

# SCG LEGAL AI STRATEGY EXCHANGE 2025 Session 5

AI Training, Education, and Adoption

# Session 5

## AGENDA

Industry Updates

Budgeting for AI

AI Education: the Impetus for Change

Internal vs External Curricula

Personas for Training

Future Lawyer Skills Training

Adoption and Change Management

AI Usage Tracking and Auditing

Q&A

# Industry Updates

# Industry Insights

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- **AI Market Jitters:** Vendors are jostling for position, but funding is strong.
- **AI Teams in Firms:** Law firms are forming dedicated AI groups, sometimes within IT or innovation, sometimes as standalone departments, focused on upskilling and strategy.
- **Platform Shifts:** The “core system” for lawyers may be changing, moving beyond Outlook and DMS toward new platforms that integrate workflows and data.
- **Pricing Models:** Growing momentum to evaluate legal work by workflow value and efficiency, not just the billable hour.
- **AI as Value Driver:** No longer seen only as an efficiency tool, AI is being framed as delivering higher ROI, quality, and client value.
- **Vendor Shake-Up:** Established players may lose ground as newer entrants rise as potential enduring platforms.

# Budgeting for AI

# Cost of Investment

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## New Line Item

- 43% of Am Law 200 firms report having a dedicated budget for generative AI tools in 2024 (still a small percentage of overall spend)
  - Firms with a dedicated AI budget were spending <1% of firm revenue on AI in 2024-2025
  - Budget set to increase 2026
- In midsize firms (50 lawyers and above), ~19% of firms have a separate line item for AI spend
  - Still more typical in these firms to spend on general tools with AI built in than distinct AI solutions

# Investment is Growing

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- Large firms are **increasing** total tech budgets year-over-year
  - Tech spend grew ~7.6% YoY in 2024 (far outpacing inflation), to accommodate AI investments, rather than cannibalizing critical existing IT needs
  - This is expected to grow in 2026
- Overhead up ~8.6% in H1 2025, with GenAI/tooling cited as a contributor

# Guidance for 2026

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If you're midsize (~50–200 lawyers):

- Total GenAI program: ~0.3%–1.0% of revenue (most peers with dedicated budgets are still <1%).
- Funding model: Often new line item for GenAI + some incremental IT/security and KM/innovation allocations.

If you're Am Law 200 / upper-mid:

- Total GenAI program: ~0.5%–1.5% of revenue (a larger share reporting dedicated budgets and broader tool portfolios).
- Expect a more visible overhead uptick (licenses, compute, data projects, enablement) as reflected in 2025 expense trends.

If you take just one thing from this: **Dedicate a separate line item for AI spend.**

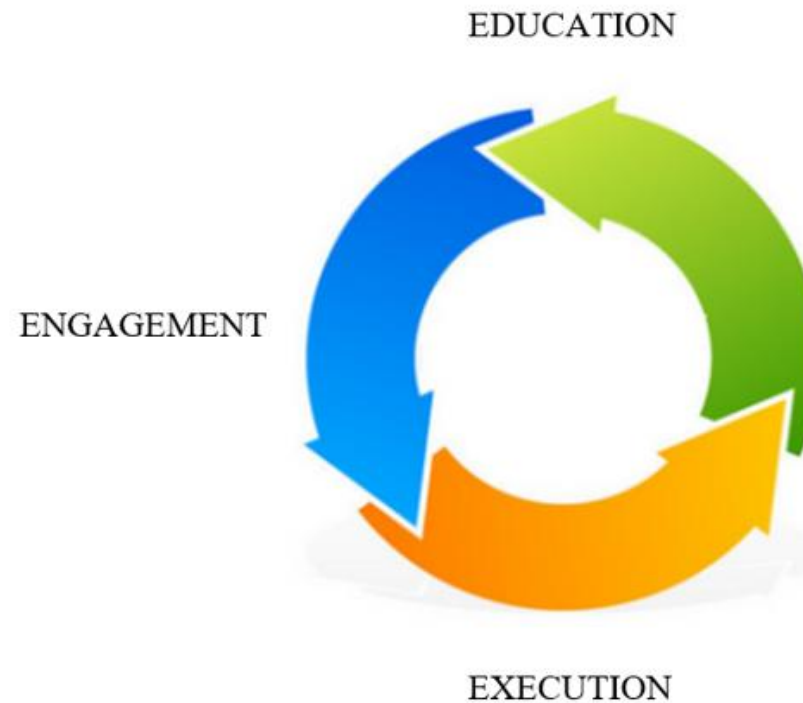
- Demonstrates commitment (internally & externally)
- Makes it easier to track ROI
- Dedicated budgets correlates with improved, faster adoption rates!



