AI INNOVATION WORKSHOP RECAP

ILTA Events Committee

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International Legal Technology Association

OVERVIEW

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In an era where legal teams are expected to do more with less—and do it faster, smarter, and more strategically—AI offers both promise and complexity. To help legal professionals navigate this evolving landscape, ILTA convened an interactive virtual workshop designed to explore and co-create AI-powered solutions for common operational challenges within law firms.

This three-hour event brought together cross-functional teams of professionals across knowledge management, legal operations, IT, finance, HR, training, and practice group leadership. Guided by experienced facilitators and supported by subject matter experts (SMEs) in AI and legal tech, participants tackled real-world issues facing law firms today and collaborated on developing tangible, actionable solutions.

A massive thank you to all our participants, SMEs, the team that organized and facilitated the workshop, and the ILTA staff who helped make this a successful experience for all!

WORKSHOP FLOW & STRUCTURE

Purpose:
To identify practical AI use cases within law firm operations and collaboratively develop high-level action plans that address those needs with clarity, feasibility, and strategic alignment.

Structure:
Participants were assigned to one of five cross-functional teams, each focused on a different area:

- Data Analytics
- Governance, Risk & Compliance
- Knowledge Management
- Timekeeping & Billing
- Workflow Automation

Each team engaged in a structured design sprint using a Miro board to guide:

- Problem definition and impact framing
- Brainstorming of AI solutions and approaches
- Action plan development with defined steps, stakeholders, and success metrics

The workshop culminated in team share-outs, crowdsourced feedback, and a final synthesis of ideas—offering the ILTA community both insight and inspiration on what is possible when people collaborate with intention and curiosity around AI.

WHAT FOLLOWS IN THIS REPORT

In the sections ahead, you will find:

- A summary of each team's problem statement and proposed action plan
- Key tools and technologies discussed
- Top five takeaways
- Profiles of the SMEs who guided the process

PLEASE NOTE: The following recap summarizes the output of a three-hour innovation workshop in which five cross-functional teams collaboratively developed draft action plans based on specific problem statements. This format was intentionally experimental and yielded valuable lessons for future events.

Each team progressed through their plan to varying degrees, depending on the complexity of the issue and team dynamics.

These drafts **are not exhaustive**; instead, they are intended to serve as starting points and inspiration for others who may wish to tackle similar challenges in their own firms or practice areas.

1 DATA ANALYTICS

PROBLEM STATEMENT & SUMMARY

Problem Statement:

Practice group leaders struggle to forecast case workload and staffing needs based on disparate and low-quality time entry and financial data. This mismatch leads to burnout, inefficiency, and missed strategic opportunities.

Key Pain Points:

- Lack of consistent, integrated data sources
- Limited attorney input into planning
- Poor compliance and a need for leadership alignment
- Need for user-friendly dashboards and visualizations

Ideal Outcome:

An integrated, predictive resource management solution powered by AI and customizable dashboards that allow for more innovative workforce planning.

Tools & Technology Mentioned

- **Custom Dashboards:** Power BI, Tableau
- **Predictive Tools:** DataRobot, Python-based modeling
- **Resource Management Systems:** BigHand, Intapp Operations, Mosaic, ProFinda
- **Supporting Tools:** Laurel (lost time capture), Toggle, Foundation, DMS search integrations

DATA ANALYTICS

Key Stakeholders

The team identified key stakeholders that must be interviewed and integrated into the success of a project like this:

- Practice Group Leaders
- Legal Talent / HR Teams
- Legal Support Staff (LAAs, Paralegals)
- Finance / CFO
- Knowledge Management / IT / PM
- Executive Leadership Team

Success Metrics/KPIs

- Increased timekeeper utilization
- Better workload balance
- Improved associate retention and engagement
- Higher client satisfaction (NPS)
- More accurate resource forecasting for growth planning

Risks & Considerations

- Incomplete or unstructured data inputs
- Internal capacity for change and adoption
- Scope creep and under-resourced tech builds
- Vendor pricing and system integration challenges
- Sustained user engagement post-launch

DATA ANALYTICS: Action Plan

Phase	Key Activities
1. Discovery & Feasibility	- Identify all critical data points - Define qualitative insights needed - Stakeholder interviews (HR, Finance, Practice Leaders) - Internal vs. external tool comparison
2. Technical Assessment	- Audit data quality & clean-up opportunities - Evaluate integration points (HRIS, Outlook, DMS) - Assess internal BI/reporting capabilities
3. Planning & Design	- Select beta testers - Build comms plan & stakeholder updates - Begin initial design of dashboard structure
4. Build / Pilot	- Develop or configure solution - Launch training and onboarding - Pilot dashboard and forecasting with one team
5. Rollout & Measure	- Monitor usage & adoption - Track KPIs and refine dashboards - Plan for broader rollout with feedback loop

