

Use the simplest solution that reliably fits the work

Don't chase the latest shiny AI tool. First, define the work to simplify and identify the desired measurable result.

01 RULES BASED

Use when decisions follow clear, predefined rules

- Fixed IF–THEN logic
- Exact, repeatable output
- Simple validation, routing or calculations
- Rules change infrequently

Conflicts checks • deadline alerts • approval routing

02 MACHINE LEARNING

Use when data should predict or classify

- Patterns exceed hand-written rules
- Historical data is sufficient and representative
- A measurable error rate is acceptable
- Ongoing monitoring is funded

Document classification • anomaly detection • matter forecasting

03 GENERATIVE AI

Use when the task involves analyzing, transforming or creating content

- Works with documents, emails, conversations, images or audio
- Drafts, summarizes, extracts, translates or answers questions
- More than one reasonable response may be acceptable
- A qualified person can review and verify the output

First drafts • deposition summaries • research assistance

THE BOTTOM LINE

Make AI earn its keep. Move forward only when measurable benefits justify the total cost, risks are within tolerance and clear controls can be enforced.

Good AI governance needs a control room

Bring the right stakeholders together, assign ownership and keep the rules current.

01 SET THE GUARDRAILS

Define clear usage rules, data boundaries, security, audit, retention rules, testing, and required human review.

02 ASSIGN OWNERSHIP

Use a RACI matrix to name who is

Responsible,
Accountable,
Consulted, and
Informed.

03 REINFORCE AND EVOLVE

Communicate the rules repeatedly.

Update governance as tools, risks, regulations and business needs change.

When AI should assist, not decide

Keep a qualified human responsible whenever consequences, evidence or confidentiality are at stake.

THE HUMAN DECISION FRAMEWORK

**Final judgment
must stay human.**

CRITICAL CONSEQUENCE

An error could materially harm a client.

NO EVIDENCE

Source accuracy cannot be verified.

GOVERNANCE GAPS

Privilege, confidentiality, personal health information (PHI) or retention controls are unresolved.

PRECISION REQUIRED

A deterministic result is required.