A guide by **SUPIO**

The COO's 6-Step Playbook for Rolling Out AI in Your Personal Injury Firm

How to roll out AI across people, processes, and performance without breaking what already works
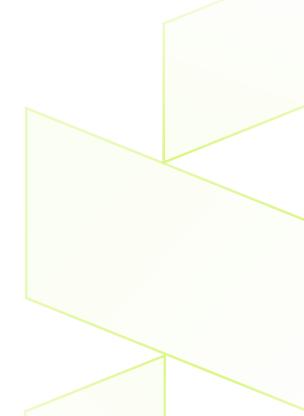
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Who this playbook is for

This guide is for operations leaders at contingency-fee Personal Injury law firms – COOs, CFOs, Directors of Ops – charged with scaling what works and fixing what doesn't.

This playbook pulls lessons from PI firms already embedding AI across litigation, intake, and settlement ops.

Chat with this guide →

Drop this PDF into ChatGPT, Claude, or your preferred chatbot. Then paste in one of these prompts to get the answers you need.

- *"Summarize the best practices for re-engineering SOPs with AI from this white paper."*
- *"Give me a checklist of rollout priorities based on this playbook."*
- *"Highlight what parts of this white paper apply most to pre-litigation workflows."*
- *"What's the guidance in here about building a prompt library?"*
- *"Draft a quick internal email to share this with our operations team, summarizing the key sections."*

Good news: you're right on time to rollout AI

AI is being widely adopted in legal services

79% of legal professionals now use AI tools in their practice (up from 19% in 2023)

Source: LawNext

Most firms agree this is the future

79% of law firms say AI will have a high or transformational impact within five years

Source: Thomson Reuters Legal

Clients are ok with it

70% of clients prefer or are neutral to law firms using AI

Source: Clio

Step 1. People → The Power-User Flywheel

AI adoption doesn't begin with policy. It begins with people.

In almost every firm where AI has taken hold, the pattern is the same: a handful of individuals start using it to finish actual work. They're not there to experiment or prove a point. They're there to get leverage in their work.

This is the first principle of AI adoption: people use what helps them.

And AI, when paired with the right workflow, helps.

These users often operate quietly. They're not necessarily senior. They're not always the loudest in meetings. But they share a common trait: they treat AI less like an innovation and more like infrastructure. Not something to try out, but something to rely on.

Their behavior isn't particularly flashy, but it is contagious. When others see the time savings and quality of output, curiosity spreads. Prompts get shared. Conversations spark. The perception of AI shifts from "that new tool" to "that thing everyone's using to get ahead."

This is the beginning of the flywheel: visible usage leads to trust, which leads to more usage. And the firms that build around this momentum – not against it – see the fastest adoption.

The job of operations leadership isn't to dictate how AI gets used. It's to identify where usage is already happening and reinforce it. Often, that starts with a simple question:

"Who's actually using AI right now?"

Once you know, you can begin to study what they're doing and help the rest of the firm catch up.

Signal	What It Looks Like
Uses AI on live casework	Runs Supio or LLM prompts during chronology, demand, or depo prep
Seems to finish work faster	Consistently completes time-consuming tasks ahead of schedule
Iterates prompts	Adjusts and improves their own queries to get better results
Acts as a local guide	Answers peers' questions about AI or shares tips informally
Shows up in usage data	Ranks high in Supio dashboards or prompt activity logs
Self-starts with new tools	Has experimented with tools like ChatGPT or Claude outside of formal training
Works around blockers	Doesn't wait for permission & just starts solving problems

Step 2. Systems → SOP Re-engineering

AI doesn't stick unless it shows up in your systems.

That's where most rollouts break down. You get a few wins – one paralegal uses AI to build a demand faster, someone else saves time prepping for a deposition – but the breakthroughs stay siloed.

Without a system to catch and spread them, they fade.

To fix this, start with the bottlenecked workflows where staff are stuck re-reading, re-typing, or repeating the same steps across cases. Anywhere work piles up and where the value of speed, accuracy, and context is high are your leverage points.

Important: you're not trying to reinvent the process. You're folding AI into the middle of it. If it's done right, no one stops to ask "Am I allowed to use this?" The AI step is already written into the SOP.

