Consilio

AI in legal operations

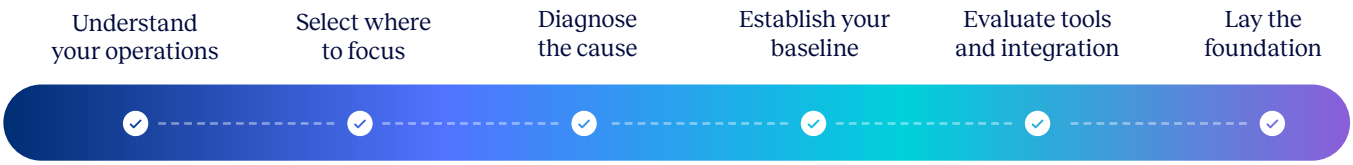


The pressure to adopt AI has arrived and comes from many places. It comes down from leadership, a general counsel, sometimes a chief executive, and it usually arrives as a broad direction: do something with AI, this year. What it rarely comes with is an answer to the question that follows immediately after. Where do we start?

This guide answers that question and breaks down where and how to start. It is the method we use every day with legal teams.

The market offers more tools, more demonstrations, and more confident claims than any team could evaluate, and that abundance is what makes the first move so difficult. A legal function already running at full stretch is asked to become an expert in a technical, fast-moving field, on top of the work it already carries.

Consilio runs complex legal work at scale for corporations and law firms around the world, which shows us where AI delivers value and where it doesn't. We bring that to you here: the approach and the tools that fit your environment, without tying you to any single platform.



Before you start

Before evaluating any technology or provider, you need to understand the question you are trying to answer. For most legal operations leaders, it resolves into three.

1. Where across my operations can I apply AI?
2. What does my current AI landscape look like? I already have technology in place, so do any of those systems include AI I could be taking advantage of?
3. Are there areas of my operations where I have no technology at all, and does that create an opportunity to bring in a new tool?

Everything that follows is a method for answering these three questions. Answer them well and the tool decision becomes straightforward. Reach for a tool before answering them and the decision is a guess.

1. Understand how your function operates

A legal operations function is substantial, particularly inside a corporate legal department. It carries a wide range of work, and each area runs its own processes, holds its own data, and consumes time in its own way. Understanding how that work flows, where the effort concentrates, and where the friction sits is the foundation for every decision that follows.

This understanding has little to do with AI, and more to do with operational knowledge. Only when you understand your current processes can you judge where a tool belongs.

WHAT TO MAP

	The core processes it runs day to day.	Who performs them, and how much of their time they take.	How long a typical task takes from start to finish.	Where the delays, rework, or frustration concentrate.
Contracts				
Intellectual property				
Compliance				
Matter management				
Invoicing				

2. Select where to focus first

Transformation does not begin everywhere at once. Pick one workflow to start with and choose it carefully. The first choice is important, because a clear win builds the confidence and the evidence to take on the next.

The best place to start is work that is high in volume and low in risk: repetitive, high-frequency tasks where no single item carries much risk on its own. Reviewing large numbers of contracts is the familiar example. Answering a high volume of routine legal questions is another, particularly where the knowledge already exists somewhere in the organization and technology helps the business find its own answers rather than routing every query through the legal team. That is a self-service opportunity built on knowledge you already hold, and it is often overlooked in favor of document-heavy work.

Run each area you mapped against this test. Look for the following signs:

- It happens often and in volume.
- The risk carried by any single item is low.
- It consumes significant time from skilled people.
- The work is repetitive and broadly consistent each time.
- The knowledge or material it draws on already exists in the organization.

