



# Legal AI Playbook Series

## **The AI Legal Front Door vs. General-Purpose AI Tools**

Why CoPilot and Claude don't replace your Legal Front Door—and how to explain this to finance, IT, and executive stakeholders



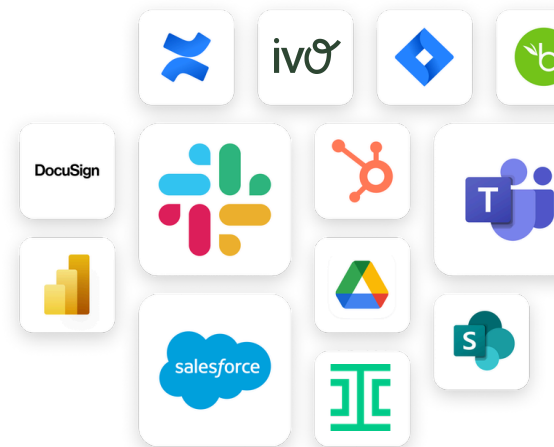
# The AI Legal Front Door vs. General-Purpose AI Tools

Why CoPilot and Claude don't replace your Legal Front Door—and how to explain this to finance, IT, and executive stakeholders

As organizations grow, legal demand expands across the business: sales contracts, procurement agreements, marketing approvals, HR issues, product compliance. But that work still enters legal through **unstructured channels** like Slack DMs, email threads, Teams messages, and ad-hoc requests across dozens of tools.

This creates systemic problems: no visibility into demand, incomplete requests, lawyers manually routing work, and repetitive low-value requests consuming senior legal time. General-purpose AI tools like CoPilot and Claude address the productivity side—they help individuals draft faster, summarize documents, and answer questions. That's valuable, and your team should keep using them.

But the downside is they only come into the equation **after a lawyer has already received work**. They don't answer the operational questions that actually determine efficiency: What work is coming into legal? Who should handle it? Should this reach a lawyer at all? Can it be automated?



## The Highest ROI Lever Is Upstream

Most legal technology focuses on making lawyers faster. But the biggest efficiency gains come from **reducing the work that reaches lawyers in the first place.**

With structured intake and triage, routine requests can be automated, handled through self-service, or routed correctly – before a lawyer touches them. That means lawyers spend their time on work that actually requires their expertise and judgment, not on repetitive tasks that could have been resolved upstream. Organizations using Checkbox's AI Legal Front Door typically see **20–40% reductions in lawyer-handled work.** In one example, after implementing automated NDA intake, only 5–7% of requests required redlining.

This is where tools like CoPilot and Claude fit into the picture, and where they're genuinely valuable. They should be part of your legal tech stack for tasks like redlining, document review, and research. But they operate after work reaches a lawyer. They aren't built to manage a structured intake process that classifies requests against your policies, routes them based on risk and complexity, enforces approval chains, and ensures consistent outcomes across every request. That requires a system, not an assistant.

You cannot optimize work you do not control.

## Legal Needs an Operating System

Every mature business function eventually gets its own central platform that acts as a system of record controlling how work comes in, how it's handled, and how results are measured. Sales has Salesforce. Support has Zendesk. IT has ServiceNow.

Legal currently has many applications: CLM, contract AI, e-billing, compliance tools—but it lacks this coordination layer. The AI Legal Front Door fills that gap. It becomes the **operating system for legal work**, orchestrating how requests enter, how they're handled, and how outcomes are measured.

This is a fundamentally different category from CoPilot or Claude. Those tools help with individual tasks. Checkbox controls the system.

## Side-by-Side Comparison

	General-Purpose AI	Checkbox: AI Legal Front Door
<b>Where It Operates</b>	After a lawyer receives work—optimizes individual tasks like drafting and review	Upstream—controls how work enters legal, automating and routing before a lawyer is involved
<b>What It Manages</b>	Individual moments of work (one document, one question)	The full lifecycle: intake, triage, workflow, matter management, and reporting
<b>AI Approach</b>	General-purpose AI with variable outputs that require prompt engineering	Purpose-built AI Agents that classify, route, trigger workflows, and escalate—consistently
<b>Configuration</b>	Requires engineering resources to build and modify	No-code: legal teams create and update workflows conversationally, without IT dependency
<b>Security &amp; Compliance</b>	Your team is responsible for SOC 2, audit trails, and access controls	SOC 2 certified with role-based access, audit trails, and data governance built in
<b>Integrations</b>	Each connection to CLM, matter management, or business systems is a custom project	Pre-built connectors across email, Slack, Teams, Salesforce, CLM, and matter management—all maintained
<b>Operational Visibility</b>	No structured data on legal demand, bottlenecks, or automation rates	Captures structured data across all requests—enabling measurement of demand, turnaround, and ROI
<b>Time to Value</b>	Months of development, testing, and iteration	Weeks to deploy production-ready workflows

## The “Vibe Coding” Reality

You've likely seen the demos: someone uses an AI coding assistant to build a working application in a weekend, posts it on LinkedIn, and the comments are full of people declaring that dedicated software platforms are now obsolete.

