



Legal AI Playbook

How In-House Legal Teams Can Operationalize AI From Experimentation to Measurable Business Impact

Featuring:

- A practical framework for AI adoption
- Real insights from **Elastic** and **Ivo**
- Use case prioritization guidance
- Vendor evaluation criteria
- Implementation advice for lean teams
- A quick-start action checklist

Contents

1.	The State of Legal AI in 2026	03
2.	Start With the Problem, Not the Technology	04
3.	Choosing Impactful AI Use Cases	05
4.	Case Study: The NDA Workflow at Elastic	06
5.	Measuring What Matters	07
6.	Five Principles for Driving Adoption	08
7.	How to Evaluate AI Vendors	09
8.	Implementation Guide for Lean Teams	11
9.	Your Quick-Start Checklist	13

The State of Legal AI in 2026

2024 and 2025 were the years of AI experimentation in legal. Teams explored LLMs like ChatGPT, piloted contract tools, and tested what AI could do. 2026 is different. The question is no longer whether AI belongs in legal; it's how to make it work.

Across in-house teams, the pressure is clear: leadership expects AI to deliver measurable business impact, not just serve as a productivity side tool. The mandate has shifted from 'explore' to 'operationalize'.

The Shift

In 2024-25, AI was something legal teams experimented with. In 2026, it needs to be integrated into the actual workflows and truly embedded into how work gets done.

“Make AI your coworker, not a hobby.”

Caitlan Rocha
In-House Legal Counsel



What Operationalizing AI Actually Means

For most legal teams, operationalizing AI means moving from:

FROM

- Ad hoc AI tool usage
- Experimenting with generic LLMs
- Measuring success by time saved
- Individual adoption
- Solving problems after they occur

TO

- AI embedded in core workflows
- Using fit-for-purpose legal AI tools
- Measuring success by velocity and business impact
- Team-wide operationalization
- Designing AI-first legal processes from the start

Start With the Problem, Not the Technology

The most common mistake legal teams make when adopting AI is starting with the solution: choosing a tool before clearly identifying the problem. The best approach is to begin with the problem and work forward from there.

As companies grow, legal demand spreads across the organization, from sales contracts to procurement, marketing, HR, and product compliance. But most of that work still comes in through unstructured channels like Slack and email. Without a structured intake process, legal teams face:

- Inability to accurately report on volume, velocity, and capacity
- No visibility into which requests are outliers or high-risk
- A 'black hole' effect where requests fall through the cracks
- No clear data for justifying headcount or demonstrating legal value

Key Insight

If you solve intake right at the very top of where legal requests originate, you create waterfall effects, including better data for AI tools, improved visibility, and a cleaner foundation for every workflow downstream.

Questions to Ask Before Buying Any Tool

Before evaluating technology, answer these questions about your own operations:

1. What are the top 3 pain points consuming the most legal team time?
2. Where do legal requests currently originate (Slack, email, Salesforce, ad hoc)?
3. What is your current average time-to-resolution for your highest-volume request type?
4. What does 'success' look like – and can you measure it today?
5. Who else in the business is affected by the inefficiency you're trying to solve?

Choosing Impactful AI Use Cases

Many legal teams focus on AI that makes lawyers faster, like redlining tools, copilots, and research assistants. But the biggest gains come from reducing the work that reaches lawyers in the first place.

With structured intake and triage, requests can be automated, handled through self-service, or routed correctly before they reach a lawyer. Whether you're already using AI or just getting started, a legal front door improves your entire stack by directing the right work to the right system and lawyer. Successful adoption starts with choosing the right entry point.

	LOW RISK	HIGH RISK
LOW VOLUME	<p>NDA's, standard intake forms, LOAs, simple self-service requests</p>	<p>COI disclosures, complex vendor agreements, DSARs</p>
HIGH VOLUME	<p>Reseller agreements, partner templates, recurring standard workflows</p>	<p>M&A, board matters, high-stakes litigation support</p>



Case Study:

The NDA Workflow at Elastic

Elastic, the company behind Elasticsearch, operates at global scale with a lean legal team managing commercial agreements across multiple regions.

NDA's are high-volume, low-risk, and directly impact sales velocity, making them an ideal first use case. But Elastic's NDA process had a hidden problem: of the 23 days it took to close an NDA on average, nearly 20 weren't spent reviewing the contract at all. They were spent negotiating whose paper to use.

