FRAMEWORK | IT

# AI Implementation Roadmap

A Crawl, Walk, Run Framework for AI Adoption

*Prepared for*

Your Company
Logo Here

**Sample Law Firm, LLC**

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www.frameworkit.com

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# 1 Executive Summary

Sample Law Firm, LLC is a mid-sized law firm with well-documented processes spanning client intake, matter management, docketing, billing, discovery, and compliance filings. This operational maturity makes the firm an outstanding candidate for AI-powered augmentation: the workflows are clearly defined, the pain points are identifiable, and the opportunities for time savings are significant.

This roadmap identifies specific AI and automation opportunities drawn directly from the firm's Processes and Procedures Manual and maps them into a phased Crawl, Walk, Run adoption framework. Each initiative is designed to be built on the Framework AI platform (powered by Hatz AI), which the firm has recently adopted alongside its longstanding Framework IT managed services relationship.

The guiding principle throughout is augmentation, not replacement. Every recommendation in this roadmap is designed to make the firm's attorneys, paralegals, and administrative staff more efficient and effective, not to remove human judgment from legal processes. AI serves as a force multiplier for the people who already drive the firm's success.

## How to Read This Document

- Crawl initiatives are low-complexity quick wins. Most involve building dedicated AI agents in Framework AI Chat that staff can select and use immediately, with instructions, tools, and source knowledge files already built in. The one exception is the Personal Communications Agent, which benefits from a Microsoft 365 or Google Workspace integration to analyze communication style.
- Walk initiatives are intermediate-complexity items that involve building workflows in AI Workshop, potentially integrating with firm software systems, or requiring more configuration and testing.
- Run initiatives are higher-complexity projects that involve multi-system integrations, custom workflows, or significant process redesign.
- Where a Framework AI standard agent or workflow already exists that can accelerate an initiative, it is noted as an "Accelerator" in the initiative table. These are pre-built tools that can be deployed immediately or customized to fit the firm's specific needs. Adapting a standard agent is typically a low-complexity effort involving custom instructions, knowledge files, and minor configuration.

*Important: Any initiative requiring integration to an external application is automatically classified as Walk or Run complexity, regardless of other factors.*

# 2 About Framework AI

Framework AI, powered by Hatz AI, is an enterprise-grade AI platform that provides secure access to 67 Large Language Models (LLMs), a low-code workflow automation builder (AI Workshop), and intelligent phone agents (ADEL). The platform is SOC 2 Type I, Type II, and SOC 3 certified, meaning it meets the security and compliance requirements for legal industry use. Your data is never used to train AI models.

## Three Core Products

**Framework AI Chat:** Secure chat interface with access to 67 AI models for drafting, research, summarization, brainstorming, and analysis. Build dedicated AI agents with custom instructions, tools, and uploaded knowledge files that any team member can select and use immediately. No software installation required.

**Framework AI Workshop:** Low-code workflow builder with 50+ native integrations and thousands more via Zapier. Build multi-step automations with triggers, schedules, and webhooks without writing code.

**ADEL (AI Phone Agent):** AI-powered phone agent for handling inbound calls, intelligent routing, and multi-turn conversations. Available 24/7.

## Standard Application Library

Framework AI includes a library of over 90 pre-built agents and workflows covering business functions like operations, marketing, HR, sales, legal, and finance. Many of these standard applications can be deployed as-is or customized for the firm's specific needs, significantly reducing the time to value for several of the initiatives in this roadmap. Where a standard application applies, it is called out as an Accelerator.

## Why This Matters for Legal

- SOC 2/SOC 3 certified with zero data training guarantees, suitable for handling confidential client information
- Enterprise-grade encryption at rest (AES-256) and in transit (TLS 1.2+)
- Complete audit trails for compliance documentation
- Role-based access controls and centralized administration

# 3 The Crawl, Walk, Run Methodology

The Crawl, Walk, Run framework is a proven approach to AI adoption that reduces risk, builds organizational confidence, and delivers measurable wins at every stage. Rather than attempting a large-scale transformation all at once, this methodology introduces AI gradually, building trust and capability as you go.

| Phase | Timeline | Focus | Complexity |
|---|---|---|---|
| Crawl | Months 1–3 | Foundation building, AI agent deployment, first quick wins using AI Chat | Low — No integrations |
| Walk | Months 3–9 | Workshop workflows, first pilot automations, initial integrations with firm software | Intermediate — Some integrations |
| Run | Month 9+ | Scaling proven solutions, multi-system integrations, advanced automations, continuous improvement | High — Multi-system integrations |

## Key Principles

- Start with governance: establish an AI acceptable use policy and role structure before deploying tools widely. the firm's existing AI Policy provides a strong starting foundation.
- Deploy agents, not just chat access: rather than asking staff to craft their own prompts, build dedicated AI agents with instructions, knowledge files, and tools already configured. Staff simply select the agent and start working.
- Invest in people, not just tools: identify AI Champions within the firm who receive deeper training and become internal experts for their colleagues.
- Measure early, measure often: document the current state (time spent, steps involved, error rates) before building an AI solution, then measure the after state rigorously.

# 4 Current Process Landscape

the firm operates a well-structured set of processes across the full client lifecycle, from initial intake through matter closure. The firm's Processes and Procedures Manual documents these workflows in detail, spanning multiple sections and dozens of pages of step-by-step procedures.

