
Cedar Grove Law Group

As of September 21, 2026

BUSINESS PROFILE

Regional business law firm serving SMB clients in commercial contracts, employment matters, and real estate transactions. Twelve attorneys and ten paralegals across two offices. Matter intake, conflict checks, and engagement letters follow established playbooks but remain document-heavy.

BUSINESS TYPE

Partnership

INDUSTRY

Legal Services

LOCATION

United States

OPERATING REGIONS

North America

COMPANY SIZE

Small (11–50 employees)

CUSTOMER TYPES

Small & Medium Businesses, Consumer

BUSINESS MODEL

Fee-for-Service

REGULATORY CONTEXT

Other

STRATEGIC PRIORITIES

Operational Efficiency, Revenue Growth, Talent, Compliance

KEY SYSTEMS

Custom / Proprietary, CRM, Accounting

DATA SENSITIVITY

Personally Identifiable Information (PII), Financial Records

CURRENT BUSINESS AI POSTURE

MARKETING

Experimenting

Marketing assistant uses ChatGPT for newsletter drafts. Partner review before send.

SALES

Avoiding

Conflict checks and engagement letters are manual. No AI in intake workflow.

DELIVERY

Experimenting

Associates informally use ChatGPT for research memos. No firm policy on client-confidential content.

CUSTOMER SUCCESS

Avoiding

Client status updates are partner-drafted. No AI in client communications.

OPERATIONS

Experimenting

Billing team uses ChatGPT for cover email templates. Time entries remain manual.

GROWTH

Avoiding

Training materials and precedent libraries are static document sets.

IT / TECHNOLOGY

LOGISTICS

Avoiding

Practice management and document management systems are vendor-supported. No AI in IT operations.

Avoiding

Office supplies and print services are managed by the office administrator. No AI in procurement.

CURRENT AI USE

Newsletter and seminar description drafts

BUSINESS FUNCTION

Marketing

TOOL / VENDOR

ChatGPT

WHO IS USING

Marketing assistant

WORK SUPPORTED

Drafting client alert emails and event descriptions

PROCESS DOCUMENTED

Documented and repeatable

IS IT HELPING?

Yes

CREATING REWORK / PROBLEMS?

No

INFORMATION SHARED

No client-identifying information — generic legal topics only.

APPROVED?

Yes

NOTES

Managing partner reviews before external send.

Research memo first drafts

BUSINESS FUNCTION

Delivery

TOOL / VENDOR

ChatGPT

WHO IS USING

Junior associates

WORK SUPPORTED

Drafting background sections for internal research memos

PROCESS DOCUMENTED

No

IS IT HELPING?

Partly

CREATING REWORK / PROBLEMS?

Partly

INFORMATION SHARED

Associates instructed not to paste client facts; compliance not verified.

APPROVED?

Partly

NOTES

Shadow use — firm policy update in progress.

Invoice cover letter templates

BUSINESS FUNCTION

Operations

TOOL / VENDOR

ChatGPT

WHO IS USING

Billing coordinator

WORK SUPPORTED

Standard billing correspondence templates

PROCESS DOCUMENTED

Informal / primarily in one person's head

IS IT HELPING?

Yes

CREATING REWORK / PROBLEMS?

No

INFORMATION SHARED

No matter-specific details in templates.

APPROVED?

Yes

NOTES

Approved for non-confidential billing language only.

Time Entry Narrative Assistance

Operations · In Progress

OPPORTUNITY BEING ASSESSED

TITLE

Time Entry Narrative Assistance

BUSINESS FUNCTION

Operations

OWNER

Rita Fernandez, Director of Operations

STATUS

Deferred

VALUE PROPOSITION

Improve accuracy

CURRENT FRICTION

Attorneys batch-enter time weekly. Narrative descriptions are inconsistent and often rejected by billing review.

DESIRED CHANGE

Suggest clearer billing narratives from attorney-entered activity prompts while keeping attorney certification and billing review intact.

SUCCESS INDICATOR

Rejected time-entry narratives reduced by 25%; attorneys certify every submitted entry; no privileged strategy appears in invoices.

AI'S ROLE

AI suggests billing narrative language from approved matter metadata and attorney prompts. Attorneys certify accuracy before billing review.

