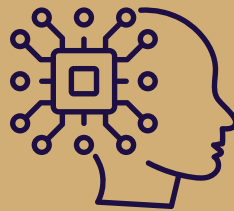




**Law Society  
of Ireland**

## **WORKFLOW READINESS GUIDE**



**A process-level question set for assessing whether a specific workflow is ready for AI – and in what priority order.**



# WORKFLOW READINESS GUIDE



## Build Practice Readiness

- Solicitors in private practice • Practice managers • Managing partners • All firm sizes

**This is the reference guide.** It explains what each dimension means and how to interpret the scores. To run the diagnostic and record your scores, open the accompanying Excel Workbook (Tool-4-1-Workflow-Readiness-Workbook.xlsx). Scores, banding, and the multi-workflow comparison are all calculated there automatically.

*This document does not constitute legal advice.*

## About this tool

This is an indicative readiness diagnostic, not a Law Society readiness certification. The score and band are a starting point for a firm conversation, not a green light. The bands position a workflow in a band of indicative readiness – they do not approve adoption, nor prohibit it.

The firm's actual decisions on what is allowed, what is supervised, and what is verified live in the Acceptable Use Policy ([www.lawsociety.ie/Practice-Essentials](http://www.lawsociety.ie/Practice-Essentials)). Vendor evaluation, where applicable, sits in Tool 2.1 – AI Vendor Assessment Framework. For practice-area mapping of where AI may add value at all, see Tool 3.1 – Indicative Safe-Use Pattern Map.

This diagnostic is broadly consistent with the Law Society's published AI training programme positions, including the framing that AI maps to existing professional obligations — competence, confidentiality, supervision – rather than constituting a new compliance universe.

## About This Diagnostic

This diagnostic helps a firm assess whether a specific workflow – for example file opening in conveyancing, discovery review in PI litigation, due diligence in corporate, intake in family law – is in a state where AI can usefully be introduced. It does not evaluate AI tools. It evaluates the workflow.

Earlier tools in this toolkit tell a firm what AI it is currently using (Tool 1.1, Shadow AI Audit), how a candidate vendor stacks up under firm-grade evaluation (Tool 2.1, AI Vendor Assessment Framework), and whether the firm has an Acceptable Use Policy in place ([www.lawsociety.ie/Practice-Essentials](http://www.lawsociety.ie/Practice-Essentials)).

This tool tells the firm what to do next: which workflow to start with, what foundational work has to happen before AI is layered on, and what risk is created by skipping that work. Use Tool 3.1's pattern map to identify which workflows in a practice area are worth assessing for AI; use this tool to test the readiness of a specific workflow before adoption; record the resulting decision in the firm's Acceptable Use Policy ([www.lawsociety.ie/Practice-Essentials](http://www.lawsociety.ie/Practice-Essentials)).

The diagnostic maps to the duty of competence under the Law Society's Guidelines for the Use of Generative Artificial Intelligence by Solicitors (Law Society of Ireland, 2025).

**Core insight:** In many firms, the initial opportunity is automating the existing manual steps in the productivity stack – templates, naming conventions, document assembly, e-signing – before introducing new AI risk layers. AI applied to undisciplined processes produces faster chaos, not better outcomes.

## How to Use It

Run the diagnostic per workflow — not per firm. A firm's conveyancing workflow may be ready; its litigation discovery workflow may not be. Score one workflow at a time and prioritise across workflows using the comparison sheet in the accompanying workbook.

### 1. Pick one concrete workflow.

Choose a real, repeatable end-to-end process — not an abstract category like “research”.

### 2. Identify the workflow owner.

One person who can answer for the workflow as it actually runs — usually the senior associate or department head, with the practice manager as second view.

### 3. Score the five dimensions.

Each dimension contains six questions, scored 0–4 (0 = absent, 4 = fully in place, documented, applied and reviewed).

### 4. Read the band, not just the number.

The total lands the workflow in one of three indicative bands: foundations work first, lower-risk pilot candidate, adoption-track candidate. The band is a starting point for a firm conversation, not a Law Society sign-off.