## Technology Stack

| System | Function |
|---|---|
| CRM Platform | Client Relationship Management (CRM), intake forms, pipeline tracking, email templates, marketing automation |
| practice management system | Practice management, matter management, document storage, task workflows, docketing tasks |
| Time & Billing System | Time tracking, billing, client trust fund accounting, expense recording |
| e-signature platform | Electronic signature for retainer agreements and contracts |
| Court E-Filing System | State court e-filing |
| Network File Share | File storage for active and closed client folders, templates, and office records |
| Online Training Platform | Employee training platform (compliance training courses) |
| Building Access System | Building lobby security and visitor management |
| Calendar System | Firm docket calendar, scheduling, conference room booking |
| Online Payment Platform | Online credit card payments for retainers |

## Core Process Areas

- Client Intake and Consultation: potential client screening, free consultations, fee structure determination, CRM pipeline management, referral-out scripts for declined cases
- Retainer and Matter Creation: agreement preparation, e-signature, payment processing, matter setup across Practice Mgmt, Time & Billing, and network file share
- Docketing and Deadlines: court filing deadlines, statute of limitations tracking, regulatory agency deadlines, calendar/practice management dual-entry
- Active Client Procedures: e-filing, discovery compilation, Bates-stamping, privilege log creation, depositions, document production

- Billing and Timekeeping: weekly timeslip entry, retainer payment processing, settlement check handling, client billing
- Communications: client correspondence management, internal communication protocols, email template usage
- Matter Closure: close-of-file letters, disengagement letters, balance verification, file archival, system cleanup
- Recurring Compliance Filings: annual filings and regulatory compliance tasks for business entity clients
- Training and Compliance: online training platform compliance training administration, expense tracking

# 5 Phase 1: Crawl — Foundation and Quick Wins

*Timeline: Months 1–3 | Complexity: Low | One optional integration (Microsoft 365 / Google Workspace)*

The Crawl phase establishes the foundation for AI adoption and delivers immediate value through dedicated AI agents that staff can use right away. With one exception (the Microsoft 365 or Google Workspace integration for the Personal Communications Agent), these initiatives require no integrations and can be built entirely within the Framework AI platform. Each agent is configured with custom instructions, relevant knowledge files (such as firm templates and procedures), and any necessary tools so that staff simply select the agent and start working.

## Foundation Activities

### C-1: Formalize AI Governance

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|---|---|
| Current State | The firm has an existing AI policy covering AI features built into its current software systems. This provides a strong starting point but needs expansion to cover the Framework AI platform. |
| AI Solution | Expand the existing AI Policy into a comprehensive AI Acceptable Use Policy that covers Framework AI Chat, Workshop, agents, and any future automations. Define which types of data can be used with AI tools, establish attorney review requirements for AI-generated content, and set documentation protocols. |
| Expected Outcome | Clear governance framework that gives attorneys and staff confidence to use AI tools within defined boundaries. Reduces risk of inadvertent data mishandling. |
| Complexity | Low — Policy document, no technology build required |
| **Accelerator** | *Framework AI: Change Management Advisor (standard agent) can guide the policy development and rollout communication plan. SOP Writer (standard agent) can produce consistent, formal process documentation for the AI governance framework. Both are low-complexity adaptations.* |

### C-2: Onboard and Train the Team

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| Current State | Staff are accustomed to following documented procedures but have limited AI exposure beyond built-in features in existing legal software. There is no centralized place to track which AI tools the firm has built, how they perform, or |

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| | what ROI they deliver. Team communication about AI use is informal and ad hoc. |
| AI Solution | Enroll all staff in the AI Champions training program through the Framework AI learning portal. This is not limited to a few designated champions; every team member should complete the training to build a shared baseline of AI fluency across the firm. Identify 2-3 AI Champions (suggested: 1 attorney, 1 paralegal, 1 admin staff) who receive deeper, advanced training and become internal experts. Launch weekly AI Office Hours for live coaching and troubleshooting. Stand up 3 supporting structures: (1) a central AI documentation repository where the firm catalogs every AI tool built, its purpose, usage instructions, and ROI metrics; (2) an AI Tips & Wins channel in the firm's messaging platform (e.g., Microsoft Teams or Slack) where team members share successes, creative uses, and helpful tips to encourage learning and experimentation; and (3) an internal AI Resource Hub collecting training materials, how-to guides, and best practices. |
| Expected Outcome | Team-wide AI fluency from day 1 of adoption. AI Champions become go-to internal experts while every staff member has the foundational skills to use the platform effectively. The central repository provides leadership with a single view of all AI tools and their business impact. The Tips & Wins channel creates organic peer learning and surfaces new use case ideas from the people closest to the work. |
| Complexity | Low — Training, culture, and lightweight internal infrastructure (no technical build required) |
| **Accelerator** | *Framework AI: Expert Training & Curriculum Designer (standard agent) can help build firm-specific training materials and onboarding curriculum. Low-complexity adaptation.* |

## Use Case Agents

Each of the following initiatives involves building a dedicated AI agent in Framework AI Chat. Unlike generic chat, these agents come pre-loaded with the firm's own templates, procedures, and instructions so that staff get tailored results without needing to craft detailed prompts.

### C-3: Personal Communications Agent

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| Current State | Attorneys and staff draft emails, messages, and routine communications manually. Each person has their own writing style and voice, but translating that into AI-assisted drafting typically requires extensive configuration that most people skip, defaulting to generic AI output that sounds nothing like them. |

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| AI Solution | Each team member receives a personalized AI communications agent built around their own voice, role, and communication preferences. The setup is nearly effortless: fill out a short survey (about 10 minutes), receive an email with personalized agent instructions delivered to your inbox within minutes, then follow the directions to copy and paste the instructions into your agent (less than 5 minutes). The result is a custom communications agent that drafts emails, writes messages, and handles routine communications in a fraction of the time, with guardrails already configured to eliminate typical signs of AI-generated writing. Pairing this agent with your device's speech-to-text capability makes it even faster: speak naturally, and the agent turns your words into polished, professional communications instantly. See Appendix A for complete setup instructions and the survey link. |
| Expected Outcome | Immediate, measurable time savings on daily communications for every team member who sets one up. The personalization process itself demonstrates how powerful AI tools can be when configured correctly. Team members who have already adopted this tool consistently report it as one they wonder how they worked without. |
| Complexity | Low — Automated setup via survey and email delivery; optional Microsoft 365 or Google Workspace integration for communication style analysis |
| **Accelerator** | *Framework AI: Personal Communications Assistant (standard agent) is the foundation. The automated personalization survey and delivery workflow handles the customization. Connecting Microsoft 365 or Google Workspace to the platform before setup allows the AI to analyze your actual communication style, producing even more accurate personalization. Low-complexity adaptation.* |