ASSESSMENT

STATUS

In Progress

VERSION

LIGHTNING_1.0

STARTED

9/21/2026

READINESS PROFILE

Dimension	Status	Key Observation
Process	READY TO INVESTIGATE	Time entry narratives follow a predictable path from calendar/docket activity to billing review. AI can suggest clearer descriptions, but attorneys must confirm accuracy before submission.
Data & Information	NEEDS ATTENTION	Billing narratives include client and matter details that may reveal strategy. Drafting should use matter metadata from approved systems and avoid sending privileged text to unmanaged tools.
People & Training	READY TO INVESTIGATE	Attorneys already write narratives; the behavior change is editing for billing clarity and privilege risk. Billing reviewers can provide early feedback on rejected or vague entries.
Risk & Security	NEEDS ATTENTION	The risk is lower than client-facing drafting but still real: inaccurate narratives can create billing disputes or reveal privileged strategy. Human certification remains required.
Technology & Vendor	NEEDS ATTENTION	Calendar, DMS, and billing systems are not connected in a governed AI workflow. Start with draft suggestions inside the billing review process rather than automated time entry.

OVERALL INTERPRETATION

Billing narrative assistance is lower risk but lower priority. Time entry pilots should not distract from client-facing intake workstreams.

QUESTION RESPONSES

PROCESS

We can explain how the current work is performed from beginning to end.

YES

The people involved generally perform the work in a consistent way.

YES

We understand what a good result looks like.

YES

We know where judgment, exceptions, or escalation are required.

YES

The process is documented well enough to support testing or improvement.

YES

We know who owns the process and who can approve changes to it.

YES

DATA & INFORMATION

We know what information the AI would need to perform this work.

PARTLY

We know where that information comes from and who owns it.

PARTLY

The information is accurate, complete, and usable enough for the intended purpose.

NO

We know what information would be shared with the AI and understand whether it is appropriate and permitted to share that information with the specific tool being considered.

NO

We understand whether customer, employee, financial, confidential, proprietary, regulated, or restricted information is involved.

PARTLY

We know what information should not be provided to the AI.

PARTLY

PEOPLE & TRAINING

The people involved are willing to try AI for this use case.	YES
They can learn how to provide useful instructions and context.	YES
The proposed AI use fits reasonably into how the work is performed.	YES
Someone involved has enough subject-matter expertise to evaluate the AI output.	PARTLY
We know what quality or accuracy is acceptable for this use case.	PARTLY
People understand that AI output may need to be challenged, corrected, or rejected.	PARTLY
It is clear who remains responsible for the final work or decision.	PARTLY
People understand when human review is required.	PARTLY

RISK & SECURITY

We know whether this use is internal, employee-facing, customer-facing, vendor-facing, or public.	YES
We know who will see, use, or rely on the AI output.	YES
We understand what could happen if the AI is wrong.	YES
We know when human review is required before the output is used.	PARTLY
We have or can establish acceptable-use boundaries for this use case.	PARTLY
We can document, when appropriate, what the AI did, what information it used, who reviewed it, and what action was taken.	PARTLY

We know who is responsible for identifying and responding to security or privacy concerns.

PARTLY

TECHNOLOGY & VENDOR

We know which technology platforms and vendors touch this process or its information.

PARTLY

We know whether those vendors use AI in relevant features or services.

PARTLY

We understand what information may be sent to or processed by the AI service.

NO

We understand how information is stored, retained, or shared.

NO

We know whether information may be used to train or improve models or services.

NO

We know what controls are available, including whether AI features can be disabled or configured.

NO

We understand who has access to the data and what happens to it if we stop using the vendor.

NO

The proposed technology is a reasonable fit for the intended business use.