It's clear that AI has genuinely lowered the barrier to creating a first version of almost anything. But a first version is not a production system. And production is where the cost lives. Here's what typically happens when organizations try to build operational tooling internally with AI coding assistants:

**The first demo looks great.** A small team generates working workflows, connects to a few data sources, and shows something functional. Leadership is excited. The total investment is modest, requiring a few weeks of engineering time.

**Then reality sets in.** The demo didn't account for permissions, audit trails, role-based access, or how to handle exceptions. Reporting is manual. Integrations break when upstream systems update their APIs. AI token consumption is unpredictable and hard to budget. And a critical question emerges: who on the legal team is going to make changes, test updates, and troubleshoot when something breaks? These are engineering responsibilities that your legal team shouldn't be owning.

**The ongoing cost is the real surprise.** This isn't a one-time project; it's a permanent operational commitment.

AI has made the surface layer easier: generating forms, summarizing documents, building simple automations. But the operational infrastructure underneath—security, compliance, integration reliability, access controls, audit trails, and ongoing maintenance—hasn't gotten any simpler. That's where the real investment lives.

You or your colleagues may be seeing LinkedIn posts about AI replacing enterprise software, or watching demos where someone builds a working tool in an afternoon. What these demos don't show is the infrastructure required to turn a prototype into something a legal team can rely on every day.

When a colleague or stakeholder asks “why can't we just build this ourselves?”, it's worth distinguishing between what AI has made easier (generating a prototype) and what remains just as hard (running a system the legal team depends on every day).

## The Total Cost of Building In-House

The prototype-to-production cost curve described above is consistent with industry patterns when organizations attempt to build legal operations tooling in-house. Here's a detailed breakdown of the annual investment required:

Cost Category	Annual Estimate
Software Engineer (1 FTE)	\$130,000–\$200,000
Product / Project Manager (0.5 FTE)	\$75,000–\$120,000
QA Engineer / Testing Process	\$80,000–\$130,000
Infrastructure, Tooling & Cloud	\$15,000–\$30,000
Ongoing Compliance (SOC 2, audits)	\$20,000–\$50,000
<b>Estimated Year 1 Total</b>	<b>\$320,000–\$530,000</b>
<b>Estimated 3-Year Total</b>	<b>\$960,000–\$1,590,000</b>

\$320K–\$530K annual cost to build in-house	\$1M–\$1.6M 3-year total cost of ownership	100% of maintenance falls on your team
---	--	--

*These estimates use market-rate compensation data and standard infrastructure costs. Your actual figures may vary based on geography and seniority, but the order of magnitude is consistent. And these numbers don't include opportunity cost—the value your engineering and product teams could be delivering elsewhere instead of building legal workflow tooling.*

Starting small doesn't reduce the risk. A proof-of-concept for one workflow is manageable. Extending it to five workflows, across three teams, with different approval chains, compliance requirements, and integrations, while maintaining security and audit readiness, is a fundamentally different problem. Checkbox scales by design. Custom builds scale by re-investment.

## What This Means for Each Part of Your Organization

The AI Legal Front Door touches multiple stakeholders. Here's how it applies to different priorities across your organization:

### THE FINANCIAL PERSPECTIVE

- The fully-loaded cost of building legal operations tooling in-house – engineering, product management, quality assurance, compliance, and infrastructure – runs \$320K–\$530K per year, approaching \$1M–\$1.6M over three years. A platform subscription is a fraction of that, with predictable costs that don't compound as usage scales.
- Custom builds generate unpredictable maintenance expenses that grow with every new workflow, integration, and compliance requirement. A managed platform absorbs all of that.
- The AI Legal Front Door includes built-in ROI measurement and KPI reporting, making it easy to demonstrate value each quarter. That visibility simply doesn't exist when processes are built on disconnected AI prompts.
- Organizations using Checkbox typically see 20–40% reductions in lawyer-handled work – so you're not just avoiding build costs, you're reducing operational costs through automation.

### THE TECHNOLOGY PERSPECTIVE

- CoPilot and Claude are excellent productivity tools and belong in your stack. The AI Legal Front Door handles a different layer entirely: controlling how work enters legal, orchestrating processes across systems, and maintaining compliance infrastructure.
- Building equivalent capability in-house means taking on SOC 2 certification, integration maintenance, ongoing compliance, and no-code workflow tooling—none of which are core to your product or engineering mission.
- Checkbox integrates with your existing architecture (email, Slack, Teams, Salesforce, CLM, matter management). It extends your stack; it doesn't compete with it.
- Because legal teams configure and update their own workflows without engineering involvement, adopting Checkbox actually frees your technical resources for higher-priority work.