2 GOVERNANCE, RISK & COMPLIANCE

PROBLEM STATEMENT & SUMMARY

Problem Statement:
Compliance officers in large, multinational organizations need to proactively monitor and manage both internal policy adherence and external regulatory compliance across departments, frameworks, and jurisdictions because manual, fragmented processes lead to inconsistent compliance, audit failures, and increased risk exposure.

Key Pain Points:
- Policy exists, but monitoring is inconsistent or absent
- No clear audit trail for AI use in documents or client matters
- Difficulty ensuring compliance across multiple systems and policies
- Lack of end-user awareness or training reinforcement

Ideal Outcome:
A centralized "Compliance Copilot" tool that monitors AI usage in real time, compares actions against firm and client policies, prompts appropriate actions (e.g., training, tagging), and prevents violations before they occur.

Tools & Technology Mentioned
- **Compliance Copilot:** a conceptual tool that:
  - Tags documents automatically based on policy alignment
  - Monitors AI prompts and usage for “dirty word” triggers
  - Cross-references firm and client compliance policies
  - Embeds into existing platforms (e.g., CCP or DMS)
- **Trigger-based Training:** prompts users to complete training if misuse or risk is detected
- **Buy vs. Build:** teams discussed whether to build internally or evaluate third-party compliance automation tools

Key Stakeholders

The team identified key stakeholders that must be interviewed and integrated into the success of a project like this:

- Compliance Officers
- Firm Management / Risk Leads
- Knowledge Management
- HR and IT
- Department overseeing AI deployment
- Client Counsel (in matters with specific restrictions)
- End Users (Associates, Legal Support, Salaried Members)

Success Metrics/KPIs

- Percentage of users completing compliance training
- A decrease in AI policy violations or misuses
- Tagging accuracy for documents and matters
- Ability to generate clear, client-ready compliance reports

Risks & Considerations

- Documents tagged as compliant when they are not (false positives)
- Outdated “dirty word” lists that no longer reflect policy evolution
- AI use within matters where clients have opted out of AI usage
- Internal bandwidth and ownership of tool development or adoption

GOVERNANCE, RISK & COMPLIANCE: Action Plan

Phase	Key Activities
1. Policy & Risk Review	- Audit existing firm and client AI compliance policies - Identify policy gaps and common violations
2. Technical Feasibility	- Evaluate systems for tagging, prompt monitoring, and document scanning - Assess integration points
3. Prototype Compliance Copilot	- Build or demo a conceptual tool - Include real-time flagging, training triggers, and tagging workflows
4. Pilot Deployment	- Deploy to a test group - Monitor false positives and usability-Refine list of “dirty” trigger words
5. Rollout & Measure	- Define compliance KPIs (training completion, fewer violations) - Provide client-facing reports where relevant

3 KNOWLEDGE MANAGEMENT

PROBLEM STATEMENT & SUMMARY

Problem Statement:
Our firm has a wealth of knowledge locked in individual lawyers' heads, email chains, chats, and meeting notes. How might we use AI-driven tools to capture, surface, and structure this tacit knowledge so that it is available across the firm and can drive innovation, learning, and collaboration?

Key Pain Points:

- Critical knowledge is trapped in individual inboxes and is not easily accessible
- No consistent or scalable way to extract and share insights from daily communications
- Lawyers are often unaware of existing expertise within the firm
- Manual KM efforts are time-intensive and unsustainable

Ideal Outcome:
A firmwide solution that passively captures relevant knowledge from communications, distills key information, and makes it discoverable through an intuitive, search-forward interface or AI-powered assistant.

