

MPL LEGAL TECH ADVISORS

# The 90-Day Legal Team AI Rollout Roadmap

CONTROL AI BEFORE IT CONTROLS YOUR TEAM

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## What You Get In This Kit

- One-page policy: approved tools, red lines, disclosure clause
- Pilot tracker: usage %, edit rate %, hours saved
- Tool-by-task matrix: which tool is allowed for which workflow
- Verification checklist: cites | facts | reasoning → tag every AI draft

Everything else is optional.

These four are not.



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# The 90-Day Framework Overview

This roadmap breaks AI adoption into three distinct phases, each with specific deliverables and decision points:

## **PHASE 1: Weeks 0-2 | SET GUARDRAILS & ACCESS**

- Establish your one-page AI use policy
- Define approved tools and access tiers
- Launch 60-minute training for the whole team

*If guardrails aren't clear, do not move forward.*

## **PHASE 2: Weeks 2-6 | ONE DEPARTMENT-WIDE PILOT**

- Pick one admin workflow (high volume, low risk, easy to verify)
- Track weekly metrics (time saved, edit rate, quality flags)
- Gather adoption data and refine

*Week 4 decision: KEEP / KILL / MODIFY. No "maybe."*

## **PHASE 3: Weeks 6-9 | SCALE WHAT WORKED, KILL WHAT DIDN'T**

- Codify successful workflow as SOP
- Expand to second practice group
- Publish tool-by-task matrix department-wide

## **DAY 91+ | RUN THE FLYWHEEL QUARTERLY**

- Update policy and tool list based on results
- Scale one proven workflow, retire one that failed
- Plan next quarter's expansion

## **SUCCESS AT DAY 91**

- One workflow running smoothly with measurable time savings
- Team uses approved tools only, per matrix
- Every AI output verified and tagged

- Zero shadow AI
- Leadership dashboard proves time saved and risk controlled

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## **PHASE 1. Weeks 0-2 | SET GUARDRAILS AND ACCESS**

### **Week 0-2 Checklist:**

#### **One-Page AI Policy:**

- No client identifiers in public models
- Only department-approved tools for matter data
- Human review is non-optional
- Consent rule → if AI touches identifiable data, get it in writing
- Prompt hygiene → replace names with [CLIENT\_A]
- Approved tools list with exact allowed uses

#### **Access Model That Matches Risk:**

##### **Baseline** (everyone):

- Adobe AI Assistant → doc Q&A / formatting
- Lexis+ AI → research starting points
- Absolutely no open chatbots with client data

##### **Tiered Access** (practice leads / power users):

- ChatGPT Team / enterprise equivalent
- Restricted to non-privileged drafts and templates
- Privileged content → client consent + controlled channel only

#### **Training (60 mins, live or recorded):**

##### **Cover:**

- What AI can / can't do internally
- Approved tools by task
- How to verify + log outputs

##### **But the training does nothing - enforce a pulse:**

- New hires onboarded within 30 days
- 15-min micro-training monthly (one workflow / one pitfall)

- Biweekly office hours (30 min)
- 10-min incident debriefs shared team-wide

#### Data Hygiene Sprint:

- Standardize folder names
- Reduce nesting
- Pick a single source of truth for email-to-matter filing

#### **STOP HERE IF:**

- Your red lines are not written
- Your access model is unclear
- Your tools list is still “implied”

→ Running a pilot without guardrails doesn't prove innovation, it multiplies liability.

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### **PHASE 2. Weeks 2-6 | ONE PILOT, ONE DECISION**

One workflow only.

Criteria:

- High volume
- Low legal risk
- Easy to verify

Good candidates:

- Retainer / standard letter from structured notes
- Email triage (summaries, labels - *no auto-send*)
- Document formatting (TOCs, headings, numbering)

**Pilot Spec (Boring = Safe)**

- **Scope:** One practice group | 1–2 assistants | Executive sponsor
- **Seats:** Power users get premium. Everyone else uses Adobe/Lexis/365.
- **Inputs:** Exact templates | Fixed folder structure | Pre-approved metadata
- **Tooling:** One tool per task → Adobe (Q&A), Lexis (research), ChatGPT Team (template-fill, non-privileged only)
- **Controls:** No client identifiers in public models. Save every prompt/output in matter. Final draft tagged: “*Verified by [initials], [date]*”

### Verification Rule-of-Three

1. Cites
2. Facts
3. Reasoning

*If you can't verify it, don't use it.*

### Weekly Metrics

- Time saved per item
- Edit rate (%)
- Quality flags
- Adoption count



20-Minute Review → Kill what doesn't work. Standardize what does.

### Week 4 Decision Gate

KEEP: ≥30% time saved & <20% edit rate & 0 incidents & >70% adoption

KILL: No measurable time savings | >40% edit | incidents | <40% adoption

MODIFY & RETEST: Value present but unstable.

## Day 91+ | THE QUARTERLY FLYWHEEL

Day 91 is not “done”. It’s where the discipline starts.

Your AI program is now a recurring cycle, not an initiative. Each quarter, you tighten, reassign, and expand one step at a time.

### Quarterly Review Checklist

#### Update policy / SOP / Tool-by-Task Matrix

Reflect pilot metrics + any incidents. If rules aren’t updated, they aren’t real.

