties:** John Doe, Jane Smith, Claims Dept (claims@ex
System Admin Training Sessions.eml	2022-01-10 11:08:00	N/A	**Parties:** John Smith (tenant), Lisa Chen (landlord), Robe
Database Access Request.eml	2022-03-02 10:05:00	N/A	**Parties:** [List all parties included in the email thread] **
Core Database Functionality - Data Model Concerns.eml	2022-03-22 09:14:00	N/A	**Parties:** John Doe, Jane Smith, Acme Insurers **Subject
March 2022 Invoice Payment Confirmation.eml	2022-04-14 10:23:00	N/A	**Parties:** John Smith, Emily Doe, Insurer Claims Team **
SSL Certificate Renewal.eml	2022-04-14 14:15:00	N/A	**Parties:** John Smith (Tenant), Lisa Wang (Property Manag
Invoice #TN-2022-0387 - Core System Development Phase.eml	2022-04-22 15:47:00	N/A	**Parties:** John Smith, Sarah Lee, Acme Insurance **Subje
Customer Notification Preferences Clarification.eml	2022-05-24 10:37:00	N/A	**Parties:** John Smith (Tenant), Jane Doe (Landlord), Mark
Core System Demo - Scheduling.eml	2022-06-01 10:23:00	N/A	**Parties:** John Smith (Tenant), Jane Doe (Landlord), Acme
Holiday Notification - Annual Leave.eml	2022-06-13 16:47:00	Broken kitchen appliances	**Parties:** John Smith (Tenant), Jane Doe (Landlord), Alex J
Invoicing System Requirements Mismatch.eml	2022-07-03 08:49:00	Broken kitchen appliances	**Parties:** John Smith, Jane Doe, Michael Lee **Subject:**
Holiday Coverage Notice.eml	2022-08-05 09:23:00	Damaged lighting fixtures	**Parties:** Alice Smith (tenant), Bob Jones (Property Mana

### What This Means for Your Practice

Similar playbooks can be applied to any dataset, what's important is that the documents are dated.