### THE LEGAL & EXECUTIVE PERSPECTIVE

- The AI Legal Front Door gives legal the same kind of operating system that Sales has in Salesforce and IT has in ServiceNow—controlling how work enters the function and measuring outcomes at scale.
- The risk of building in-house isn't just cost—it's time. Every month spent building is a month without the operational improvements and visibility your team needs now.
- Checkbox connects legal operations to broader business KPIs, making it easier to demonstrate strategic value to the organization rather than being perceived as a cost center.
- This is a platform your legal team controls directly—adapting workflows as policies change, not waiting for engineering sprint cycles.

## Common Questions

### “We already pay for CoPilot / Claude. Why pay for another tool?”

Because they operate at different layers. CoPilot helps a lawyer draft a document faster. Checkbox controls whether that document needs to reach a lawyer at all—and if it does, ensures it reaches the right lawyer with the right context through a consistent, auditable process. Most legal technology optimizes moments of work. Checkbox orchestrates the system. They’re complementary; they don’t overlap.

### “Our IT team could build this.”

A skilled engineering team can build many things. The question is whether this is the best use of their time and budget. Building a legal operations platform requires deep domain expertise, ongoing compliance (including SOC 2), no-code workflow tooling, and continuous iteration. The fully-loaded cost runs \$320K–\$530K per year—before accounting for the opportunity cost of diverting engineering talent from your core business. With Checkbox, legal teams configure their own workflows without engineering dependency.

### “I keep hearing that AI can do everything now. Why do we still need dedicated software?”

AI is genuinely transformative, and general-purpose tools will keep improving. But there’s a meaningful difference between what’s possible in a demo and what’s required in production. Individual AI tasks—drafting, summarizing, answering questions—are different from operational infrastructure: intake management, workflow orchestration, compliance enforcement, and cross-team reporting. Every mature business function runs on a dedicated operating system. Legal’s is the AI Legal Front Door.

### “Can’t we start small and build incrementally?”

You can, and many teams try. The challenge is that each addition compounds cost and complexity. A proof-of-concept for one workflow is manageable. Extending it to multiple workflows, teams, and jurisdictions—while maintaining security, compliance, and audit readiness—is a fundamentally different problem. Checkbox is designed to scale across all of that. Custom builds require re-investment at each stage.

### “What makes Checkbox different from other solutions?”

Many solutions focus on centralizing requests through intake portals—improving visibility but stopping at request management. Checkbox is designed to orchestrate how legal work happens across the entire stack. Three capabilities differentiate it: agentic workflow creation (legal teams build and modify workflows conversationally), AI-powered work orchestration (the system actively classifies, routes, and automates—not just collects), and operational visibility across all legal demand (structured data that enables CFO-level reporting and ROI measurement).

## The Bottom Line

Tools like CoPilot and Claude are valuable parts of your technology stack, but they can only optimize individual moments of existing work. Checkbox's AI Legal Front Door controls how work enters legal in the first place, orchestrates it across your team and systems, and gives you the visibility to run legal as a scalable business function.

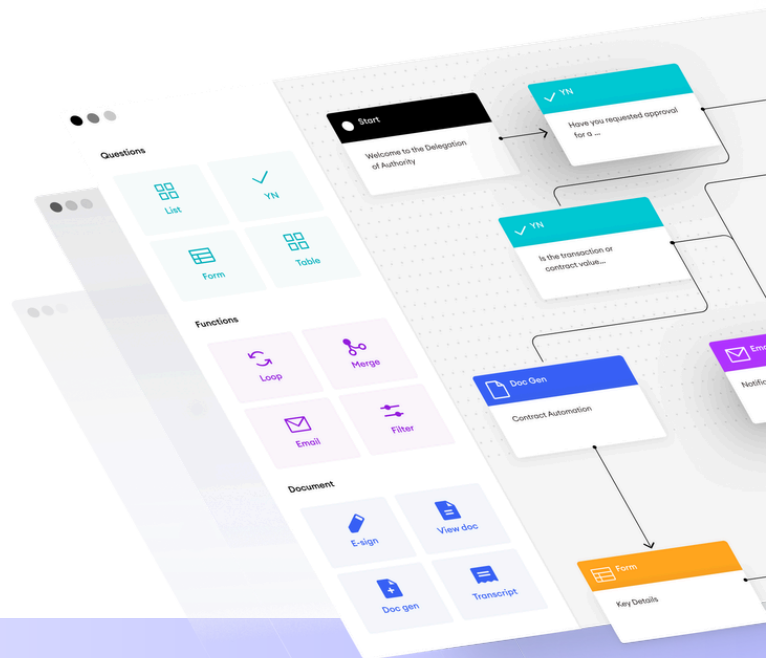
**These aren't competing tools. They're different layers of your stack.**

Attempting to build this operating system in-house with general-purpose AI tools carries both direct and hidden costs and creates ongoing maintenance obligations that compound over time, all without delivering the operational visibility, compliance infrastructure, or domain expertise that a purpose-built platform provides.

**Checkbox exists so your legal team can operate at the scale your business demands without taking on the extra workload and cost associated with other solutions.**



**Checkbox** is the AI 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