

Where could AI help your firm?

Start with the work, check the tools you own, and choose one practical task to explore.

Firm / team: _____ Completed by: _____

01 Find the repeated work

List three tasks that repeat or involve copying information between tools. Use generic task descriptions; leave out client names and matter details.

Task	Who does it?	Times / week	Minutes / task

Weekly effort = times per week x minutes per task. This is a baseline, not a forecast of time saved.

02 Check what you already own

- ☐ We have checked current templates, automation and AI features.
- ☐ We know what an upgrade or integration would cost.
- ☐ We know who would maintain the workflow.

Tool or feature to investigate: _____

03 Choose a useful first candidate

- ☐ The task has a clear starting point and a clear finished result.
- ☐ Suitable inputs are available and approved for the proposed use.
- ☐ Someone can reliably review the result.

Task to explore first: _____

Plan one small pilot.

Complete this page with the person doing the task and the person reviewing the output.

04 Define the test

Task and intended output:

Pilot owner:

Reviewer:

Tool or approach to test:

Approved inputs / information the tool may access:

Information to keep out / questions to resolve before testing:

05 Agree on the checks

- ☐ Define a useful, accurate output and the checks a person must make.
- ☐ Confirm who may use the tool and access the information.
- ☐ Keep the current process available if the pilot does not help.

Compare the whole task: preparation, production, review and corrections. Record setup effort, additional cost and quality issues separately.

Current task time:

Pilot task time:

Review date:

Decision: ☐ Continue

☐ Adjust

☐ Stop

Want a firm-specific recommendation?

AI Assessment / \$499

Two Zoom calls and a written report tailored to your firm. Implementation and custom development are scoped separately.

[Explore the AI Assessment](#)

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