### 5. Build the priority action list.

Lowest-scoring dimension first. A workflow scoring 1 on Process Discipline cannot be fixed by AI — fix the process first.

### 6. Compare 3–5 workflows side by side.

Use the comparison tab to sequence AI investment across the firm.

# The Five Readiness Dimensions

Each dimension is scored independently. The lowest-scoring dimension is usually where the firm’s attention needs to go first, regardless of the headline number.

## 1. Process Discipline

*Is the workflow standardised, written down, and run the same way by everyone? The most common bottleneck is not AI capability — it is process discipline.*

Question
Is this workflow documented as a written process anyone can follow?
Do all fee-earners and staff run the workflow the same way?
Are the inputs and outputs of each step clearly defined?
Is there a checklist, template, or matter plan that the workflow follows?
Have the failure modes and rework points been identified and addressed?
When a new person joins, can they pick up the workflow without a senior colleague rebuilding it from memory?

## 2. Data Hygiene

*Is the data in this workflow clean, structured, and accessible? AI applied to chaotic data produces chaotic output faster — not better output.*

Question
Does the workflow use a consistent file and folder naming convention?
Is matter data stored in one authoritative location, or scattered across email, desktops, network drives, and personal folders?
Are documents tagged, indexed, or otherwise searchable beyond filename?
Is client data captured once and re-used, or re-keyed at each stage?
Are there known gaps, duplicates, or quality problems in the underlying data?
Could a competent person, given access today, locate the last twelve months of completed matters in this workflow?

### 3. Foundation Tooling

*Are existing productivity, document, and practice-management systems being used to their potential before new AI is introduced?*

Question
Are document templates with the firm's current style and clauses in place and in use?
Are mail-merge, document assembly, or precedent libraries used where they could be?
Is the practice or case management system being used for matter-level workflow, not just billing?
Are routine steps (engagement letters, conflict checks, ID/AML, e-signing) digital and automated where they sensibly can be?
Does the firm know what its existing productivity stack can do that it currently does not use?
Have manual, repetitive tasks been identified and listed before any AI tool is evaluated?

### 4. Governance Coverage

*Does the workflow sit under existing AI policy and professional-obligation coverage? Have client confidentiality, privilege, and verification requirements been mapped?*

Question
Is this workflow explicitly addressed in the firm's Acceptable Use Policy ( <a href="http://www.lawsociety.ie/Practice-Essentials">www.lawsociety.ie/Practice-Essentials</a> ), or only implicitly?
Have the data categories handled in this workflow (client confidential, privileged, special category) been mapped?
Is a verification or human-oversight step built into the workflow at the points where AI output would be relied on?
Are court-submission, regulator-facing, or third-party-facing outputs flagged for the disclosure rules they engage?
Is there a clear position on whether consumer AI tools may be used in this workflow at all?
If something went wrong in this workflow tomorrow, is the incident-response path clear and rehearsed?

### 5. People & Capability

*Does the team operating this workflow have the AI literacy to critically evaluate AI output? Is there a clear owner and supervision structure?*

Question
Does the team know the difference between consumer and enterprise AI tools and why it matters?
Can the team identify a plausible-looking but wrong AI output and challenge it?
Is there a named individual responsible for AI use in this workflow?
Is supervision of junior staff using AI built into the workflow, not assumed?
Has the team had structured AI training (for example a Law Society workshop) within the last twelve months?
Is professional liability — the personal obligation, not the firm's — understood by every fee-earner working in this workflow?

# Scoring Guide

Each of the five dimensions contributes a maximum of 24 points (six questions × 4 points). Total maximum is 120, normalised to a 0–100 score for readability.

## Per-question scoring

Score	Meaning
0	Not in place at all — the question has not been considered.
1	Aware of the gap but no action taken.
2	Partial — some parts of the workflow, some of the time.
3	Mostly in place — consistent practice but not formalised.
4	Fully in place — documented, applied, reviewed.

