Legal AI Workflow Readiness Scorecard

In about 10 minutes, identify which legal workflow your organization should automate first, and what needs to be in place before you start.

For Legal Operations, Innovation, General Counsel, and Managing Partners

BY THE END YOU WILL HAVE

- An overall readiness score
- Scores by workflow area
- A shortlist of AI-suitable workflows
- A recommended starting stage
- A practical 30-day action plan

WHY THIS SCORECARD EXISTS

Many firms want to use AI in legal work, but are unsure which process to improve first. This scorecard gives you a shared way to compare options across four areas: workflow value, process readiness, technology and data, and risk and governance. Complete it once, share the results with partners, IT, and security, and leave with a clear, evidence-based recommendation for a first pilot.

HOW TO COMPLETE IT

1. **Firm snapshot**
   Your role, firm type, systems, and priority practices.
2. **Score four dimensions**
   Rate each item from 1 to 5. Low scores are useful signals.
3. **List candidate workflows**
   Name up to five workflows you are considering.
4. **Tally and interpret**
   Calculate your stage and shortlist.
5. **30-day plan**
   Assign owners and dates for next steps.

Firm snapshot

Complete this before scoring. It frames the rest of the worksheet and helps interpret your results.

ORGANISATION / FIRM NAME

YOUR ROLE / TITLE

FIRM TYPE (AM LAW / MID / BOUTIQUE / IN-HOUSE)

APPROX. ATTORNEYS / LEGAL FTES

PRIMARY JURISDICTION(S)

PRIORITY PRACTICE AREAS / MATTER TYPES

CURRENT LEGAL TECH STACK (PMS, DMS, INTAKE, E-DISCOVERY, ETC.)

Score each dimension from 1 to 5. On the next pages, rate every criterion, then total each dimension. Use the notes column for brief evidence such as volume, tools, owners, or blockers.

SCALE 1 Not ready 2 Weak 3 Partial 4 Strong 5 Pilot-ready

DIMENSION 1 Workflow value

Is this work worth automating? Consider volume, friction, and business impact.

CRITERION	1	2	3	4	5	NOTES / EVIDENCE
Volume and frequency. The work repeats weekly or monthly at meaningful scale	☐	☐	☐	☐	☐	
Time cost. Hours spent per cycle on intake, review, research, or follow-up	☐	☐	☐	☐	☐	
Business impact. Effect on revenue, client experience, risk, or capacity if improved	☐	☐	☐	☐	☐	
Error and leakage risk. Mistakes, missed deadlines, or lost matters today	☐	☐	☐	☐	☐	
Strategic fit. Aligns with firm priorities such as growth, margin, or service	☐	☐	☐	☐	☐	
Dimension 1 subtotal (max 25) · average (/5)						

CANDIDATE WORKFLOWS

Examples: **intake and conflicts** · **client updates** · **contract triage** · **research drafts** · **deposition summaries**

#	WORKFLOW NAME	OWNER / TEAM	HRS / WEEK	PAIN (1 TO 5)
1				
2				
3				
4				
5				

SCALE 1 Not ready 2 Weak 3 Partial 4 Strong 5 Pilot-ready

DIMENSION 2 Process readiness

Is the work defined clearly enough for consistent automation support?

CRITERION	1	2	3	4	5	NOTES / EVIDENCE
Documented steps. An SOP, playbook, or checklist exists and is current	☐	☐	☐	☐	☐	
Stable inputs and outputs. Clear triggers, templates, and deliverables	☐	☐	☐	☐	☐	
Decision rules. When people must approve versus when work can proceed	☐	☐	☐	☐	☐	
Exception handling. Edge cases are known and escalated consistently	☐	☐	☐	☐	☐	
Ownership. A named owner is accountable for quality and change	☐	☐	☐	☐	☐	
Dimension 2 subtotal (max 25) · average (/5)						

Documentation and ownership are the biggest predictors of a smooth pilot. If most scores here are low, plan a short definition step before any automation.