NO

OPEN QUESTIONS

Which matter metadata can be used without exposing privileged strategy in AI prompts?	MEDIUM	OPEN
What narrative formats reduce billing reviewer rejection while satisfying client guidelines?	MEDIUM	OPEN
Can suggestions live inside the billing review workflow instead of a separate AI tool?	MEDIUM	OPEN

ASSUMPTIONS

Attorneys certify every narrative before submission.	UNVERIFIED
Billing reviewers can tag rejected narratives to refine guidance.	UNVERIFIED
The pilot will not create or submit time entries automatically.	UNVERIFIED

RISKS

Suggested narrative reveals privileged strategy or sensitive matter posture	OPEN
LIKELIHOOD	DECISION
Medium	Reduce
Attorney submits inaccurate AI-suggested billing narrative	OPEN
LIKELIHOOD	DECISION
Medium	Reduce
Client billing guidelines are violated by generic language	OPEN

LIKELIHOOD	DECISION
Low	Reduce

CONSTRAINTS

Professional responsibility obligations require accurate billing and confidentiality.	REGULATORY	IDENTIFIED
Attorney certification cannot be delegated to AI or billing staff.	OTHER	IDENTIFIED

ACTION ITEMS

Catalog top billing narrative rejection reasons	INVESTIGATION	OPEN
Define privileged-language exclusions for AI suggestions	GOVERNANCE	OPEN
Pilot draft suggestions on internal billing review before invoice release	PILOT PREPARATION	OPEN
Add attorney certification checklist for AI-assisted narratives	GOVERNANCE	OPEN

BUSINESS OBJECTIVES

Reduce rejected billing narratives by 25% during pilot EXPECTED VALUE Quality Improvement
Reduce attorney billing clean-up time by 15% without increasing disputes EXPECTED VALUE Time Savings

TEAM READINESS

Name	Role	AI Familiarity	Business Knowledge	Process Knowledge	Review Capability	Risk Awareness	Notes
Rita Fernandez	Director of Operations	—	—	—	—	—	—
David Park	Associate Practice Lead	—	—	—	—	—	—

Name	Role	AI Familiarity	Business Knowledge	Process Knowledge	Review Capability	Risk Awareness	Notes
Margaret Hale	Managing Partner	—	—	—	—	—	—

AI ROLE ASSIGNMENTS

Role	Person	Notes
AI Sponsor	Rita Fernandez	—
AI Champion	David Park	—
AI Reviewer	Margaret Hale	—

OPERATING GUARDRAILS

Attorneys must certify every AI-assisted billing narrative before submission.	HUMAN REVIEW	PROPOSED
Prompts may not include privileged legal strategy or sensitive matter posture.	DATA HANDLING	PROPOSED
AI suggestions may not automatically create, submit, or alter billable time.	OTHER	PROPOSED

PILOT CHARTERS

Inconsistent weekly time narratives create billing review rejections, write-down risk, and attorney rework.	DRAFT
USERS	
5 attorneys and billing reviewer for non-litigation business-law matters	
IN SCOPE	
Draft billing narrative suggestions from attorney prompts and approved matter metadata	
OUT OF SCOPE	
Automated time capture, privileged strategy text, invoice release without attorney certification	
INFORMATION	

Matter code, task category, attorney-entered activity prompt, client billing guidelines

WORKFLOW

1. Attorney enters activity prompt. 2. AI suggests billing narrative. 3. Attorney edits and certifies. 4. Billing reviewer audits sample and rejection reasons.

HUMAN REVIEW APPROACH

Attorney certification required before every narrative enters billing review.

SUCCESS MEASURES

Rejected narratives -25%; clean-up time -15%; no privilege or billing disputes from pilot entries

RISKS SUMMARY

Privilege leakage, inaccurate descriptions, client billing guideline violations

CONTROLS

Certification checklist; privileged-term exclusions; billing review sampling; no auto-submit

OWNER

Rita Fernandez

DURATION

60 days

STOP CONDITIONS

Any privilege concern; billing dispute tied to AI narrative; attorney certification bypass

DECISION POINT

Day 30: continue or narrow users. Day 60: adopt, integrate with billing workflow, or stop.

Contract First-Draft Generation

Delivery · In Progress

OPPORTUNITY BEING ASSESSED

TITLE

Contract First-Draft Generation

BUSINESS FUNCTION

Delivery

OWNER

David Park, Associate Practice Lead

STATUS

Assessing

VALUE PROPOSITION

Save staff time

CURRENT FRICTION

Standard commercial agreements start from precedent libraries but require heavy customization. First drafts take 4-6 associate hours.

DESIRED CHANGE

Reduce routine first-draft time by generating clause drafts from structured deal terms while preserving associate edit and partner review.

SUCCESS INDICATOR

First-draft time reduced to 2 hours for routine agreements; zero client-facing drafts leave without partner approval.

