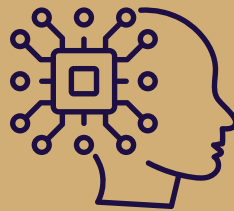




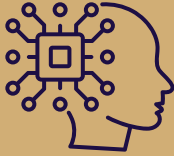
**Law Society
of Ireland**

**WORKFLOW
READINESS
DIAGNOSTIC**





WORKFLOW READINESS DIAGNOSTIC



Category 4: Build Practice Readiness

Audience: Practice managers | Managing partners | Solicitors in private practice | All firm sizes

The question this tool puts you in a position to answer:

“Are my workflows, data, and systems actually in a state where AI will work - or will I just be automating chaos?”

How to use this diagnostic:

- Work through each of the eight diagnostic areas below
- For each area, honestly assess whether your practice shows the Ready or Not Ready indicators
- Score each area using the simple 1-3 scale provided
- Total your scores and read the overall readiness assessment
- Use the Priority Actions section to build your readiness plan before deploying AI

This tool is most useful before making significant AI investment decisions. It identifies whether the bottleneck in your practice is AI capability - or process discipline, data quality, and workflow clarity. Many practices find the readiness diagnostic reveals that the initial opportunity is to automate existing manual steps in the Microsoft 365 stack before introducing new AI tools.

01 - What It Does

The Workflow Readiness Diagnostic assesses whether your practice is genuinely ready to benefit from AI tools - or whether underlying workflow, data, and process issues will undermine any AI investment you make.

This is the most frequently overlooked step in AI adoption. Practices that introduce AI tools into poorly structured workflows typically find that AI makes them faster at producing the wrong outputs, or that AI tools cannot function effectively because the data they need is inconsistent, incomplete, or trapped in formats they cannot use.

The Core Insight

In most legal practices, the initial AI opportunity is not the introduction of sophisticated AI tools. It is the automation of existing manual, repetitive steps - document creation from templates, email triage, meeting scheduling, time recording prompts, standard precedent population - using tools already available in the Microsoft 365 stack (Power Automate, Copilot, Forms, SharePoint).

These automation opportunities exist today, carry lower risk than generative AI, require minimal governance overhead, and free up fee earner time that can then be directed to higher-value work. The Workflow Readiness Diagnostic identifies whether those foundations are in place before you invest in the next layer.

KEY INSIGHT

The bottleneck in most legal practice AI adoption is not AI capability - it is process discipline. Unclear workflows, inconsistent data, and poor file management mean AI tools cannot do their jobs. Fix the process first; then the AI works.

Scope of This Diagnostic

The diagnostic covers eight workflow readiness areas:

- 1. Document management and file structure
- 2. Precedent and template discipline
- 3. Data quality and consistency
- 4. Process documentation
- 5. Microsoft 365 stack utilisation
- 6. Time recording and matter management
- 7. Client data and CRM discipline
- 8. Knowledge management and institutional memory

02 - Scoring Guide

Score each of the eight diagnostic areas on a 1-3 scale:

Score	Rating	What it means
3	Ready	This area is well-managed. AI can be deployed here now with standard controls.
2	Developing	Partially in place. Some quick wins available before or alongside AI deployment.
1	Not Ready	Significant gaps. AI deployment here will produce poor results or create new risks.

Overall Readiness Score

Total Score	Overall Rating	Recommended Approach
20 – 24	AI Ready	Proceed with planned AI deployments. Maintain readiness through ongoing hygiene.
13 – 19	Developing - Address Gaps	Deploy AI in ready areas now. Build 60-day plan for developing areas before wider rollout.
8 – 12	Foundation Work First	Build process discipline before AI investment. Start with M365 automation of existing workflows.

03 - The Eight Diagnostic Areas

4.1A Document Management & File Structure

Diagnostic question: If I need to find all documents relating to a specific client matter, how long would it take - and how confident would I be that I had found everything?

READY INDICATORS

- Consistent folder structure used across all matters
- Files named using a standard convention (matter number, document type, date)
- Current versions clearly identifiable from superseded drafts
- Practice management system reflects actual document location
- New staff can navigate file structure without specific guidance

NOT READY INDICATORS

- Files saved to desktop, personal drives, or email folders
- No consistent naming convention - documents found by memory or searching
- Multiple versions of same document with no clear current version
- Physical files and digital files not reconciled
- Documents regularly lost or rediscovered unexpectedly

Score this area: Circle: 3 (Ready) / 2 (Developing) / 1 (Not Ready)

4.1B Precedent & Template Discipline

Diagnostic question: When a fee earner creates a standard document, are they working from a current, approved precedent - or recreating from scratch or from an old version?

