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The Ultimate Guide to Piloting Legal AI Technology

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In this guide, we'll cover the key elements that firms need to consider for the launch of a successful legal AI technology pilot:

- ✓ Identifying the Right Users
- ✓ Strategizing Internal Communications
- ✓ Implementation Considerations
- ✓ Measuring and Proving Success

Securing internal buy-in for new technologies can be a daunting task, especially in the legal field, where tradition and established practices hold significant sway. As AI technology continues to integrate into legal workflows, firms must determine how to find lasting and scalable solutions. Implementing a well-designed pilot program is one effective approach to overcoming resistance and fostering lasting success.

During a pilot – or a proof of concept – firms can select a specific control group, identify a pressing problem to solve, and evaluate how well the proposed technology addresses that challenge. The pilot phase serves as a miniature launch: providing invaluable insights, enabling refinement of strategies, and setting the stage for broader implementation.

Piloting a new legal AI technology can transform work within legal firms – but it doesn't come without challenges.

A successful pilot requires acquiring adoption, filling in knowledge gaps, technical installation, and securing internal buy-in from stakeholders throughout the firm. Without the right vendor, knowledge, and preparation pilots can act as a resource drain that fails to benefit firms.

Step 1

Identifying the Right Users: Getting People on Board

A successful legal AI pilot starts with getting the right users on board.

Firms should carefully consider who will benefit most from a new AI technology and tailor the pilot to address their specific needs. A targeted roll-out approach helps ensure the pilot group is representative of the larger user base, while also aligning with a defined use case.

Selecting Your Pilot Group

Start small with a focused pilot group. This allows you to identify potential gaps, tailor communications to particular needs, and gather constructive feedback for a larger rollout.

A successful pilot group involves a **diverse range of stakeholders**, including both willing early adopters and skeptics. This fosters a well-rounded perspective and helps build momentum for internal buy-in down the line.

Additionally, including attorneys from a **range of practice groups** is key to evaluating the capabilities of a legal AI tool across a variety of use cases. Firms should consider which practice groups have repetitive low-value tasks that could be streamlined with technology.

Ultimately, the learnings from the pilot group should be applied to refine the strategy for a larger rollout, ensuring that your firm is best set up to benefit from the capabilities of a new technology.

Identifying Your Champions

Champions are key figures to catalyze adoption across the firm.

Strong champions are most impacted by solving the use case or problem addressed by the legal AI tech solution. Champions should be identified and supported in sharing their experience with the pilot and how it's potential to benefit others at the firm.

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Additionally, people within the firm who have shown a particular interest in technology and innovation – whether due to personal interest or members of an IT team or GenAI task force – are valuable for promoting a culture of innovation and adoption of new technologies.

Individuals who work cross-functionally across the firm are also excellent champions, as they're positioned to spread the value of and potential impact of new technology both across teams and across the firm.

“Lawyers and law firms have survived decades working in low-tech environments. Introducing groundbreaking technologies that challenge the way they approach tasks like drafting contracts and negotiating with clients will take both time and a deep level of trust.”



*James Ding
DraftWise CEO & Co-Founder*

Step 2

Internal Marketing: Communicating Value

Overcome barriers to adoption by strategically speaking to product benefits, capabilities, and ease of use.

Attorneys are often inundated with new technologies and tools, making it challenging to introduce yet another solution into already time-constrained days. As a result, there is frequently skepticism that a new tool is not worth the time and effort of onboarding and training. Internal marketing is a powerful lever to combat this initial resistance to introducing legal AI tools.

Consider these guidelines for strategically approaching internal marketing for a legal AI technology pilot:

Clearly Define Goals & Value Proposition

Effective messaging is the first step to success in marketing a new legal AI technology within a firm. Pilot leaders should clearly define the goals and value of the pilot and determine how to best motivate attorneys to learn about a new technology offering.

Identifying a single action that provides repeat value to attorneys can be an effective method to encourage adoption. This initial hook paves the way for users to learn more about the functionality of a new tool and how it can enhance their daily work.

For example: An attorney practicing in a Merger and Acquisition group may often need to tailor a merger agreement to a client's preferences. Showing how a new technology reduces time from this repetitive task can help motivate testing adoption.

Providing a range of materials such as one-pagers, interactive demos, videos, case studies, and user guides tailored to different practice groups are powerful tools for informing your team about a pilot program.