AI'S ROLE

AI drafts first-pass contract sections from approved templates and structured terms. Associates edit and partners approve before client delivery.

ASSESSMENT

STATUS

In Progress

VERSION

LIGHTNING_1.0

STARTED

9/21/2026

READINESS PROFILE

Dimension	Status	Key Observation
Process	READY TO INVESTIGATE	Commercial contract drafting already starts from precedent selection, deal terms, associate editing, and partner review. AI can draft first-pass clauses from structured terms, but partner approval remains the release gate.
Data & Information	SIGNIFICANT CONCERN	Draft agreements contain client strategy, negotiated terms, and confidential counterparty details. The pilot should use approved templates and anonymized/de-identified deal facts until vendor confidentiality is settled.
People & Training	NEEDS ATTENTION	Associates can benefit from first drafts, but they need training to spot clause drift, missing jurisdiction-specific language, and overconfident AI phrasing before partner review.
Risk & Security	SIGNIFICANT CONCERN	Bad contract language creates direct client liability. AI output must be treated as draft work product, not legal advice, with partner review on every client-facing document.
Technology & Vendor	NEEDS ATTENTION	The DMS and precedent library are not connected to an approved legal AI platform. Select a vendor with legal-specific confidentiality terms before drafting against real matter content.

OVERALL INTERPRETATION

Contract first-draft generation is the highest-value follow-on once intake summarization proves accurate. Precedent library search should wait for document management integration.

QUESTION RESPONSES

PROCESS

We can explain how the current work is performed from beginning to end.

YES

The people involved generally perform the work in a consistent way.

YES

We understand what a good result looks like.

YES

We know where judgment, exceptions, or escalation are required.

YES

The process is documented well enough to support testing or improvement.

YES

We know who owns the process and who can approve changes to it.

YES

DATA & INFORMATION

We know what information the AI would need to perform this work.

PARTLY

We know where that information comes from and who owns it.

PARTLY

The information is accurate, complete, and usable enough for the intended purpose.

NO

We know what information would be shared with the AI and understand whether it is appropriate and permitted to share that information with the specific tool being considered.

NO

We understand whether customer, employee, financial, confidential, proprietary, regulated, or restricted information is involved.

PARTLY

We know what information should not be provided to the AI.

PARTLY

PEOPLE & TRAINING

The people involved are willing to try AI for this use case.	YES
They can learn how to provide useful instructions and context.	YES
The proposed AI use fits reasonably into how the work is performed.	YES
Someone involved has enough subject-matter expertise to evaluate the AI output.	PARTLY
We know what quality or accuracy is acceptable for this use case.	PARTLY
People understand that AI output may need to be challenged, corrected, or rejected.	PARTLY
It is clear who remains responsible for the final work or decision.	PARTLY
People understand when human review is required.	PARTLY

RISK & SECURITY

We know whether this use is internal, employee-facing, customer-facing, vendor-facing, or public.	YES
We know who will see, use, or rely on the AI output.	YES
We understand what could happen if the AI is wrong.	YES
We know when human review is required before the output is used.	PARTLY
We have or can establish acceptable-use boundaries for this use case.	PARTLY
We can document, when appropriate, what the AI did, what information it used, who reviewed it, and what action was taken.	PARTLY

We know who is responsible for identifying and responding to security or privacy concerns.	PARTLY
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TECHNOLOGY & VENDOR

We know which technology platforms and vendors touch this process or its information.	PARTLY
We know whether those vendors use AI in relevant features or services.	PARTLY
We understand what information may be sent to or processed by the AI service.	NO
We understand how information is stored, retained, or shared.	NO
We know whether information may be used to train or improve models or services.	NO
We know what controls are available, including whether AI features can be disabled or configured.	NO
We understand who has access to the data and what happens to it if we stop using the vendor.	NO
The proposed technology is a reasonable fit for the intended business use.	NO

OPEN QUESTIONS

Which agreement types are routine enough for a first-draft pilot?	MEDIUM	OPEN
Which precedent templates are approved for AI-assisted drafting?	MEDIUM	OPEN
What vendor confidentiality terms satisfy professional responsibility and malpractice requirements?	MEDIUM	OPEN

