

Legal Tech Rollout: 10-Step Adoption Checklist

A one-page checklist for the IT, KM, and Operations leaders running a legal tech rollout. Five phases. Ten checkpoints. Use it at the kickoff and at every quarterly review.

Check each box where the answer is **YES** for your rollout. Each checkbox is worth one point. The higher your score, the healthier your adoption plan. Reassess at month three, month six, and month twelve.

PHASE 1

Pre-Rollout

- 1. Pick a workflow-fit tool.**
The chosen tool extends the existing workflow rather than asking lawyers to leave Microsoft Word.
- 2. Name the partner sponsor.**
A senior partner is named (not just informed) and has agreed to publicly enforce the rollout.

PHASE 2

Plan

- 3. Phase the rollout.**
A pilot practice group is identified and a six to eight week pilot window is scheduled.
- 4. Pick adoption metrics.**
Five metrics are selected before launch and baselined for the pilot group.

PHASE 3

Launch

- 5. Train the workflow.**
Training is built around the top three lawyer tasks, not the tool feature menu.
- 6. Embed the support.**
Quick reference cards, two-minute workflow videos, and a named help owner are live before launch.

PHASE 4

Operate

- 7. Report metrics monthly.**
The five adoption metrics are reported on a monthly dashboard and reach the partner sponsor every quarter.
- 8. Triage the feedback channel.**
A clear feedback intake is open and the first three visible fixes ship in the first quarter.

PHASE 5

Sustain

- 9. Run a quarterly adoption review.**
A 60-minute quarterly review with the partner sponsor reviews the metrics, the resistance pockets, and the wins.
- 10. Plan champion succession.**
A documented successor exists for the operational owner and for the partner sponsor.

WHERE MOST ROLLOUTS STALL

- **9 to 10 points:** Your rollout is set up to hold. Run the quarterly review and protect the adoption metrics from getting demoted.
- **5 to 8 points:** The plan is sound but exposed. Audit which boxes are unchecked and close them in the next thirty days.
- **0 to 4 points:** The rollout is about to stall (or already is). Talk to Word LX before the launch email goes out.

Talk to Word LX about your rollout.

Free 20-minute rollout conversation. We will walk the seven steps with you and help you set the adoption metrics that actually matter.

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