

THE FIDAM PLAYBOOK

How Law Firms Choose Their Next AI Steps With Confidence

A practical, five-step decision framework for
boutique and mid-sized law firms

Your next AI step matters more than
your AI vision



INTRODUCTION

Why This Playbook Exists

The legal AI market is noisy, with new tools, features, and opportunities emerging every week. Law firms feel pressure to “do something with AI” but most of them don't really know where to start. Teams are overwhelmed, vendors overpromise, and leadership wants to see progress yesterday.

The Two Common Traps

This pressure often pushes firms into one of two common traps.

- **Trap 1: Buy Something Shiny.**
A slick demo or a competitor announcement leads to a signed contract. Six months later, adoption is near zero. The tool is misaligned with how you actually work, and no one knows how to evaluate success. It becomes an exercise in innovation theatre.
- **Trap 2: Commission a Big Strategy.**
The firm invests in weeks of interviews and receives a thick slide deck with a glossy roadmap. By the time the report is delivered, the market has already changed, and the appetite for action is gone. The result is paralysis by analysis.

Why These Traps Fail

Both options fail because they aim for perfection. Option A assumes the tool is perfect; Option B assumes the plan is perfect. But in the current market, perfection is impossible.

The Real Need Behind AI Decisions

And behind the question “Which AI tool should we buy?” is often a much simpler need: you want to reduce risk. You want confidence that you are not wasting money, not embarrassing the firm, and not making a decision you will regret in six months. This is about finding a clear path forward without getting burned by the hype.

The Shift from Perfection to Safe Steps

So instead of chasing perfection, law firms should be aiming for the next safe steps. Five safe, actionable steps forward.

Where FIDAM Comes In

FIDAM solves this by offering a fast, practical, and low-regret framework tailored for mid-sized and boutique law firms that cannot afford months of planning or the wrong technology choices.



WHAT IS FIDAM

A Practical Decision Framework

FIDAM is a decision-making framework that cuts through the noise, focusing on the smallest set of insights needed to make real progress.

What FIDAM Is

FIDAM is not a roadmap. It is a decision-making framework that cuts through the noise, focussing on the smallest set of insights needed to make real progress.

The Five Steps of FIDAM

It follows five simple steps:

Foundations: Where are you today, and what is your actual AI maturity?

Identity: Who are you as a firm, and what work truly defines your value?

Direction: How does your firm behave when making decisions: as a Pioneer, Builder, or Guardian?

Actions: What could you do, exploring the full universe of available options?

Moves: What will you do, committing to five concrete decisions you won't regret in six months?

Where It Comes From

This is the exact flow we use in our one-week client engagements. It is simple by design, provides a clear path forward, and aligns with how law firms make decisions.

FOUNDATIONS (F)

Where you really stand. No sugarcoating.

Why Foundations Matter

Before deciding where to go, you need an honest assessment of your starting point. Skipping this crucial step often leads to regret. An accurate self-assessment is the bedrock of any successful AI initiative.

The Seven Dimensions of AI Maturity

Our AI maturity scan offers clarity by evaluating seven key dimensions:

- Vision
- Governance
- People
- Data
- Technology
- Clients
- Capabilities

The Four Practical Maturity Levels

We use four practical maturity levels to map your position:

Ad Hoc, where there is no structure and only individual experimentation;

Emerging, where the first formal initiatives and some training appear;

Growing, characterized by structured adoption and clear guardrails; and

Scaling, where AI is fully embedded in workflows and client interactions.

Why This Step Is Critical

Why does this matter? Technology cannot fix operational disorder. A firm with unclear governance or inconsistent workflows will not benefit from advanced AI, no matter how impressive the vendor's pitch is. Foundations ensure you can walk before running. Skipping steps risks failure and setbacks.

A Practical Example

For example, deploying a contract redlining tool without playbooks or organized precedents often leads to inconsistent results and erodes confidence in the tool. Building a solid knowledge base is essential when deploying tools like redlining tools.

IDENTITY (I)

Who you are determines what you should care about.

Why Identity Matters

Identity is often the most overlooked step in AI decision-making. Without understanding your firm's identity, you risk pursuing the wrong opportunities and wasting valuable resources.

8 Dimensions of Identity

The Identity Questionnaire moves the conversation from hype to realism by examining:

- Back-office structure
- Work mix (B2C vs B2B; high-volume vs. bespoke; transactional vs. regulatory vs. disputes)
- What type of work drives revenue (where the firm excels)
- Market pressure (where the firm is under pressure)
- Client demands and expectations
- Team structure and bottlenecks
- Appetite for discipline and standardization
- Tolerance for change

Why This Step is Critical

Identity helps you focus on the AI opportunities that truly matter, avoiding noise, bad investments, and misaligned projects.

The Risk of Misalignment

When a firm misreads its identity, even promising AI initiatives drift off course. Misalignment creates resistance, weak adoption, and limited impact. The result decline confidence in future innovation.