The signal you're doing it right? No one asks for permission. They just follow the updated SOP.

Steal This AI SOP Framework

Huge thanks to Thomas Law Offices for generously sharing the SOP framework they use with Supio. It's rare to get this kind of behind-the-scenes access from a top firm — and they've made it available to help others move faster.

📄⬇ **View and Download the SOP Framework** ↗

What They Did	How You Can Adapt It
Embedded AI directly into core workflows (e.g. Supio used for demand prep, record summaries, depo outlines)	Update your SOPs so AI usage is the default, not optional. No toggle. No parallel process. Just the new way work gets done.
Mapped prompts to real litigation bottlenecks (e.g. standardized questions for nursing home, MVA, med mal cases)	Create or borrow prompt libraries by case type. Start with your highest-volume categories.
Wrote for reuse—SOPs were built in modular, plug-and-play language	Build your process docs so anyone – new hires, paralegals, case managers – can follow them without retraining.
Kept it flexible with live links and update paths	Use living documents or appendices that can evolve as your usage of Supio grows. Avoid locking into static PDFs.

Step 3. Culture → Celebrate the Wins, or Nothing Changes

AI sticks when two things happen: the people in the trenches see real wins, and those wins get broadcast.

When staff see someone save four hours on a chronology and leadership treats it like a real moment, that's when the shift begins.

Culture is the lever. And the fastest way to create cultural shifts is to over-communicate wins.

When someone builds a better draft in less time, say something. When a paralegal finds an overlooked injury using AI, tell the firm. If nobody hears about the wins, they never get normalized.

Copy/Paste This Email Template

When someone on your team makes a breakthrough with AI, broadcast it. Use this template to send a firmwide nudge that drives culture forward.

Subject: AI in action → [Team Member]

Body:

Hi team,

Wanted to shout out [NAME] for using [TOOL/FEATURE] to [SHORT WIN – e.g. "shave 4 hours off a chronology" or "spot an unclaimed special"].

This is a great example of how AI is becoming part of how we work.

If you're curious how [NAME] did it or want to try it on your next case, just reply here or ask the AI Assistant.

We'll keep surfacing these. The more we learn from each other, the faster this sticks.

– [Your Name]

Step 4. Collecting Data → Usage Is the New Source of Truth

"What gets measured gets managed." – Peter Drucker

Most firms count AI log-ins and call it a day. That tells you adoption, not improvement. Every prompt, every follow-up question, every draft that gets accepted (or ignored) is operational telemetry.

Treat that stream as a feedback loop, not a scoreboard. The firms that do this well:

- Harvest prompts that win. High-impact queries become shared templates, not personal hacks.
- Patch the cold spots. Low-usage teams pair with heavy users before habits calcify.
- Tie behavior to results. Frequency alone isn't success; look for faster chronos, cleaner demands, shorter cycle times.

The 5 Metrics that Matter

If you're trying to evaluate whether AI is actually improving the business, start here. These are the metrics operations leaders at high-performing PI firms care about most and the ones AI can move.

Metric	What it tells you	How AI moves it
Time on Desk	How long a case sits between key stages	AI shortens prep time and accelerates progress through demand, deposition, and settlement
Intake-to-Demand Cycle Time	The velocity of your pipeline	Prompt libraries and auto-drafting reduce lag and bottlenecks
Average Settlement Value	Quality of outcomes per case	AI catches overlooked injuries or codes, improving claim strength
Average Settlement Value	Output per headcount	AI lets staff handle more volume, faster, with fewer errors
Active Case Capacity	How many cases the team can manage at once	Faster turnaround frees bandwidth without increasing burnout

Monthly AI-Usage Review — Meeting Agenda

(30 minutes, first week of every month)

Time	Item
5 min	**Usage Snapshot** • Pull data by team, user, case type.
10 min	**Highlights & Gaps** • Spotlight most-used prompts • Flag drop-offs or flatlines
10 min	**Action Items** • Pair low-usage roles with power users • Add top prompts to SOP / library
5 min	**Outcomes Check** • Compare usage to speed, throughput, resolution time.

Build Better Prompt Engineers

Enroll your team in Supio's free, on-demand AI Academy. Short videos cover legal-AI fundamentals – machine learning, document intelligence – and give staff ready-to-run Supio prompts.