# AI Education: the Impetus for Change

# Education as Phase 1 of Adoption

- Education will either underpin or undermine everything that follows.
- Lessons learned from AI the last time around...
- The Law School perspective – *‘We would love to teach this, but we won’t’* (though this is rapidly changing)



*Education* builds a sense of urgency to persuade people that change is necessary.

*Engagement* takes this a step further and helps build a coalition of people in support of the change, who are supportive because they are part of the initiative.

*Execution* creates small or quick wins that build on momentum.

These forces work together as iterative cycles that are amplified each time they revolve.

# Why Is This Different?

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- **Training and education around AI is more pressing than any other technical advancement in a generation.**
- Consider previous big disrupters:
  - Email
  - Mobile communications
  - The cloud / SaaS
  - E-signature
- What does AI have that the other big changes didn't?

# Why Is This Different?

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- **Contemporary interest with the public!**
- Typically law will lag other industries and the consumer in adopting new technology, and people generally expect that to be the case.
- ChatGPT 3.0 landed with the public and the profession around the same time. We aren't catching up on a technology that's been around for a decade – we're seeing it evolve in real time.
- That's the difference for education and training – we are learning as we go, and we cannot afford to wait and see, or let others go first.
- Is that exciting? Or is that frightening?

# The Client Perspective

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- **Contemporary interest with your clients as well!**
- Clients are experimenting with this technology. They may \*want\* to speak about their experiences, share ideas, and ultimately share in the benefits.
  - Clients are booking the same hackathons law firms are....
- Every touch point between you and your clients is potentially a conversation about AI. Your people need to know what to say, what not to say, and to have at least some understanding of what this is all about.
- Failure to speak knowledgably about AI may be seen as an indication that you are not keeping up, and may not be the modern advisor that client expects.

# Business Opportunities

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- Clients will need additional support to safely integrate AI into their own operations and business plans.
- Many don't know what they don't know.
  - E.g. the leaked ChatGPT conversation collection is full of sensitive information entered by professionals who did not understand what they were doing.
- How can your people identify opportunities to add value to your clients if they do not understand the basics of AI themselves?
- Example - discovery practices: clients probably need new governance and retention advice. Do all of your discovery lawyers know that, and do they know how to talk to clients about it?

# Summary: Push and Pull

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- **Push:** We **must** educate because
  - Clients expect us to stay up-to-date
  - Protect against errors and damage
  - Technology competency requirements
  - Our people need these skills to survive
- **Pull:** We **want** to educate because
  - New business opportunities
  - Efficiencies and growth potential
  - Reach new markets and new workstreams
  - Our people want these skills to thrive