## C-4: Procedures Manual FAQ Agent

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|---|---|
| Current State | The comprehensive Processes and Procedures Manual covers everything from office logistics to court filing rules. Staff must read, remember, and reference it manually. New hires face a steep learning curve. |
| AI Solution | Build a Procedures FAQ Agent with the entire Procedures Manual (and any supplemental guides) uploaded as a knowledge base. Staff ask natural-language questions like "How do I create a new matter in the time & billing system?" or "What is the deadline for answering a complaint in federal court?" and get accurate, sourced answers instantly. |
| Expected Outcome | Dramatically reduces onboarding time for new staff. Provides instant answers to procedural questions without interrupting colleagues. Particularly valuable given the manual's detail on docketing rules, discovery deadlines, and multi-step procedures. |

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| Complexity | Low — AI Chat agent with uploaded manual, immediate value |
| **Accelerator** | *Framework AI: FAQ Agent (standard agent) provides the foundation for a firm-specific procedures Q&A bot. Knowledge Base Architect (standard agent) can help structure and optimize the knowledge files for best results. Both are low-complexity adaptations.* |

## C-5: Company HR Policy Agent

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|---|---|
| Current State | Firm HR policies, employee handbook provisions, and internal guidelines are stored across multiple documents. Staff direct questions about PTO, expense procedures, benefits, and workplace policies to office management or leadership, creating interruptions and inconsistent answers. |
| AI Solution | Build an HR Policy Agent with the firm's employee handbook, HR policies, and internal guidelines uploaded as a knowledge base. Staff ask questions like "How do I submit an expense report?" or "What is the firm's PTO policy?" and receive accurate, sourced answers instantly. The agent references specific policy sections so staff can verify the answer themselves. |
| Expected Outcome | Reduces interruptions to office management and leadership for routine HR questions. New hires get instant access to policy answers during onboarding. Consistent, accurate responses every time, sourced directly from the firm's own documentation. |
| Complexity | Low — AI Chat agent with uploaded handbook and policies, immediate value |
| **Accelerator** | *Framework AI: HR Company Policy Assistant (standard agent) provides the foundation for a firm-specific HR Q&A bot. Knowledge Base Architect (standard agent) can help structure and optimize the knowledge files for best results. Both are low-complexity adaptations.* |

## C-6: Legal Correspondence Drafting Agent

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| Current State | Attorneys draft correspondence, demand letters, motions, and memos manually or from templates stored on the network file share. Email templates exist in the CRM but customization is done by hand. |
| AI Solution | Build a dedicated Legal Drafting Agent loaded with the firm's standard templates, tone guidelines, and formatting preferences. Attorneys select the agent, provide key facts, and receive a polished first draft of correspondence, demand letters, client communications, and internal memos ready for review. |

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| Expected Outcome | Faster first drafts. More consistent tone and quality across correspondence. Attorneys spend less time on initial drafting and more on strategy and review. |
| Complexity | Low — AI Chat agent, no integration needed |
| **Accelerator** | *Framework AI: Personal Communications Assistant (standard agent) can be customized with the firm's tone and templates. Low-complexity adaptation.* |

## C-7: Intake Call Preparation and Summarization Agent

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| Current State | Intake Specialists conduct initial screenings and enter information into the CRM. Attorneys review the CRM contact record before the free 15-20 minute consultation. This review is manual. |
| AI Solution | Build an Intake Prep Agent that takes raw intake notes and produces a structured pre-consultation brief: key facts, claim type classification, potential fee structure, relevant statute of limitations, and suggested questions. Intake staff or attorneys paste notes and receive an organized summary. |
| Expected Outcome | Attorneys walk into consultations better prepared. Reduced time reviewing raw intake notes. More consistent evaluation of potential claims. |
| Complexity | Low — AI Chat agent, no integration |
| **Accelerator** | *Framework AI: Meeting Executive Summary (standard workflow) can be adapted for intake note summarization. Low-complexity adaptation.* |

## C-8: Discovery Response Drafting Agent

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|---|---|
| Current State | Attorneys and paralegals draft responses to interrogatories, requests for production, and requests to admit. These follow standard formats but require significant time to customize per case. |
| AI Solution | Build a Discovery Response Agent loaded with the firm's standard objection language, privilege assertions, and response formats. Attorneys provide case facts and the specific discovery requests, and the agent generates first-draft responses with appropriate objections already included. |
| Expected Outcome | Reduced time spent on repetitive discovery drafting. More consistent use of standard objections and privilege assertions. Paralegals can prepare stronger initial drafts for attorney review. |
| Complexity | Low — AI Chat agent, no integration |

## C-9: Client Communication Agent

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|---|---|
| Current State | The firm uses email templates from the network file share and CRM Platform for standard client communications (welcome emails, retainer reminders, close-of-file letters, annual report approval requests). Customization for individual clients is manual. |
| AI Solution | Build a Client Communication Agent loaded with the firm's email templates and communication standards. Staff select the agent, specify the communication type and client details, and receive a polished, personalized draft following the firm's tone and templates. |
| Expected Outcome | Faster turnaround on routine client communications. More personalized messaging without extra effort. Consistent professional tone across the firm. |
| Complexity | Low — AI Chat agent, no integration |
| **Accelerator** | *Framework AI: Personal Communications Assistant and Email Sentiment Analyzer & Responder (standard agents) can be customized for client-facing communications. Low-complexity adaptations.* |