ASSUMPTIONS

Partner review remains mandatory before any client-facing draft is shared.	UNVERIFIED
Pilot starts with routine commercial agreements, not litigation or regulated specialty matters.	UNVERIFIED
Structured deal terms can be de-identified until vendor terms are approved.	UNVERIFIED

RISKS

AI draft introduces clause language that creates client liability	OPEN
LIKELIHOOD Medium	DECISION Reduce
Associate relies on draft without checking jurisdiction-specific requirements	OPEN
LIKELIHOOD Medium	DECISION Reduce
Client-confidential terms are entered into an unapproved tool	OPEN

LIKELIHOOD	DECISION
High	Reduce

CONSTRAINTS

Professional responsibility obligations require competent review and confidentiality safeguards.	REGULATORY	IDENTIFIED
Client engagement terms and malpractice carrier guidance may restrict AI drafting workflows.	CONTRACTUAL	IDENTIFIED

ACTION ITEMS

Select two routine commercial agreement types for pilot	PILOT PREPARATION	OPEN
Approve template library and forbidden clause categories	GOVERNANCE	OPEN
Complete legal AI vendor confidentiality review	INVESTIGATION	OPEN
Create partner review checklist for AI-assisted first drafts	GOVERNANCE	OPEN

BUSINESS OBJECTIVES

Reduce routine first-draft agreement time from 4-6 hours to 2 hours
EXPECTED VALUE
Time Savings
Maintain zero client complaints or partner escalations tied to AI draft quality
EXPECTED VALUE
Quality Improvement

TEAM READINESS

Name	Role	AI Familiarity	Business Knowledge	Process Knowledge	Review Capability	Risk Awareness	Notes
David Park	Associate Practice Lead	—	—	—	—	—	—
Margaret Hale	Managing Partner	—	—	—	—	—	—

Name	Role	AI Familiarity	Business Knowledge	Process Knowledge	Review Capability	Risk Awareness	Notes
Rita Fernandez	Director of Operations	—	—	—	—	—	—

AI ROLE ASSIGNMENTS

Role	Person	Notes
AI Sponsor	Margaret Hale	—
AI Champion	David Park	—
AI Reviewer	Rita Fernandez	—

OPERATING GUARDRAILS

All AI-assisted contract drafts require partner approval before client delivery.	HUMAN REVIEW	PROPOSED
Only approved templates and de-identified deal terms may be used until vendor terms are approved.	DATA HANDLING	PROPOSED
Litigation and high-risk specialty matters are excluded from the drafting pilot.	VENDOR USE	PROPOSED

PILOT CHARTERS

Routine commercial agreements take 4-6 associate hours to turn precedent language into a usable first draft. USERS 2 associates and 1 partner reviewer for routine commercial agreement pilots IN SCOPE First-pass clauses from approved templates and structured deal terms OUT OF SCOPE Litigation pleadings, final legal advice, client delivery without partner review	DRAFT
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INFORMATION

Approved template clauses and structured deal term checklist with client identifiers removed where possible

WORKFLOW

1. Associate completes deal-term checklist. 2. AI drafts first-pass sections. 3. Associate edits for facts and law. 4. Partner approves before client delivery.

HUMAN REVIEW APPROACH

Associate edit plus partner approval on every client-facing draft.

SUCCESS MEASURES

Draft time ≤ 2 hours; zero unreviewed client-facing AI text; partner satisfaction $\geq 4/5$

RISKS SUMMARY

Clause drift, confidentiality breach, jurisdiction-specific errors

CONTROLS

Approved templates; de-identification; partner checklist; vendor confidentiality review

OWNER

David Park

DURATION

90 days

STOP CONDITIONS

Any confidentiality incident; partner rejection rate above 25%; malpractice carrier objection

DECISION POINT

Day 45: continue or narrow agreement types. Day 90: expand, adopt, or stop.

AI-Assisted Client Intake Summaries

Sales · Completed

OPPORTUNITY BEING ASSESSED

TITLE

AI-Assisted Client Intake Summaries

BUSINESS FUNCTION

Sales

OWNER

Margaret Hale, Managing Partner

STATUS

Ready for Pilot

VALUE PROPOSITION

Reduce cycle time

CURRENT FRICTION

Initial client calls produce lengthy notes. Associates spend 2–3 hours synthesizing intake into matter summaries before partners can approve engagement.