# Internal and External Curricula



# What are firms doing?

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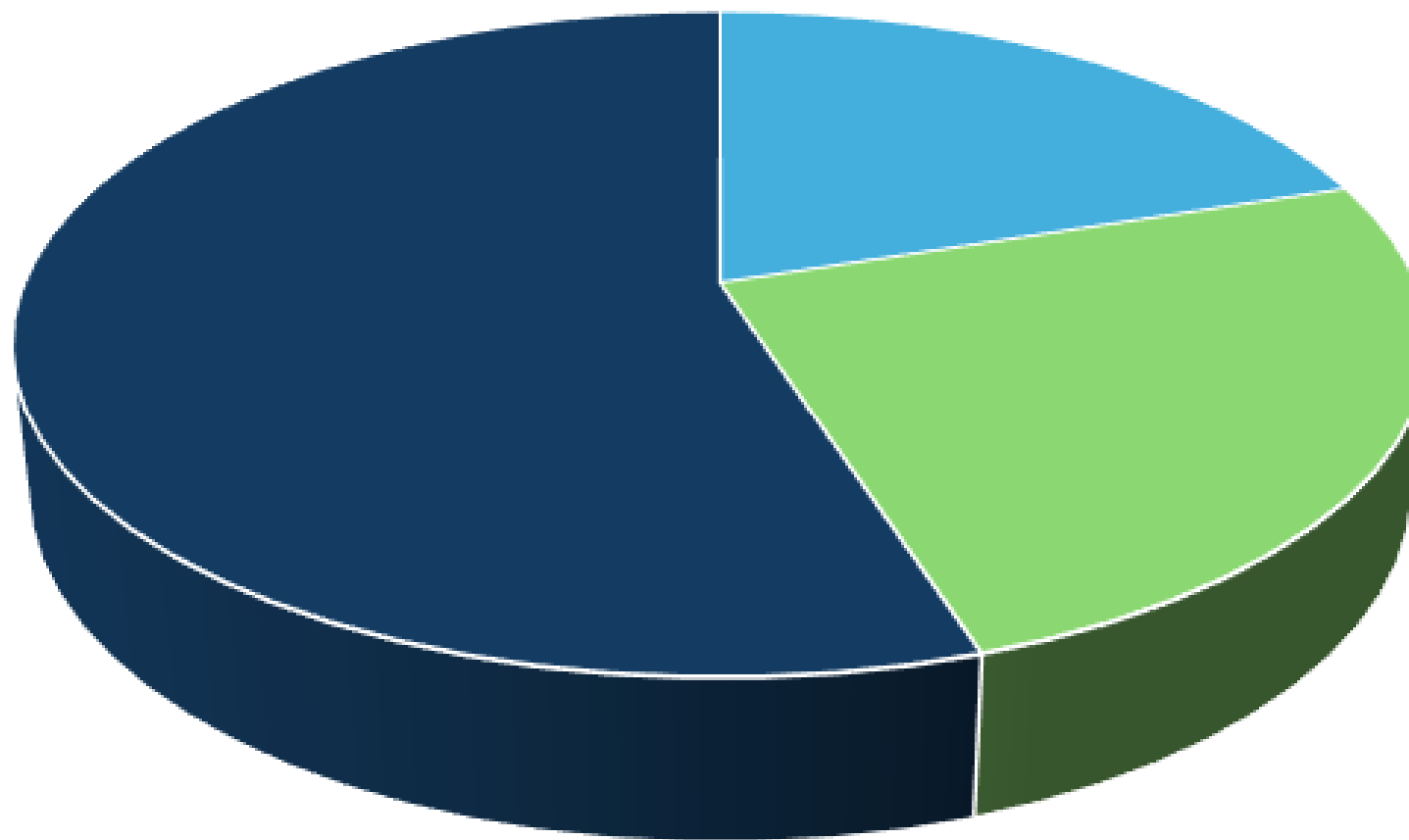
- Options for 'off the shelf' training have improved greatly in the last 24 months e.g. HotShot, SkillBurst, Alta Claro, Factor, Legaltech Hub.
- Firms are framing AI Education as a Professional Development topic, not just an Innovation or IT topic. This is bolstered by some learning options being CLE-accredited.
- Hackathons and workshops are also in demand: getting 'hands on' with AI guided by knowledgeable tutors. Limited by capacity and availability, but powerful for 'super users'.
- Vendors are still providing the bulk of tool-specific training, and will likely continue to do so, however weaknesses are becoming evident especially around new entrants with limited experience of training.

