Is Your Legal Team Ready for Strategic AI?

A practical checklist for building AI that supports better legal decisions

Many legal departments have already introduced AI into document review, contract analysis, legal research, and other workflows. Expanding AI into more strategic applications requires an operating model that supports reliable, transparent, and scalable use.

Use this checklist to evaluate your organization's AI implementation and usage readiness.

Leadership & Strategy

- [ ] Executive leadership has defined a clear vision for AI within the legal department.
- [ ] AI initiatives align with broader business objectives.
- [ ] Success metrics have been established before new AI projects begin.
- [ ] Funding and resources are available to support long-term adoption.
- [ ] Legal, IT, Compliance, Information Security, and Legal Operations are aligned on implementation priorities.

Data Readiness

- [ ] Legal data is accurate, complete, and consistently maintained.
- [ ] Information is accessible across matters, contracts, investigations, and other legal work.
- [ ] Data standards and metadata are applied consistently.
- [ ] Duplicate, outdated, and unnecessary data has been addressed.
- [ ] Teams understand which data sources AI can safely access.

Integrated Technology

- [ ] Core legal platforms can exchange information efficiently.
- [ ] AI tools integrate with existing legal technology.
- [ ] Manual transfers between systems have been minimized.
- [ ] Technology supports secure collaboration across departments.
- [ ] AI can access the context needed to generate meaningful insights.

Governance & Risk Management

- [ ] AI governance policies have been documented.
- [ ] Roles and responsibilities for AI oversight are clearly defined.
- [ ] Human review is required for significant legal decisions.
- [ ] AI outputs are validated before they are relied upon.
- [ ] Privacy, confidentiality, and security requirements have been incorporated into AI workflows.
- [ ] Processes exist to monitor AI performance over time.

Explainability & Trust

- [ ] Users understand how AI recommendations are generated.
- [ ] AI results can be explained to internal stakeholders when necessary.
- [ ] Teams can identify the sources used to support AI outputs.
- [ ] Legal professionals know when additional review or validation is appropriate.
- [ ] Confidence in AI is supported through testing, documentation, and ongoing evaluation.

People & Skills

- [ ] Lawyers and legal professionals have received AI training.
- [ ] Staff understand where AI adds value within legal workflows.
- [ ] Employees know how to evaluate AI-generated work product.
- [ ] Cross-functional collaboration supports AI implementation and continuous improvement.
- [ ] Specialized expertise is available when needed for complex implementations.

Measuring AI Success

- [ ] AI initiatives are evaluated against defined business objectives.
- [ ] Productivity, quality, and risk outcomes are measured.
- [ ] Feedback from users informs future improvements.
- [ ] Lessons learned from pilot projects are applied across the legal department.
- [ ] AI investments are reviewed regularly to identify new opportunities for improvement.

Your Results Explained

If you have 30 to 35 boxes checked:
Your legal department has established many of the capabilities needed to support strategic AI initiatives and is well positioned to expand AI across higher-value legal work.

If you have 20 to 29 boxes checked:
Strong progress is underway, but targeted improvements in data, governance, integration, or organizational readiness can help strengthen long-term success.

If you have fewer than 20 boxes checked:
Building stronger operational foundations will improve AI readiness and create a more reliable platform for future innovation.

Excelling with Strategic AI

Strategic AI depends on more than technology alone. Businesses that invest in leadership, connected data, integrated systems, governance, explainability, and skilled professionals are better positioned to scale AI responsibly and generate lasting business value. Gain even more insight into incorporating AI as a strategic asset for your legal team from our latest report.