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Mid-Sized Firm Legal AI Evaluation Checklist

A preflight for data, quality, security and exit.

Use it when	a mid-sized firm is comparing AI products or trials
Boundary	This is supplier-neutral and is not procurement, privacy, legal or cyber-security advice.

Built for independent law firms in England and Wales

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1. Frame the decision

Write the requirement from the workflow backwards. A demonstration is not evidence that the firm can operate the product safely.

Specific focus

Write non-negotiable requirements from one workflow and its owners.

Questions to answer

- For this guide: Write non-negotiable requirements from one workflow and its owners.
- What problem is in scope?
- Which data can supplier access?
- How is quality tested?
- What is the exit route?

Avoid

- buying because peers are buying
- accepting security claims without evidence
- testing with confidential data before approval

2. Control sheet

Treat a blank evidence field as a reason to pause, not a reason to guess. Record sources and owners before changing the workflow.

Area	Evidence to collect	Pass condition
Need	Workflow and baseline	Owner agrees
Data	Retention and subprocessors	Route approved
Quality	Test set and errors	Threshold frozen
Security	Access, logs and incidents	Owner accepts risk
Exit	Export and deletion	Records are retrievable

Fail closed

If an input, owner or approval is missing, record the gap and keep the affected step outside the proposed change.

3. Working record

Complete this page with counts, dates and named sources. Do not include client names, matter names, contract text or privileged material.

Field	Evidence or answer
Guide focus	Write non-negotiable requirements from one workflow and its owners.
Workflow	
Current volume	
Data categories	
Requirements	
Pass and stop rule	
Exit evidence	

Evidence quality check

- The source is named and dated.
- An estimate is labelled as an estimate.
- The owner can reproduce the measure.
- The same method can be used after a change.

4. Decision record

Select the outcome that the evidence supports. A stop or no-change decision is valid.

- Stop: a required source, owner or approval is missing.
- Fix: repair the underlying route before adding technology or cost.
- Test: run one bounded change with a baseline and review date.
- Proceed: adopt only the option supported by the recorded evidence.

Decision field	Record
Chosen outcome	
Reason and evidence	
Owner and approvers	
Review or expiry date	

Primary sources

[Law Society: Buying new technology](#)

[Law Society: How to use lawtech in your practice](#)

[ICO: Guidance on AI and data protection](#)

[NCSC: Choosing a cloud provider](#)

Source status

Links checked 18 August 2026. Confirm the current version and obtain appropriate professional advice before relying on regulated, contractual, privacy, security, insurance, financial or wellbeing conclusions.