

Case Study Canvas

ANNOTATION: The Case Study Canvas is our semi-structured follow-up instrument for exploring GenAI use cases in real depth—but only when depth is actually warranted. In every organization, use cases are numerous, uneven, and constantly evolving. Asking providers to fully document every use case up front would create enormous burden while producing more detail than most clients could reasonably absorb. The Case Study Canvas solves this problem by creating a targeted, on-demand pathway for deeper exploration.

The idea is simple: Our survey already captures high-level summaries of what providers are doing, planning, and thinking across a wide range of GenAI applications with commercial impact. Those summaries give clients a quick, comparable view of activity—but they are not meant to be exhaustive narratives. If a client reviews those summaries and wants to understand a particular use case more fully, then the Case Study Canvas becomes the next step. It provides a structured way for the provider to unpack a specific use case—its purpose, workflow, safeguards, outcomes, constraints, and lessons learned—without requiring them to write essays about every experiment or deployment in their portfolio.

Put differently:

- If a client never engages with the high-level summaries, they were never going to read (or need) deep case studies in the first place.
- If a use case *does* spark genuine interest, the Case Study Canvas ensures the follow-up is focused, comparable, and meaningful—rather than ad hoc or overwhelming.

By reserving detail for where it matters, the Case Study Canvas accomplishes two things:

- It reduces burden on providers by eliminating the need for comprehensive write-ups on every use case.
- It enhances the quality of client–provider dialogue by channeling attention toward the use cases that actually activate client interest and merit deeper discussion.

The result is a smarter, lighter, more purposeful exchange: rich where it needs to be rich; efficient where it needs to be efficient; and well-structured enough to support clarity, alignment, and decision-making on both sides.

Note: Submit to save progress and enable collaboration. Submission alone does not release the Case Study Canvas. Details on submission, saving, and authorization appear in Section 6 of the Acknowledgment at the bottom of the Case Study Canvas as well as in the answer to Question 9 of the [FAQ](#) on the L.E.G.A.L. website.

Organization:

Primary Point of Contact. The primary contact is responsible for coordinating the organization's L.E.G.A.L. profile, managing internal collaborators, and serving as the point of contact for follow-up, including receipt of client-specific release requests as explained in the Acknowledgment at the end of the Case Study Canvas as well as in the [L.E.G.A.L. Nondisclosure Policy](#) and the answer to Question 19 of the [FAQ](#) on the L.E.G.A.L. website.

Name:

Title:

Email:

Optional Collaborators. Internal collaborators may also contribute input to the live Case Study Canvas. To add internal collaborators, enter their email addresses in the field below, separated by a comma.

Important: To enable collaboration, responses must be submitted to be saved. Submission alone does not authorize release to any client. Submission, saving, and authorization are explained in detail in Section 6 of the Acknowledgment at the bottom of the Case Study Canvas and in the answer to Question 9 of the [FAQ](#) on the L.E.G.A.L. website.

(Example: collaborator1@example.com, collaborator2@example.com, collaborator3@example.com...)

Snapshot

1. **Use Case Name.** What is the best available shorthand for referring to the use case?

[TEXT BOX]

ANNOTATION: This is about clarity and recall. The shorthand should be what a colleague or client would naturally use to identify the project—not internal jargon or an overly technical label. A crisp, intuitive name makes it easier to benchmark use cases across organizations and reference them consistently in comparative outputs.

2. **Deployment Date.** When was the use case first rolled out?

[TEXT BOX]

ANNOTATION: This question situates the use case in time. We're looking not for initial experimentation but rather for when it became operationally available in practice, even in pilot form. The goal is to establish a temporal benchmark that allows us to map maturity and adoption trajectories across different organizations.

3. **Updates.** When was the last material upgrade or update?

[TEXT BOX]

ANNOTATION: This asks when the use case last advanced in a meaningful way—whether through new features, expanded scope, technical improvements, or significant process refinements. “Material” here distinguishes substantive evolution from routine maintenance. The goal is to capture how actively the use case is being iterated on.

4. **Brief Description.** Please provide a concise description (three to six sentences) of the use case.

[TEXT BOX]

ANNOTATION: This is the narrative anchor of the Case Study Canvas. A good description should be concrete and client-facing, explaining what the use case does, who it serves, and how it adds value. It should be understandable without specialized technical knowledge. Avoid promotional tone—focus on clarity, specificity, and enough detail to distinguish it from other use cases.

5. **Operation.** Where in the workflow (e.g., stage of matter) does the use case operate? Which concrete tasks are being automated or augmented?