Using Checkbox, Elastic redesigned NDA intake to give counterparties four structured options:

- Sign as-is – quick, frictionless
- Make pre-approved changes via dropdowns – still self-service
- Redline the template – triggers review
- Submit your own paper – triggers full AI-assisted review

A small but effective tactic: the intake flow uses light humor to surface the cost of Option 4, nudging most counterparties toward Options 1 or 2 without friction. The result is a process that is faster for Elastic's legal team and a better experience for counterparties – nobody wants a three-week NDA negotiation on either side of the table.

Elastic didn't implement everything at once. The team started with intake and document generation, then layered in AI contract review – each component working independently but connecting seamlessly.

23 → 3 days

NDA turnaround time change: **87% reduction** in cycle time

Nearly 20 days

Previously lost to paper negotiation alone – now eliminated entirely

2 days → 2 min

Time to generate a Letter of Authorization / Deals no longer stall at quarter-end

Measuring What Matters

Legal has historically struggled to quantify its value to the business. AI changes that, but only if teams are intentional about measurement from the start. Every workflow you automate is an opportunity to capture before-and-after data that connects legal performance to business outcomes: **deal velocity, sales cycle length, revenue recognition timing.**

Framing results in this language doesn't just demonstrate ROI – it repositions legal as a strategic function rather than a cost center.

Start With a Baseline

Before deploying any AI workflow, record where you are today. What is the average time-to-resolution for your highest-volume request type? How many requests reach a lawyer that could have been handled through self-service? You cannot demonstrate ROI without a starting point – and the data you collect now becomes the proof you need later.

Two Types of Value to Track

Volume Reduction

Reducing the number of requests that reach legal through self-service, AI routing, and smart intake. Legal only touches what requires legal judgment.

Metrics to track:

Requests handled without attorney involvement; self-service completion rate; deflection rate

Productivity Uplift

Enabling the attorneys who do touch work to handle it faster and more consistently through AI-assisted review, playbook automation, and workflow tooling.

Metrics to track:

Time to first review; number of negotiation turns; time to signature; attorney hours per contract type

Five Principles for Driving Adoption

The legal teams that successfully operationalize AI share common traits. These five principles, drawn from the experiences of practitioners who have done it, separate teams that make progress from those stuck in pilot mode.

1

MINIMIZE CHANGE MANAGEMENT

Meet people where they already work. Salesforce users should still work in Salesforce; lawyers should still review in the tools they already use. AI should augment existing workflows, not replace them. Teams that require too much behavioral change see low adoption regardless of how powerful the underlying technology is.

2

DON'T LET PERFECT BE THE ENEMY OF GOOD

AI will not redline a contract exactly the way you would. Three lawyers reviewing the same document would not produce identical output either. Set realistic expectations, build in human-in-the-loop checkpoints, and treat early imperfections as learning opportunities rather than proof that the technology doesn't work.

3

KEEP THE HUMAN IN THE LOOP

AI is not here to remove lawyers from the process. It is here to reserve lawyers for the decisions that actually require legal judgment. The goal is to triage intelligently: use AI to route low-risk, high-volume work to self-service, and surface only the exceptions that genuinely require human expertise.

4

INVEST IN EARLY WINS TO FUND FUTURE COMPLEXITY

Start with a use case that is solvable within weeks, not months, one where you can demonstrate ROI quickly. That early win creates the internal credibility and time savings needed to build more sophisticated workflows. Success compounds: showing legal can solve business problems attracts requests from other departments.

5

BUILD AI LITERACY ACROSS THE TEAM

AI literacy is a professional skill, not a given. If you receive outputs that disappoint you, investigate whether it is a technology limitation or a prompting and configuration problem. Collaborate with your vendor, share learnings with peers, and treat AI as a coworker you are training, not a vending machine you press for results.

How to Evaluate AI Vendors

Whether you're evaluating an AI legal front door or other legal AI software, the legal AI market is crowded. Demo fatigue is real. Here is a three-point framework for cutting through the noise and identifying vendors that will actually deliver.

1. Understand the Data

AI is only as good as the data it is grounded in. Before being impressed by an interface, ask:

- What data is the AI trained or grounded on? Is it legal-specific data, your own data, or a generic web scrape?
- Is the tool a thin wrapper over a general-purpose LLM, or does it have a genuinely legal-specific model or RAG pipeline?
- How does it handle your proprietary data – is it used for training, or kept isolated?
- Can you see evidence of how it produces its outputs, rather than just trusting the result?