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QUICK TIPS

Pilot leaders should ensure communication assets answer essential questions about a new legal AI technology tool, such as:

- **What** the new technology does
- **Why** attorneys should use the tool
- **Where** & on what platforms the tool can be used
- **How** to access the tool

Create a Distribution plan

Once you've developed assets communicating the value of a pilot – strategically distributing these assets ensures that potential users are informed on the existence and benefits of a pilot for a new legal AI tool.

By setting clear goals, tailoring the value proposition, preparing relevant assets, and creating a comprehensive distribution plan with multiple touchpoints, pilot leaders can ensure they're connecting the right users with new technology opportunities.

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Internal Marketing: Communicating Value

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Pilot leaders should approach their distribution strategy with these guidelines:

- Provide clear next steps and opportunities for hands-on experience with the platform, such as scheduled training sessions
- Leverage research indicating that people need to hear about new technology multiple times before they fully understand and embrace it.
- A single demo is often insufficient for driving adoption, Plan for multiple touchpoints and continuous engagement. Build name familiarity and clearly share information through various channels (e.g., internal newsletters, team meetings, email campaigns).
- Implement ongoing education efforts, such as webinars, lunch-and-learns, or office hours with subject matter experts, to reinforce the benefits, address concerns, and encourage continued usage.

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Step 3

Implementation - Setting up the Infrastructure

Security and reliability are foundational to implementation success.

Implementing AI technology, even in a pilot environment, can be a complex and resource-intensive process that may create a barrier to firm-wide access to cutting-edge solutions. However, With proper planning and vendor support, firms can get ahead of implementation roadblocks.

There are four key elements to the successful implementation of an AI technology pilot:

Evaluate Your Firm's Existing Tech Stack

Assess where there is overlap or gaps in use cases between a newly proposed AI technology and your firm's current technology offerings.

Understand how this new technology should be positioned and discussed in comparison to your existing tech stack.

Identify key integrations with your existing tools and assess if, and how effectively, the newly proposed technology integrates with other tools in your firm's ecosystem.

Understand Technical Requirements

Delve into the technical capabilities, external audits, training methods, and potential limitations of the new AI tool. It's essential to understand vendor's data policies and how they handle sensitive information.

Address concerns within your firm regarding the "black box" nature of AI systems and ensure transparency about where your firm's data is going and how it is being used.

Consider the implementation timeline, internal resource requirements, and security processes involved in installation, whether it's an on-premises deployment, a private cloud solution, or a shared cloud environment.

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Determine Training Needs

Establish a comprehensive training plan, evaluating whether internal resources can handle training, if vendor support is required, or if a combination of both is optimal.

Develop tailored training materials and sessions for each relevant practice group, ensuring that everyone from attorneys to support staff understands how the proposed AI solution can benefit their work.

Ensure Security and Compliance

Collaborate with your firm's security and compliance teams to ensure that the AI solution meets all necessary security standards and regulatory requirements, particularly when dealing with sensitive client data.

Successfully piloting a new AI technology requires forethought and cross-department collaboration. Firms can best prepare for a pilot program by thoroughly evaluating their existing tech stack, understanding the technical requirements, determining training needs, and ensuring security and compliance.

“At DraftWise, security is foundational to how we build our product. A crucial part of building for our customers is ensuring that we offer cutting-edge solutions for law firms, without sacrificing the integrity of customer data.”



Emre Ozen
DraftWise CTO & Co-Founder

Step 4

Measuring and Proving Success

Measuring success is essential to determining a pilot's effectiveness.

Before launching a pilot program, firms should align on desired outcomes and identify which metrics will be used to track progress.

Define Clear Goals

Establish a consistent schedule for reviewing and analyzing data collected throughout a pilot, allowing for adjustments and course corrections. Select and measure metrics that best align with your firm's goals:

- Adoption Metrics: Widespread adoption is often a key indicator of user acceptance
- Efficiency Metrics: Time saved by utilizing the AI solution compared to a traditional method
- Engagement metrics: Monitor user usage patterns to understand how the AI tool is being applied and identify areas for additional training