DESIRED CHANGE

Reduce intake synthesis to ≤45 minutes using AI drafts from structured questionnaires. Partners review all summaries before conflict clearance proceeds.

SUCCESS INDICATOR

Intake-to-engagement letter cycle ≤3 business days; associate synthesis time ≤45 minutes.

AI'S ROLE

AI drafts matter summaries and engagement letter outlines from structured intake fields. Associates and partners edit before any client communication.

ASSESSMENT

STATUS

Completed

VERSION

LIGHTNING_1.0

STARTED

9/21/2026

COMPLETED

9/21/2026

READINESS PROFILE

Dimension	Status	Key Observation
Process	READY TO INVESTIGATE	Intake-to-engagement workflow is documented. Associates know where matter-summary drafts would fit. Partner review before client delivery is established practice.
Data & Information	NEEDS ATTENTION	Client confidential information appears in intake notes and engagement materials. Firm must confirm vendor confidentiality commitments and conflict rules before piloting.
People & Training	NEEDS ATTENTION	Associates already use ChatGPT informally. Clear policy on client data and partner sign-off on all external deliverables is needed.
Risk & Security	NEEDS ATTENTION	Incorrect matter-summary or engagement-letter language creates client-service risk. Unauthorized disclosure of client confidences is an ethical and legal risk.
Technology & Vendor	NEEDS ATTENTION	No enterprise legal AI platform selected. Document management system has no native drafting assist. Vendor evaluation should precede firm-wide rollout.

OVERALL INTERPRETATION

Client intake summarization is a strong pilot candidate with clear partner review gates. Informal associate AI use signals demand but also confidentiality risk — firm policy and vendor selection should precede expansion. A 90-day commercial intake pilot with de-identified data is the recommended next step.

QUESTION RESPONSES

PROCESS

We can explain how the current work is performed from beginning to end.

YES

The people involved generally perform the work in a consistent way.

YES

We understand what a good result looks like.

YES

We know where judgment, exceptions, or escalation are required.

YES

The process is documented well enough to support testing or improvement.

YES

We know who owns the process and who can approve changes to it.

YES

DATA & INFORMATION

We know what information the AI would need to perform this work.

PARTLY

We know where that information comes from and who owns it.

PARTLY

The information is accurate, complete, and usable enough for the intended purpose.

NO

We know what information would be shared with the AI and understand whether it is appropriate and permitted to share that information with the specific tool being considered.

NO

We understand whether customer, employee, financial, confidential, proprietary, regulated, or restricted information is involved.

PARTLY

We know what information should not be provided to the AI.

PARTLY

PEOPLE & TRAINING

The people involved are willing to try AI for this use case.	YES
They can learn how to provide useful instructions and context.	YES
The proposed AI use fits reasonably into how the work is performed.	YES
Someone involved has enough subject-matter expertise to evaluate the AI output.	PARTLY
We know what quality or accuracy is acceptable for this use case.	PARTLY
People understand that AI output may need to be challenged, corrected, or rejected.	PARTLY
It is clear who remains responsible for the final work or decision.	PARTLY
People understand when human review is required.	PARTLY

RISK & SECURITY

We know whether this use is internal, employee-facing, customer-facing, vendor-facing, or public.	YES
We know who will see, use, or rely on the AI output.	YES
We understand what could happen if the AI is wrong.	YES
We know when human review is required before the output is used.	PARTLY
We have or can establish acceptable-use boundaries for this use case.	PARTLY
We can document, when appropriate, what the AI did, what information it used, who reviewed it, and what action was taken.	PARTLY

We know who is responsible for identifying and responding to security or privacy concerns.

PARTLY

TECHNOLOGY & VENDOR

We know which technology platforms and vendors touch this process or its information.

PARTLY

We know whether those vendors use AI in relevant features or services.

PARTLY

We understand what information may be sent to or processed by the AI service.

NO

We understand how information is stored, retained, or shared.

NO

We know whether information may be used to train or improve models or services.

NO

We know what controls are available, including whether AI features can be disabled or configured.

NO

We understand who has access to the data and what happens to it if we stop using the vendor.

NO

The proposed technology is a reasonable fit for the intended business use.

