



• A 12-MONTH ROLLOUT PLAN

# Legal AI Adoption Framework.

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AUDIENCE

COOs, CIOs, Firm Administrators & Directors of Innovation

EDITION

2026



## • THE THESIS

# Most firms roll out AI in the wrong order.

Most legal AI rollouts begin with substantive practice work, where the partnership has the most to gain. It is also where governance is hardest, time-to-value is longest, and the politics absorb a budget cycle before a single workflow ships.

A faster path sequences the rollout by **business function**, not by tool. Three waves, twelve months, each earning the budget, the data, and the partner support for the next.

## THE FRAMEWORK, IN BRIEF.

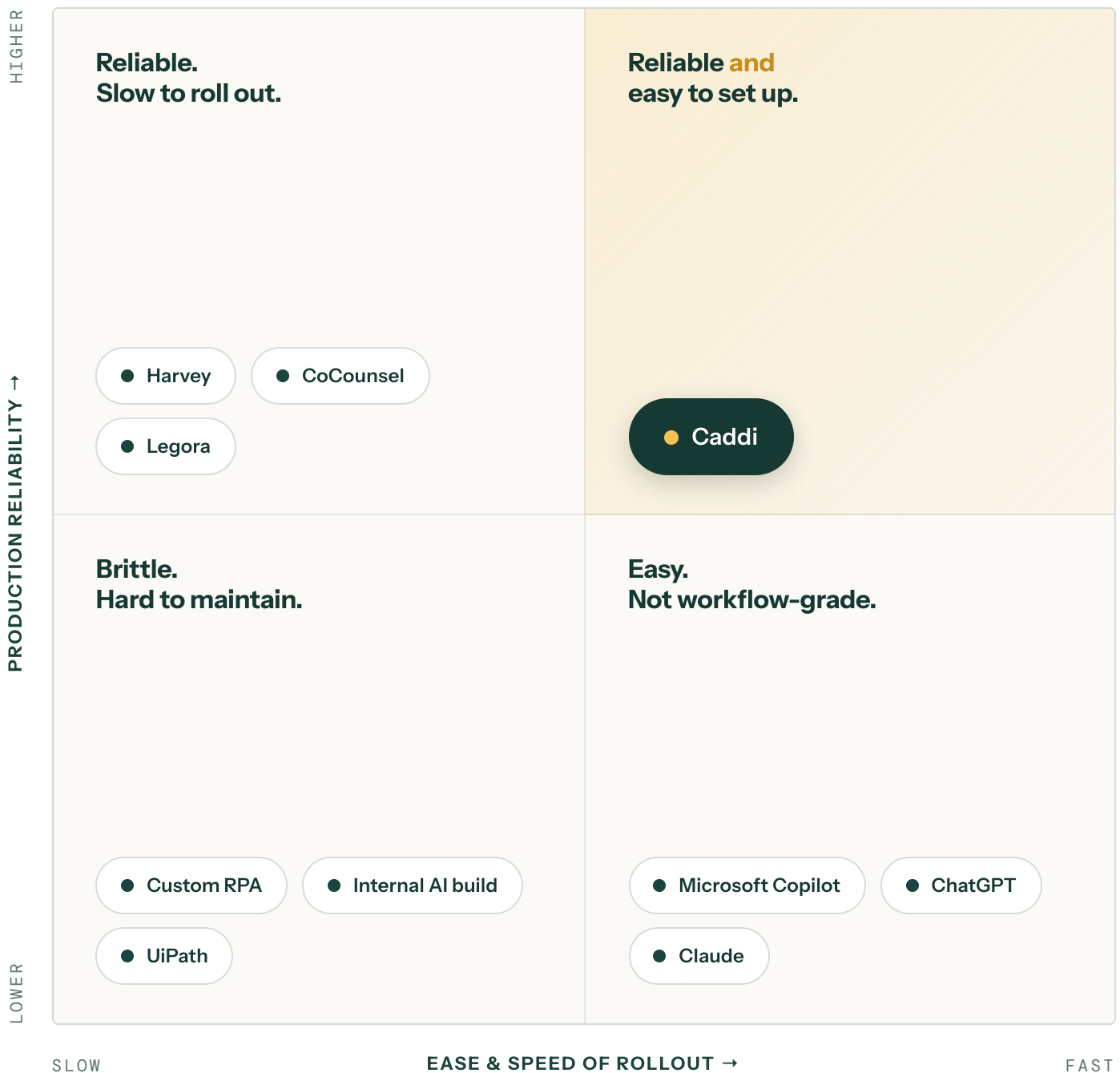
WAVE 01	MONTHS 1 TO 5	<b>Revenue Operations</b>	Intake, conflicts, billing, invoicing. Cash impact inside one quarter. Lower governance, fastest measurable ROI.
WAVE 02	MONTHS 3 TO 9	<b>Firm Operations</b>	Email, documents, search, internal IT. Broad user base, low stakes per workflow, IT-led deployment.
WAVE 03	MONTHS 6 TO 12	<b>Legal Operations</b>	Drafting, research, knowledge management. Highest substantive value, greatest governance burden. Last, not first.

