

One workflow. A measurable decision.

Complete together before the pilot. Planning template only; no pricing or capability commitments.

1 / Scope and ownership

Workflow / deliverable: _____ Duration: _____

Sponsor / operational owner / attorney reviewer / IT contact: _____

Representative files, volume, jurisdiction, exclusions: _____

2 / Baseline and review standard

Compare like-for-like tasks at the same approval standard. Record separately for each role:

Preparation + intake/transfer + verification + corrections + final handoff.

Current total: _____ Pilot total: _____

Track setup/training, elapsed turnaround, omissions, citation errors, and repeat corrections. Agreed quality threshold / pause conditions: _____

3 / Economics, including the hours you stop billing

Hourly: account for lost collected fees and realistic additional case capacity. **Flat-fee / capped:** compare cost to complete equivalent approved work. Deduct software, setup, training, overlap, and remaining review costs.

State assumptions for demand, rates, labor cost, and realizable savings. Do not count one recovered hour as both payroll savings and new capacity.

Conservative net impact / assumptions: _____

4 / Integration, data, and client requirements

Confirm source of truth, document access, output export, manual handoffs, failed-transfer handling, and any time/billing handoff. Demonstrate required integrations and permissions on a test matter.

Obtain written terms for ownership, retention/deletion, model-training use, subprocessors, and access. Check client AI-use policies before transferring client records.

Approved scope / unresolved dependencies / owner: _____

5 / Budget and approval

Setup fee / recurring fee / usage limits / included support: _____

Maximum pilot spend / change approver: _____

Expected post-pilot cost, overlapping contracts, and exit/export terms: _____

6 / Stop, adjust, or expand

Decision date: _____ Decision owner: _____

Expand only after quality, total effort, system fit, and economics meet agreed thresholds. Record unresolved risks and next scope. Case-management or billing replacement requires its own acceptance criteria.

Decision / next action: _____