NO

OPEN QUESTIONS

Which AI vendors offer confidentiality terms acceptable to our malpractice carrier?	MEDIUM	OPEN
Can intake summaries be generated without storing client names in external systems?	MEDIUM	OPEN
What partner review workflow satisfies our professional responsibility obligations?	MEDIUM	OPEN

ASSUMPTIONS

Partners will review and approve all AI-generated client-facing documents.	UNVERIFIED
Intake summaries use de-identified fact patterns until engagement is confirmed.	UNVERIFIED
Enterprise tool pricing is feasible for a 22-person firm.	UNVERIFIED

RISKS

AI draft includes incorrect clause that creates client contract exposure	OPEN
LIKELIHOOD	DECISION
Medium	Reduce
Associate pastes client-confidential facts into non-approved AI tool	OPEN
LIKELIHOOD	DECISION
High	Reduce
Client receives unreviewed AI output under deadline pressure	OPEN

LIKELIHOOD	DECISION
Low	Reduce

CONSTRAINTS

Professional responsibility rules require competent representation and confidentiality safeguards.	REGULATORY	IDENTIFIED
Malpractice insurance may impose notification requirements for new AI tooling.	CONTRACTUAL	IDENTIFIED

ACTION ITEMS

Review malpractice carrier guidance on generative AI use	INVESTIGATION	OPEN
Publish firm AI use policy with client confidentiality rules	GOVERNANCE	OPEN
Evaluate 2 enterprise intake-summary tools with partner working group	INVESTIGATION	OPEN
Pilot intake summaries on 5 non-litigation matters	PILOT PREPARATION	OPEN

BUSINESS OBJECTIVES

Reduce intake-to-engagement letter cycle from 5 days to ≤3 days within 90 days
EXPECTED VALUE
Time Savings
Maintain zero client complaints related to document accuracy during pilot
EXPECTED VALUE
Quality Improvement

TEAM READINESS

Name	Role	AI Familiarity	Business Knowledge	Process Knowledge	Review Capability	Risk Awareness	Notes
Margaret Hale	Managing Partner	—	—	—	—	—	—
David Park	Associate Practice Lead	—	—	—	—	—	—

Name	Role	AI Familiarity	Business Knowledge	Process Knowledge	Review Capability	Risk Awareness	Notes
Rita Fernandez	Director of Operations	—	—	—	—	—	—

AI ROLE ASSIGNMENTS

Role	Person	Notes
AI Sponsor	Margaret Hale	—
AI Champion	David Park	—
AI Reviewer	Rita Fernandez	—

OPERATING GUARDRAILS

No client-identifying information in external AI tools without partner approval and vendor confidentiality terms.	DATA HANDLING	PROPOSED
All client-facing documents require partner review before delivery.	HUMAN REVIEW	PROPOSED
Litigation matters are excluded from AI drafting pilot until policy review completes.	VENDOR USE	PROPOSED

PILOT CHARTERS

Associates spend 2–3 hours synthesizing initial client intake into matter summaries and conflict packets. Engagement letters lag behind competitor firms on routine commercial matters.	DRAFT
USERS 2 associates and 1 paralegal on commercial contract intake for 90 days	
IN SCOPE De-identified intake summaries, conflict-check packets, and engagement letter outlines from structured intake fields	
OUT OF SCOPE	

Litigation pleadings, client emails sent without partner review, trust account workflows

INFORMATION

Structured intake questionnaire responses — client names tokenized until engagement confirmed

WORKFLOW

1. Paralegal completes intake questionnaire. 2. AI drafts matter summary and engagement-letter outline. 3. Associate edits. 4. Partner approves before client delivery.

HUMAN REVIEW APPROACH

Partner review required on all client-facing output; associate review on internal summaries.

SUCCESS MEASURES

Intake summary time ≤45 minutes; engagement letter cycle ≤3 days; zero accuracy complaints

RISKS SUMMARY

Confidentiality breach; incorrect contract language; ethical compliance

CONTROLS

De-identification step; approved vendor only; partner sign-off gate; malpractice carrier notification

OWNER

Margaret Hale

DURATION

90 days

STOP CONDITIONS

Any confidentiality incident; malpractice carrier objection; partner satisfaction below 3/5

DECISION POINT

Day 45: continue, narrow scope, or stop. Day 90: expand, adopt, or discontinue.