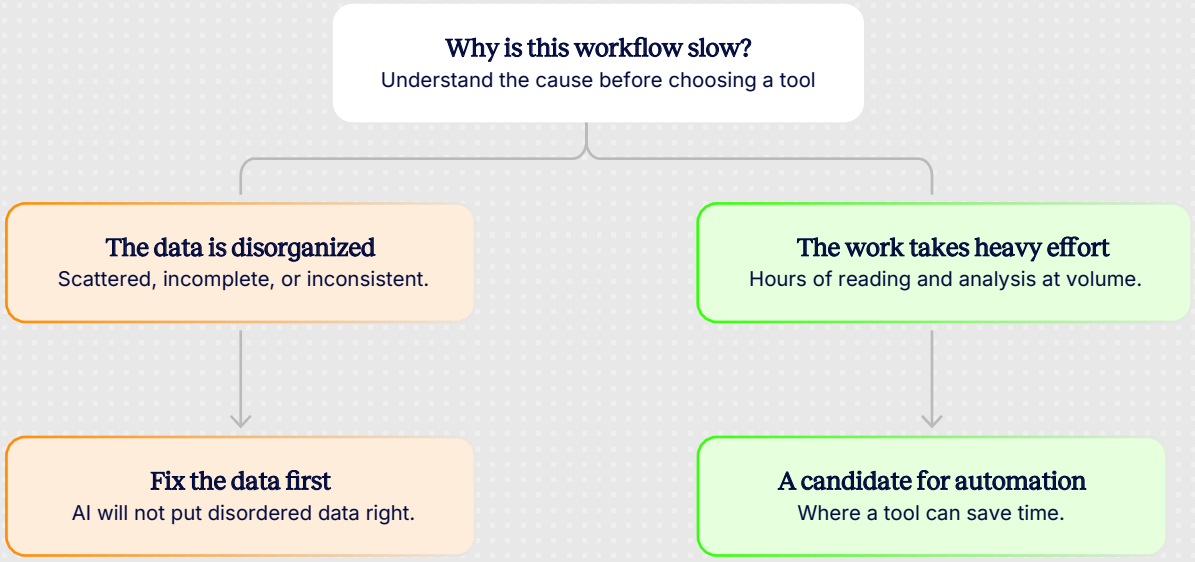


3. Diagnose the cause

A workflow can be slow for more than one reason, and the reason decides whether AI is the right answer. Before reaching for a tool, understand why the work takes as long as it does.

Two causes call for opposite responses. If the work is slow because the data is disorganized, incomplete, or inconsistent, a tool will not fix it, because AI cannot work reliably on data that is not in order. The first task is to put the data right. If the work is slow because people spend hours reading, summarizing, and analyzing a large volume of material, that is the kind of workflow a tool must take on.

So before you go further, state plainly why the workflow is slow today, and decide which of the two causes you are dealing with. The answer changes what you do next: fix the data, or move ahead toward automation.





4. Establish your baseline and measure ROI

Any assessment of what AI delivers depends on a baseline, and in legal operations that baseline should be captured before a new tool is introduced.

Pick the unit that matters for the workflow: one contract reviewed, one query resolved, one document set summarized. Measure four things against it:

CYCLE TIME
How long the unit takes end to end.

THROUGHPUT
How many the team clears in a week or a month.

COST
Who does the work, and at what seniority. Paralegal hours and partner hours are not the same number.

REWORK
How often the output goes back for correction. In legal work, this is the figure that decides whether faster is worth anything at all.

Measure across a representative period, not a single matter, because volumes swing and one week proves nothing. Record it the same way you intend to measure the result, or the two will not reconcile. Then set your target: the reduction in cycle time, or the shift in who does the work, that would justify the spend.



5. Evaluate tools, and how they integrate

With the operational understanding mapped and the opportunity defined, it is time to consider what the market offers. One question tends to get overlooked at this stage: how a new tool will sit alongside what you already run.

Most legal functions already operate separate systems for contracts, documents, matters, and invoicing. Any new tool has to work among them. Two things sink an otherwise sound choice: buying a separate tool for every task until a dozen applications overlap and none connect, and selecting a tool that cannot reach the data it needs.

Establish these before you select:

- What it connects to, and what data it can and cannot reach
- What it duplicates in your current systems
- What it would replace, and what that migration costs
- Who owns and maintains it once it is in place



6. Lay the foundation

The tool is the small part; plan for the real work

It is tempting to treat the tool as the thing that delivers the result. In practice it is one piece among several, and often not the largest. Most of what determines whether AI succeeds has nothing to do with which tool you choose. It falls into four areas: the data, the process, the people, and the systems it connects to.

