



Start small. Iterate. Learn.

Pilot AI on one workflow before you roll anything out.

01

Identify it

Pick one of each. Keep it narrow.

- ☐ One workflow
- ☐ One task
- ☐ One owner
- ☐ One user group

02

Define it

Set the boundaries before anyone opens the tool.

- ☐ **Approved data** listed: what the tool may use
- ☐ **Prohibited data** listed: what must never go in
- ☐ **Rules** reviewed: confidentiality, client terms, who signs off
- ☐ **Success** defined: e.g. time saved, fewer errors, faster turnaround

03

Test it

Use examples that look like the real work.

- ☐ Run it on a **representative set** of examples
- ☐ Use **sanitized** examples if you're not in a closed system
- ☐ A **lawyer reviews** every output

04

Measure it

Be honest about what happened.

- ☐ Compare against how the task is done today
- ☐ Record what worked and what didn't in the iteration log (page 2)

05

Decide

Every round ends with a call.

- ☐ Refine
- ☐ Expand
- ☐ Stop

Expect at least three iterations, and often many more.

Rarely does the first one work. Each round teaches you how to implement and adopt.

Log every round

Write down what you changed, what happened and what you decided, so each round's lessons carry into the next one.

ROUND	WHAT WE CHANGED	WHAT HAPPENED	DECISION
1			☐ Refine ☐ Expand ☐ Stop
2			☐ Refine ☐ Expand ☐ Stop
3 the usual minimum			☐ Refine ☐ Expand ☐ Stop
4			☐ Refine ☐ Expand ☐ Stop

If it gets worse, start fresh.

With AI, a workflow sometimes gets worse instead of better after two or three attempts. It gets confused. Don't keep patching it: drop that version and start again with what you've learned.

Want help running your first pilot?

We run hands-on, human-led AI training and implementation for solo and small law firms.

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