AI Readiness Checklist for Law Firms
[Levantage AI Advisors for Law Firms](#)

Before implementing AI tools in your legal practice, use this checklist to evaluate your firm's readiness. These categories will help ensure you have the right foundation, strategy, and safeguards in place.

1. Strategy & Leadership

- ✔ Leadership understands the potential benefits and limitations of AI.
- ✔ Clear goals have been defined (e.g., increase efficiency, improve client experience, reduce costs).
- ✔ A small pilot project is chosen to test AI before full implementation.

2. Data & Infrastructure

- ✔ Client data is well-organized and stored securely (e.g., in a case management system).
- ✔ Staff know where to access key documents and workflows are documented.
- ✔ You've reviewed the compatibility of your systems with potential AI tools (e.g., Clio, Lawmatics, Zapier).

3. Compliance & Ethics

- ✔ You understand your state bar guidelines regarding AI and legal tech.
- ✔ You have protocols to avoid inputting confidential data into unsecured AI tools.
- ✔ You plan to keep a human in the loop for all AI-assisted legal outputs.

4. Team Readiness & Training

- ✔ Staff are open to using new technology and willing to adapt.
- ✔ At least one team member is responsible for overseeing AI tool usage.
- ✔ You've identified training resources or consulting support for implementation.

5. Vendor & Tool Selection

- ✔ You've researched and shortlisted AI tools that meet your firm's needs.
- ✔ You've checked privacy policies, data handling practices, and user reviews.
- ✔ You plan to start with low-risk, high-reward areas (e.g., marketing, intake automation).

🪢 Tip: Use this checklist before and after implementation to ensure you're aligned with best practices.