



# AI for PI Action Plan: Achieve Lasting, Impactful Adoption

The following Action Plan is based on countless successful implementations with firms across the country. Read on to see proven steps that encourage faster AI implementation and adoption.

# Here's What We Cover

## Set the Vision for AI

Define the goals of your pilot or early use cases, establish metrics to track progress, and lay a strong foundation for long-term AI benefits.

## Introduction & Early Pre-Litigation

Get your case managers and demand writers into the platform. Show them quick wins that build momentum and encourage continued platform use.

## Expanded Pre-Litigation

Pre-lit team members are steadily increasing the number of cases worked in the platform. Tasks now include document generation and full case analysis.

## Litigation Training for Advanced Usage

AI can streamline lots of litigation case analysis and document creation, but litigators and their team must nail process integrations.

## Ongoing Support & Training Library

Build a foundation around ongoing learning and AI innovation as well as support onboarding new hires on your platform.

### Quick Tips

#### Transparency Builds Trust

Acknowledge upfront that EvenUp adds a new step to current processes. By showing your team the payoff (time saved later), you will reduce resistance

#### Separate Tracks = Higher Adoption

Pre-Lit teams can build confidence and familiarity with quick wins, such as surfacing missing records/bills early on. Litigation teams may need more training up front to realize the full scope of case file analysis and document generation.

#### Create Stickiness by Starting Small and Steadily Increase

The more cases inside the platform in the first 45 days, the faster you'll see the value and positive impact of AI. However, it's best to start case managers and demand writers with just two to three cases and grow from there.



# Set the Vision for AI

## How do you want AI to help your firm?

Examples may include: working more efficiently and saving time, increasing caseloads without adding headcount, and delivering stronger case outcomes.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Adoption metrics to track that encourage AI success for PI firms

% Of active cases uploaded to platform in the first 45 days: \_\_\_\_\_

Avg. Time to demand before AI adoption: \_\_\_\_\_

Avg. Time to demand after AI adoption: \_\_\_\_\_

### Quick wins achieved:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# Phase 1: Introduction & Pre-Lit Adoption

## *Within First 3 Weeks*

**Goal:** Build confidence and surface early value.

**Instructions:** Upload a small number of active cases (2–3) near the demand stage. Use EvenUp's legal AI assistant to quickly summarize the case facts and determine key **strengths and weaknesses**. Run a check for **missing docs and treatment gaps** to demonstrate immediate savings.

### Define

Cases selected for upload:

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Team members in pilot:

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### To Do:

#### Run Missing Docs Check

Missing Docs Results (notes):

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#### Run Treatment Gap Check

Missing Docs Results (notes):

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### *Next Steps*

1. Review results with the pilot team
2. Request and upload any identified missing documents
3. If treatment gaps are ongoing, consider:
  - Consult client on importance of treatment consistency
  - Preparing arguments against treatment gaps
  - Generate and submit the demand to mitigate lost value

# Phase 2: Expanded Pre-Lit Adoption

## *Within First 6 Weeks*

**Goal:** Move from light lift to full integration in team's processes.

**Instructions:** Generate an Express Demand, Medical Summaries, and Negotiation Briefs across all active cases. Implement Express Demands as a standard step in case workup.

**Tip:** Once cases are ready for demand creation, have Case Managers trigger an Express Demand to accelerate document production.

### Who owns demand writing?

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### Who owns Medical Summaries?

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### Who owns Negotiation Briefs?

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### To Do:

- Create Medical Summaries for Active Cases
- Produce Negotiation Briefs to prep attorneys
- Use Express Demands for fast draft turnaround

### *Next Steps*

1. Review demands with pilot team; include relevant attorneys
2. Prep attorneys with medical summaries and negotiation briefs
3. Create and/or update workflows in your Standard Operating Procedures (SOP)\*

*\*Reach out if you need help defining what exactly your ideal SOP looks like. It's very common to need brand new procedures defined when adopting AI, and EvenUp is experienced and ready to help you.*

# Litigation Adoption Plan

## *From the Start, or Parallel to Pre-lit*

**Goal:** Enable litigation attorneys and paralegals with case analysis and document generation prompting.

**Instructions:** Implement with litigation staff separately. Focus on extracting key details and inconsistencies, preparing for deposition, and other strategic case analysis.

**Start by identifying...**

**Litigation attorneys to train:**

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**Paralegals to train:**

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**Key litigation processes use cases identified:**

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### *Next Steps*

1. Identify high-burden, repeatable tasks—complaints,
2. discovery responses, deposition prep, and medical summaries
3. Train paralegals and junior staff first, as they'll handle the bulk of document creation and benefit most from efficiency gains
4. Upskill attorneys on key litigation-focused prompts
5. Identify 2–3 litigation cases to immediately implement AI tools
6. Incorporate AI insights into trial prep outlines, ensuring facts and narratives are fully supported

# Ongoing Support & Training Library

*Create During Adoption, Update Regularly*

**Goal:** Create lasting adoption and support new hires.

**Instructions:** Maintain an internal library of role-specific training content (videos, guides, SOPs). Use it for onboarding, refreshers, and role transitions.

**Location of training library:**

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**Owner responsible for update:**

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**Last updated on:**

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## To Do:

- Record role-specific trainings using your AI platform (Case Manager, Attorney, Paralegal, Demand Writer)
- Store records in a shared, easily accessible firm location
- Assign owner(s) to update trainings regularly, accounting for the rapid pace of AI innovation

## Next Steps

1. Review adoption metrics weekly
2. Identify process improvements quarterly
3. Celebrate wins internally to sustain momentum
4. Integrate training materials into employee onboarding processes