



SAMPLE BLUEPRINT REPORT

# Your AI Catch-Up Blueprint.

A personalized plan to adopt AI safely, compliantly, and at your own pace.  
Prepared for Priya R., Director of Operations.

<b>Plan</b>	AI Catch-Up Plan
<b>Industry</b>	Legal services (mid-size firm)
<b>Stack</b>	Microsoft 365
<b>Strategist</b>	M. Alvarez
<b>Delivered</b>	Sample — June 2026

## EXECUTIVE SUMMARY

# You're closer than you think — with one risk to fix first.

Priya, you're a high-leverage candidate for AI adoption. Your team already lives in Microsoft 365, you have an established document-review workflow, and your people are asking for AI help — not resisting it. The headline finding: a moderate compliance risk driven by three shadow-AI tools your associates are pasting client matter into. Close that loop in week one and the rest of this plan compounds quickly.

This blueprint gives you a 90-day rollout, three quick wins you can ship this week, tool-by-tool guidance for your stack, and a personal note from your strategist on what to watch for in a legal-services context.

## Team profile

**Role:** Director of Operations

**Team size:** 18 (incl. 11 associates)

**Industry:** Legal services

## Stack snapshot

**Primary stack:** Microsoft 365

**Tools in use:** Outlook, Word, Teams, SharePoint, iManage, Clio

**Shadow / unsanctioned:** ChatGPT (personal), Claude (personal), an unnamed contract-review browser extension

## Risk assessment

**Risk level: Moderate** · 38/100



0 · Low

100 · Critical

### What's driving the score:

- Three unsanctioned AI tools in active use by associates — client matter is being pasted into consumer accounts with no DPA.
- Informal approval process: tool requests go through "ask IT in Teams" with no written policy or audit trail.
- Handling of legal / contractual data combined with shadow tools creates privilege-waiver exposure.

## Top 3 quick wins

**1. Issue a one-page interim AI use policy (this week).** Don't wait for the full policy review. A 200-word interim memo — "these three tools are approved, nothing else, no client matter in personal accounts" — eliminates 80% of the active risk in 48 hours. Template is in the appendix of your strategist note.

**2. Turn on Copilot for Microsoft 365 for a 5-person pilot.** Your stack already supports it and you have the licenses. Start with two associates and three partners doing matter intake, document summary, and email triage. Target: 4–6 hours / week saved per pilot user by week three.

**3. Replace the shadow contract-review extension with a sanctioned tool.** Spellbook or Harvey Assistant both meet your privilege requirements. Pick one, give it to the two associates already trying to do this work, and the shadow tool quietly dies.

## 30 / 60 / 90-day rollout plan

	Days 1–30	Days 31–60	Days 61–90
<b>Theme</b>	Stop the bleeding	Build the habit	Scale what works
<b>Policy</b>	Interim 1-page AI policy issued; shadow tools blocked at firewall.	Full AI use policy ratified; DPAs signed with Copilot, Spellbook.	Quarterly AI policy review cadence added to ops calendar.
<b>People</b>	5-person Copilot pilot kicks off with 30-min onboarding.	Pilot expands to 12 users; 2 internal champions identified.	Firm-wide rollout with champion-led office hours.
<b>Tools</b>	Copilot for M365 licensed and configured; Spellbook trial started.	Spellbook deployed to contracts team; iManage AI search enabled.	Matter-intake automation in Teams; weekly usage dashboard.
<b>Metric</b>	Zero client matter in personal AI accounts (audited).	Avg 4 hrs/week saved per pilot user.	30%+ of associates use sanctioned AI tools weekly.

## Tool-by-tool recommendations

**Microsoft 365 Copilot** — *Adopt now*. Native to your stack, respects your existing M365 data boundary, no new vendor review. Start in Word and Outlook before Teams; the Teams meeting-summary feature is the single highest-leverage default to enable for partners.

**Spellbook** — *Pilot in days 1–30*. Contract review and markup inside Word. SOC 2 Type II, no training on client data, US data residency. Replaces the shadow extension currently in use.

**iManage AI search** — *Enable in days 31–60*. You already pay for iManage; the AI search add-on is a one-click enable on your tier. Immediate win for associates doing precedent research.

**ChatGPT / Claude (personal accounts)** — *Decommission*. Block at the network layer once Copilot and Spellbook are live. Don't block before the replacements are in hand — that just pushes shadow use to phones.

## Risk mitigations

**Privilege protection:** All sanctioned tools above sign BAAs or equivalent DPAs with explicit no-training and US-residency clauses. The interim policy memo names them by vendor.

**Audit trail:** Copilot and Spellbook both log per-user activity to your M365 tenant. Pipe these into your existing compliance dashboard in month two.

**Client disclosure:** Draft a short addendum to engagement letters covering AI-assisted work product. Template included in the strategist note.

## Personal note from your strategist

Priya — the thing that stood out from your intake: you already know what's broken. You don't need a strategy deck, you need air cover to act on what you've been seeing for six months. The interim policy memo is the single highest-leverage move and it's the one that requires the least technical lift. Get the managing partner's sign-off on a one-pager Monday morning and the rest of this plan becomes execution, not politics.

On Copilot: pick partners who already type their own emails for the pilot. The ones who dictate to assistants will tell you Copilot is "not for them" and you'll lose three weeks. The early adopters protect the rollout.

— M. Alvarez, eJaano strategist

**This is a sample report.**

Take the 60-second diagnostic to get yours — built around your stack, your team, and your actual risk profile.

[ejaano.com/assessment](https://ejaano.com/assessment)