## C-10: Meeting and Deposition Preparation Agent

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|---|---|
| Current State | Attorneys prepare for client meetings, depositions, and court appearances by reviewing case files and notes. Preparation is largely unstructured beyond checking the practice management system matter and docket calendar. |
| AI Solution | Build a Deposition/Meeting Prep Agent that generates structured preparation briefs. Attorneys provide case details, and the agent compiles key facts, opposing counsel information, relevant deadlines, and suggested questions or arguments. Particularly valuable for depositions and hearings with time constraints. |
| Expected Outcome | More thorough and consistent preparation. Reduced risk of overlooking key case details. Particularly valuable for depositions and hearings with time constraints. |
| Complexity | Low — AI Chat agent, no integration |

## C-11: Retainer Agreement Drafting Agent

| | |
|---|---|
| Current State | Staff manually select the correct retainer template (Hourly, Contingency, Hybrid, Flat Fee, or Hour Consultation) from the network file share, fill in client-specific information, and save with a naming convention (Year.Month.Date_Name_RA.Doc). Template selection and field population are done by hand. |
| AI Solution | Build a Retainer Agreement Agent loaded with all five retainer templates as knowledge files. Staff provide client name, fee type, retainer amount, and scope, and the agent selects the correct template structure, populates it with the provided details, applies the firm's naming convention, and produces a ready-to-review draft. |
| Expected Outcome | Faster retainer drafting. Eliminates wrong-template errors. Ensures consistent field population and naming conventions. Staff review and finalize rather than building from scratch. |
| Complexity | Low — AI Chat agent with uploaded templates, no integration needed |

## C-12: Close-of-File Letter Agent

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|---|---|
| Current State | Staff locate close-of-file and disengagement letter templates on the network file share, manually fill in client-specific details, and determine which version to use (standard close, no review request, refund). Email templates are also pulled manually from the network file share. |
| AI Solution | Build a Close-of-File Letter Agent trained on all letter template variations. Staff provide the client name, matter details, balance status (zero/refund), and whether a review request should be included. The agent generates the complete letter and corresponding email text, selecting the correct version automatically. |
| Expected Outcome | Eliminates time spent locating templates and deciding which version applies. Reduces risk of sending the wrong version (e.g., forgetting to remove the review paragraph). Consistent output every time. |
| Complexity | Low — AI Chat agent with uploaded templates, no integration |

## C-13: Intake Script and Referral-Out Agent

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|---|---|
| Current State | When a potential client is not retained, staff use predefined scripts from the network file share and refer them to attorneys from a referral list. Scripts vary |

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| | based on the reason for not retaining (caseload, fee structure mismatch, practice area mismatch). |
| AI Solution | Build a Referral-Out Agent that the Intake Specialist can query to get the appropriate script based on the reason for not retaining. The agent also suggests referral attorneys from the uploaded referral list based on claim type and practice area. |
| Expected Outcome | Instant, accurate script and referral suggestions without searching the network file share. Consistent, professional communication with potential clients who are not retained. |
| Complexity | Low — AI Chat agent with uploaded scripts and referral list |

## C-14: Document Production Prep Agent

| | |
|---|---|
| Current State | Paralegals manually review requests for production, identify responsive documents, prepare privilege logs in Excel, and follow a multi-step Production Checklist (redacting, Bates-stamping, metadata removal, password protection). |
| AI Solution | Build a Production Prep Agent that assists with the administrative side of discovery production. From document descriptions, the agent generates draft privilege log entries, creates production checklists customized to the specific matter, and drafts cover letters or correspondence to opposing counsel. The agent helps paralegals identify which document categories are responsive vs. non-responsive based on the request language. |
| Expected Outcome | Reduced paralegal time on administrative production tasks. Privilege log drafting alone can save significant time on each production. The checklist generation ensures no steps are missed. |
| Complexity | Low — AI Chat agent with uploaded Production Checklist, no integration |

## C-15: Fee Structure and Retainer Recommendation Agent

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|---|---|
| Current State | Attorneys determine fee structures based on detailed internal guidelines (hourly ranges, hybrid structures, contingency approval requirements, flat fee scoping). These guidelines include specific dollar ranges based on case type, litigation likelihood, and claim strength. |
| AI Solution | Build a Fee Structure Agent loaded with the firm's internal fee structure guidelines. Attorneys input case type, claim strength assessment, likelihood of litigation, and client type, and the agent recommends the appropriate fee |

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|---|---|
| | structure and retainer range. Serves as a guardrail, not a replacement for attorney judgment. |
| Expected Outcome | Consistent fee quoting across attorneys. Particularly useful for newer attorneys or when a case straddles categories. Reduces the risk of underquoting or overquoting. |
| Complexity | Low — AI Chat agent with uploaded guidelines, no integration |

# 6 Phase 2: Walk — Guided Automation and Integration

*Timeline: Months 3–9* | *Complexity: Intermediate* | *May involve integrations*

The Walk phase moves from agent-based quick wins to targeted, firm-specific automations built in Framework AI Workshop. These initiatives involve multi-step workflows, deploying pre-built applications to specific teams, and beginning to explore integrations with the firm's existing software. Each initiative should be piloted with a small group before broader rollout.

