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# GenAI Readiness Checklist

By Robin Snasdell and Murtuza Vohra



As artificial intelligence (AI) continues to revolutionize industries, law firms and legal departments are exploring ways to integrate AI into their workflows. From streamlining document review and legal research, to enhancing data analysis and contract management, AI offers powerful tools to improve efficiency and accuracy. However, the successful implementation of AI requires careful planning, adherence to ethical guidelines, and strategic investment in technology and training.

This checklist is designed to guide law firms and legal departments through the key steps involved in integrating AI into their processes.



### ✓ Define Objectives

- Consider what AI is best at, currently: summarizing, analyzing, interpreting, reviewing, etc.
- How do these specialties fit into your business objectives? For example:
  - Document review
  - Workflow automation
  - Legal research
  - Contract analysis
  - Compliance monitoring
- Prioritize your business objectives based on how pressing each need is.
- Clarify your desired outcomes, like increased efficiency, cost savings, or improved decision-making.

### ✓ Cost-Benefit Analysis

- Conduct a thorough cost-benefit analysis to evaluate the potential savings and efficiency gains from AI adoption.
- Costs should include:
  - upfront costs of AI adoption
  - ongoing costs of the lifecycle of the solution
  - subscription fees
  - maintenance
  - potential upgrades
- Estimate the potential ROI for each department affected and calculate the total.
- Propose cost allocation based on which departments will most benefit from the AI initiative.

### ✓ Early Stakeholder Involvement

- Engage your key stakeholders including legal professionals, IT staff, and management to ensure buy-in and support for the AI initiative.
- Ensure that all end users (lawyers, contract managers, etc.) are kept in the loop.

### ✓ Assess Current Technology

- Evaluate your existing systems to ensure compatibility with the proposed AI solutions. Make sure to cover your bases:
  - Legal systems
  - Compliance systems
  - Any relevant workflows in place
- Identify any gaps in your technology stack that need to be upgraded to support AI integration.

### ✓ Ethical and Compliance Concerns

- Research and consider the risks of AI integration:
  - Ethical implications
  - Biases
  - Transparency of AI decision-making
  - Accountability to AI-generated decisions
  - Impact on your organization's reputation
- Ensure that the use of AI complies with relevant laws and regulations, and stay updated on regulations affecting AI use including:
  - data privacy
  - confidentiality protocols
  - intellectual property
  - ethical guidelines

### ✓ Select the Right AI Tools and Platforms

- Research AI tools that align with your organizational goals and industry standards.
  - Do you need these tools to be legal-specific or more general, covering additional departments?
- Choose reputable AI vendors with a proven track record and strong support and maintenance services to ensure you will have their help when you need it.
- Set up demos with key stakeholders and create pros/cons list for each vendor option.
- Ensure sufficient budget, staffing, and technical support for long-term AI adoption.

### ✓ Change Management

- Once a vendor is chosen, develop a change management strategy to facilitate adoption.
- Create dedicated teams to oversee the AI initiative and its integration across your organization.
- Keep all relevant parties in the loop on how things will change, the intended benefits of the AI initiative, and upcoming training.
- Anticipate some resistance to change and promptly address any concerns as they arise.

### ✓ Pilot the AI Solution

- Start with a small-scale pilot program with a designated test group to measure the effectiveness and integration of the AI tool.
- Collect feedback and adjust the solution as needed before scaling up.

### ✓ Continuous Improvement

- Create training programs to ensure employees understand how to use AI tools effectively.
- Implement processes to review and edit AI-generated content for quality and accuracy before use.
- Continuously train and refine AI models to keep them up-to-date with any policy changes or new legal standards so they can adapt to future challenges.
- Set up monitoring and performance tracking to assess the success of the initiative.
- Keep refining processes based on your users' feedback and performance metrics.

By following this checklist, law firms and legal departments can ensure they are taking a structured and comprehensive approach to implementing AI technology.

If you're looking for a partner to help guide you through this process, Morae can work alongside you and your teams as you go through this checklist. We've helped many mid- to large-sized law firms and corporations assess their current operations, plan for the future, and implement AI-enabled workflows and tools successfully.

For more information on our proven track record of AI integration and our MorAI business consulting solutions, visit [morae.com/ai](https://morae.com/ai) or reach out to us at [info@morae.com](mailto:info@morae.com)

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