SCALE 1 Not ready 2 Weak 3 Partial 4 Strong 5 Pilot-ready

DIMENSION 3 Technology and data readiness

Can your systems and data support an integrated assistant in your environment?

CRITERION	1	2	3	4	5	NOTES / EVIDENCE
System of record. PMS, DMS, or CRM holds the matter data you would need	☐	☐	☐	☐	☐	
Integration access. APIs or exports for tools such as Clio, Aderant, or Elite	☐	☐	☐	☐	☐	
Data quality. Fields are complete, naming is consistent, history is usable	☐	☐	☐	☐	☐	
Document access. Templates, prior work, and clause banks are findable	☐	☐	☐	☐	☐	
Environment posture. Work can run in a firm-controlled environment	☐	☐	☐	☐	☐	
Dimension 3 subtotal (max 25) · average (/5)						

You do not need every system integrated on day one. A single well-owned system of record plus reliable document access is often enough to start.

SCALE 1 Not ready 2 Weak 3 Partial 4 Strong 5 Pilot-ready

DIMENSION 4 Risk and governance

Can you introduce AI without creating ethics, privilege, or client-trust problems?

CRITERION	1	2	3	4	5	NOTES / EVIDENCE
Privilege and confidentiality. Clear rules for what data AI may touch	☐	☐	☐	☐	☐	
Human review. Attorney review gates for client-facing outputs	☐	☐	☐	☐	☐	
Audit and traceability. Ability to log prompts, sources, and decisions	☐	☐	☐	☐	☐	
Policy readiness. AI use policy, vendor review, or bar ethics guidance in place	☐	☐	☐	☐	☐	
Client and matter constraints. Sensitive matters excluded or under stricter rules	☐	☐	☐	☐	☐	
Dimension 4 subtotal (max 25) · average (/5)						

PAUSE FLAGS Check any that apply. Two or more means fix fundamentals before choosing a pilot.

- ☐ No agreement on where client data may be processed
- ☐ No attorney review required for AI-assisted client work product
- ☐ Target workflow has no documented steps or owner
- ☐ Matter data lives only in email or personal drives
- ☐ Leadership expects full automation of legal judgment in phase one
- ☐ Current AI use is informal with no audit trail

Your results

Transfer the four dimension subtotals from the previous pages. Overall score equals the sum of the four dimension averages (maximum 20).

DIMENSION	SUBTOTAL (OUT OF 25)	AVERAGE (OUT OF 5)
1. Workflow value		
2. Process readiness		
3. Technology and data		
4. Risk and governance		
Overall (sum of averages, max 20) or raw total / 100		

YOUR RECOMMENDED STARTING STAGE Based on the overall score out of 20

0 to 8
FOUNDATION
Strengthen ownership, data access, and AI policy before any pilot.

9 to 13
PREPARE
Choose one narrow workflow. Document steps and define review points.

14 to 17
PILOT
Run a 30 to 60 day pilot on one high-value, well-owned workflow.

18 to 20
SCALE
Extend to related workflows. Standardize playbooks and partner sign-off.

AUTOMATION SHORTLIST Rank your top three

RANK	WORKFLOW	WHY THIS FIRST	BLOCKERS TO FIX FIRST	EST. HRS / MO
1				
2				
3				

ONE-SENTENCE PILOT RECOMMENDATION

30-DAY NEXT STEPS

WEEK 1	Confirm pilot workflow with ops and practice lead	Owner	By
WEEK 2	Document steps, review gates, and data boundaries	Owner	By
WEEK 3	Define success measures and sample matters	Owner	By

Book an ARIA workflow session

Your assessment identified workflows suitable for AI. Book an ARIA workflow session to validate the highest-value opportunity against your real processes, systems, and governance constraints, and leave with a practical first pilot scope.

Book an ARIA session