#### Scale or Stop

Promote **one** proven workflow department-wide. Retire **one** that didn’t meet your bar.

#### Seat Sanity Check

Premium licenses go to users with usage. Everyone else loses access.

#### Vendor Check-In

Confirm data handling. Log new features. Reassess pricing.

#### Data Hygiene Pulse

Fix one naming/folder issue per quarter. Don’t wait for a rebuild.

#### Training Pulse

Publish next quarter’s micro-training calendar. Refresh quizzes and examples.

Same rule as before: Expand only what’s proven. Strip what isn’t.

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# AI USE POLICY TEMPLATE

Company Name: \_\_\_\_\_

Effective Date: \_\_\_\_\_

Policy Owner (GC / Legal Ops Lead): \_\_\_\_\_

Tool Category	Approved Use	Data Retention Allowed?	Review Cycle
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____

*(Attach separate retention details if required)*

## Red Lines (Never Allowed Without Legal Approval)

- No personally identifiable data in external or unvetted AI tools
- No privileged or regulated content entered into AI systems without review
- No AI-generated outputs sent externally without human verification
- No auto-execution or unsupervised workflows

*(Add team-specific rules if needed)*

## Mandatory Procedure

**Before Using AI:**

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- Confirm tool is on approved list
- Remove identifiers / tokenize names
- Save original input copy

**After Using AI:**

- Human review completed
- Verification applied (see checklist)
- Document tagged:

*"AI-assisted draft. Verified by [INITIALS], [DATE]"*

**Internal Disclosure (If Required)**

"This document contains AI-assisted content reviewed and approved by Legal."

*(Adjust language per policy)*

**Acknowledgment**

I confirm I understand and will comply with this AI use policy.

**Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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# PILOT TRACKER TEMPLATE

Pilot Workflow: \_\_\_\_\_

Business Unit / Function: \_\_\_\_\_

Pilot Period: Week \_\_\_\_ of \_\_\_\_

Reviewed By: \_\_\_\_\_

## ITEM LOG

Entry # \_\_\_\_\_

Task Description: \_\_\_\_\_

Time Without AI: \_\_\_\_\_

Time With AI: \_\_\_\_\_

Time Saved (Minutes): \_\_\_\_\_

Edit Rate (% of AI output rewritten): \_\_\_\_\_

Errors or Close Calls: \_\_\_\_\_

Verified By (Initials): \_\_\_\_\_

Decision (Keep / Kill / Modify): \_\_\_\_\_

Entry # \_\_\_\_\_

Task Description: \_\_\_\_\_

Time Without AI: \_\_\_\_\_

Time With AI: \_\_\_\_\_

Time Saved (Minutes): \_\_\_\_\_

Edit Rate (% of AI output rewritten): \_\_\_\_\_

Errors or Close Calls: \_\_\_\_\_

Verified By (Initials): \_\_\_\_\_

Decision (Keep / Kill / Modify): \_\_\_\_\_

## WEEKLY SUMMARY

Total Items Processed: \_\_\_\_\_

Total Time Saved (Hours): \_\_\_\_\_

Average Edit Rate: \_\_\_\_\_

Incidents Logged: \_\_\_\_\_

Adoption Rate (% of team using AI on eligible tasks): \_\_\_\_\_

**TREND VS LAST WEEK**

- Improving
- Stable
- Declining

**ACTION ITEMS FOR NEXT WEEK**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**WEEK 4 DECISION**

- KEEP (Expand)
- KILL (End / Replace Workflow)
- MODIFY (Adjust and Re-test)

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# TOOL-BY-TASK MATRIX TEMPLATE

Task Type: \_\_\_\_\_  
Approved Tool Category: \_\_\_\_\_  
Allowed Use: \_\_\_\_\_  
Supervision Required?  Yes  No  
Never Use AI For: \_\_\_\_\_

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Approved Tool Category: \_\_\_\_\_  
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Supervision Required?  Yes  No  
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Approved Tool Category: \_\_\_\_\_  
Allowed Use: \_\_\_\_\_  
Supervision Required?  Yes  No  
Never Use AI For: \_\_\_\_\_

## YOUR INTERNAL WORKFLOWS TO BE MAPPED

Workflow Name: \_\_\_\_\_  
Proposed Tool Category: \_\_\_\_\_  
Requires Calibration?  Yes  No

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Proposed Tool Category: \_\_\_\_\_  
Requires Calibration?  Yes  No

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Proposed Tool Category: \_\_\_\_\_  
Requires Calibration?  Yes  No

# VERIFICATION CHECKLIST TEMPLATE

## RULE OF THREE: COMPLETE BEFORE ANY AI OUTPUT LEAVES LEGAL

CITE CHECK

Have all references, sources, or quoted content been validated manually?

FACT CHECK

Have names, dates, figures, and identifiers been confirmed against originals?

REASONING CHECK

Is the logic consistent with jurisdiction, policy, and precedent?

TAG FORMAT (MANDATORY)

*"AI-assisted draft. Verified by [INITIALS], [DATE]."*

### RED FLAG: ESCALATE IMMEDIATELY

- AI output sent without human review
- Privileged or confidential data entered into an unapproved tool
- Verification tag missing or incomplete
- Tool used outside approved matrix

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