[TEXT BOX]

ANNOTATION: This question locates the use case within the legal workflow. The emphasis is on specificity: which stage(s) of a matter it applies to and which tasks are directly impacted. Naming concrete activities (e.g., drafting NDAs, summarizing depositions, reviewing compliance documents) reduces ambiguity.

Strategic Rationale and Impact

6. **Objective(s).** Which objectives does this use case advance? (*check all that apply*)

- | | |
|---|--|
| <input type="checkbox"/> New Offering(s) to Clients | <input type="checkbox"/> Outcome Predictability |
| <input type="checkbox"/> Output Quality | <input type="checkbox"/> Volume/Scalability |
| <input type="checkbox"/> Speed | <input type="checkbox"/> Client Experience |
| <input type="checkbox"/> Cost Predictability | <input type="checkbox"/> Cost Reduction |
| <input type="checkbox"/> Compliance | <input type="checkbox"/> Multilingual Capacity |
| <input type="checkbox"/> Risk Mitigation | <input type="checkbox"/> Knowledge Capture and Reuse |
| <input type="checkbox"/> Other: | |

ANNOTATION: This question surfaces the strategic “why” behind the use case. It’s a structured way of mapping GenAI activity to broader business or client-facing goals, from efficiency and cost control to quality and risk mitigation. Checking multiple boxes is common—most use cases serve several objectives. What matters is being candid about which outcomes the initiative is intended to advance, not overstating impact.

7. **Impact on Objective(s).** Please explain *how* the use case advances the objective(s) checked directly above. Where possible, include specific examples or directional metrics (e.g., throughput, turnaround time, predictability scores).

[TEXT BOX]

ANNOTATION: This moves from intent to evidence. We’re asking you to connect the dots between objectives and outcomes, ideally with directional measures (e.g., “Reduced review time by ~30%,” “Expanded coverage across X matters”). Precision is welcome but not required—directional examples are often the most helpful. The goal is to understand how organizations are translating GenAI into observable results.

8. **Client Value.** What specific and visible value does this initiative deliver to clients? What about this use case should influence their commercial decisions (e.g., work allocation, fee structures) or deliver demonstrable benefits (e.g., measurable savings, tangible improvements)?

[TEXT BOX]

ANNOTATION: This question tests whether the initiative produces client-facing value, not just internal efficiencies. It prompts respondents to articulate tangible benefits clients can perceive, measure, or act upon in commercial terms. The goal is to capture how GenAI initiatives translate into differentiators that matter in client decision-making.

9. **Commercial Impact.** What has been the commercial impact of this use case? Please describe how it has changed your client relationships (e.g., generated new work, reduced costs, altered fee models). Where possible, include specific examples or directional metrics (e.g., percentage of cost reduction, new matter types, volume of work retained).

[TEXT BOX]

ANNOTATION: This is the heart of our exercise. We want to understand how the use case has shifted the economics of service delivery—who does the work, how clients are billed, whether new revenue or pricing models have emerged. Even modest or directional examples are valuable: a fee model adjustment, a client retention story, or a new matter category created. The emphasis is not on internal efficiency alone but on observable changes in commercial relationships.

Users and Adoption

- 10. Matters.** Which matter types does this use case primarily apply to (e.g., general M&A, litigation, compliance, IP)? Please specify practice areas or categories, not client names.

[TEXT BOX]

ANNOTATION: This question asks where the use case “lands” in practice. The goal is to identify which kinds of legal work it most directly applies to, using categories or practice areas rather than client examples. Precision matters less than clarity—naming the matter types helps benchmark adoption patterns across the industry.

- 11. Users.** Who are the primary users (e.g., associates, partners, paralegals, project managers, technical staff, clients)? Please specify roles or functions, not individuals.

[TEXT BOX]

ANNOTATION: This captures who is actually interacting with the tool or output. We’re interested in functions and roles, not specific names. Responses might include different levels of lawyers, allied professionals, clients, or technical staff. The focus is on identifying the primary user base so we can better understand adoption dynamics and workflow impact.

- 12. Adoption Metrics.** What are your best available adoption indicators? Please include quantitative metrics where possible (e.g., percentage of matters covered, number of active users, frequency of use) and qualitative signals (e.g., user feedback, repeat usage).

[TEXT BOX]

ANNOTATION: This moves beyond intent to evidence of uptake. We're asking how you measure adoption, whether through numbers (e.g., percentage of matters, frequency of use) or qualitative indicators (e.g., strong repeat usage, positive feedback). Even directional or partial metrics are useful.

13. **Target.** What would an optimal adoption footprint look like (e.g., proportion of matters, user penetration, business units)? What specific actions are you taking to drive adoption toward that goal?

