

Is your Canadian law firm **prepared** to use AI solutions?

Use this **checklist** to assess your firm's AI readiness: Track your progress across five stages and pinpoint where to invest next.

Stage 1 of 5

1 Strategy and investment

You've decided AI is on the table. Have you decided what success looks like?

Checklist:

- ☐ We have a written AI strategy tied to specific firm goals, not just "explore AI"
- ☐ AI investment is budgeted and accountable to a named owner (CKO, innovation lead, or managing partner)
- ☐ We've identified the high-repetition, time-intensive tasks where AI will land first (document review, legal research, document summarisation, administrative automation)
- ☐ We've defined how we'll measure ROI, not just adoption



\$26,200 average annual value of AI time savings per Canadian legal professional (~5 hours/week, ~240 hours/year)



53% of professionals report ROI directly or indirectly tied to their AI investment, but only firms that define success up front capture it

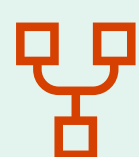
Stage 2 of 5

2 Infrastructure and integration

AI only delivers if it fits the systems your firm already runs on.

Checklist:

- ☐ We've audited our current tech stack for AI compatibility
- ☐ Our chosen AI tools integrate with case management and document management systems
- ☐ We have a plan to consolidate overlapping platforms (the average Canadian firm uses 3+ daily)
- ☐ Data flows are mapped for confidentiality before any AI tool touches client matter data



71% of Canadian legal professionals use over three platforms daily



40% say consolidating into one platform is the best profitability investment their firm could make

Stage 3 of 5

3 Processes and workflows

Adoption is easy. Operationalisation is the gap Canadian firms are missing.

Checklist:

- ☐ We've standardised at least one AI workflow with templates and repeatable steps
- ☐ Human review is built into the workflow, not bolted on after
- ☐ We've documented where AI is used, by whom, and under what oversight
- ☐ We've targeted document review first (Canada's leading AI use case)



19% of Canadian firms invest in standardising processes with templates and workflows, the lowest rate globally



33% of Canadian firms already use AI for document review and analysis

Stage 4 of 5

4 Governance, risk, and regulatory compliance

Canadian AI guidance is a patchwork. Your firm can't afford to treat it as optional.

Checklist:

- ☐ Our AI usage aligns with the four core pillars: competence, confidentiality, supervision, transparency
- ☐ We've mapped the law society guidance for every province/territory we practise in
- ☐ We've embedded the standard verification duties: every citation checked, authorities confirmed, jurisdiction verified, facts compared to the client file, outputs reviewed for privilege and bias
- ☐ A lawyer reviews and approves every AI-assisted work product before it's filed or sent



74% of Canadian legal professionals are slightly concerned about AI risks

Law society guidance across Canada consistently rests on four pillars.

- ☒ competence
- ☒ confidentiality
- ☒ supervision
- ☒ transparency

Stage 5 of 5

5 Training, transparency, and client communication

Your clients deserve to know how their matter is being handled. Most Canadian firms aren't telling them.

Checklist:

- ☐ Every lawyer and staff member using AI has completed role-appropriate training
- ☐ We obtain client consent for AI usage on their matters, and can show we do
- ☐ We actively communicate our use of AI to clients, not just when asked
- ☐ Our fee practices reflect AI-driven time savings, no "fee windfalls"
- ☐ We can demonstrate, on request, that our AI use meets CBA and provincial law society standards



11% of Canadian firms actively communicate their use of AI to clients; **7%** never disclose it



Only **27%** of large firms, **29%** of midsize firms, and **18%** of small firms obtain client consent for AI usage

Pick the stage where you have the most unchecked boxes. That's where your next investment goes.

The firms pulling ahead aren't the ones with the most tools. They're the ones with the infrastructure, governance, and transparency to scale them responsibly.

→ To learn more, visit [Thomson Reuters | CoCounsel Legal](#)



89% of Canadian law firms have adopted or are piloting AI tools. Zero firms report avoiding AI entirely.