# What are firms doing?

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- Internal projects: building ‘academies’ or ‘centers of excellence’, running ‘boot camps’, simulated projects to learn on the job.
- Partnering with external providers to build something specific.
  - E.g. Alta Claro and K&L Gates
- Developing learning paths specific to roles within the business
  - E.g. Partners learning higher-level topics to inform client conversations, Senior Associates learning how to manage teams using AI, Junior Associates learning how to safely use AI applications etc.
- Mandatory training? Some firms are putting requirements in place before users are given credentials to new products.

## Law Firm AI Training



■ Internal only   ■ External only   ■ Both

# Personas for Training

# Personas

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- Useful to think about grouping learners into personas before assigning them to a learning path.
- How to group your learners?
  - **By Role:** Are they senior people who want efficiency, client impact, and strategic value? Are they junior people who are focused on skill-building, matter execution, day-to-day value? Are they support staff who care about process, task accuracy, and practical tools? Are they business services / ops people who care about helping the firm run smoothly?
  - **By Motivation:** Are they achievers who want credentials and career advancement? Are they problem-solvers who care about practical, efficient fixes to daily issues? Are they skeptics who need to be convinced of the relevance and value? Are they explorers who are curious, open to new ideas, and enjoy experimenting for its own sake?

# Personas

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- How to group your learners?
  - **By Learning Preference:** Are they visual learners (show me)? Are they auditory learners? Or are they kinesthetic learners (let me try it)?
    - Combine videos, handouts, podcasts, workshops for best effect.
  - **By Technology Comfort:** Are they early adopters? Are they practical adopters (need to see proof of benefit first)? Are they reluctant users who need to be 'sold' on the premise first?
  - **By Training Outcomes:** What are they training to achieve? Are they 'just checking the box' for compliance? Are they skill builders who want to become better at their job? Are they future leaders who want to build their skills? Are they innovators who want to try new things or create new things?

# Personas

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- AI is a much bigger, broader, and more technical subject than most learning in a law firm or law department environment.
- You cannot learn this by picking up and hour or two of off-the-shelf training.
- The topic is new and still evolving: generously we could say gen AI has been relevant for 2.5 years.
- Recognize that most learners do not have the time it would take to *\*really\** understand this topic. Be realistic about what is achievable based on those personas. Accept and communicate that everyone needs to know *\*something\**, but not everyone needs to know the *\*same\** thing.

# Future Lawyer Skills Training



# Industry Concerns

- Loss of traditional learning methods:
  - Lawyers have learned partly by "doing"
  - Will AI strip away these opportunities?
- Less face-time means fewer opportunities for shadowing



# The Good News: Legal Tech to the Rescue

- “In the flow” learning in legal GenAI tools becoming increasingly common:
  - **Guided workflows & playbooks baked into copilots**
    - Thomson Reuters CoCounsel (w/ Practical Law): Word-based drafting that pulls in expert-curated playbooks or auto-builds playbooks from your own precedents for tailored negotiation guidance—so juniors see *the why* behind redlines while they draft.
    - Lexis+ AI (Protégé): Adds “Guided Research” and explain-the-steps responses (the UI literally walks users through how it will research primary/secondary law).
  - **Writing coaches that score and teach in context**
    - Clearbrief: Scores support for each sentence, hyperlinks every assertion back to the record, and gives feedback inside Word—so associates learn to evidence every line as they go.
    - BriefCatch: Real-time legal-writing suggestions plus scoring dashboards for style/clarity; firms use it to enforce a “house voice” and give juniors immediate coaching.
  - **Precedent-driven drafting that teaches firm style & market norms**
    - DraftWise (AI Associate / Markup): Auto-drafts and marks up using your precedent language and playbooks—junior lawyers see the preferred clause, the fallback, and the rationale inline while negotiating.