[TEXT BOX]

ANNOTATION: This question highlights both aspiration and tactics. We want to know what “good” looks like for you (e.g., adoption across all compliance matters, or penetration across X% of associates) and the concrete steps you're taking to get there.

Tooling and Evaluation

14. **Models.** Which GenAI models does this use case rely on (e.g., GPT-5, Gemini, Claude, Llama)? Please specify version(s) if relevant.

[TEXT BOX]

ANNOTATION: This captures the underlying model choices. Specificity helps—version numbers and distinctions between proprietary vs. open-source models. The goal is not to endorse one vendor but to benchmark which models are being used in practice, and in what combinations.

15. **Buy.** Which commercially available tools are part of the stack (e.g., Legora, Harvey, CoCounsel, Microsoft Copilot)? Please list primary tools and their function in this use case.

[TEXT BOX]

ANNOTATION: This focuses on the off-the-shelf tools you've layered into the use case. Naming the tool and its role provides important context. We're not looking for an exhaustive list of every integration—just the key tools that materially enable the use case.

16. **Build.** Which components have you built, configured, or customized (e.g., connectors, fine-tuning, UI)? Why was this approach chosen instead of using off-the-shelf solutions?

[TEXT BOX]

ANNOTATION: This question explores where you've gone beyond plug-and-play. Did you develop connectors, fine-tune models, or build interfaces? If so, why? The goal is to surface the balance between buying and building, and the rationale behind it—cost, control, data sensitivity.

17. **Data Sources.** Which data sources (e.g., DMS, matter management, precedent libraries) are required for this use case? What steps were taken to prepare or clean data to achieve AI readiness?

[TEXT BOX]

ANNOTATION: This probes the data foundation. We're interested both in the sources being tapped (DMS, precedent sets, case law, etc.) and in what was required to make that data usable (cleaning, tagging, structuring). The emphasis is on readiness and data governance, since these are common adoption bottlenecks.

18. **Selection.** How did you evaluate and select models, tools, and integrations for this use case? What criteria (e.g., accuracy, cost, security, vendor reputation) were most decisive?

[TEXT BOX]

ANNOTATION: This is about decision rationale. We want to understand the criteria that mattered most—accuracy, cost, security, client comfort, or vendor reputation. Responses help benchmark how organizations are weighing trade-offs when making GenAI investment choices.

19. **Evaluation.** How did you test full-stack performance before rollout (e.g., pilots, benchmarks, feedback)? What factors (e.g., accuracy, efficiency, user adoption) ultimately drove your decision to proceed?

[TEXT BOX]

ANNOTATION: This captures the “last mile” before deployment. We’re interested in how you validated the solution (pilots, benchmarks, controlled rollouts) and the factors that ultimately tipped the decision to proceed. The emphasis is on the evaluation process, not just technical performance.

Notice, Risk, Controls, and Ethical Use

- 20. Opt-In/Opt-Out.** Do you offer clients the ability to opt in to or opt out of these GenAI-enabled services? If yes, please describe when and how you present these options.

[TEXT BOX]

ANNOTATION: This question explores whether, when, and how clients are given formal choice or control over GenAI use in their matters. “Opt-in” typically means explicit client approval is required before GenAI is used; “opt-out” means GenAI is the default, but clients are notified and may decline. The follow-up prompt asks how these choices are presented (e.g., standard engagement terms, individual matter scoping, policy statements).

- 21. Accuracy.** What accuracy threshold do you consider acceptable for this use case? How do you measure it (e.g., benchmarks, user validation, error rates), and what safeguards (e.g., human-in-the-loop, escalation protocols) ensure it is consistently achieved?

[TEXT BOX]

ANNOTATION: This question targets how you define and maintain quality. We’re interested in what “good enough” looks like for the use case—how accuracy is measured and what controls are in place to maintain it. The emphasis is on thresholds and safeguards rather than perfection. We know human oversight is often part of the answer; the key is clarity on how accuracy is tracked and enforced.

- 22. Ethical Use.** What practices or guidelines did you adopt to ensure ethical and responsible use of AI in this project (e.g., bias testing, transparency measures, restrictions on sensitive data use)?

[TEXT BOX]

ANNOTATION: This asks how you’ve framed the use case in ethical terms. That may include fairness testing, transparency practices, or restrictions on sensitive data. The goal is to surface principles and practices—not just technical controls—that help ensure the project aligns with professional standards, client trust, and responsible innovation.

- 23. Controls.** What technical or organizational controls are in place to address risks such as data segregation, model privacy, auditability, and bias mitigation?