2. Look for Fit-for-Purpose Design

General-purpose LLMs are excellent for drafting and research, but legal workflows have specific requirements such as confidentiality, accuracy standards, jurisdiction awareness, and playbook alignment that generic tools cannot fully address. Ask:

- Was this tool designed specifically for legal teams, or is legal just one of many use cases?
- Does it integrate into legal-specific workflows (e.g., Word redlining, contract repositories)?
- Can it encode your organization's specific legal positions, fallback clauses, and risk thresholds?
- Does the vendor employ practicing or former lawyers who understand your work?

3. Test the Partnership

You are not just buying a product – you are entering a long-term relationship with a vendor who needs to grow with you. In a fast-moving field, the quality of the partnership matters as much as the quality of the tool. Evaluate:

- Is the vendor honest about what the tool cannot do, or do they oversell?
- Do they proactively share learnings from other customer implementations?
- Can you have a candid conversation about what's not working without damaging the relationship?
- Do they have a roadmap that aligns with where you want to go in 12-24 months?

A Word on Generalist Tools

General-purpose AI tools are genuinely useful for drafting, research, and working through large volumes of legal data. They complement, not replace, a purpose-built legal AI tool. Build a tech stack that uses both: generalist tools where breadth matters, and specialist tools where precision and legal expertise are non-negotiable.



"Being really intentional about the solutions you need—and being strategic in choosing a partner—is critical."

Caitlan Rocha

In-House Legal Counsel



Green Flags

- Honest about what the tool cannot do
- Legal-specific training data or RAG pipeline
- Practicing or former lawyers on the team
- Clear data isolation policy
- Roadmap that aligns with where you want to go in 12–24 months
- Proactively shares learnings from other customer implementations

Red Flags

- Overpromises in the demo, undersells limitations
- Generic LLM with a legal-themed interface
- No domain expertise on staff
- Vague or evasive about how your proprietary data is handled
- "We're building that" is the answer to every capability question
- No evidence of how outputs are produced

Implementation Guide for Lean Teams

Most in-house legal teams are lean. They do not have dedicated engineers, large implementation budgets, or months to wait for results.

This section translates the framework into practical steps for teams with limited resources.

STEP 1

IDENTIFY YOUR HIGHEST-PAIN, MOST MEASURABLE PROBLEM

Look at where legal time is being consumed most and where you already have data (or can easily collect it). Good candidates: NDAs, standard vendor agreements, intake from a specific team.

STEP 2

MAP THE CURRENT PROCESS IN DETAIL

Before touching any technology, document every step of your current workflow. Automation forces you to confront gaps and assumptions you've been working around. Be thorough.

STEP 3

PICK A NO-CODE OR LOW-CODE TOOL YOU CAN OWN

For lean teams, it's critical to choose tooling your team can build and iterate on without IT dependency. No-code intake and workflow tools can be built, modified, and expanded by legal ops in hours.

STEP 4

BUILD THE FIRST WORKFLOW AND SET A SUCCESS METRIC

Launch with one workflow, not twenty. Define success before you go live: what does the metric look like before and after? Track it from day one.

STEP 5

DEMONSTRATE THE WIN AND EXPAND

Show the result to leadership and to the teams who benefited. Use that proof to justify the next workflow or an additional tool. Let success compound.

Realistic Implementation Timescales

Implementation time varies widely by workflow complexity.

A useful rule of thumb:

✓ **Simple self-service intake form with auto-generated document: 1-3 days**

✓ **NDA workflow with multi-path logic and e-signature integration: 1-3 weeks**

✓ **Multi-team intake portal with reporting and integrations: 4-8 weeks**

Practical Tip

The first workflow you build creates the time to build the next one. Even a simple automation that saves five hours per week gives you back the bandwidth to tackle something more complex. Start small, prove the value, and reinvest the time you save.

Your Quick-Start Checklist

Phase 1: Diagnose

- Identify and document the top 3 highest-volume or highest-friction legal workflows
- Establish a baseline metric for each (average time, attorney hours, request volume)
- Map who in the business is affected by each inefficiency
- Prioritize one workflow to automate first based on volume, risk, and measurability

Phase 2: Design

- Document every step of your chosen workflow from request to resolution
- Identify which steps can be self-service, which need AI, and which need human review
- Define your 'first paper preference' strategy for contracting workflows
- Decide on tooling: intake, review, and/or repository
- Ensure tools meet users where they already work (Salesforce, Word, Slack, email, etc.)