# In the Flow

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- **Knowledge surfacing + validation that model “good lawyering”**
  - CoCounsel + Westlaw/KeyCite flags and Lexis Shepardize within the draft make juniors practice verify-as-you-write habits (status checks, treatment), which is classic professional-skills training embedded in tooling.
- **Firm programs that formalize “learn-while-using-AI”**
  - Orrick & K&L Gates added gen-AI modules for summer associates (prompting to mark up NDAs, review contracts, then debrief with instructors), explicitly reframing early-career training around AI-assisted work.
  - Harvey Academic/Law-school programs (2025-26): Tools made available to students with co-created curricula, pushing skills training where the tools are used day-to-day.
- **Agentic/step-by-step AI that exposes reasoning (metacognitive coaching)**
  - Lexis’s Protégé shows the planned research steps (what it will consult and in what order) before answering – a scaffold for juniors learning how to structure research.

# State of Play

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- **Emerging—but real.** Major platforms are moving beyond speed to guided, pedagogical experiences (playbooks, benchmarks, reasoning traces, scoring).
- **Training is formalizing around the tools.** Firms are teaching AI-assisted workflows to summers/associates; vendors are partnering with law schools—accelerating the culture shift.
- **Evidence base is growing.** Case studies and ROI reports focus on productivity, but the *learning* signal appears in features that enforce verification, expose reasoning, and encode firm knowledge into the drafting surface.

# How to Evaluate Tools for Learning Potential

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- **Scaffolds:** Does the tool show *how* it got there (steps, sources, alternatives), not just the answer? (e.g., Guided Research, citation validation).
- **Codified know-how:** Can you embed playbooks, fallback positions, and firm examples, and will it surface them inline in Word/Docs?
- **Feedback loops:** Are there scores/diagnostics (writing clarity, support strength, missing terms) that juniors can improve against?
- **Market context:** Can it benchmark against industry standards/market terms so users learn what “good/normal” looks like?
- **Verification by design:** Does it force/enable cite-checking and status checks in the same pane? (teaches good hygiene).
- **Governance of content quality:** Who curates the guidance, and how often is it refreshed?

# Critical Skills for any Learning Program

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- Human Skills
- Critical Thinking
- Client Advocacy
- Technical Know-How
- Project Management

# **Adoption and Change Management**



Technology deployment in  
the absence of adoption  
is not transformative.



# Myth: GenAI is Intuitive, so Adoption Will Just Happen

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- Reality
  - Interacting with GenAI does not replace anything – it's a brand new skill
  - Prompting a chatbot puts pressure on lawyers
  - Chat interface is not suitable for most types of legal work
  - Legal workflows are just that – workflows, not discrete tasks



Driving adoption remains critical

# Pre-Deployment: Design for Adoption

- **Start with behavioral reality, not features.** Lawyers over-weight losses vs. gains; expect a “9× better” bar for switching. Choose use cases that clearly clear that bar (e.g., first-drafts, summaries, search accelerators).
- **Pick “smash hits.”** Use the benefit vs. behavior-change lens: prioritize high-benefit/low-behavior-change use cases (e.g., Word/DMS-embedded assistants) before “long-haul” platform shifts.
- **Apply Rogers’ 5 attributes** to each candidate use case:
  - Relative advantage
  - Compatibility
  - Simplicity
  - Trialability
  - Observability
  - If a use case scores low on any, re-design it or defer. (Rogers shows these explain ~49–87% of adoption variance.)
- **Evidence of fit in BigLaw:** A&O Shearman scaled an AI assistant to ~3,500 lawyers by focusing on safe, high-leverage tasks (first drafts, summaries) and clear human review: “minimum viable trust”
- **Firmwide readiness matters.** Treat adoption as part of your innovation strategy (leadership messaging, incentives, integration into workflows), not a post-launch add-on.

