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A Roadmap for Integrating AI at Your Law Firm

Katie Langer · Thursday, May 9th, 2024

The usage of artificial intelligence has entered the legal field, and it will change the way attorneys and law firms operate for good. Now is the time to create a roadmap for adopting AI to make sure your firm is ready. Integrating this leading-edge technology can create benefits for your firm and clients, and you'll need strategic planning to do it right. Check out this roadmap to get started.

Educate your team on AI

The more educated you and your firm are about AI and its implications within the legal market, the more likely you are to maximize AI's possibilities while minimizing its risks. Seek educational opportunities to help your entire staff understand the foundations of using AI within law firms, including use cases, benefits, and ethical considerations.

1. Attend CLE and other educational opportunities

Many vendors and associations are beginning to provide education and guidance on AI for law firms. Begin attending events through your Bar Associations, practice area groups, technology vendors, and Association of Legal Administrators. You could also invite outside subject matter experts to train your team on AI usage.

2. Try AI products

"Rent" AI products now using SaaS pricing models to begin testing how AI could provide a competitive advantage for your law firm and staff. Many products include free trials or low-cost, short-term subscription options to get started with.

For each product you test, have trial users fill out a rubric to help evaluate the product's

effectiveness for your firm. The rubric can document things like the product's use cases, accuracy and performance, robustness and limitations, regulatory and ethical considerations, security, user experience, and cost.

3. Read up

Even though AI usage in the legal field is just beginning, many resources exist to help you understand the full landscape of AI. For example, the American Bar Association's [Law Technology Today](#) often covers topics related to AI, machine learning, and automation in law practice.

Of course, a quick Google search will produce a multitude of resources, including white papers on [AI in the legal market](#), [checklists](#) to implement AI at your firm, and even [sample AI policies](#) to help your firm document its AI approach.

Evaluate your firm's technology

To integrate AI technology effectively, your existing technology needs to be ready for it, too. That means you will need a solid technology infrastructure in place to ensure successful integration and operation of AI products when you're ready to implement them. Consider these recommendations to get started.

1. Move your core systems of record to cloud-based technology

Ensure your firm uses modernized cloud-based technology that supports continued enhancements and updates. By having your client data, research data, and documents in modern platforms, you increase your firm's ability to quickly access this information within AI platforms.

2. Research your vendors

Speak with your current vendors to understand their AI roadmap and AI usage within their platform. Ensure you understand the underlying technology the vendor plans to use and that it aligns with your firm's policy on AI usage.

3. Consider API access

Understand the API access available in your current software. APIs allow you to integrate your products and data with software and could speed up the transition to using AI within your law firm.

Form an AI committee within your firm

Evaluating AI's fit within your firm could be a significant undertaking, so be prepared to dedicate some resources to it. You will recoup costs incurred during this research and evaluation phase by avoiding surprises and setbacks with a well-prepared AI integration plan.

While you might need one point of contact to organize the effort, forming an AI task force within your firm allows multiple stakeholders to weigh in, ensures diverse perspectives and user groups are considered, and helps your firm prioritize AI and other emerging technologies.

This task force can begin identifying specific AI use cases within the firm, such as document review, contract analysis, legal research, or client communication. Prioritizing the use cases where AI technology can provide the most significant value will allow the committee to begin architecting your future technology stack to support them.

The committee should also be responsible for drafting policies and guidance on how your staff can use AI. This helps ensure your firm factors in compliance and ethical considerations when making decisions about using AI.

Synthesize your research and prioritize next steps

It's time to move from research and analysis to implementation. Synthesize information from each roadmap component above to determine your next steps. How you prioritize what AI solutions to implement will depend on your firm's unique set of users, client needs, existing technology infrastructure, budget, and many other factors.

Communication will be critical throughout your firm's AI journey. Remember to update stakeholders frequently, hold training sessions to upskill your staff on AI technology and its implications for their roles, and continually monitor how AI is working for your firm and clients.

Following these general guidelines will help you begin your AI journey. For more information on integrating AI in your law practice, check out these resources:

- [AI in the Legal Market white paper](#)

- [Checklist for your AI roadmap](#)

- [Sample AI policy for law firms](#)

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