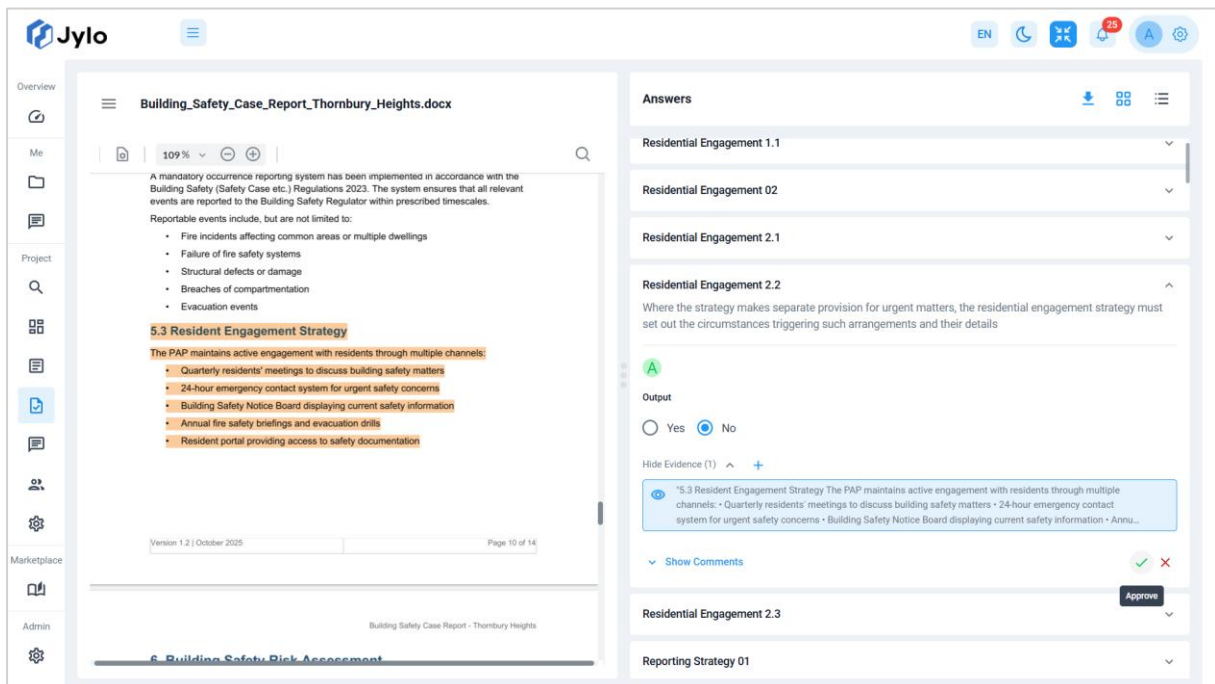
## Building Safety Case Compliance

### The Challenge

Review a 200k word building safety case assessment against a Building Safety Regulations (BSR) issues list containing 100 questions. The output needed: a comprehensive report including linguistic assessment, a score out of 100, and suggestions for improvement.

### The Solution

This playbook transforms an extensive compliance checklist into an automated assessment tool. Each question from the issues list becomes a separate prompt, with responses easily verifiable using Jylo's evidence and validation tools in the flow interface. A dedicated prompt conducts linguistic analysis for spelling and grammar, whilst a final prompt synthesises all responses into a scored report with recommendations for improvement.

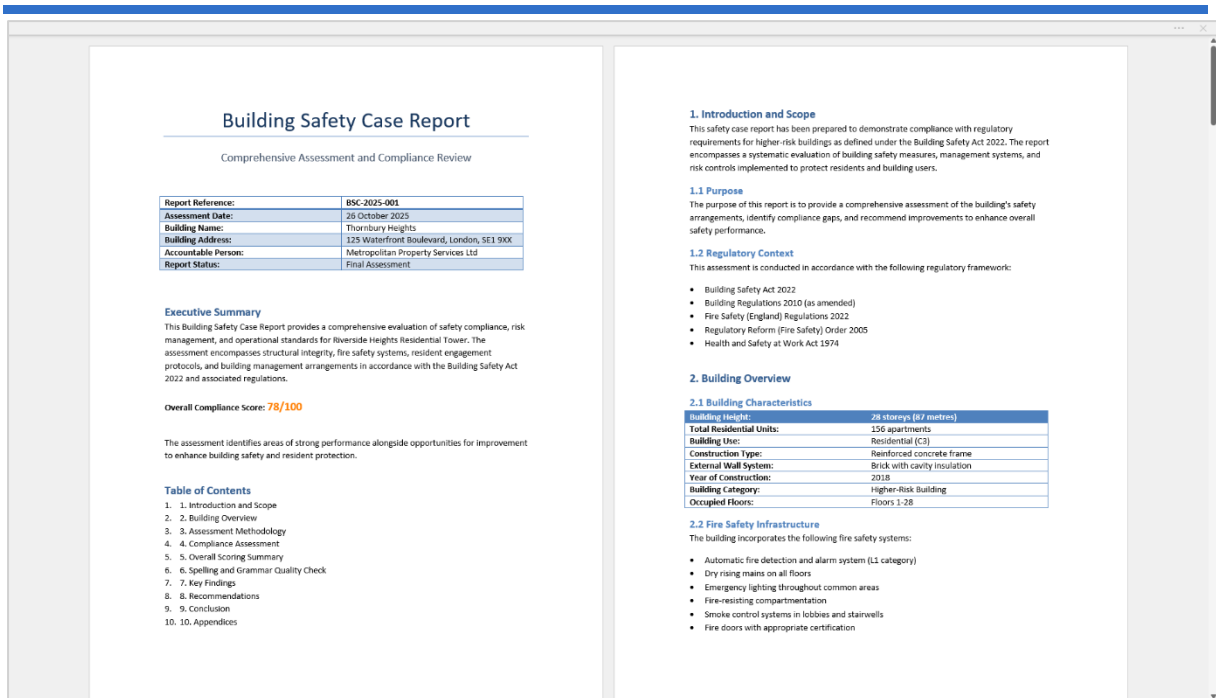


The screenshot displays the Jylo interface for document review and assessment. On the left, a sidebar shows navigation options: Overview, Me, Project, Marketplace, and Admin. The main document viewer shows a document titled "Building\_Safety\_Case\_Report\_Thornbury\_Heights.docx" at 109% zoom. The document content includes a section titled "5.3 Resident Engagement Strategy" with several bullet points: "Quarterly residents' meetings to discuss building safety matters", "24-hour emergency contact system for urgent safety concerns", "Building Safety Notice Board displaying current safety information", "Annual fire safety briefings and evacuation drills", and "Resident portal providing access to safety documentation".

