SMBTeam

LAW FIRM REVENUE RECOVERY

The Unbilled Hours Recovery Playbook

How to use AI to find the billable time your team forgot to log, and recover that revenue every single week

> MONEY ON THE TABLE
>
> Most law firms are leaving thousands of dollars on the table every year. Not from bad cases, but from hours that were never logged.
>
> **Your attorneys did the work. Clients owe for it. But if a call, email, or document review never made it into your billing system, that money is gone.**

The average firm loses 1 to 2 hours per attorney per week to unbilled time, and most never know it.

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THE PROBLEM

01 The unbilled time problem is bigger than you think

Every law firm has it. Most have no system to find it.

Attorneys don't forget to work. They forget to log. A quick call handled on the way to a hearing. An email thread that resolved a client issue in ten minutes. A document reviewed after hours. All of that is billable time, and all of it can slip through the cracks before it ever reaches a time entry.

The problem compounds when entries that do get logged land on the wrong matter, or carry vague narratives like "call" or "email" that could be challenged in a fee dispute. Billing software doesn't catch this because it only sees what you give it. It has no way to compare what was logged against what actually happened.

$39,000

PER YEAR, SMALL FIRM

If two attorneys each miss 1.2 hours of billable time per week at an average rate of $325 per hour, that's $780 per week in unrecorded revenue. Over 50 weeks, that's **$39,000 a year.**

This is what the audit finds in firms that have never tracked it before.

THE PROCESS

02 How the weekly unbilled time audit works

Three phases. Fully automated. Nothing billed without your approval.

AI Workforce Pro's Weekly Unbilled Time Audit skill connects directly to every tool your firm already uses: your calendar, email, cloud storage, phone system, and practice management software. It reads what actually happened during the week, compares it to what was billed, and shows you exactly what was missed.

#	PHASE	WHAT AI WORKFORCE PRO DOES
1	**Pull**	Connects to every tool your firm uses and collects everything that happened during the audit week. Every call, meeting, email thread, document, and file access is gathered and listed.
2	**Reconcile**	Compares the work it found in your tools against what was logged in your billing system. It identifies the gap: hours worked but never recorded, entries on the wrong matter, and time entries with vague narratives that could be challenged.
3	**Bill the gap**	Shows you the exact unbilled hours by timekeeper and matter, calculates the dollar value at your firm's rates, and gives you a one-command option to push the corrected entries directly into your billing system.

NOTHING CHANGES UNTIL YOU APPROVE IT

The audit is read-only until you give the command to update.

You review every flagged entry (unbilled hours, wrong-matter assignments, vague narratives) and decide what to push. Once you say go, AI Workforce Pro updates your billing system and gives you a full accounting of every change made.

THE CONNECTIONS

03 The tools it connects to

If your firm uses it, AI Workforce Pro can read it.

The audit pulls data from every system where work actually happens, then cross-references it against your billing records. The tools it supports include:

Practice management and billing

- **Clio:** matters, time entries, billing rates, and client records
- **Filevine:** case files, tasks, and matter activity

Communication and scheduling

- **Google Calendar and Microsoft Outlook:** meetings, calls, and scheduled work
- **Gmail and Outlook email:** client correspondence and follow-ups
- **CallRail and Dialpad:** inbound and outbound call logs with duration and caller ID

Files and documents

- **Google Drive and Microsoft OneDrive / SharePoint:** documents accessed, drafted, or reviewed
- **Fathom and Otter.ai:** meeting transcripts and notes

Financial tools

- **QuickBooks:** for firms that cross-reference billing with accounting records

> THE EXAMPLE FIRM
>
> **The firm in this example uses Google Calendar, Gmail, Google Drive, CallRail, and Clio. The prompt simply lists which tools to pull from. You can also set the date range, the time zone, and whether to use the rates already stored in your billing system.**

THE PROMPT

04 The prompt, and what it produces

A live example from a real audit run

To run the audit, go into AI Workforce Pro, type the prompt below, and submit. The skill handles everything from there. This example is for a firm that uses Google tools and Clio, set to audit one specific week and annualize the results.