Tools & Technology Mentioned

- **AI-Powered Knowledge Bots:** Chatbot-style interface integrated across tools (email, chat, DMS) to deliver relevant expertise and documents on demand
- **Matter Knowledge Base:** A structured repository linking insights to client/matter context
- **Search-First Wiki or KM Portal:** Lightweight interface that presents summaries and enables drill-downs
- **Inline Data Mining ("Forward" Method):** Concept of proactively tagging or extracting insights during communication, not just retrospectively

3 KNOWLEDGE MANAGEMENT

Key Stakeholders

The team identified key stakeholders that must be interviewed and integrated into the success of a project like this:

- Attorneys
- Practice Group Leaders
- Knowledge Management Teams
- Marketing & Business Development
- Operations
- Firm Management

Success Metrics/KPIs

- Increased knowledge reuse across matters and teams
- Reduction in duplicative work or time spent finding prior work product
- Higher engagement with KM platforms or search tools
- Improved onboarding for new attorneys and staff
- Contributions to innovation and collaboration firmwide

Risks & Considerations

- Privacy and sensitivity concerns around extracting content from emails/chats
- Overloading attorneys with KM-related requests or approvals
- False positives in AI classification and enrichment
- Lack of adoption if search tools are not intuitive

KNOWLEDGE MANAGEMENT: Action Plan

Phase	Key Activities
1. Discovery & Workflow Mapping	- Identify key communication tools used daily - Map where knowledge typically resides (email, meetings, chats) - Survey pain points among attorneys and staff
2. Feasibility & Tool Review	- Explore AI classification/enrichment tools - Review existing KM platforms or DMS capabilities - Evaluate need for chatbot vs. knowledge base interface
3. Design Minimal Viable Product (MVP)	- Build a prototype (light wiki or chatbot) - Test data capture and classification process - Ensure content links back to matters or practice groups
4. Pilot & Feedback Loop	- Select pilot group (e.g., one practice team) - Collect feedback on usability and search accuracy - Adjust based on search relevance and ease of access
5. Firmwide Launch Strategy	- Create engagement campaign to highlight "what's possible" - Embed training into onboarding/Professional Dev - Set long-term metrics and refinement cycles

4 TIMEKEEPING & BILLING

PROBLEM STATEMENT & SUMMARY

Problem Statement:
First-year attorneys must create time entries that comply with firm and client guidelines to ensure billable work is approved and paid. Failure to meet these standards can result in client invoice rejections and nonpayment.

Key Pain Points:

- Manual, inconsistent timekeeping methods (pen & paper, Word/Excel, Dictaphone, etc.)
- Time entry varies by personal preference and lacks standardization
- Requires partner or biller review, slowing down billing cycles
- Leads to write-offs, delayed invoicing, and lost revenue

Ideal Outcome:
A smart, AI-powered timekeeping assistant that helps attorneys capture time, auto-generate compliant narratives, check entries against client billing rules, and reduce the need for manual corrections.

Tools & Technology Mentioned

- **Time Capture Tools:** Laurel, iTimekeep, Intapp
- **AI/LLM Integration:** Grounded in firm-specific rules and client preferences
- **Computer Vision:** Potential to automate timecard creation from visual workflows or documents

4 TIMEKEEPING & BILLING

Key Stakeholders

The team identified key stakeholders that must be interviewed and integrated into the success of a project like this:

- Timekeepers (First-Year Attorneys)
- Billing and Collections Teams
- Pricing Team
- Relationship Managers
- Partners and Firm Leadership
- Legal Administrative Assistants (LAAs)
- Clients

Success Metrics/KPIs

- Fewer billing errors and write-offs
- Improved narrative quality and compliance
- Faster time-to-invoice release
- Higher collection realization rates
- Lower frustration for both attorneys and clients

Risks & Considerations

- Data privacy and security concerns
- System outages or AI errors in entry suggestions
- Resistance to AI from attorneys or perception of micromanagement
- Subscription and training costs (~$100+/user/month)

TIMEKEEPING & BILLING: Action Plan

Phase	Key Activities
1. Workflow & Gap Analysis	- Document current timekeeping practices - Identify baseline metrics for accuracy, write-offs, and cycle time
2. Tool Evaluation	- Compare vendors (Laurel, iTimekeep, etc.) - Assess integration with billing systems and security/privacy requirements
3. Proof of Concept	- Set up focus group or test environment - Collect attorney feedback on usability and quality of AI-generated entries
4. Change Readiness	- Train users on tool features - Monitor friction and resistance - Address micromanagement perceptions
5. Rollout & Measure	- Launch firmwide with support - Track improvements in accuracy, collection realization, and attorney satisfaction

5 WORKFLOW AUTOMATION

PROBLEM STATEMENT & SUMMARY

Problem Statement:
A lawyer and client team need to intake and analyze documents and information to create an efficient estate plan for a client, because the current manual process is slow, error-prone, and delays personalized planning.