On the right, the "Answers" panel shows a list of assessment questions, including "Residential Engagement 1.1", "Residential Engagement 02", "Residential Engagement 2.1", "Residential Engagement 2.2", "Residential Engagement 2.3", and "Reporting Strategy 01". The "Residential Engagement 2.2" question is expanded, showing the prompt: "Where the strategy makes separate provision for urgent matters, the residential engagement strategy must set out the circumstances triggering such arrangements and their details". The answer is "No", indicated by a selected radio button. Below the answer, there is a "Hide Evidence (1)" button and a preview of the evidence text: "5.3 Resident Engagement Strategy The PAP maintains active engagement with residents through multiple channels: • Quarterly residents' meetings to discuss building safety matters • 24-hour emergency contact system for urgent safety concerns • Building Safety Notice Board displaying current safety information • Annual fire safety briefings and evacuation drills • Resident portal providing access to safety documentation". An "Approve" button is visible at the bottom right of the answer panel.

### The Result

A complete assessment report with scoring and actionable recommendations—all at the click of a button.



## What This Means for Your Practice

Build the playbook once and carry out extensive assessments at the click of a button thereafter. The time investment upfront pays dividends on every subsequent use.

### Tip

Any issues list can typically be converted into a successful playbook without too much trouble—most of the prompts are already written for you!

## Statements of Work

### The Challenge

Law firms must adhere to strict guidelines whilst offering bespoke service when committing to perform work for clients. Creating statements of work requires balancing standardisation with customisation—a time-consuming process when done manually.

