



**AI Readiness for Law Firms:
A Five-Part Series for IT Leaders**

PART 1 – DATA INFRASTRUCTURE AND GOVERNANCE

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Introduction to Ebook Series

The legal industry stands at an inflection point. Artificial intelligence has moved from theoretical promise to practical reality, with tools that can draft contracts, conduct legal research, analyze discovery documents, and predict case outcomes. For mid-size law firms, the question is no longer whether to adopt AI, but how to do so responsibly, securely, and in compliance with ethical obligations.

While firm leadership focuses on strategic AI adoption and attorneys explore use cases, IT teams face a critical challenge: building the technical foundation that makes safe, effective AI deployment possible. Without proper preparation, firms risk data breaches, ethical violations, regulatory non-compliance, and malpractice exposure.

This five-part series provides IT leaders at mid-size law firms with a practical roadmap for AI readiness, covering the technical, security, and operational considerations essential for successful AI integration. If law firms lack the appropriate IT resources on their staffs, the professional services team at Rize Technologies is available to help them plan and implement a customized roadmap for AI readiness.

Unlike other industries, law firms must navigate strict confidentiality obligations and regulatory requirements including data protection laws that vary by jurisdiction, and potential malpractice liability for AI-generated errors or omissions. A single misstep—such as inadvertently training a public AI model on privileged client data—could result in bar complaints, malpractice claims, and reputational damage that far exceeds any efficiency gains AI might provide.

Each installment of this series focuses on one critical pillar of AI readiness:

- 01. Data Infrastructure and Governance**

- 02. Security and Confidentiality Controls**

- 03. Network and Computing Infrastructure**

- 04. Compliance and Risk Management**

- 05. Change Management and Adoption Support**

Together, these five pillars provide the foundation for responsible AI adoption that enhances your firm's competitive position while protecting client interests and meeting professional obligations.

Whether you're just beginning to explore AI or already piloting specific tools, this series will help you build a systematic approach to AI readiness. The goal isn't to adopt AI first, but to adopt it effectively, creating sustainable capability that positions your firm for long-term success in an increasingly AI-enabled legal landscape.



Data Infrastructure and Governance

AI is only as good as the data it processes. Before deploying any AI tools, firms must ensure their data infrastructure can support safe, effective AI use. This begins with understanding exactly what data you have, where it lives, and how it's organized.



Assess Your Current Data Landscape

Start by conducting a comprehensive audit of your existing data repositories. You'll need to examine document management systems containing client files, practice management and billing systems with matter details and time entries, email archives holding privileged communications, collaboration platforms and shared drives, and any legacy systems or offline archives that might have been forgotten but still contain valuable information.

As you conduct this audit, evaluate each system for data quality, accessibility, and organization. AI tools struggle with inconsistent naming conventions, incomplete metadata, and fragmented information across multiple platforms. You'll likely discover data silos that prevent comprehensive AI analysis—a contract database that doesn't talk to your document management system, billing records isolated from matter files, or email archives separate from work product repositories. Identifying these disconnects at this stage allows you to plan integration strategies that will dramatically improve AI effectiveness later.

Implement Data Classification

Not all data is suitable for AI processing, and treating everything the same is a recipe for disaster. You need a classification scheme that helps everyone understand what data can go where. Consider establishing tiers of sensitivity, such as:

- Highly sensitive information like privileged communications, confidential client strategies, and sealed court documents
- Client confidential material protected by general professional duties
- Internal firm operational data, templates, and administrative content
- Public information from filings, marketing materials, or published content

The key is creating clear policies defining which data tiers can be processed by which AI tools. For example, public AI models should only access already-public information, while highly sensitive data might require on-premises AI solutions with no external connectivity. This framework gives attorneys practical guidance when they're deciding whether they can use a particular AI tool for a specific task.

Establish Data Governance Protocols

Beyond classification, you need formal governance that addresses these hard questions:

- Which datasets can be used to train or fine-tune AI models versus those that should only be used for inference?
- What client consent do you need before using matter data with AI tools?
- How do data retention and deletion procedures need to adapt to comply with ethical obligations when AI is involved?
- Who owns AI-generated work product, and who's accountable when it contains errors?

These aren't just theoretical questions. You'll face them the first time an attorney wants to use an AI tool to analyze a complex contract or summarize years of case law. Having clear answers ready, with specific responsibility assigned to a role or committee that includes IT leadership, ethics counsel, and practice group representatives, prevents decision-making paralysis and ensures consistency.

In Part 2 of this 5-part series, we will look at effective security and confidentiality controls as they relate to AI-readiness. Be sure to download the entire series by visiting the Resources section on **rizetechnologies.com**



About This Guide

This guide was developed based on emerging best practices in legal technology, cybersecurity, and professional responsibility for AI adoption in law firms, but it does not constitute legal, technical, or professional advice. While we always strive to provide accurate information, we make no warranties regarding completeness or accuracy, and we assume no liability for any damages, losses, or consequences arising from your use of or reliance on this information. Each firm is solely responsible for evaluating the applicability of this guidance to their situation and for all decisions and actions taken.

About **Rize** Technologies

Rize Technologies helps law firms thrive in today's fast-moving, AI-powered world. With more than a decade of experience serving the legal industry, we deliver end-to-end IT solutions that keep firms secure, productive, and ready for what's next. From 24/7 managed IT and cloud services to advanced cybersecurity, data protection, disaster recovery, and AI readiness, every solution is built around the unique needs of each firm. Our white-glove support and proactive approach to IT helps minimize downtime and maximize confidence. Discover how your firm can rise higher at