*The rest of this brief makes the case visually. One quadrant, three swim lanes, twelve months.*

• WHERE TO START

# Pick the easy, reliable win **first.**

Plotted on the two axes that matter to a rollout, how **fast a firm sees real value** and how **reliably a tool runs in production**, the market reads more clearly. One quadrant stands alone.



• WAVE STRUCTURE

# Sequence by function, not by tool.

Most legal AI initiatives stall because they begin with substantive practice work. Governance is hardest there, time-to-value is longest, and partner politics absorb a budget cycle before a single workflow ships. A faster path begins in revenue operations, expands to firm operations, then reaches legal operations.

WAVE 01 · MONTHS 1 TO 5

## Revenue Operations

INTAKE · CONFLICTS  
BILLING · INVOICING

M1 | M2 | M3 | M4 | M5 | M6 | M7 | M8 | M9 | M10 | M11 | M12

PILOT · OPERATE · EXPAND

WHY FIRST

Lower governance overhead. Cash impact inside one quarter. Workflows are bounded and repeatable.

REPRESENTATIVE TOOLS

Workflow automation platforms. Examples include Caddi and custom RPA.

WAVE 02 · MONTHS 3 TO 9

## Firm Operations

EMAIL · DOCUMENTS  
SEARCH · INTERNAL IT

M1 | M2 | M3 | M4 | M5 | M6 | M7 | M8 | M9 | M10 | M11 | M12

PILOT · FIRM-WIDE ROLLOUT

WHY SECOND

Broad user base, low stakes per workflow, IT-led deployment. Runs in parallel with the tail of Wave 1.

REPRESENTATIVE TOOLS

Horizontal productivity copilots. Examples include Microsoft 365 Copilot and ChatGPT Enterprise.

WAVE 03 · MONTHS 6 TO 12

## Legal Operations

DRAFTING · RESEARCH  
KNOWLEDGE MANAGEMENT

M1 | M2 | M3 | M4 | M5 | M6 | M7 | M8 | M9 | M10 | M11 | M12

PILOT · PRACTICE-GROUP EXPANSION

WHY THIRD

Highest substantive value, greatest governance burden. Builds on the foundation Waves 1 and 2 establish.

REPRESENTATIVE TOOLS

Legal-specific platforms. Examples include Harvey, CoCounsel, Legora, and Spellbook.

*Each wave earns the budget, the data, and the partner support for the next.*

Month twelve

## What 'done' looks like.

A working program at the twelve-month mark is observable, not aspirational. The signals below describe a firm that has moved from pilot to production across the three waves.

### WAVE 01 · DONE

Revenue operations runs on a **scheduled batch**. Cycle times tracked at the workflow level. ROI defended in committee with real numbers.

### WAVE 02 · DONE

Copilot is **normalized**. IT manages it like any other piece of infrastructure. Personal AI use is no longer a security debate.

### WAVE 03 · DONE

One **flagship practice group** with measurable cycle time and quality metrics. The next group is budgeted.

### NEXT STEP

## Questions to bring to your committee.

01 Which workflow in revenue operations costs the firm the most time today?

*Intake, conflicts, engagement letters, bill review, collections.*

02 Who owns the first loop end to end?

*Not the buyer. An operator inside the workflow.*

03 What does the security review path look like for a new AI vendor?

*SOC 2, data residency, retention, prompt and output logging.*

04 Which one practice group is ready to be the Wave 3 flagship?

*Volume, partner sponsorship, willingness to instrument quality.*

05 What numbers will you show the management committee at month twelve?

*Decide the scoreboard before the first vendor demo.*

06 What happens if Wave 1 underperforms?

*The sequencing assumes a real result. Plan for the alternative.*

*The firms that move first are not the firms with the biggest AI budget. They are the firms with the clearest first loop.*