

Where Could AI Help Your Firm?

The AI Opportunity Workbook

A practical companion to the AI Opportunity Checklist

Choose one recurring task worth improving.

Start with the work your team actually does. Use this workbook to identify a useful opportunity, check what you already own, and outline a small pilot.

YOUR PATH

Map the work → Check your tools → Compare opportunities → Plan one pilot

Set aside about 20 minutes for a first pass. Complete it with someone who does the work, then discuss what is worth testing.

Firm / team: _____

Completed by: _____ Date: _____

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01 / Find the repeated work

Where does your team get stuck?

List three tasks that repeat often or require the same information to be handled more than once. Describe the task rather than naming an AI product.

Prompts to consider:

- What gets copied between tools?
- Which requests need repeated follow-up?
- What does your team explain or format again and again?
- Which task has a clear starting point and a clear finished result?

Weekly effort estimate = times per week × minutes per task.

Use your own estimates. This is a starting baseline, not a prediction of time saved.

Examples to spark ideas: turn meeting notes into an internal task list; organize approved marketing content; prepare a first draft of an internal checklist.

Use generic task descriptions in this workbook. Leave out client names and matter details.

Task	Who does it?	Times per week	Minutes each time
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----

02 / Check what you already own

The useful feature may already be there.

Before considering another subscription, review the tools your team uses today. Ask the people doing the task what is already working and where the process breaks down.

CHECK BEFORE ADDING A TOOL

- ☐ We have named the problem we want to solve.
- ☐ We have checked existing templates, automation and AI features.
- ☐ We know whether an upgrade or integration would cost extra.
- ☐ We have identified who would maintain the workflow.
- ☐ We know what question still needs an answer.

Could a better process or an existing feature solve this?

Person who will check: _____ By: _____

Current tool	What do we use it for?	Feature or integration to check
-----	-----	-----
-----	-----	-----
-----	-----	-----

03 / Compare the opportunities

Choose a useful first experiment.

Consider the three tasks from page 2. A good first candidate has a clear output, approved inputs, a person who can review it, and a practical way to test whether it helps.

Write Yes, No or Unsure. There is no score to add up.

If inputs, access or review are unclear, resolve those questions before testing. A task may be better suited to a template, a conventional automation, or a process change.

Candidate task: _____

Why this task first? _____

What must we clarify? _____

NEXT STEP

☐ Test a small version ☐ Investigate further ☐ Improve the existing process

Question	Task A	Task B	Task C
Does it repeat often enough to test?	----	----	----
Can we clearly describe a good result?	----	----	----
Are suitable inputs available and approved?	----	----	----
Can someone reliably check the output?	----	----	----
Can we test a small version without disrupting work?	----	----	----

04 / Plan one small pilot

Make the test specific.

Task and intended output:

Pilot owner: _____ Reviewer: _____

Tool or approach to test: _____

Approved sample inputs: _____

Information the tool can access: _____

Information to keep out: _____

Before the pilot, agree:

- ☐ What a useful, accurate output looks like.
- ☐ Which checks a person must perform.
- ☐ Who can use the tool and access the information.
- ☐ How the current process will continue if the pilot does not help.
- ☐ When the team will review the results.

MEASURE THE WHOLE TASK

Record time spent preparing inputs, producing the output, reviewing it and correcting it. Note setup effort and any additional cost separately.

Current task time: _____ Pilot task time: _____

Quality issues or corrections: _____

Review date: _____ Decision: ☐ Continue ☐ Adjust ☐ Stop

05 / Turn the worksheet into a plan

You have a starting point.

You should now have:

- ☐ One recurring task worth investigating.
- ☐ A list of existing tools and features to check.
- ☐ Clear questions about inputs, access and review.
- ☐ A named pilot owner and reviewer.
- ☐ A way to compare effort and output quality.

A useful next step can be an AI pilot, a simpler workflow, or better use of software you already own. The goal is to make the work easier to manage.

Want a firm-specific recommendation?

AI Assessment / \$499

Two Zoom calls and a written report tailored to your firm.

We review your recurring work, current tools and priorities, then identify practical opportunities and a sensible first step. The second call walks through the findings with you. Implementation and custom development are scoped separately.

[Explore the AI Assessment](#)

[Read the assessment article and watch the video](#)

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Keep your completed workbook for the conversation.