READY INDICATORS

- Approved precedent library exists and is accessible to all fee earners
- Precedents reviewed and updated at least annually
- Fee earners default to library precedents rather than previous matter documents
- Responsibility for precedent maintenance is clearly assigned
- New precedents created in matters are captured back into the library

NOT READY INDICATORS

- Precedents scattered across shared drives, email, and personal files
- Outdated precedents in circulation - last review date unknown
- Fee earners create documents from scratch or from previous matter files
- No clear ownership of precedent quality or currency
- Standard documents vary significantly between fee earners

Score this area: Circle: 3 (Ready) / 2 (Developing) / 1 (Not Ready)

4.1C Data Quality & Consistency

Diagnostic question: Is the data we hold about clients, matters, and contacts accurate, complete, and in a consistent format - or is it a patchwork of different conventions?

READY INDICATORS

- Client and matter data entered consistently in the practice management system
- Duplicate records identified and resolved
- Contact information current - not reliant on individual fee earners knowing details
- Standard data fields used consistently (not free-text workarounds)
- Data can be exported and used for reporting without manual cleaning

NOT READY INDICATORS

- Practice management system used inconsistently across the team
- Significant number of duplicate or outdated client records
- Client data in email contacts rather than central system
- Free-text fields used where structured data fields exist
- Reports require manual correction before they can be relied on

Score this area: Circle: 3 (Ready) / 2 (Developing) / 1 (Not Ready)

4.1D Process Documentation

Diagnostic question: If a key fee earner was unavailable tomorrow, could another solicitor step into their matters - and how long would it take to understand the current status and next steps?

READY INDICATORS

- Standard processes for common matter types are documented
- Matter status is recorded in the practice management system, not just in fee earner memory
- Checklists or workflow guides exist for routine transaction types
- Handover information can be produced within an hour for any active matter
- New staff can follow standard processes without informal guidance

NOT READY INDICATORS

- Process knowledge is in individual heads, not documented
- Matter status known only to the fee earner handling it
- No checklists - experience and memory substitute for process
- Handover requires significant time and explanation
- Departing staff take institutional knowledge with them

Score this area: Circle: 3 (Ready) / 2 (Developing) / 1 (Not Ready)

4.1E Microsoft 365 Stack Utilisation

Diagnostic question: Are we getting full value from the Microsoft 365 tools already licensed and available to the practice - or are we using email and Word for everything and leaving substantial automation capability untouched?

READY INDICATORS

- SharePoint or equivalent used for document storage and collaboration
- Teams used for internal communication (reducing email fragmentation)
- Power Automate or similar used for at least some routine task automation
- Calendar and task management integrated with matter management
- Staff confident using Microsoft 365 tools beyond Word, Outlook, and Excel

NOT READY INDICATORS

- Documents primarily stored on local drives or email attachments
- Internal communication almost entirely through email
- No workflow automation in place - all routine tasks are manual
- Microsoft 365 licences in place but most features unused
- Staff reliant on Word and Outlook; other tools unfamiliar

Score this area: Circle: 3 (Ready) / 2 (Developing) / 1 (Not Ready)

M365 AUTOMATION OPPORTUNITY

The Microsoft 365 stack contains substantial automation capability that most legal practices are not using. Power Automate can handle document creation from templates, approval workflows, time recording reminders, and task assignment. These tools carry lower AI risk than generative AI and can be deployed now with minimal governance overhead.

4.1F Time Recording & Matter Management

Diagnostic question: Is time being recorded accurately, consistently, and promptly - and does matter management data reflect the actual state of active work?

READY INDICATORS

- Time recorded on the day work is done - not reconstructed from memory
- All fee earners record time consistently, using standard activity codes
- Matter budgets and actual time compared regularly
- WIP reports used actively for billing and cash flow management
- Matter opening and closing procedures followed consistently

NOT READY INDICATORS

- Time recording often done at end of week or month from memory
- Significant variation in time recording practice between fee earners
- WIP reports not reliable enough to use for management decisions
- Unbilled time regularly written off without analysis
- Matter management system not kept current

Score this area: Circle: 3 (Ready) / 2 (Developing) / 1 (Not Ready)

4.1G Client Data & CRM Discipline

Diagnostic question: Do we have a clear, current, accurate picture of our client relationships - or is that knowledge distributed across individual fee earners, email histories, and memory?

READY INDICATORS

- Central client record contains current contact information, matter history, and relationship notes
- Client categorisation (active, dormant, prospect) kept current
- Business development activity tracked in a shared system
- Client communication preferences and key contact details accessible to the whole team
- GDPR data subject access requests could be fulfilled within statutory timeframe

NOT READY INDICATORS

- Client relationship knowledge lives with individual fee earners
- No central record of matter history across the client relationship
- Business development activity tracked individually, if at all
- Departing fee earners take client relationships with them informally
- GDPR compliance for client data would require significant effort to demonstrate

Score this area: Circle: 3 (Ready) / 2 (Developing) / 1 (Not Ready)

4.1H Knowledge Management & Institutional Memory

Diagnostic question: When a novel legal issue arises, how does the practice draw on its collective experience - and is precedent research and legal knowledge shared systematically or rediscovered individually?