THE AUDIT PROMPT

Run the weekly unbilled time audit skill for the week of Monday, September 28th to Friday, October 2nd, 2026. Go into Google Calendar, Gmail, Google Drive, CallRail, and Clio. Our firm's time zone is New York. Use the rates we have listed in Clio and annualize this to 50 weeks.

Here's what the audit found when this prompt was run on a small firm with two timekeepers:

RESULT	WHAT IT MEANS
$405	Billable time unrecorded in a single week (1.2 hours)
$20,250	Projected missed revenue per year (50 weeks)
5.6 hrs	Gap between hours worked and hours logged that week
6 items	Unbilled time entries identified across two timekeepers

What the audit flagged beyond unbilled hours

- Two time entries logged on the wrong matter, so revenue was going to the wrong client file
- Three entries with vague narratives (like "call") that could be challenged in a fee dispute
- 16.7 hours of client work confirmed in the tools, but only 11.1 hours logged in Clio
- Grant (lead attorney): 4.2 hours missing. Priya (associate): 1.4 hours missing

THE UPDATE

05 Pushing the changes into Clio

One command. Everything updated.

After reviewing the audit findings, you tell AI Workforce Pro to push the approved changes into your billing system. It doesn't guess or batch update blindly, because you've already reviewed the full list of what it found. The command is straightforward:

THE UPDATE COMMAND

Go ahead and update Clio with these changes.

What happens when you submit the update command

- Time entries are created for unbilled hours, assigned to the correct matter and timekeeper
- Entries on the wrong matter are moved to the correct one
- Vague narratives are rewritten with clear, defensible descriptions
- A full accounting is generated showing every change made: what was added, what was moved, and what was updated

Once applied, your billing system reflects everything that actually happened that week. You bill for the work your attorneys did. Clients pay for the work they received.

AUTOPILOT

06 Putting it on autopilot

Schedule it once. Run every Friday. Never miss another hour.

Running the audit once is valuable. Running it every week automatically is what changes your firm's revenue baseline. AI Workforce Pro lets you schedule any skill to run on a recurring basis, so the audit happens whether you remember to run it or not.

How to set up the weekly schedule

- In AI Workforce Pro, click the clock icon to open Scheduled Skills
- Click New Scheduled Skill and name it Weekly Unbilled Time Audit
- Insert the Weekly Unbilled Time Audit skill using the $ shortcut
- Set the recurrence to Friday at 6:00 p.m.
- Save. It will run automatically every Friday from that point forward

What happens when it runs automatically

- You receive an alert before anything is submitted or changed in Clio
- You can preview the output: what was found, what would be billed, and what would be updated
- If everything looks correct, you approve it with a single command and Clio is updated
- If anything looks off, you review it manually before it touches your billing records

> **WHY FRIDAY AT 6:00 P.M.**
>
> Running the audit at the close of the work week captures everything from Monday through Friday while it's still fresh.
>
> **Any corrections or approvals can be handled before the weekend, so Monday morning starts with a clean ledger instead of a backlog of unlogged time.**

CHEAT SHEET

07 Quick reference

Everything you need to run your first audit

Before you start

- An AI Workforce Pro account with your firm's tools connected (calendar, email, drive, phone system, billing software)
- Your billing rates entered in your practice management system
- A specific date range to audit. Start with the most recent full work week

Quick reference, continued

THE AUDIT PROMPT (FILL IN YOUR TOOLS AND DATES)

Run the weekly unbilled time audit skill for the week of [START DATE] to [END DATE]. Go into [list your connected tools] and [your billing system]. Our firm's time zone is [your time zone]. Use the rates in [your billing system]. Annualize this to 50 weeks.

Review before approving

- Unbilled hours by timekeeper: confirm each entry before pushing to billing
- Wrong-matter entries: verify the corrected matter assignment
- Rewritten narratives: confirm each accurately describes the work performed

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