Sign up here ↗

Step 5. Privacy, Security, and the Judgment to Know the Difference

In legal operations, trust isn't a feature. It's the baseline. And when AI enters the picture, the question isn't just what a tool can do—it's whether it should be doing it at all.

The truth is, security and ethics aren't back-office concerns. They shape the frontline experience. The tools you roll out shape how your staff engage with sensitive client data, how you build your cases, and how exposed your firm becomes in the process. That's why knowing when to use what isn't a matter of preference. It's operational due diligence.

General vs. Specialized AI Tools (When to Use Each)

General AI tools like ChatGPT:

- **Appropriate for:** general brainstorming, non-case-specific research

- **Never for:** Citation generation, case document generation, case workflows, client-specific advice

- **Remember:** These tools lack legal-specific context understanding because they are not purpose-built to know and understand personal injury data. These general tools can also lack HIPAA and GDPR compliance.

Specialized legal AI platforms:

- **Best for:** Case document analysis, case document generation, case workflows like economics analysis and case strategy development, case analysis and summarization

- **Value-add:** Built-in verification systems, source document linking, legal-specific knowledge

- **Critical difference:** Human expert review integrated into the workflow to ensure data is accurate and elements like handwritten notes or imaging are incorporated into your case insights.

Supio is purpose-built for PI litigation with security and quality controls baked into the architecture: SOC 2 Type II certification, HIPAA and GDPR compliance, and expert-reviewed features that prevent hallucinations and surface missing data. That's the difference between a demo and a deployable solution.

So how do you make sure the next tool you vet is built to the same standard?

Here's your checklist.

AI Vendor Evaluation Checklist

Ask these questions and watch out for specifics.

- ☐ Can the tool read medical records, bills, imaging, and transcripts?

- ☐ Was this tool built for PI or retrofitted from another industry?

- ☐ Can it identify missed injuries, connect ICDs to treatment, and flag billing errors?

- ☐ What changed for firms like ours after 30 days? 6 months?

- ☐ Is it HIPAA and SOC 2 compliant? Where is data stored and who can access it?

- ☐ Can we export or delete our data anytime? Are audit logs available?

- ☐ Who owns onboarding and support?

- ☐ How often is the product updated? What's one feature built from user feedback?

- ☐ Can we test the tool with real cases? How do we measure success?

AI You Can Trust

Specialized legal AI platforms like Supio incorporate custom built AI models that understand personal injury documents and workflows. And with SOC2 certification, HIPAA and GDPR compliance, your sensitive case information is protected by the highest security standards in the industry.

SOC 2 TYPE II CERTIFIED — AICPA SOC

HIPAA COMPLIANT

GDPR COMPLIANT

Step 6. Reframe ROI for execs and partners

If you want buy-in from partners and firm leadership, don't talk about tools. Show the delta. What changed after AI got involved?

- How many more cases hit the demand stage last quarter?
- How much faster are files closing post-depo?
- What's the average increase in settlement value after adopting AI?

Curious what real change looks like after AI adoption?

Visit the Supio Customer Center.

There, you'll find case studies from firms that moved faster, caught missed injuries, and standardized processes.

Explore Customer Stories ↗

This is especially critical at contingency-based firms where revenue is tied to outcomes, not hours billed. If AI shortens timelines, improves prep, or bumps up settlement values by even 10%, that's a material impact.

Objections are predictable. If you don't get ahead of them, they calcify.

Here's how to tackle the most common ones.

Objection	How to address
"It'll replace us."	Show how it frees up time, not jobs. Example: medical chronologies drop from 4 hours to 20 minutes. Use that time for client calls, not Ctrl+F.
"I don't trust it."	Run a side-by-side. Take a real file and compare AI output to your sharpest paralegal's summary. Let the quality speak.
"We don't have time to train it."	Don't train AI. Train tasks. Assign a real use case (e.g. treatment timeline) and walk through it live. Show how fast someone can get to value.
"What's the ROI?"	Pull throughput numbers. How many cases hit demand stage faster? How much prep time dropped? Frame it as margin protection.

See Supio in Action

Book a demo to see all the ways Supio can help your firm maximize settlements and take on more cases.

Book A Demo ↗