## W-1: Automated Intake Screening Workflow

| | |
|---|---|
| Current State | Intake Specialists manually screen potential clients, enter information into the CRM, and determine whether to schedule a consultation or refer out. Attorneys separately review intake data before consultations. The pipeline must be updated weekly by end of day Friday. |
| AI Solution | Build a Workshop workflow that takes intake form data and automatically generates a structured case evaluation summary: claim type classification, fee structure recommendation, relevant statute of limitations dates, and a preliminary viability score. Can also perform initial triage to route to the correct consulting attorney based on claim type and practice area criteria. The output supplements (not replaces) the Intake Specialist's judgment. |
| Expected Outcome | More consistent intake screening. Faster determination of case viability. Attorneys receive better-organized information before consultations. Improved routing accuracy to the correct attorney. |
| Complexity | Intermediate — Workshop workflow; higher complexity if integrated with the CRM |

## W-2: Docket Deadline Calculator and Reminder Workflow

| | |
|---|---|
| Current State | Paralegals manually calculate court filing deadlines, discovery deadlines, statute of limitations dates, and regulatory agency deadlines with varying calculation rules based on jurisdiction and claim type. Dates must be entered in both the firm docket calendar and practice management system. The Docketing Checklist on the paralegal drive guides this process, but deadline calculation itself is manual and high-stakes. |
| AI Solution | Build a Workshop workflow where a paralegal enters the triggering event (e.g., date of service, date of wrongdoing) and jurisdiction, and the AI automatically calculates all applicable deadlines using the firm's rules. Generates a formatted |

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| | list ready for calendar entry. Can also flag upcoming statute of limitations expirations. |
| Expected Outcome | Reduced risk of miscalculated deadlines. Faster docketing turnaround. Particularly valuable for regulatory agency deadlines where calculation rules are nuanced. Serves as a second check on paralegal calculations. |
| Complexity | Intermediate — Workshop workflow with rules engine; no integration required in basic form, higher with calendar integration |

### W-3: Retainer Agreement Automation Workflow

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|---|---|
| Current State | Even with the Crawl-phase drafting agent in place, the full retainer process still involves manual steps: converting to PDF, sending via the e-signature platform, tracking whether the client signs within 48 hours, following up on unsigned or unpaid agreements, and advancing the CRM pipeline stage. |
| AI Solution | Build a Workshop workflow that takes the drafted retainer agreement and automates the downstream steps: PDF conversion, e-signature platform submission, automated follow-up reminders for unsigned or unpaid agreements, and pipeline stage updates. Human review gates remain at key decision points. |
| Expected Outcome | Faster retainer turnaround from draft to signature. Automated follow-up eliminates dropped balls. Reduces administrative burden on the team during the critical intake-to-retainer window. |
| Complexity | Intermediate — Workshop workflow; higher if integrated with e-signature platform and CRM Platform |

### W-4: Client Status Update Generator

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|---|---|
| Current State | The Client Status Sheet is updated daily/weekly by the Intake Specialist and admin staff. Proactive client communication is emphasized across the Playbook, but crafting individual status updates for each active matter is time-consuming. |
| AI Solution | Build a Workshop workflow that takes case status inputs (recent activity, upcoming deadlines, next steps) and generates a professional, personalized client status update email. Attorneys review before sending. |

| | |
|---|---|
| Expected Outcome | Easier to maintain proactive client communication at scale. Consistent quality and tone across updates. Attorneys spend less time writing routine status emails. |
| Complexity | Intermediate — Workshop workflow; higher with the practice management system integration to pull case activity automatically |

## W-5: Discovery Document Review Assistant

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|---|---|
| Current State | Paralegals compile documents for production by reviewing requests, finding responsive documents, redacting sensitive information (SSN, bank accounts), creating privilege logs, Bates-stamping, and preparing final productions. The Production Checklist guides this multi-step process. |
| AI Solution | Build a Workshop workflow that assists with initial document categorization: upload a document set and the workflow identifies likely privilege candidates, flags documents that may need redaction (based on content patterns for SSNs, account numbers), and suggests responsiveness to specific discovery requests. |
| Expected Outcome | Faster initial document review. Reduced risk of inadvertent production of privileged material. Paralegals spend less time on initial sorting and more on substantive review. |
| Complexity | Intermediate — Workshop workflow with document processing |

## W-6: Annual Report Filing Workflow

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|---|---|
| Current State | The firm handles recurring compliance filings for business entity clients. The process involves reviewing notices, preparing documents from templates (which vary by entity type), obtaining client approval, filing with the appropriate state authority, recording expenses, and sending confirmation. This is repetitive, multi-step, and template-heavy. |
| AI Solution | Build a Workshop workflow that takes entity details (name, type, members/directors) and generates the required documents from the correct template, drafts the client approval email with the applicable fee schedule, and creates a checklist for the remaining manual steps (filing, expense entry). |
| Expected Outcome | Significantly faster annual report preparation. Fewer errors in template selection and fee quoting. Consistent process across all entity types. |
| Complexity | Intermediate — Workshop workflow with document generation |

## W-7: New Matter Setup Automation

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|---|---|
| Current State | Creating a new matter involves steps across 4-5 systems: network file share (copy and rename folder template), time & billing system (contact info, rate table, reference, initial matter, custom fields), practice management system (matter creation, tagging), and a physical file for long-term litigation business clients. The client numbering convention (YEAR.MONTH.#) and specific field requirements are documented but executed manually. |
| AI Solution | Build a Workshop workflow that takes new client/matter details and generates formatted checklists with pre-filled field values for each system. Staff enter core information once, and the AI generates the specific actions needed in each system (folder name, time & billing fields, practice management tags) along with a tracking checklist. In a more advanced version, integrate with the practice management system and/or time & billing system APIs to auto-populate fields directly. |
| Expected Outcome | Faster, more consistent matter setup. Reduced errors in data entry across systems. Clear visibility into which setup steps are complete. Eliminates the risk of missing a setup step (e.g., forgetting the trust account in the time & billing system). |
| Complexity | Intermediate (checklist generation) to High (direct system integration) |

## W-8: Pipeline Status Updates and Notifications

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|---|---|
| Current State | The CRM pipeline must be updated weekly by end of day Friday. Moving a client through stages (Retainer Sent, RA Signed, Welcome Email, etc.) involves multiple manual toggles, and several automated emails are triggered by pipeline position. Staff must remember to update pipeline stages at the right time. |
| AI Solution | Build a Workshop workflow that detects key events (e.g., retainer agreement signed in the e-signature platform) and prompts staff to update the corresponding CRM pipeline stage. The workflow can also generate weekly |