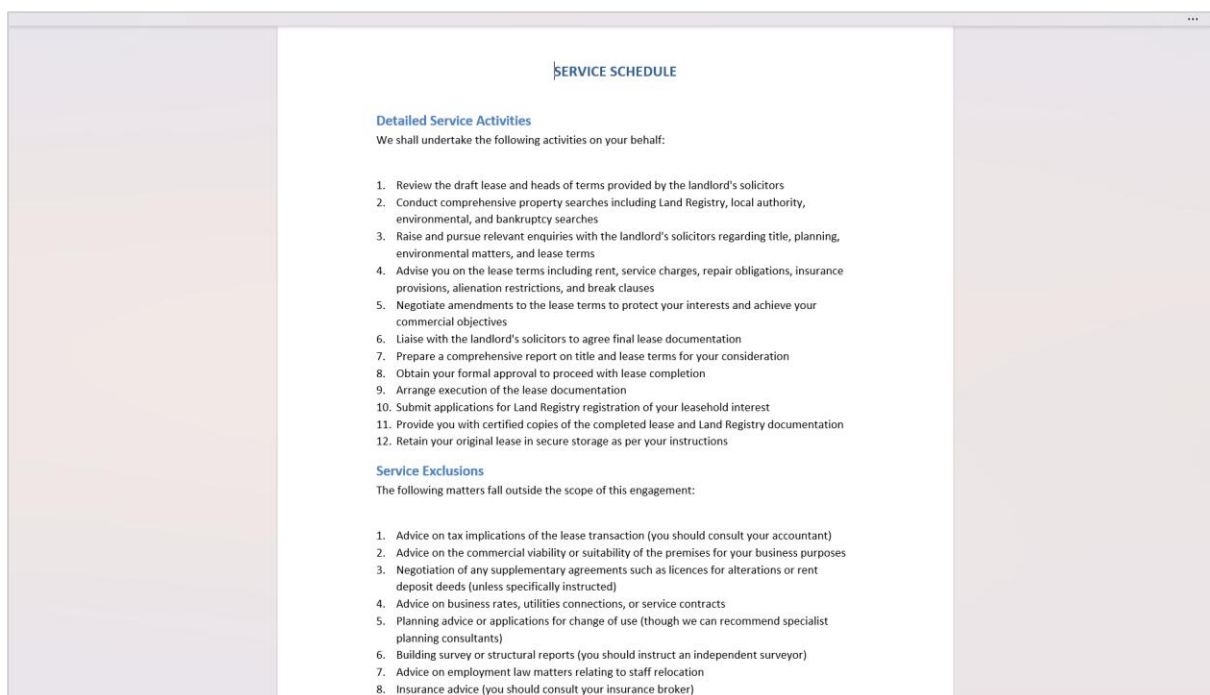
### The Solution

This playbook extracts relevant information from client correspondence and associated documents, then generates each section of the statement of work systematically. All relevant client correspondence and documents are reviewed as a bundle, with each prompt extracting or generating a specific section. By attaching your firm's legal guidelines and previous examples to prompts, the playbook ensures your firm's style

and standards are retained through all new engagements. Standard clauses are populated automatically whilst bespoke elements—scope and timescale—are tailored to the specific engagement.

### The Result

A professional statement of work combining standard clauses with bespoke scope and timescale, ready for review and client distribution.



### What This Means for Your Practice

Previous responses and communications are fantastic datasets for to aid AI in generating suitable yet bespoke content. The same approach works for information security questionnaires, tender responses and many other workflows.

### Traineeship Applications

#### The Challenge

Reviewing hundreds of traineeship applications to identify the most promising candidates is time-intensive, yet crucial for building your firm's future talent pipeline.

