

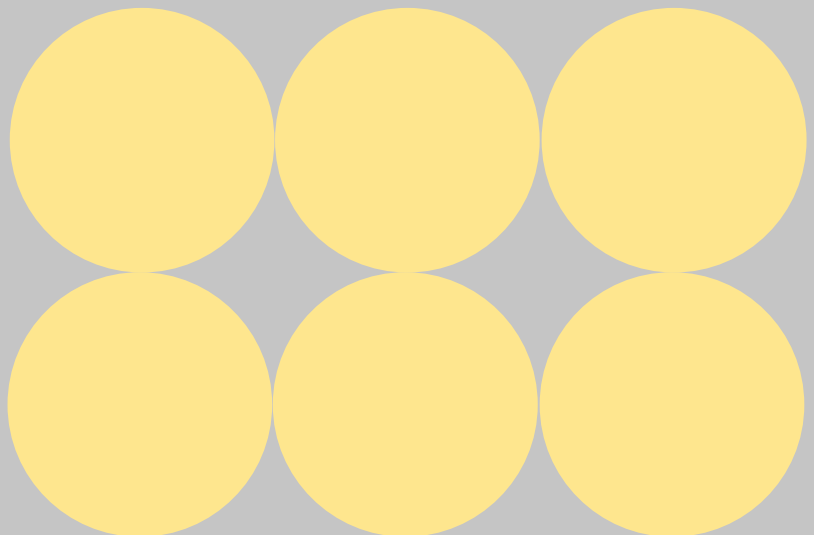


Legal Data
Intelligence™

The Legal Data Intelligence Guide for Onboarding New Technologies

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Contents

Introduction..... 2

Define Organizational Needs 2

Stakeholder Engagement..... 2

Change Management 3

Pilot Program..... 3

Risk Assessment 3

Metrics and Procurement 4

Accessibility and User Support..... 4

Process Checklist 4

Introduction

The [Legal Data Intelligence \(LDI\) model](#) currently includes processes for use cases in four categories: Disputes & Investigations; Corporate; Data Protection Compliance; and Business of Law. While distinctly different practice areas, there is a fundamental challenge they share today: the explosion of data volumes, variety, and sources.

The LDI model shows the workflow to holistically address the data challenge that is at the heart of each individual use case: finding and acting on sensitive, useful, or necessary (SUN) data within all the redundant, obsolete, or trivial (ROT) data that constitutes the bulk of data in every organization. The processes represented by the LDI model enable the SUN data to shine through, illuminating the information so it can be transformed by legal professionals into new levels of intelligence.

The LDI model also highlights the role that technologies – powered by generative AI – can play to make steps in the process faster, more efficient, or less risky, enabling legal professionals to get to insights and advice faster and with confidence. These technologies can handle laborious data tasks and more quickly and accurately find the SUN data that informs sound decision making.

This guide provides a comprehensive approach to technology onboarding to help legal organizations successfully select new technologies for various use cases while maintaining their commitment to security, compliance, and operational excellence.

Define Organizational Needs

Before initiating any technology onboarding process, organizations must ensure the technology in question directly transforms data into actionable items. This begins with mapping technology adoption to specific business and legal goals, including reducing operational risk, improving workflow efficiency, and most of all, enabling data-driven decision-making capabilities. Legal teams should evaluate how the proposed solution will contribute to the broader transition from traditional document-centric practices to modern legal data intelligence operations that can separate SUN data from ROT data. Adopting a legal data intelligence mindset at the start of new technology onboarding enables organizations to gain deeper insights into the technology and its value to the organization. This approach enhances decision making with improved risk assessment accuracy, ultimately supporting more strategic and effective technology integration.

Stakeholder Engagement

Successful technology onboarding requires early identification and engagement of key stakeholders across various functions, namely Legal, IT, Compliance, Procurement, Contract Management, and relevant business units. Building a guiding coalition of influential leaders and champions who can advocate for the change throughout the organization is essential for overcoming traditional resistance to technological adoption in legal environments. Equally important is determining who will own the onboarding process and take responsibility for the ongoing administration of the new technology.

Change Management

The change management strategy must include transparent communication plans that clearly articulate the benefits and necessity of the technological change, addressing potential concerns about disruption to established workflows. Training programs should be customized to different user groups, recognizing that legal professionals have varying levels of technical expertise and different learning preferences. Feedback loops must be established to ensure continuous communication and adjustment of the implementation approach based on user experiences and emerging challenges.