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| | pipeline status summary reports and flag stale entries that haven't moved in a configurable number of days. |
| Expected Outcome | Pipeline stays current without relying solely on the Friday deadline. Reduces risk of clients stalling in incorrect pipeline stages, which could delay welcome emails or matter creation. |
| Complexity | Intermediate — Workshop workflow; integration with the CRM and potentially e-signature platform |

## W-9: Training Platform Administration Assistant

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|---|---|
| Current State | Setting up training seats in the online training platform involves a detailed manual process: creating groups with specific naming conventions, distinguishing between existing and new learners, enrolling users, adding courses, sending confirmation emails, and entering expenses in the time & billing system with specific pricing and descriptions. |
| AI Solution | Build a Workshop workflow that takes the intake information (company name, seats needed, learner emails) and generates step-by-step instructions customized to the specific request, including the correct pricing from the current year's pricing sheet, the exact time & billing expense description format, and the confirmation email. With integration, the workflow could interact directly with the training platform's system. |
| Expected Outcome | Reduces training setup errors. Ensures correct pricing is applied. Speeds up the administrative process, particularly helpful when handling multiple training requests. |
| Complexity | Intermediate — Workshop workflow with document generation; higher with the training platform and time & billing integration |

## W-10: Time Entry Description Agent

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|---|---|
| Current State | All staff must enter billable and administrative hours into the time & billing system weekly. Staff have defined billable hour requirements. Time descriptions must be accurate and client-appropriate since they appear on invoices. Descriptions require specific formatting and professional language. |
| AI Solution | Build an agent that helps staff draft professional time entry descriptions from rough notes. Staff input what they worked on in plain language, and the agent |

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| | generates billing-appropriate descriptions following the firm's conventions. The agent can also flag entries that look administrative but are coded as billable, or vice versa. |
| Expected Outcome | Improved invoice professionalism and consistency. Saves time on the weekly time entry process. Helps ensure entries are properly categorized. Even without time & billing integration, staff can copy the AI-generated descriptions into the system. |
| Complexity | Intermediate — Can start as a Chat agent (low) and evolve to a Workshop workflow with the time & billing system integration |

# 7 Phase 3: Run — Advanced Automation and Scaling

*Timeline: Month 9+ | Complexity: High | Multi-system integrations*

The Run phase builds on the foundation and proven workflows from Crawl and Walk to pursue more ambitious automations. These initiatives involve deeper integrations between Framework AI and the firm's core systems, custom-built AI applications, and process redesign. By this phase, the team will have built internal AI expertise and a track record of measurable wins to justify the investment.

## R-1: Integrated Intake-to-Matter Pipeline

| | |
|---|---|
| Current State | The intake-to-matter workflow spans CRM (intake, pipeline), e-signature platform (engagement agreement), time & billing system (billing setup), practice management system (matter management), and the network file share (file folders). Each handoff is manual and tracked through pipeline stages. The Playbook documents at least 8 distinct steps from initial intake to matter creation. |
| AI Solution | Build an end-to-end orchestration workflow that connects the CRM, practice management system, time & billing system, and network file share. When a retainer agreement is signed and paid, the workflow automatically triggers matter creation across all systems, using the firm's naming conventions and field requirements. Human review gates are built in at key decision points (attorney approval, payment confirmation). |
| Expected Outcome | Dramatic reduction in administrative time for matter setup. Near elimination of data entry errors across systems. Faster time-to-active for new clients. |
| Complexity | High — Multi-system integration (CRM, e-signature, practice management, time & billing, file storage) |

## R-2: Intelligent Docketing System

| | |
|---|---|
| Current State | Docketing is the firm's highest-priority administrative function. Paralegals are assigned specific days for docketing. Dates must be entered in the firm docket calendar and practice management tasks, with at least 2 attorneys and 1 paralegal added to each entry. Court orders, scheduling orders, and agency deadlines each have their own calculation rules. Missing a government-regulated filing deadline is grounds for immediate corrective action. |
| AI Solution | Build an advanced workflow that monitors incoming court notifications (via court notification email), extracts deadline information from orders and notices |

| | |
|---|---|
| | via document parsing, calculates all applicable deadlines using federal and state rules, and creates properly formatted docket entries in both the calendar system and practice management system. Include human verification checkpoints before any deadline is finalized. |
| Expected Outcome | Reduced risk of missed deadlines. Faster processing of court orders into docket entries. Paralegals freed to focus on substantive case work. Built-in redundancy through AI-generated and human-verified dual entry. |
| Complexity | High — Email monitoring, document parsing, calendar integration, practice management integration |

## R-3: AI-Powered Phone Agent for Initial Inquiries

| | |
|---|---|
| Current State | Potential clients call in or submit online inquiry forms. The Intake Specialist conducts initial screening calls, gathers basic information, and determines whether to schedule an attorney consultation or refer out. Call scripts exist for referral situations. |
| AI Solution | Deploy ADEL (Framework AI's phone agent) as a first-response layer for incoming calls. ADEL can gather initial caller information, ask screening questions based on the firm's intake criteria, and route qualified prospects to the Intake Specialist for full intake. Available 24/7 to capture after-hours inquiries. |
| Expected Outcome | No missed calls, even outside business hours. Pre-qualified callers reach the Intake Specialist with basic information already captured. The firm captures leads that would otherwise go to voicemail or competitors. |
| Complexity | High — ADEL deployment, routing configuration, CRM Platform integration |
| **Accelerator** | *Framework AI: Call Log Analysis (standard agent) can analyze call data to optimize ADEL's routing and identify peak call times for staffing decisions. Low-complexity adaptation.* |