Collect Qualitative and Quantitative Data

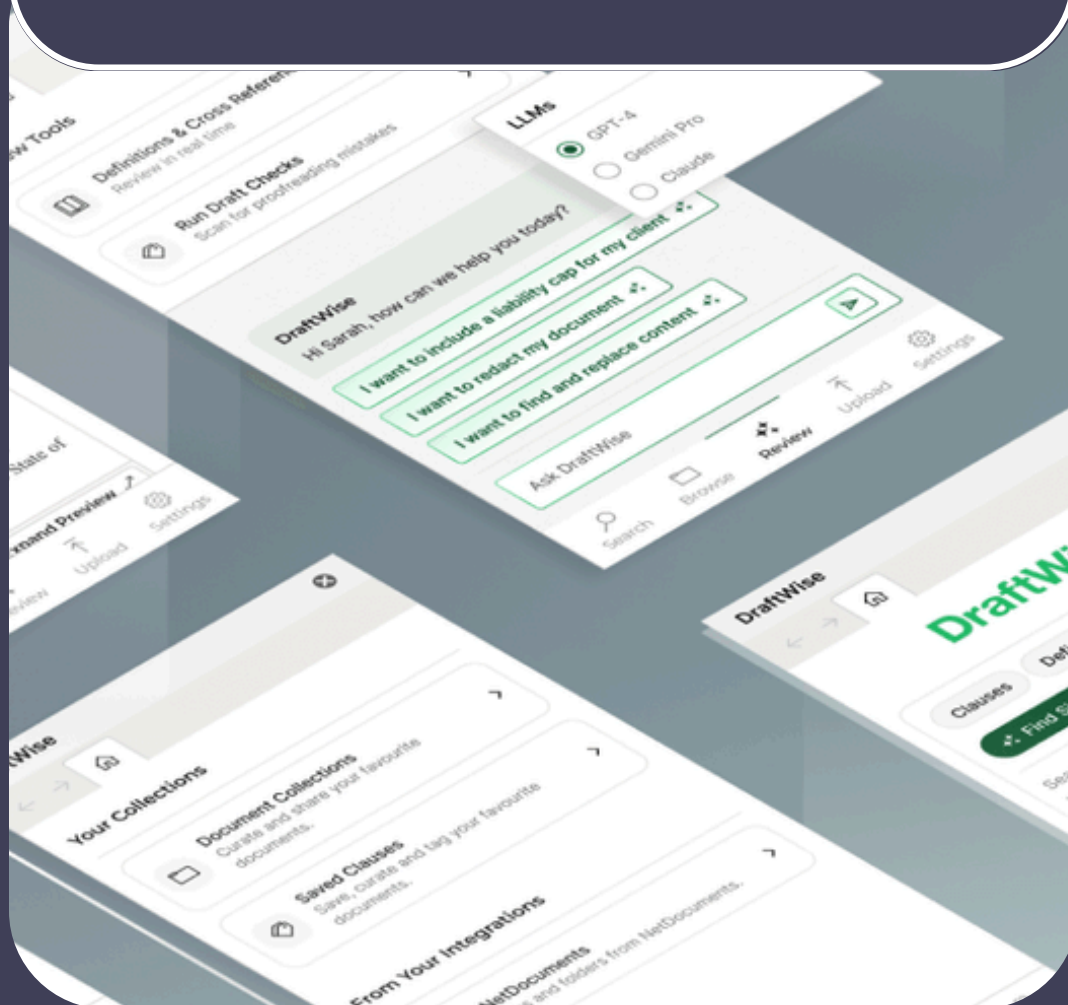
Implement mechanisms to capture both quantitative data (e.g., usage statistics, time logs, etc.) and qualitative data (e.g., user feedback, testimonials, etc.) to gain a comprehensive understanding of the pilot's impact and likelihood of success if launched at full scale.

Develop and distribute proprietary surveys tailored to the pilot group to gather feedback on experience, pain points, and suggestions for improvement.

By establishing a regular cadence of metrics reviews, measuring against predefined goals, conducting proprietary surveys, and collecting both qualitative and quantitative data, firms can effectively evaluate the success of an AI technology pilot. This data-driven approach will provide valuable insights, enabling firms to make informed decisions on the broad implementation of an AI solution.

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Don't embark on a legal AI technology pilot without the right roadmap.



Choose a Vendor that Enables Lasting Success

Piloting legal AI technology presents a unique opportunity for firms to gain a competitive edge – and the good news is that firms don't have to brave it alone. To stay ahead of the AI technology learning curve, firms need to invest in testing proof of concept for technology's ability to positively impact various use cases. Partnering with the right vendor allows firms to maximize the benefits of the pilot and position themselves for long-term success in an increasingly competitive market.

See How DraftWise enables Pilot Success.

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Download the Guide