DATA

AI is only as good as the information it runs on, and that information usually needs work before any tool is introduced. It has to be found across the systems it is scattered through, consolidated, cleaned of duplicates, and corrected where it is inconsistent or incomplete.

PROCESS

A workflow rarely absorbs AI without changing shape. Decide which steps AI takes on, which stay with people, and where the handoffs and the review and approval points sit. Adjust the workflow to suit. If you bolt AI onto an unchanged process, you tend to add a step rather than remove one.

PEOPLE

The people doing the work have to be brought with it, trained to judge the output as well as produce it, and to know where it is reliable and where it needs checking. In legal work that judgment is the safeguard, because accountability for the result stays with the lawyer, no matter where it is produced.

INTEGRATION

A tool has to connect to the systems that hold the data it needs, so information moves between them without a person carrying it. A tool that cannot reach your contracts, documents, or matter data leaves someone moving files by hand, and the efficiency you bought disappears into that gap.

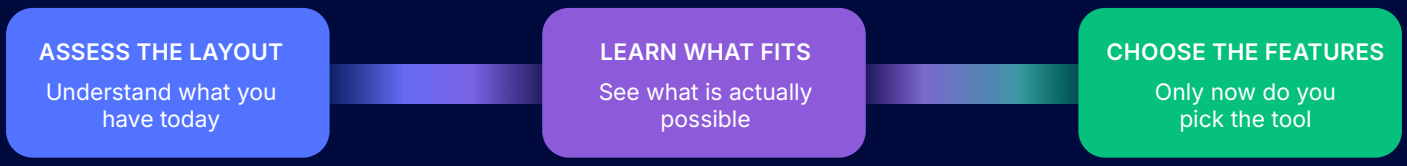
Common missteps to avoid

Clients come to us having made the same few mistakes, and it always comes back to buying a new tool before doing the work.

Following peers. A client hears that reputable law firms and their peers are deploying a particular tool, and concludes that if it is good enough for them, it is good enough for us. That skips the roughly 70% of the work still needed to know whether the tool is right for their operations and where they would use it.

Buying a tool and calling it done. Under pressure to show progress on AI, a client grabs whatever is ready. They end up able to say they use AI for contracts, and consider the job finished, when the work of making it deliver has barely started.

Skipping the preparation and implementation. The data needs to be cleaned and checked before layering on a tool; the process and workflows need to change, and the team needs to be trained.



You would not choose kitchen fittings before seeing the room
AI adoption runs the same way: understand the operation, then choose the tool

Wherever you're starting from

Clients come to us at different points. Some have a mandate and nothing else, and need direction on where to begin. Some are partway into evaluation, running vendor demos, and want help making sense of what they are seeing. Some have already selected a tool and need to deploy it well. The sequence in this guide works from any of them.

One pattern deserves a flag, because it is common and easy to fall into. Where adoption is driven by one or two people arranging vendor demos, a legal team can be deep into comparing products before anyone has understood the operations those products are meant to serve. If that describes your position, step back to the earlier questions before going further. The evaluation will be sharper for it.

NOW, LET'S START

This is the foundation. Understanding your operations, identifying the right workflow, preparing your data and your process, are the groundwork that determines whether an AI investment succeeds or stalls, whatever tool you eventually select.

Some organizations choose to take this forward themselves. Many prefer to do it alongside a partner, and this is the work Consilio does with legal teams every day. We meet you at whatever stage you have reached: a broad mandate, an evaluation already underway, or a tool selected but not yet delivering, and we see it through to a measurable result.

As a tech-agnostic partner, we are not steering you toward a product. We help you work out what fits your operations, and then do the work around it: preparing the data, integrating the systems, redesigning the workflow, and equipping the team to rely on it. That is how a tool becomes a working part of the legal operation rather than a license that goes unused.

This is the distinction between acquiring AI and transforming how legal work is delivered. We would welcome the conversation.

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Ready to Learn More?
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