## R-4: Automated Billing and Timekeeping Reconciliation

| | |
|---|---|
| Current State | All staff must submit billable and administrative hours into the time & billing system by end of day every Friday. Staff have defined billable hour requirements per week. Retainer payments go into the client trust account. Credit card payments, settlement checks, and electronic payments each have specific entry procedures with required description language. |

| | |
|---|---|
| AI Solution | Build a workflow that reviews weekly time entries for completeness, flags missing or anomalous entries, identifies matters approaching retainer depletion, and generates a weekly billing summary for review. In a more advanced version, integrate with the time & billing system to auto-generate pre-billing reports and flag discrepancies. |
| Expected Outcome | Fewer billing errors caught late in the cycle. Proactive retainer management reduces uncomfortable client conversations. Attorneys and leadership have better visibility into billing health. |
| Complexity | High — time & billing integration, data analysis, reporting |

## R-5: Close-of-File Orchestration Workflow

| | |
|---|---|
| Current State | Closing a matter is a 10-step process involving attorney confirmation, balance verification in the time & billing system, practice management workflow execution, close-of-file letter generation from templates, client notification, file transfer from Active Clients to Closed Cases on the network file share, and printer code deletion. The process requires coordination between attorneys, paralegals, and the Operations Manager. |
| AI Solution | Build an orchestrated workflow that takes a matter closure request and guides it through every step: verify zero balance, generate the appropriate close-of-file letter (with or without review request, with refund if applicable), queue the practice management status change, move the network file share folder, and produce a completion checklist. Human approval required at each critical gate. |
| Expected Outcome | Faster, more consistent matter closure. Reduced risk of closing a matter with an outstanding balance or incomplete steps (e.g., file closed in the practice management system but not moved on network file share). Clear audit trail for every step. |
| Complexity | High — practice management integration, time & billing integration, network file share, document generation |

## R-6: E-Filing Workflow Orchestration

| | |
|---|---|
| Current State | E-filing involves a coordinated workflow between attorneys and paralegals across the practice management system (task assignment), network file share (organized folder structure for document workflow), court e-filing systems, and date verification. Paralegals must check dates on documents, verify correct court division forms, and read judges' standing orders before filing. |

| | |
|---|---|
| AI Solution | Build a Workshop workflow that verifies document dates, confirms correct court forms are used for the appropriate division, and provides a pre-filing checklist pulled from the relevant judge's standing order. The workflow can also automate file movement from TO FILE to FILED after stamping and update the practice management system with the file-stamped version. |
| Expected Outcome | Reduced e-filing errors (wrong division form, incorrect dates) and automated file management steps. The judge's standing order lookup alone adds a valuable quality control layer. |
| Complexity | High — Integration with network file share, practice management system, and potentially court e-filing APIs. Judge standing order database must be maintained. |

# 8 Implementation Roadmap Summary

The table below provides a consolidated view of all recommended initiatives across the three phases, organized by priority within each phase.

| ID | Initiative | Phase | Complexity | Integration Required |
|---|---|---|---|---|
| C-1 | Formalize AI Governance | Crawl | Low | None |
| C-2 | Onboard and Train the Team | Crawl | Low | None |
| C-3 | Personal Communications Agent | Crawl | Low | Optional: M365/Google |
| C-4 | Procedures Manual FAQ Agent | Crawl | Low | None |
| C-5 | Company HR Policy Agent | Crawl | Low | None |
| C-6 | Legal Correspondence Drafting Agent | Crawl | Low | None |
| C-7 | Intake Call Prep & Summarization Agent | Crawl | Low | None |
| C-8 | Discovery Response Drafting Agent | Crawl | Low | None |
| C-9 | Client Communication Agent | Crawl | Low | None |
| C-10 | Meeting & Deposition Prep Agent | Crawl | Low | None |
| C-11 | Retainer Agreement Drafting Agent | Crawl | Low | None |
| C-12 | Close-of-File Letter Agent | Crawl | Low | None |
| C-13 | Intake Script & Referral-Out Agent | Crawl | Low | None |
| C-14 | Document Production Prep Agent | Crawl | Low | None |
| C-15 | Fee Structure Recommendation Agent | Crawl | Low | None |
| W-1 | Automated Intake Screening Workflow | Walk | Intermediate | Optional: CRM Platform |
| W-2 | Docket Deadline Calculator | Walk | Intermediate | Optional: Calendar |
| W-3 | Retainer Agreement Automation | Walk | Intermediate | Optional: e-signature platform |
| W-4 | Client Status Update Generator | Walk | Intermediate | Optional: practice management system |

| | | | | |
|---|---|---|---|---|
| W-5 | Discovery Document Review Assistant | Walk | Intermediate | None (doc upload) |
| W-6 | Annual Report Filing Workflow | Walk | Intermediate | None |
| W-7 | New Matter Setup Automation | Walk | Int. to High | Practice Mgmt, Time & Billing |
| W-8 | Pipeline Status Updates | Walk | Intermediate | CRM, E-Signature |
| W-9 | Training Platform Admin | Walk | Intermediate | Optional: online training platform |
| W-10 | Time Entry Description Agent | Walk | Low to Int. | Optional: time & billing system |
| R-1 | Integrated Intake-to-Matter Pipeline | Run | High | CRM Platform, Practice Mgmt, Time & Billing |
| R-2 | Intelligent Docketing System | Run | High | Court notifications, calendar system, practice management system |
| R-3 | AI Phone Agent (ADEL) | Run | High | ADEL, CRM Platform |
| R-4 | Billing & Timekeeping Reconciliation | Run | High | time & billing system |
| R-5 | Close-of-File Orchestration | Run | High | Practice Mgmt, Time & Billing |
| R-6 | E-Filing Workflow Orchestration | Run | High | practice management system, network file share, court e-filing system |

# 9 Governance and Change Management

Successful AI adoption is an organizational transformation, not a technology deployment. The following governance and change management practices are recommended to support the roadmap throughout all three phases.