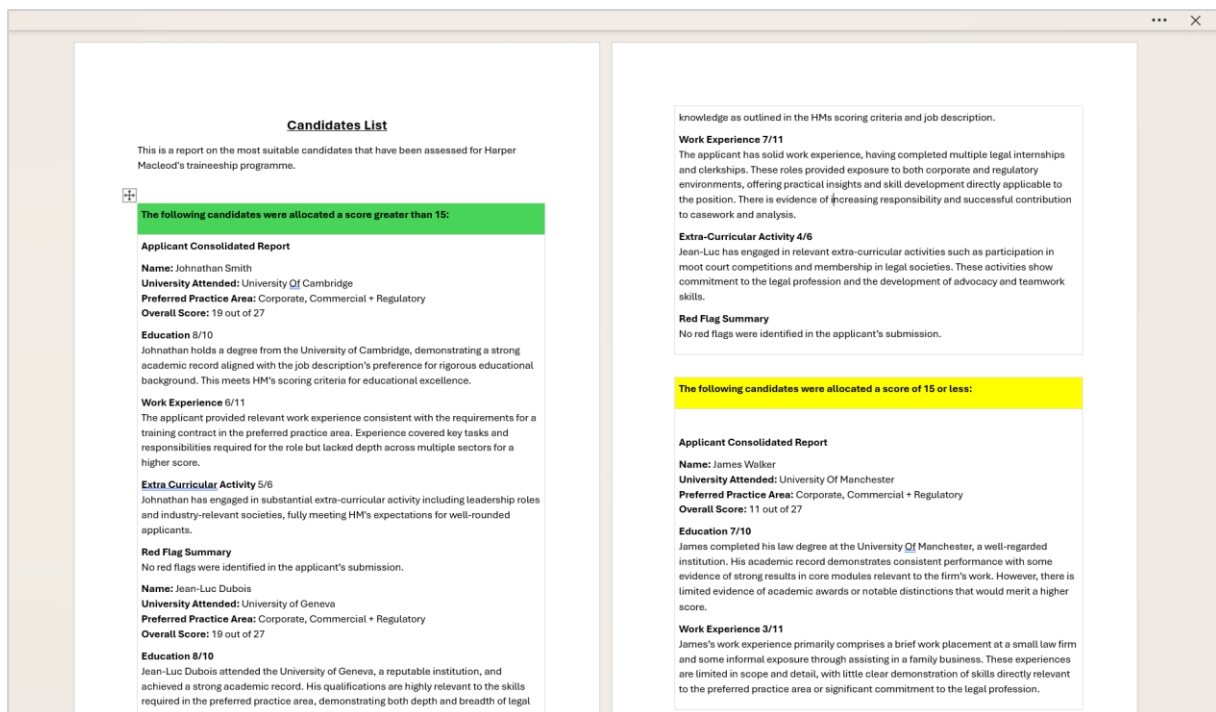
#### The Solution

This playbook reviews all traineeship applications against your job description and firm criteria, providing a suitability score for each candidate. Each application is scored

against your specified criteria, with applications ranked by score and the strongest candidates at the top. A summary of top applications is then generated in a Word document. The original pool of 200+ applications is distilled down to the top 20 for detailed human review, allowing your team to focus manual review efforts where they matter most.

## The Result

Your HR team receives a curated shortlist of the most suitable candidates, dramatically reducing time spent on initial screening whilst ensuring no strong applications are overlooked.



**Candidates List**

This is a report on the most suitable candidates that have been assessed for Harper Macteod's traineeship programme.

The following candidates were allocated a score greater than 15:

**Applicant Consolidated Report**

**Name:** Johnathan Smith  
**University Attended:** University Of Cambridge  
**Preferred Practice Area:** Corporate, Commercial + Regulatory  
**Overall Score:** 19 out of 27

**Education 8/10**  
Johnathan holds a degree from the University of Cambridge, demonstrating a strong academic record aligned with the job description's preference for rigorous educational background. This meets HM's scoring criteria for educational excellence.

**Work Experience 6/11**  
The applicant provided relevant work experience consistent with the requirements for a training contract in the preferred practice area. Experience covered key tasks and responsibilities required for the role but lacked depth across multiple sectors for a higher score.

**Extra Curricular Activity 5/6**  
Johnathan has engaged in substantial extra-curricular activity including leadership roles and industry-relevant societies, fully meeting HM's expectations for well-rounded applicants.

**Red Flag Summary**  
No red flags were identified in the applicant's submission.

**Name:** Jean-Luc Dubois  
**University Attended:** University of Geneva  
**Preferred Practice Area:** Corporate, Commercial + Regulatory  
**Overall Score:** 19 out of 27

**Education 8/10**  
Jean-Luc Dubois attended the University of Geneva, a reputable institution, and achieved a strong academic record. His qualifications are highly relevant to the skills required in the preferred practice area, demonstrating both depth and breadth of legal

knowledge as outlined in the HMs scoring criteria and job description.

**Work Experience 7/11**  
The applicant has solid work experience, having completed multiple legal internships and clerkships. These roles provided exposure to both corporate and regulatory environments, offering practical insights and skill development directly applicable to the position. There is evidence of increasing responsibility and successful contribution to casework and analysis.

**Extra-Curricular Activity 4/6**  
Jean-Luc has engaged in relevant extra-curricular activities such as participation in moot court competitions and membership in legal societies. These activities show commitment to the legal profession and the development of advocacy and teamwork skills.

**Red Flag Summary**  
No red flags were identified in the applicant's submission.

The following candidates were allocated a score of 15 or less:

**Applicant Consolidated Report**

**Name:** James Walker  
**University Attended:** University Of Manchester  
**Preferred Practice Area:** Corporate, Commercial + Regulatory  
**Overall Score:** 11 out of 27

**Education 7/10**  
James completed his law degree at the University Of Manchester, a well-regarded institution. His academic record demonstrates consistent performance with some evidence of strong results in core modules relevant to the firm's work. However, there is limited evidence of academic awards or notable distinctions that would merit a higher score.

**Work Experience 3/11**  
James's work experience primarily comprises a brief work placement at a small law firm and some informal exposure through assisting in a family business. These experiences are limited in scope and detail, with little clear demonstration of skills directly relevant to the preferred practice area or significant commitment to the legal profession.

## What This Means for Your Practice

Distil your requirements into a prompt and have AI allocate scores, allowing you to filter down to the content of most interest. This approach works for any high-volume screening process—from applications to expert witness evaluations.