[TEXT BOX]

ANNOTATION: This narrows in on safeguards beyond accuracy—focusing on governance and compliance. Examples include data segregation, audit trails, access permissions, or bias-mitigation protocols. We’re asking how you’ve operationalized risk management, both technically and organizationally, to make the use case sustainable and defensible.

Looking Back and Ahead

- 24. Road Map.** What enhancements or next steps are planned for this use case, and on what timeline (e.g., three to six months, 12 months, 24+ months)? Please include both technical improvements and adoption/rollout milestones.

[TEXT BOX]

ANNOTATION: This question looks forward. We’re interested in how you expect the use case to evolve—on both the technical side (e.g., model upgrades, added features) and the adoption side (e.g., broader rollout, more users, new matter types). Timelines help benchmark maturity: Are you in a six-month iteration cycle, a 12-month scale plan, or a longer 24+-month road map? The intent is not to lock you in but to better understand the planned trajectory.

- 25. Lessons Learned.** What are the most important lessons learned from this use case so far—whether technical, strategic, cultural, or commercial?

[TEXT BOX]

ANNOTATION: This asks you to step back and distill experience into insight. The lesson could be positive (e.g., unexpected value, client enthusiasm) or cautionary (e.g., cultural resistance, integration challenges). We're not looking for a long list—just the most salient takeaway that would help others understand what it really takes to implement a GenAI use case in practice.

26. Anything Else? This optional catch-all question leaves space for (but does not require) information, observations, or opinions not elicited above that you consider important to share with respect to your organization's usage of GenAI to deliver legal services.

[TEXT BOX]

ANNOTATION: This question provides open space for input that doesn't neatly fit into earlier categories but may be valuable to the broader dialogue. It's entirely optional. Even brief observations can highlight areas meriting deeper exploration in the future.

TAGS *(check all that apply)*

Area(s) of Law

☐ General Purpose (not specific to any area of law)

- | | | |
|---|---|---|
| <input type="checkbox"/> Agriculture | <input type="checkbox"/> Banking | <input type="checkbox"/> Bankruptcy/Restructuring |
| <input type="checkbox"/> Cannabis | <input type="checkbox"/> Commercial and Trade | <input type="checkbox"/> Constitutional and Civil Rights |
| <input type="checkbox"/> Contract | <input type="checkbox"/> Corporate | <input type="checkbox"/> Criminal |
| <input type="checkbox"/> Education | <input type="checkbox"/> Energy | <input type="checkbox"/> Environmental |
| <input type="checkbox"/> Finance | <input type="checkbox"/> Food and Drug | <input type="checkbox"/> Gaming |
| <input type="checkbox"/> Health | <input type="checkbox"/> Information Security | <input type="checkbox"/> Insurance |
| <input type="checkbox"/> IP | <input type="checkbox"/> Labor and Employment | <input type="checkbox"/> Law of Obligations |
| <input type="checkbox"/> Municipal | <input type="checkbox"/> Personal and Family | <input type="checkbox"/> Personal Injury and Tort |
| <input type="checkbox"/> Public and Admin | <input type="checkbox"/> Real Property | <input type="checkbox"/> Religious |
| <input type="checkbox"/> Securities | <input type="checkbox"/> Tax | <input type="checkbox"/> Telecoms, Media, and Entertainment |
| <input type="checkbox"/> Transportation | <input type="checkbox"/> Other: | |

ANNOTATION: This question asks you to categorize the use case by the area(s) of law it most directly applies to. The intent is not to force artificial precision—many use cases are cross-practice—but to provide a directional benchmark of where GenAI is being deployed. If it's general-purpose, you can indicate that. If it spans multiple categories, check all that reasonably apply.

Area(s) of Application

- | | |
|---|--|
| <input type="checkbox"/> Billing and Time Tracking | <input type="checkbox"/> Case/Matter/Project Mgmt |
| <input type="checkbox"/> Chronology Creation | <input type="checkbox"/> Client Communications |
| <input type="checkbox"/> Coding/Software Development | <input type="checkbox"/> Contract Review and Redlining |
| <input type="checkbox"/> Depositions | <input type="checkbox"/> Document/Data Review and Analysis |
| <input type="checkbox"/> Document and Knowledge Mgmt | <input type="checkbox"/> Drafting (Litigation) |
| <input type="checkbox"/> Drafting (Contracts/Corporate) | <input type="checkbox"/> Drafting (Other) |
| <input type="checkbox"/> Due Diligence | <input type="checkbox"/> eDiscovery |
| <input type="checkbox"/> Generating Images/Multimedia | <input type="checkbox"/> Legal Research |
| <input type="checkbox"/> Nonlegal Research | <input type="checkbox"/> Predictive Analytics |
| <input type="checkbox"/> Pricing | <input type="checkbox"/> Proofreading/Editing |
| <input type="checkbox"/> Regulatory Compliance | <input type="checkbox"/> Regulatory Tracking |
| <input type="checkbox"/> Search and Retrieval | <input type="checkbox"/> Summarization |
| <input type="checkbox"/> Written Discovery | |
| <input type="checkbox"/> Other: | |

