

6 STEPS TO ENSURE SUCCESS

Implementing any technology system entails a certain amount of risk, as no technology can deliver ROI unless it is embraced by the users it is meant to serve. The implementation of an AI tool is no exception.

To succeed, a firm's technology decision maker must do more than select the right AI solution. He or she must set the stage within the firm for usage of the new tool, as well as establish the right lines of communication for feedback and requests for support and ongoing training.

This document was created to provide a step by step guide to follow when selecting and implementing an AI solution.

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STEP 1: IDENTIFY USE CASES & KEY STAKEHOLDERS

1. Identify key stakeholders and ensure you have their buy-in for introducing AI into the firm. Keep in mind that while at boutique firms the buyers of new technology will also be the users, at very large firms there can be multiple layers of stakeholders.
2. Uncover the stakeholders' pain points prior to interviewing AI vendors. Specifically, survey the stakeholders and practice heads to determine their exact needs.
3. Document your needs analysis, so you may compare results once the initial group of employees within your firm begin using the solution. Look for AI vendors who are able to proactively help you with this process.

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STEP 2: SURVEY POTENTIAL VENDORS

Make a list of requirements for any given AI solutions you are exploring, prior to contacting any vendor. For more information, see the AI Buyer's Guide for Law Firms.

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STEP 3: BUILD A COMMUNITY OF INTERNAL CHAMPIONS AS FIRST USERS

Attorneys are busy people, who don't always come from technical backgrounds. This is why you'll want to recruit initial users who are excited about testing an AI solution, and have reasonable expectations as to what it can do for them now while being also excited for its future. If you ask individuals with little interest in new technology or AI, you will not get constructive feedback. Examples of good user categories are:

- Junior associates or other employees who will directly benefit from the automation of repetitive tasks
- Managing partners who want to drive efficiency and strengthen relationships with clients through the introduction of new tools
- Any AI enthusiasts in your firm

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STEP 4: DEVELOP FEEDBACK MECHANISM

Feedback from your initial users is essential. Before you roll out the tool with your test group, determine:

- What you want to know
- How you want your users to provide their feedback (e.g. focus groups, internal surveys, ad hoc emails, etc.)
- How you will determine whether or not the tool meet the needs of both end users, and any other stakeholders. Once again, look for AI vendors who are proactively interested in helping with this process, and in identifying internal champions who can help identify ROI

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STEP 5: DEVELOP A COMMUNICATIONS STRATEGY FOR THE FIRM

Once you receive feedback from the initial users, you will be ready to roll out the AI solution to additional users or possibly even the entire firm. Look at the feedback you've received and use it to develop key messaging and testimonials based around your internal champions. Plan a series of communications to raise awareness of the AI solution prior to user training, in order to ensure employees adopt it.

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STEP 6: ADOPTION STRATEGY/ONBOARDING PROCESS

The AI solution provider you select should have substantial resources to help ensure client success. Plan to:

- Work with vendor's customer success team to leverage their existing frameworks and best practices
- Develop support materials (available from the vendor) as resources for your employees
- Schedule end user training. Find out if the vendor provides demos and in which formats (1-on-1, 1 to many, etc.) for every individual who will access the tool
- Document help/customer service that is available
- Work with the vendor to advise on new features and AI systems that could provide further value with the firm