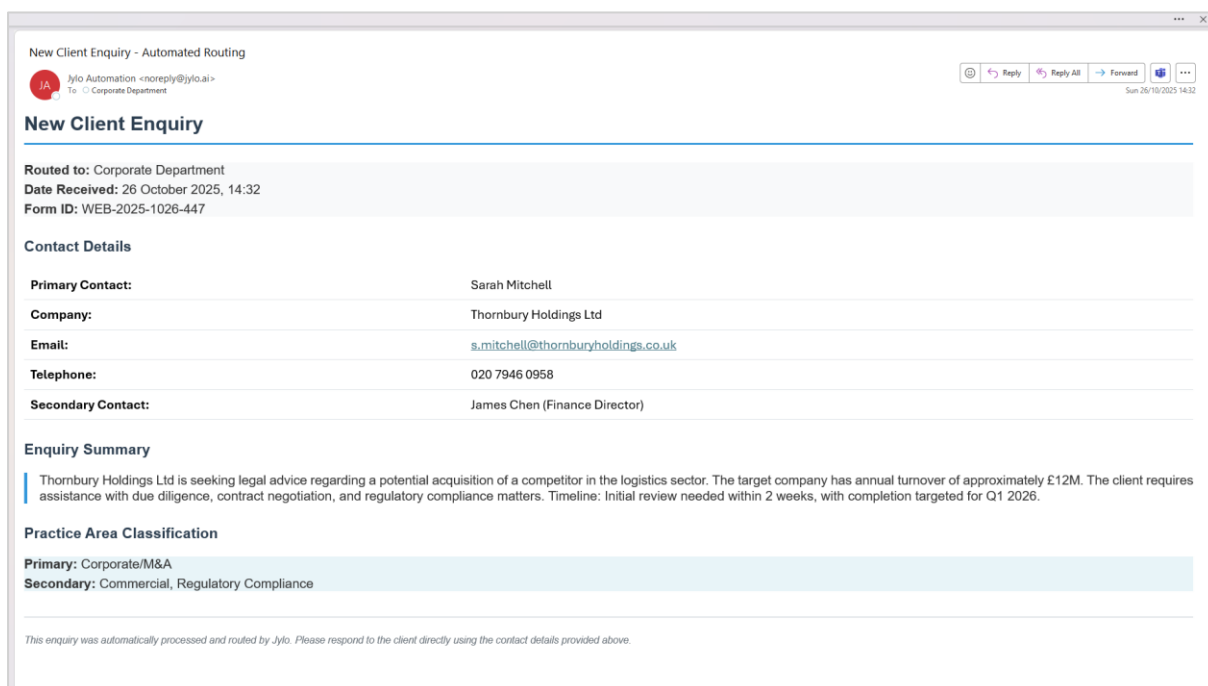
## Online Forms

### The Challenge

Manual processing of online form submissions creates administrative bottlenecks and risks misdirecting enquiries to the wrong department.

## The Solution

This playbook automatically pulls information from online forms into Jylo through an API, executes a playbook to extract and structure the information, then routes it to the correct department's inbox. Form submissions trigger automatic import to Jylo via API, with separate prompts actioning each field: prospects, contact details, and enquiry summary. A routing prompt determines the correct legal department based on your team directory, and the structured information is automatically sent to the relevant department's inbox.



## The Result

Enquiries are automatically categorised, structured, and routed to the relevant department, eliminating administrative delay and ensuring swift response times.

## What This Means for Your Practice

Less time spent on low-value administrative tasks means more time for client work. This same principle applies to any intake process—from new client enquiries to internal requests.