READY INDICATORS

- Significant legal research and opinions retained and accessible for future reference
- Lessons learned from matters captured and shared
- Know-how notes or briefings produced after complex or novel matters
- Internal expertise easily discoverable across the practice
- New joiners can access and learn from the practice's accumulated knowledge

NOT READY INDICATORS

- Research and opinions not retained systematically - redone for each matter
- No practice of capturing lessons learned
- Expertise mapping informal - colleagues find experts through personal relationships
- Institutional knowledge concentrated in a few individuals
- Knowledge leaves with departing staff

Score this area: Circle: 3 (Ready) / 2 (Developing) / 1 (Not Ready)

04 - Scoring Summary

Complete the table below after working through all eight diagnostic areas.

#	Diagnostic Area	Score (1-3)	Priority Action
4.1A	Document Management & File Structure		
4.1B	Precedent & Template Discipline		
4.1C	Data Quality & Consistency		
4.1D	Process Documentation		
4.1E	Microsoft 365 Stack Utilisation		
4.1F	Time Recording & Matter Management		
4.1G	Client Data & CRM Discipline		
4.1H	Knowledge Management & Institutional Memory		
	TOTAL SCORE (8-24)		

05 - Priority Actions by Area

Areas scored 1 (Not Ready) - Address before AI deployment

- Document Management (1): Implement a standard folder structure and naming convention before piloting any document-related AI tools. This is a prerequisite, not a nice-to-have.
- Precedent Discipline (1): Consolidate precedents into a single approved library. AI drafting tools are only as good as the templates and precedents they work from.
- Data Quality (1): Audit and clean practice management system data. AI tools that draw on client or matter data will surface and amplify existing data quality problems.
- Process Documentation (1): Document the three most common matter types before piloting AI workflow tools. Undocumented processes cannot be automated.
- M365 Utilisation (1): Start with what you have. Microsoft 365 automation capability is likely underused. Build confidence with low-risk automation before introducing generative AI.
- Time Recording (1): Consistent time recording is a prerequisite for AI-assisted time capture tools. Fix the discipline first.
- Client Data (1): A clean, current CRM is the foundation for any AI client relationship or business development tool. Data hygiene first.
- Knowledge Management (1): Establish a simple know-how capture habit before investing in AI knowledge tools. AI cannot create knowledge management culture from scratch.

Areas scored 2 (Developing) - Quick wins available

- Identify the one or two specific gaps in each developing area that, if fixed, would move the score to 3
- Prioritise quick wins that take less than one working day to implement
- Assign ownership of each improvement to a specific person with a specific deadline
- Consider whether M365 tools already available can close the gap (Power Automate, SharePoint, Teams)

PRACTICAL STARTING POINT - M365 AUDIT

For most practices scoring in the Developing range, the highest-return action is a focused Microsoft 365 audit: identify which automation capabilities are already licensed but unused and build a 30-day plan to activate the most relevant ones. This often eliminates 3-5 hours of manual work per fee earner per week before any new AI tools are introduced.

Sequencing AI Deployment Against Readiness

Use the readiness scores to sequence your AI deployment plan:

- Start with workflow areas scored 3 (Ready) - these are your lowest-risk pilots
- In areas scored 2 (Developing), implement the specific quick wins before AI deployment
- In areas scored 1 (Not Ready), set a 60-day readiness target before any AI deployment is considered
- Revisit this diagnostic every 6 months as the practice evolves

06 - Regulatory Context

Why Readiness Matters for Compliance

Workflow readiness is not only about AI effectiveness - it also affects compliance. The Law Society of Ireland's Guidelines for the Use of Generative Artificial Intelligence by Solicitors (2025) require that solicitors maintain competence in relation to the AI tools they use. Using AI tools in poorly structured workflows, with inconsistent data, is a competence risk as well as a quality risk.

EU AI Act - Process Requirements for High-Risk Systems

The EU AI Act's high-risk provisions (scheduled to apply from August 2026) require documented risk management systems and data governance procedures. A practice that cannot demonstrate basic data quality, process documentation, and oversight mechanisms is unlikely to be able to demonstrate compliance with these requirements for any high-risk AI system it deploys.

Data Protection - Quality as a GDPR Obligation

GDPR Article 5(1)(d) requires that personal data be accurate and kept up to date (the accuracy principle). Poor data quality in client and matter records is therefore not just an operational problem - it may be a GDPR compliance issue. The data quality diagnostic in this tool is also a data protection readiness check.

LAW SOCIETY CPD PROGRAMME

For hands-on training on AI readiness and adoption, see the Law Society of Ireland's Introduction to AI workshops (CPD accredited). Details at lawsociety.ie/tech-hub.

See Also -

- Tool 1.1 - Shadow AI Audit: Identify AI tools already in use and their risk classifications
- Tool 2.1 - AI Use Policy for Solicitors: Governance framework for approved AI tool use
- Tool 3.1 - Safe Use Patterns by Practice Area: AI use guidance for specific practice areas
- Guidelines for the Use of Generative Artificial Intelligence by Solicitors (Law Society of Ireland, 2025)

Visit www.lawsociety.ie/Practice-Essentials to access additional resources.



This resource was developed by Acuity AI Advisory in consultation with the Law Society of Ireland.

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