

# Future-Proof Your Firm

## A Checklist for Your AI Roadmap

As the usage of artificial intelligence (AI) enters the legal field, now is the time for law firms to begin assessing their technology and creating a roadmap for adopting AI when the time comes. Use this checklist to be sure you're ready.

### Educate your team on AI

- What CLE and other educational opportunities about AI can your team attend?
- What AI products can you test before you buy them? How will you assess the effectiveness of each product for your firm?
- How will you stay up to date on AI and other emerging technologies? What resources can you read regularly?

### Evaluate your firm's current technology

- Do your core systems of record use cloud-based technology?
- How do your vendors use AI? Do they have an AI roadmap? Does their AI usage align with your firm's AI policy?
- Does your current software have API access to speed up your AI transition?

### Form an AI committee

- Who should participate in an AI task force to help guide your firm in adopting AI? What perspectives and user groups are important to include?
- What AI use cases is the committee exploring? How is it identifying use cases where AI can provide the most value?
- How will the committee draft policies and guidance on AI usage for your firm? Does your State Bar Association offer guidance?

### Synthesize your research and take action

- Synthesize your research
- Determine what factors will be considered to prioritize what AI solutions to implement
- Develop a communication plan to keep firm stakeholders informed
- Schedule regular training sessions for AI usage and role-specific implications
- Monitor AI's effectiveness for your firm continually and schedule frequent optimizations