Phase 3: Build and Launch

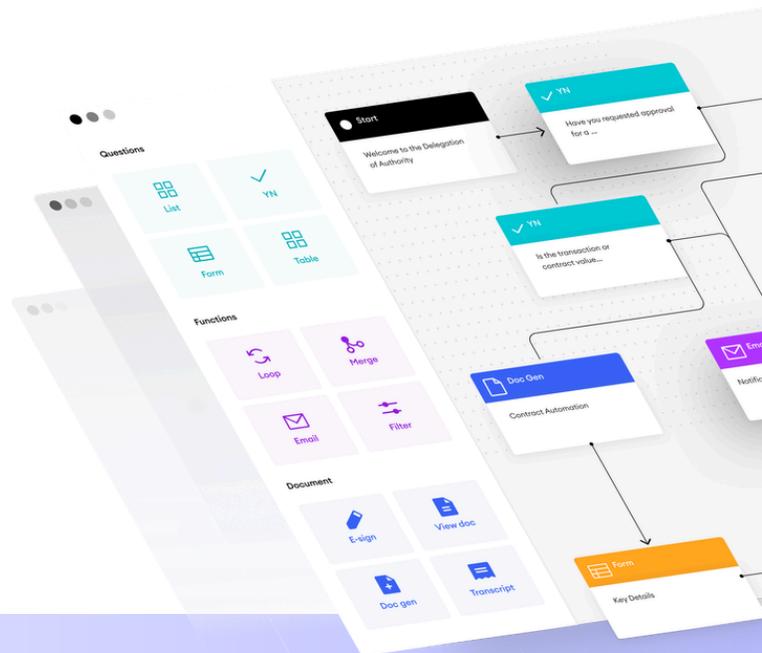
- Build the workflow in a no-code or low-code tool your team can own independently
- Define success metrics before going live
- Pilot with one team or a subset of requests before full rollout
- Communicate changes to the business in advance – brief affected teams
- Launch and monitor for the first 30 days

Phase 4: Expand

- Share results with leadership and the teams who benefited
- Use time savings from the first workflow to build the next one
- Document institutional knowledge in AI playbooks (legal positions, fallback clauses)
- Evaluate additional use cases using the prioritization matrix in Section 3
- Build a reporting layer for total request volume, velocity, and deflection rate



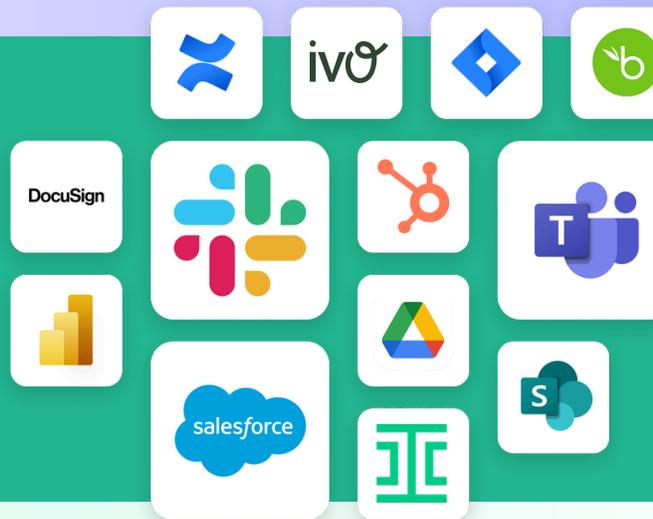
Checkbox is the Legal Front Door trusted by in-house legal teams across the globe. From structured intake and intelligent triage to automated workflows, self-service portals, and cross-tool orchestration, Checkbox provides the infrastructure layer that makes every other investment in your legal tech stack work harder.



Trusted by over 100 enterprise organizations including **SAP**, **PepsiCo**, and multiple **Fortune 500 companies** to streamline legal intake, reduce administrative burden, and improve service delivery across the business.

Legal requests come from every direction.

Checkbox's AI Legal Front Door centralizes all legal work into a single, unified system of knowledge.



✓ AI-powered intake across every channel

✓ Self-service for routine low-value work

✓ Intelligent triage and automated workflows

✓ Real-time visibility into workload and risk