ANNOTATION: This identifies the functional layer of work being augmented—contract review, drafting, research, compliance, etc. The goal is to capture the “what” of the work, not the “why.” This helps build a taxonomy of GenAI’s actual touchpoints in legal service delivery. As with law areas, multiple selections are expected and valuable.

L.E.G.A.L. Case Study Canvas Acknowledgment

L.E.G.A.L. (Leaders Exploring Generative AI in Law) is a permissioned intelligence system designed by LexFusion Intelligence, an arm of Baretz+Brunelle LLC. This Acknowledgment applies to your submission of responses to the L.E.G.A.L. Case Study Canvas. The full L.E.G.A.L. Nondisclosure Policy is available [here](#).

By authorizing release of responses to [Requesting Client], you acknowledge and agree to the following.

1. Purpose and Design

L.E.G.A.L. is a standardized, reusable survey system designed to reduce duplicative client questionnaires while enabling longitudinal, behavior-grounded market intelligence and benchmarking.

2. Persistent Responses

Responses submitted through the Case Study Canvas are persistent. You may update responses and permissions over time as described below.

3. How Responses Are Used and Shared

This Acknowledgment is specific to [Requesting Client]. By proceeding, you authorize LexFusion Intelligence to transmit the foregoing Case Study Canvas to [Requesting Client].

In addition, a core objective of L.E.G.A.L. is to establish an industry-wide shared point of reference: market-level reporting that both you and clients, like [Requesting Client], can rely on to ground informed, fact-based dialogue. Such analysis is de-identified, aggregated, and commercially oriented. No firm-level specifics are disclosed or attributed without separate, express written consent—this includes case studies. While this market-level analysis may reference broad themes, lessons, and trends distilled from submitted Case Study Canvases, we will not share the specifics of, let alone attribute, any case studies without express, separate, written consent.

4. Withdrawal of Authorization

You may withdraw this Acknowledgment at any time. Withdrawal applies prospectively. Withdrawal does not retract any prior transmissions to [Requesting Client] while this Acknowledgment was active. Withdrawal on this form is specific to [Requesting Client]—it does not effect withdrawal from the L.E.G.A.L. program as a whole. If you wish to withdraw from program-wide composite benchmarking and reporting use, you may request program-level withdrawal by emailing LFIntel@baretzbrunelle.com. Such withdrawal applies prospectively and does not affect analysis already produced.

5. Client-Requested Fresh Release and Notice

From time to time, participating clients like [Requesting Client] may request a fresh release of the Case Study Canvas. If a fresh release requested by [Requesting Client] includes your data, you will receive advance notice and have an opportunity, but no obligation, to update responses before delivery or to withdraw this Acknowledgment. If you take no action, the then-current submitted responses and authorization state on file will govern what is released to [Requesting Client] at the close of the response period.

6. Submission, Saving, Collaboration, and Client Authorization (Submit ≠ Release)

Responses must be submitted to be saved in the system and to enable collaboration.

Submission (saving). Clicking “Submit” saves the current state of your responses and makes them available for continued work, including by collaborators. You may submit multiple times as you refine your answers. Submitting does not, by itself, release any responses to any client.

Client authorization (release). Client visibility is controlled separately through the client-specific authorization checkbox below. Authorization applies to all responses—there is no question-by-question authorization. Authorization does not submit responses, and submission does not authorize release. Release is authorized only if the authorization box is checked. Only if the authorization box is checked, may your submitted responses be released to [Requesting Client] after the response period closes. Client-specific authorization may be withdrawn at any time by unchecking the box.

7. Contact Information

- Contact information (including collaborator emails) entered in the Case Study Canvas will be retained solely for program administration, including notices related to client-requested fresh releases. Contact information will not be shared with clients or other third parties but may be used to facilitate coordination within your organization (e.g., routing subsequent registrations to your organization’s established Primary Point of Contact) consistent with the original business purpose for which contact information was provided.
- Any client-supplied contact information will be deleted following the close of the response period and related follow-up.

SUBMIT

☐ Authorize release to [Requesting Client] as outlined in the Acknowledgment above.