## Readiness bands

Range	Band	Action
0 – 39	Foundations work first	Indicative band: address foundational issues before introducing AI. Process discipline and data hygiene first; AI tooling after.
40 – 69	Lower-risk pilot candidate	Indicative band: pre-approved lower-risk use cases only, with verification and supervision built in.
70 – 100	Adoption-track candidate	Indicative band: workflow appears suitable for an adoption conversation with governance in place. The firm still decides.

Lowest-scoring dimension rule: A workflow that averages 70 but scores below 10 on any single dimension is not in the adoption-track conversation — it is in the remediation conversation. Any dimension scoring below 10 (out of 24) is a foundations gap to address first, regardless of the overall score.

# Worked Example

## – Conveyancing File Opening

A 12-fee-earner private client and conveyancing firm runs the diagnostic on its conveyancing file-opening workflow: receipt of instructions, conflict check, ID/AML, engagement letter, matter setup in the practice management system, initial requisitions.

The workflow owner is the conveyancing department head, with the practice manager scoring jointly.

Dimension	Subtotal (/24)	What the score reflects
<b>1. Process Discipline</b>	18	Documented intake checklist, used consistently, minor variation between fee-earners on initial requisition drafting.
<b>2. Data Hygiene</b>	14	Naming convention in place, but matter data still scattered between PMS, network drive and individual email folders.
<b>3. Foundation Tooling</b>	11	Templates exist but underused; e-signing in pilot only; mail merge available but not consistently applied.
<b>4. Governance Coverage</b>	9	Firm's AUP exists at firm level but does not name this workflow; verification step not built in.
<b>5. People &amp; Capability</b>	13	Department head and one senior associate trained; juniors not yet through Law Society Introduction to AI workshop.

*This worked example is illustrative — a different firm's scoring will land in a different band, and that's the point. The diagnostic surfaces issues; the firm decides what to do about them.*

### **Total: 65 / 120 → 54% → indicative: Lower-risk pilot candidate**

Headline reading: the workflow is approaching pilot-ready, but Dimension 4 (Governance Coverage) is below 10 — a foundations gap to address first. Priority actions: update the firm's Acceptable Use Policy ([www.lawsociety.ie/Practice-Essentials](http://www.lawsociety.ie/Practice-Essentials)) to address this workflow specifically; build a verification step into the file-opening sign-off; then revisit Foundation Tooling (templates and e-signing) before any AI pilot launches. The firm holds off on AI-assisted intake drafting until both Governance and Foundation Tooling cross the 12–15 mark.

**What this looks like in practice:** Three quarters of remediation work is non-AI work. Documenting the verification step, finishing the e-signing rollout, and getting junior staff through the Law Society's Introduction to AI workshop unlock the workflow for AI adoption far more reliably than a vendor pilot would.

# References

Law Society of Ireland (2025), Guidelines for the Use of Generative Artificial Intelligence by Solicitors.

Regulation (EU) 2024/1689 — the EU AI Act. Article 4 (AI literacy) in force since 2 February 2025; General-Purpose AI provider obligations apply from 2 August 2025. Under the political agreement on the Digital AI Omnibus reached on 7 May 2026 (subject to final adoption), high-risk AI system obligations are now scheduled to apply from 2 December 2027 for standalone systems (Annex III) and from 2 August 2028 for high-risk AI embedded in regulated products (Annex I).

GDPR — Regulation (EU) 2016/679, Articles 5, 24, 28, 32, 35.

Solicitors Acts 1954–2015; Solicitors (Amendment) Act 1994 s.41 (confidentiality).

Copyright and Related Rights Act 2000 s.21(f) — authorship of computer-generated works (untested in Irish court).

*For practical AI literacy, see the Law Society of Ireland's Introduction to AI for Legal Practitioners workshops and the AI in Legal Practice Summit.*

**Visit [www.lawsociety.ie/Practice-Essentials](http://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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