Key Pain Points:

- Inconsistent and inefficient data collection
- Manual drafting processes introduce errors and slow turnaround
- High administrative burden reduces billable recovery and profitability
- Existing tools do not integrate well or fully support the workflow

Ideal Outcome:
An end-to-end AI-powered estate planning co-pilot that streamlines client intake, document analysis, and draft generation—leading to increased speed, accuracy, and personalization, while maintaining security and regulatory compliance.

Tools & Technology Mentioned

- **AI Intake + Document Generation:** Chat interfaces, automated document assembly tools
- **Workflow Automation Platforms:** Microsoft Power Platform, LPM tools, Azure-hosted solutions
- **Data Enrichment & OCR:** Used for structuring unstructured inputs
- **Security + Compliance Gateways:** Policies governing PII and firm-approved AI tools

5 WORKFLOW AUTOMATION

Key Stakeholders

The team identified key stakeholders that must be interviewed and integrated into the success of a project like this:

- Clients
- Estate Planning Attorneys & Practice Teams
- Legal Support & Professional Staff
- Legal Practice Management / Accounting Teams
- IT & Security Teams

Success Metrics/KPIs

- Time-to-completion per estate plan
- Time from data intake to first draft delivery
- % of drafts requiring partner-level corrections
- Client satisfaction/referral scores
- Total hours to produce a complete estate plan
- Accuracy and completeness of AI-generated documents

Risks & Considerations

- Errors or hallucinations in AI-generated legal documents
- Loss of human connection in the client experience
- Clients misinterpreting AI recommendations
- Security/privacy breaches during automation
- UI/UX challenges affecting tool adoption
- Integration issues with legacy systems
- Initial implementation slowdown during adoption phase

WORKFLOW AUTOMATION: Action Plan

Phase Key Activities	Phase Key Activities
1. Process Discovery	- Map current estate planning workflow and intake fields - Identify bottlenecks and pain points
2. Solution Scoping	- Evaluate commercially available tools - Identify gaps that may require custom builds - Align with stakeholders
3. Technical & Privacy Review	- Conduct security assessment - Define user roles and access permissions - Vet tools for PII compliance and firm policy fit
4. Build / Pilot	- Build proof of concept (sandbox) - Prototype AI modules (e.g., intake bot, doc generator) - Bring in tech partners or vendors
5. Rollout & Measure	- Develop rollout plan and training resources - Explore pricing structure for the new service - Monitor effectiveness metrics

TOP 5 TAKEAWAYS

1

AI IS ONLY AS GOOD AS THE PROBLEM IT IS SOLVING

Across all groups, the strongest progress began with a clearly defined, high-impact problem, whether it was inaccurate time entries, hidden knowledge, or fragmented compliance.
Takeaway: Start by identifying a real operational pain point, not by chasing the latest tool.

2

CROSS-FUNCTIONAL COLLABORATION IS NON-NEGOTIABLE

Every successful solution required input from multiple stakeholders—IT, attorneys, billing, KM, and compliance. AI solutions often sit at the intersection of people, process, and systems.
Takeaway: Build diverse design teams early to ensure buy-in, technical feasibility, and real-world applicability.

3

DATA QUALITY & STRUCTURE ARE FOUNDATIONAL

From knowledge capture to forecasting attorney availability, groups consistently encountered barriers with siloed, incomplete, or unstructured data.
Takeaway: Before launching AI solutions, invest in data cleanup, integration, and governance.

4

USER TRUST & ADOPTION MATTER MORE THAN FEATURES

Whether suggesting time entries or drafting estate plans, participants emphasized ease of use, clarity of AI outputs, and trust in recommendations as critical to adoption.
Takeaway: Success depends on building user trust—through training, transparency, and a positive user experience.

5

AI IMPLEMENTATION IS A CHANGE JOURNEY, NOT A PLUG-AND-PLAY TOOL

Teams acknowledged that even promising solutions come with startup friction, training time, and cultural resistance. But with proper planning, the long-term ROI (faster cycles, fewer errors, better experiences) can be transformative.
Takeaway: Plan for a phased rollout with pilot testing, metrics, and change management baked in from day one.

NOTE: AI WAS LEVERAGED THROUGHOUT THE COORDINATION OF THIS EVENT AND THE CREATION OF THIS RECAP. THESE 5 TAKEAWAYS WERE AI-GENERATED BASED ON THE INFORMATION PROVIDED.

THANK YOU TO OUR SUBJECT MATTER EXPERTS

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