## Due Diligence

## The Challenge



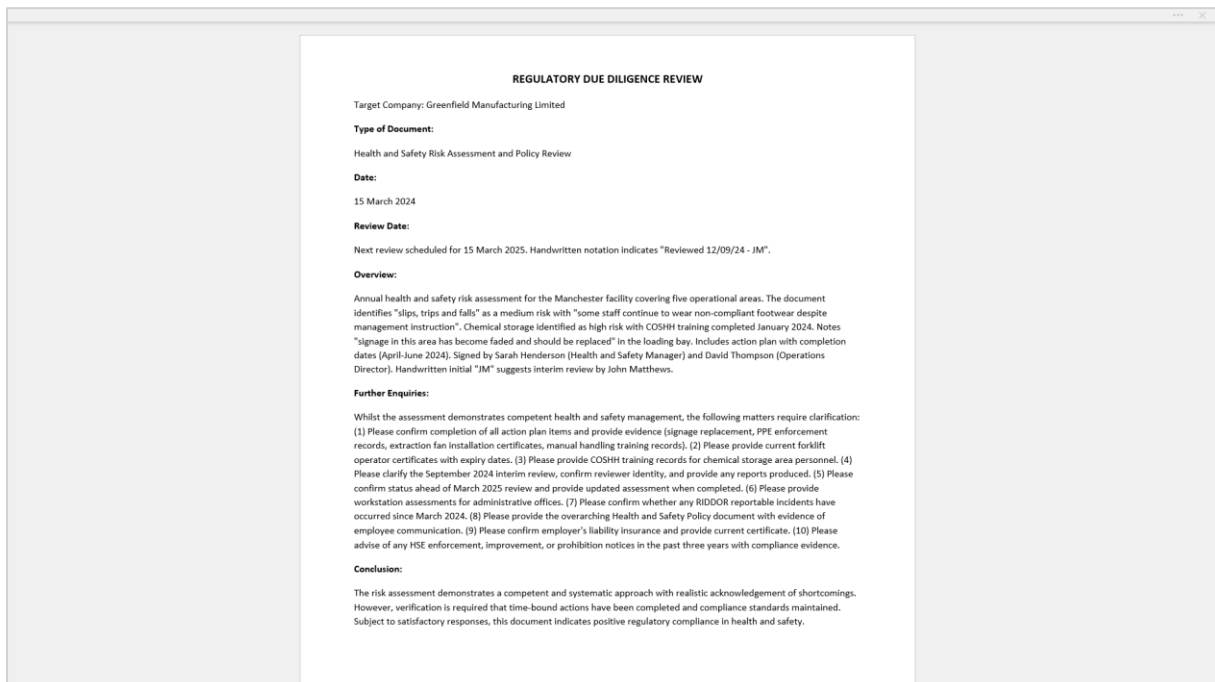
Perform thorough due diligence for clients considering company acquisitions. Different document types require different analytical approaches, making standardisation difficult whilst maintaining rigour.

## The Solution

This playbook receives a variety of documents and uses Jylo's conditional logic to execute the correct analysis depending on document type—whether policy documents, audit reports, company records, or financial statements. Documents are uploaded to the playbook in bulk, with Jylo's conditions automatically identifying document types and triggering type-specific analysis prompts for each document. Individual reports are generated highlighting key findings and red flags, with all reports following your firm's standardised format and risk criteria. A bespoke report is generated for each document, flagging anything your expert criteria deem significant.

## The Result

Comprehensive, standardised due diligence across all document types, completed in a fraction of the time manual review would require. Each document receives expert-level scrutiny based on your firm's established criteria.



## What This Means for Your Practice

Standardise your due diligence checks and save them in a playbook to execute necessary reviews in a fraction of the time. This ensures consistency across all matters

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whilst freeing senior staff to focus on strategic analysis rather than initial document review.

## Getting Started with Jylo

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Beginning your AI transformation is straightforward when you have the right foundations in place. You'll need:

- ✓ **Sample materials** from typical workflows
- ✓ **Clear objectives** for what you want to achieve

### We're Here to Help

Typically, we help our clients automate their workflows by offering:

- **Frequent catchups** to understand and refine the automation
- **Collaborative playbook development** where your expertise drives the solution
- **Continuous optimisation** based on your feedback and results

#### Remember

Your expertise is the foundation; we simply help you templatise it into powerful automation.

If you would like to discuss a potential use case or need help building a Playbook, reach out to [aaron.kirk@jylo.ai](mailto:aaron.kirk@jylo.ai).