## AI Acceptable Use Policy

the firm's existing AI Policy should be expanded to cover Framework AI specifically. The policy should address which types of client data can be used with AI tools and agents, attorney review requirements for AI-generated content, documentation and audit trail expectations, and prohibited uses (e.g., submitting confidential client information to non-approved AI tools). Framework AI's SOC 2 certification and zero data training guarantees provide the security foundation, but firm-level policies complete the picture.

## AI Champions and Power Users

All staff should complete the AI Champions training in the Framework AI learning portal during the Crawl phase. This builds a shared baseline of AI fluency across the firm and ensures everyone can use the platform effectively from the start. In addition, identify 2-3 AI Champions who receive deeper, advanced training and become the firm's internal experts and advocates. Champions should represent a cross-section of roles: at least 1 attorney, 1 paralegal, and 1 administrative staff member. During the Walk phase, expand this to a Power Users program with departmental leads.

## AI Documentation and Knowledge Sharing

Maintain a central AI documentation repository where the firm catalogs every AI tool built, its purpose, usage instructions, and ROI metrics. This repository serves as the single source of truth for what exists, who uses it, and what value it delivers. Complement this with an AI Tips & Wins channel in the firm's messaging platform (e.g., Microsoft Teams or Slack) where team members share successes, creative uses, and helpful tips. This channel encourages peer learning, surfaces new use case ideas from the people closest to the work, and keeps AI adoption visible across the firm.

## Measuring ROI

Before building any automation, document the current state: how long does the process take today, how many people are involved, what errors or delays commonly occur. After deployment, measure the same metrics. This before-and-after comparison is the most persuasive case for continued investment. Framework AI's platform analytics provide usage data; combine this with the firm's own time tracking through time & billing system for a complete picture.

*The Framework AI: AI Use Case Developer & ROI Analyzer (standard agent) can help quantify the value of each initiative and prioritize by ROI.*

## Continuous Improvement

Establish a recurring (monthly or quarterly) AI review meeting where leadership, champions, and stakeholders review adoption metrics, celebrate wins, prioritize new use cases, and address any governance or policy updates. This meeting ensures AI remains a strategic priority and that the roadmap evolves with the firm's needs.

# 10 Next Steps

This roadmap is a starting point for conversation, not a final project plan. The initiatives outlined here are based on analysis of the firm's documented processes and represent opportunities where AI can provide meaningful value. The actual prioritization, sequencing, and scope of each initiative should be refined through discussion with firm leadership.

## Recommended Immediate Actions

- Review this roadmap and identify the 3-5 Crawl-phase agents that would deliver the most value to the firm in the near term. Many can be built and deployed within days.
- Enroll all staff in AI Champions training through the Framework AI learning portal and identify 2-3 AI Champions for advanced training.
- Expand the existing AI Policy to cover Framework AI platform usage, establishing clear guidelines for attorneys and staff.
- Set up the central AI documentation repository and launch an AI Tips & Wins channel in the firm's messaging platform to support knowledge sharing from day 1.
- Deploy the Personal Communications Agent (C-3) and the Procedures Manual FAQ Agent (C-4) as early, high-visibility wins that benefit every team member immediately.
- Select a first pilot initiative from the Walk phase for planning once the Crawl foundation is in place.

Framework IT is here to support the firm at every stage of this journey. We bring deep expertise in the Framework AI platform, a library of standard agents and workflows ready to customize, a structured methodology for AI adoption, and a longstanding partnership with your firm. Together, we can turn this roadmap into measurable results.

# Appendix A: Get Your Own Personalized AI Communications Agent

We've built an automated way for every team member to get a personalized AI communications agent, one that's customized to your voice, your role, and preconfigured with guardrails to eliminate typical signs of AI writing. Think drafting emails, writing messages, answering questions about your calendar, and handling routine communications in a fraction of the time.

This isn't a generic tool. It's built around you, based on information only you can provide, and the whole process takes minutes, not hours. This becomes a real time saver when you utilize your device's speech-to-text within the agent to allow AI to fill in important information and output great emails incredibly fast.

Here's how we did it: we used our own AI and automation to make personalization for your preferences nearly effortless. And the experience itself will show you just how powerful these tools can be.

## How It Works

- **Step 1:** Fill out a short survey (about 10 minutes)
- **Step 2:** Receive an email with your personalized agent instructions and directions to build it, delivered to your inbox within minutes
- **Step 3:** Follow the directions and copy and paste the instructions into your agent (less than 5 minutes of your time to complete setup)
- **Step 4:** Start using it. Your custom communications agent is ready to go.

That's it. No heavy setup. No back-and-forth. Just a quick form, a fast turnaround, and an AI agent built around you.

People who have already set theirs up are seeing immediate time savings, the kind of tool you wonder how you worked without once it's up and running.

## Ready to Get Yours?

**Take the 10-Minute Survey:** Click here to start your personalization survey

**See It in Action:** Check out our YouTube channel to see this in action

## Pro Tip: Microsoft 365 Communication Style Analysis

If you already have the Microsoft 365 integration connected to your account, open a chat and select Microsoft 365. Then prompt the chat to analyze your communication style. It may reveal insights you weren't even aware of, which can help you fill out the survey more quickly and accurately.

If you have any questions or want to learn more before getting started, don't hesitate to reach out to the Framework IT team. We're here to help.

***Disclaimer:*** *This document is prepared by Framework IT for strategic planning purposes. Recommendations involving legal processes should be reviewed by firm leadership to ensure compliance with applicable rules of professional conduct and ethical obligations. AI-generated content should always be reviewed by a qualified attorney before use in legal proceedings or client communications. This document was produced with the assistance of AI tools.*