Pilot Program

The selection process should begin with a carefully structured pilot program using representative data samples to evaluate real-world performance, usability, and integration capabilities. The pilot phase serves multiple critical functions: validating the technology's effectiveness in the specific organizational context, identifying potential integration challenges before final selection, and building confidence among users through demonstrated success. The pilot program should include clear metrics and benchmarks that allow for objective evaluation of the technology's impact on efficiency, accuracy, and user satisfaction. Results from the pilot program should be used to refine requirements, adjust selection strategies, and build a business case for broader deployment. The pilot program should also test the technology's compatibility with existing workflows and systems to ensure seamless integration without disrupting operations.

Risk Assessment

Comprehensive risk assessment must address multiple dimensions of technology selection, beginning with privacy impact assessments to ensure compliance with relevant regulations such as the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA), among others. The emergence of artificial intelligence (AI) has made this process even more complicated and constantly evolving. For technologies incorporating AI, organizations must evaluate AI-specific risks including bias, explainability, and regulatory compliance, and establish robust AI governance protocols that address responsible AI principles. In addition, information governance frameworks must be established to manage data lifecycle requirements, retention policies, defensible deletion procedures, and audit capabilities. Further, cloud security controls require thorough evaluation, including encryption standards, access management protocols, compliance certifications, and incident response procedures. The assessment should also examine the technology's compatibility, automations, and integrations such as APIs.

Incorporating Software as a Service (SaaS) solutions can offer significant benefits in this context. SaaS provides scalability and flexibility, allowing organizations to quickly adapt to changing needs without the burden of maintaining physical infrastructure. It often includes built-in compliance and security features, reducing the complexity of managing these aspects internally. SaaS solutions typically offer seamless updates and enhancements, ensuring that the latest security patches and features are always available. Additionally, SaaS can facilitate better collaboration and accessibility, as users can access the services from anywhere with an internet connection. This can lead to increased efficiency and productivity, as well as cost savings due to reduced hardware and maintenance expenses.

Metrics and Procurement

Organizations must define clear, measurable metrics that align with both objectives and specific business goals. Building a robust selection process requires quantifying expected return on investment and developing resource requirement assessments that demonstrate financial and operational benefits. Procurement teams should be engaged early in the process to negotiate favorable terms, manage relationships, and ensure contractual clarity regarding service levels and support structures. The selection process should also account for both direct cost savings through increased efficiency and indirect benefits such as satisfaction and reduced compliance risk.

Accessibility and User Support

Technology onboarding success depends significantly on ensuring solutions are accessible to all stakeholders, including those with disabilities, and prioritizing intuitive interfaces that maximize adoption rates. User support structures must be established to provide ongoing assistance and training, recognizing that legal professionals may require extended support periods as they adapt to new technological approaches. The selection process should include provisions for addressing user resistance through education and hands-on training. Collecting stakeholder feedback on a regular basis helps ensure the technology continues to meet evolving needs.

Process Checklist

Use this checklist to streamline the process and stay on track with critical steps and considerations.

- ☐ **Determine Fit and Goal Alignment:** Ensure technology transforms legal data into actionable items, supporting the shift from traditional practices to modern legal data intelligence, and aligns with business and legal goals like reducing risk and improving efficiency.
- ☐ **Evaluate Contribution:** Assess the solution's role in separating SUN data from ROT data, contributing to broader transformation goals.
- ☐ **Engage Stakeholders:** Identify and involve key stakeholders across departments early, forming a coalition of leaders to advocate for change and overcome resistance.
- ☐ **Develop Change Management Plans:** Build transparent communication plans that articulate the benefits and necessity of change, addressing workflow disruption concerns.
- ☐ **Customize Training and Establish Feedback Loops:** Tailor training to different user groups based on their expertise and set up feedback loops to support ongoing communication and adjustments.
- ☐ **Conduct Pilot Program:** Evaluate performance and integration through a pilot, using the results to validate effectiveness, refine requirements, and strengthen the business case for deployment.

- **Implement Risk Assessments and Governance Frameworks:** Conduct comprehensive risk assessments – including AI-specific risks – and set up governance frameworks for data lifecycle management and security.
- **Evaluate Cloud Security and Performance:** Assess cloud security controls and define metrics that align with business goals, quantify ROI, and clarify resource needs.
- **Engage Procurement:** Involve procurement teams early to negotiate terms, manage relationships, and maintain contractual clarity.
- **Establish Budget:** Define the budget to cover onboarding and administration of the technology, ongoing maintenance, and periodic upgrades.
- **Evaluate Accessibility, Interfaces, and User Support:** Ensure solutions are easy to use and intuitive and supported by training and assistance programs.
- **Collect Stakeholder Feedback and Evaluate Results:** Regularly collect feedback to ensure the technology meets evolving needs and achieves goals while maintaining security and compliance.