

Defensible Pilot Starter Kit

Does this pilot pay for itself, or put your legal team at risk?

Does this pilot recover billable hours or free up lawyer capacity?

The test is whether lost hours turn into billables, or lawyers gain real time back. A few minutes of admin saved isn't worth testing.

Yes No Maybe

Can the value of this pilot be proven within one billing cycle (≈30 days)?

Thirty days are enough to prove a point. If results aren't clear within one cycle, it isn't a pilot, it's an experiment at the legal team's expense.

Yes No Maybe

Do we know exactly what happens to client data?

Where it's stored, who can see it, and when it's deleted must be clear. If not, you risk confidentiality and privilege.

Yes No Maybe

Are we paying for a finished product or using our billable time to make it better for the vendor?

If the tool only works after months of our team training it, the benefit flows to the vendor, not our firm.

Yes No Maybe

Does this tool fit seamlessly into the way we already work?

It should run inside existing processes: Outlook, DMS, PDFs, matter systems. If it disrupts workflows or adds steps, lawyers won't use it.

Yes No Maybe

Have we set a clear stop rule?

Failure must be defined upfront. For example: "If we don't recover 20 hours in the first month, we stop." Without this, costs drift and control is lost.

Yes No Maybe

Scoring

- **All Yes** → Proceed to the **Defensible Pilot Calculator™**
- **Some Maybe, Some No** → Fix the gaps, then retest.
- **Any No** → Stop. This pilot isn't defensible.

*"The best pilot is the one that **funds itself in 30 days** and builds momentum, confidence, partner buy-in and adoption for what comes next."*

If you'd like an independent set of eyes on your candidate pilot, our **Legal AI Risk & Opportunity Audit** gives partners a compliance-ready roadmap in 2-4 weeks. Book your consultation.

[Book a 15min AI & Data Readiness Check](#)

Defensible Pilot Calculator™

Know in 5 minutes if your pilot pays for itself in 30 days, while protecting confidentiality and privilege.

Run this calculator only if your candidate scored ALL YES on the *Defensible Pilot Checklist™*

Part 1: Billable Hours Recovered

Number of lawyers in pilot	
Average billable hourly rate	
Number of hours lost per lawyer per day	
Pilot cost per user per month	

Calculator:

- Step 1 – How much money are we losing each week?**
Weekly loss = Number of lawyers in pilot x Number of hours lost per lawyer per day x Average billable hourly rate x 5
- Step 2 – How much could we get back in a month if the tool works?**
Expected money back per month = Weekly loss x 4 x 60% (success %)
- Step 3 – What does the tool cost each month?**
Tool cost per month = Pilot cost per user per month x Number of lawyers in pilot
- Step 4 – How much are we ahead after paying for the tool?**
Ahead per month = Expected money back per month - Tool cost per month
- Step 5 (Extra) – How fast does the tool pay for itself?**
Break-even (days) = Tool cost per month ÷ (Expected money back per month ÷ 20)

Part 2: Extra Billables Hours

Total number of hours saved per week	
Percentage of hours realistically reallocated to client matters	
Average billable hourly rate	

Calculator:

- **Step 1 – Out of all the hours saved, how many can be used for client work?**
Number of reallocated hours per week = Total number of hours saved per week x Percentage of hours realistically reallocated to client matters
- **Step 2 – How much money does that reallocated time bring in each month?**
Monthly new capacity = Number of reallocated hours per week x Average billable hourly rate x 4

*If this calculator shows your pilot pays for itself in 30 days without adding risk, you've got a defensible pilot. If not, STOP here. Return to the **Defensible Pilot Checklist™**, or examine your processes before testing more tools.*

The calculator shows the numbers, but making them defensible to partners, insurers, and regulators is harder. That's what our **Legal AI Risk & Opportunity Audit** delivers: a compliance-ready roadmap in 2-4 weeks. Book your consultation.

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