

AI Readiness Checklist for Law Firms

Before implementing AI or automation, law firms must ensure operational, technical, ethical, and compliance readiness. This checklist helps firms assess their preparedness to adopt AI responsibly and effectively.

Strategic Readiness

- Clear business goals for AI adoption (time savings, intake growth, risk reduction)
- Executive or partner sponsorship identified
- Practice areas selected for initial automation rollout
- Defined success metrics (hours saved, conversion rates, error reduction)

Operational Readiness

- Documented intake and case workflows
- Identified repetitive or high-volume administrative tasks
- Clear ownership of workflows (attorney vs staff)
- Standardized templates and forms available

Data & Technology Readiness

- Digital intake forms or structured data sources available
- Case management / CRM systems identified for integration
- Secure document storage system in place
- Reliable internet and cloud infrastructure

Security & Compliance Readiness

- Client confidentiality policies documented
- AI tools vetted for data privacy and retention policies
- Secure access controls and authentication enabled
- Jurisdictional ethics rules reviewed for AI usage

Change Management Readiness

- Attorneys and staff informed about AI adoption goals
- Training plan identified for new workflows

- Clear escalation path for AI errors or exceptions
- Human review checkpoints defined

Client Experience Readiness

- Client communication tone and scripts approved
- Disclosure language for AI-assisted processes prepared
- Client consent process defined (if applicable)
- Feedback mechanism for client experience

Measurement & ROI Readiness

- Baseline time spent on admin tasks measured
- Billing rate assumptions documented
- ROI model defined (hours saved → dollar value)
- Continuous improvement cadence established

Firms that meet most of the criteria above are well-positioned to implement AI safely, ethically, and with strong ROI. AI readiness is not just about technology—it is about process clarity, governance, and disciplined execution.