# Activation Playbook (first 90–180 days)

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- **Champions & sequencing.** Seed with innovators/early adopters; capture their success stories to move the early and late majorities (plan for an S-curve, not a spike).
- **In-flow enablement.** Offer in-app guidance and “click-by-click” walkthroughs so busy lawyers don’t have to leave their matter flow.
- **Training as a product.** Short, role-based modules (day-1 essentials + advanced paths), 24/7 “white-glove” support in week 1, and multiple modalities (live, video, in-app).
- **Structural incentives.** Billable-hour credit for training, adoption-linked KPIs/bonuses, certifications, team leaderboards, and time-boxed “bootcamps.”
- **Positioning & trust.** Frame tools as **assistive, not autonomous**; require human review; publish risk guardrails—this is how leading firms normalized Copilot/Harvey internally.
- **What peers expect GenAI to do (social proof).** Data shows strong interest in GenAI for drafting, research, eDiscovery support and productivity. Use this in comms to reduce perceived risk

# Measure, reinforce, and scale

- **Define the adoption scorecard up front.** Track active users, weekly tasks completed, % matters touching AI, time-to-first-value, quality/accuracy review outcomes, and “fallback to old way.” Use telemetry to improve prompts, templates, and relevance (e.g., enterprise search fine-tuning).
- **Make results visible.** Publish practice-level R/A/G dashboards and celebrate improvements; healthy competition drives uptake.
- **Lock-in the new.** Embed links/buttons in DMS/Word/Outlook, phase out legacy paths after the tipping point (“unfreeze→change→refreeze”), and keep comms/events going for  $\geq 12$  months.
- **Benchmark against the market.** Cite recognizable peers’ deployments (e.g., Clifford Chance Copilot firmwide; A&O Shearman / Ashurst Harvey at scale) to reassure skeptics and clients.
- **Plan for economics.** GenAI compresses hours; align pricing, staffing, and training models so adoption doesn’t clash with revenue or associate development.

# AI Usage Tracking & Auditing

# Tracking AI Usage

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! Critical to identify upfront what metrics you'll use to determine ROI.



# User Engagement Metrics

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**Active Users:** Percentage of licensed users who log into the AI tool weekly/monthly.

**Adoption Curve:** How quickly different practice groups or offices start using the tool after rollout.

**Frequency of Use:** Average number of AI interactions (prompts, tasks completed) per user per week.

**Session Duration:** Average time spent per session with the AI tool.

## Feature-Level Usage

- **Breadth of Features Used:** Which capabilities are actually being adopted (e.g., drafting, summarization, contract review).
- **Prompt Types / Workflow Coverage:** Distribution of queries across legal research (what is being asked), contract analysis, client memos, etc (what is being used).
- **Repeat Use of Features:** Percentage of users who come back to use advanced or specialized features multiple times.

# Other Metrics

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## Practice Transformation

- **Matter/Case Coverage:** Proportion of matters where the AI tool is used at least once.
- **Document Coverage:** Percentage of documents (e.g., contracts, pleadings) created or reviewed with AI support.
- **Integration Points:** Usage tied to DMS, email, or practice management systems — how often AI is invoked from within core systems versus standalone.

## Behavioral Quality & Compliance

- **Prompt Diversity:** Are users experimenting broadly, or sticking to one narrow use case?
- **Override/Editing Rates:** How often do lawyers fully accept, partially edit, or discard AI output?
- **Escalations or Flagged Use:** Tracking when outputs are flagged as inaccurate, biased, or requiring risk review.
- **Audit Logs:** Full record of prompts, responses, and subsequent edits for defensibility and compliance.



# Adoption Over Time

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- **New vs. Returning Users:** Growth of the user base over weeks/months.
  - Growth of adoption within existing users also highly relevant
- **Churn/Drop-off Rates:** Users who try once and stop using the tool.
- **Power Users vs. Passive Users:** Distribution of use across the firm (are only a handful of associates using it, or is adoption broad?).

# Q&A

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