A Practical Example

For instance, a regulatory boutique deriving 70% of its revenue from complex, bespoke memos requires different tools than a corporate firm doing due diligence and negotiating SPAs all day. Likewise, a high-volume B2C litigation firm needs efficiency in intake and scheduling, not a high-end drafting model.

DIRECTION (D)

How your firm behaves matters more than what it wants.

What Direction Means

Direction uncovers your firm's true behavioral archetype. Not who you aspire to be, but how you truly operate when faced with decisions involving risk and change.

The 5-Question Quiz

A quick, five-question quiz identifies your firm's appetite for risk, experimentation, budget flexibility, client pressure, and decision-making speed. The answers reveal one of three distinct archetypes.

- **Pioneer:** Disruptive and experimental, Pioneers are willing to break established patterns to gain a competitive edge.
- **Builder:** Practical and improvement-focused, Builders prioritize iterative progress over radical shifts.
- **Guardian:** Cautious and stability-focused, Guardians emphasize risk aversion and proven solutions.

Firm Adoption Trends

Based on adoption studies across Europe and North America, most mid-sized firms fall into predictable patterns. Approximately 5% of firms behave as Pioneers, 60–70% as Builders, and 20–30% as Guardians.

Aligning Ambition with Capability

Clear awareness of your firm's true archetype prevents unrealistic expectations and misplaced investments. When ambition matches capability, adoption becomes smoother and early wins become far more predictable.

A Practical Example

You cannot skip this step. Acting like a Pioneer when your firm is truly a Guardian is the number one cause of AI adoption failure. Your archetype should guide the opportunities you pursue, the actions you take, the questions you ask vendors, and the speed of your rollout to prevent misalignment and wasted budgets.

ACTIONS (A)

The universe of everything you could do.

Purpose of Actions

Actions encompass the full range of potential moves a firm could take with AI. At this stage, the focus is on exploration, not commitment.

The Eight Categories of Potential Actions

We organize these potential actions into eight distinct categories:

- Vision & Strategy: defining your AI goals, aligning them with business objectives, and creating a clear plan for implementation
- Governance: policies, framework, and oversight mechanisms to ensure ethical, compliant, and effective AI usage
- People & Training: equipping teams with the skills and knowledge needed to adopt and leverage AI tools effectively
- Data & Knowledge: organizing, cleaning, and structuring data and knowledge to create a solid foundation for AI initiatives
- Technology: evaluating, selecting and implementing AI tools that align with the firm's needs and capabilities
- Client-Facing Innovation: creating solutions that enhance client services, preferably in close collaboration with clients
- Capabilities & Operating Model: defining the roles, processes, resources your firm needs to move forward with AI
- Quick Wins: identifying and implementing low-risk, high-impact AI initiatives that deliver immediate value and build momentum for larger projects

Your Job at this Stage

Your job here is simple: review the list, identify actions relevant to your firm, add any additional ideas, and compile a list of possibilities. Don't filter or prioritize yet; just collect ideas.

This step broadens your perspective, ensuring informed decisions and avoiding premature or misguided purchases.

MOVES (M)

Five concrete decisions for the next six months.

What 'Moves' Represents

Moves are the final output of the framework, transforming possibilities into clear commitments, and a focused plan for progress.

What This Stage Is About

This stage is about ruthless prioritization. Defining your moves involves filtering your list of potential Actions through a simple, four-step process. Plot each action on a Value vs. Feasibility matrix, keep only what is high-value and high-feasibility, ensure it is a low-regret decision, and then narrow the list down to just five moves for the next six months.

Why Moves Matter

Depending on your firm's foundations, identity, and archetype, these move-sets will look different:

- A Guardian firm might prioritize governance, launching targeted training, and cleaning up its document management system.
- A Builder firm might focus on running two pilots and executing a focused adoption sprint for a specific team.
- A Pioneer firm might launch an agentic workflow experiment, or co-develop a client-facing pilot, working with a RAG system or Knowledge Graph.

Why This Step Is Critical

Without this final step of prioritization, even the best intentions fail. Partners lose patience, teams lose belief in the initiative, and budgets get burned on scattered efforts. Moves safeguard your momentum, ensuring today's decisions lead to progress you won't regret in six months.

READY TO MOVE FORWARD?

The complete toolkit, exactly as we use it.

You now have the full FIDAM methodology. The same framework we use to guide clients from noise to clarity. You have the tools to apply it independently.

But having the framework is just the start. Execution is what drives real progress.

Ready to run a focused, one-week FIDAM sprint, or participate in a FIDAM bootcamp?

Our experienced team can guide your firm through the process, help you prioritize effectively, and avoid the common pitfalls other firms have faced.

Scan the QR code and book a short call today to ensure your next six months drive meaningful results.



ANNEXES



The complete toolkit, exactly as we use it.

The following annexes contain the complete set of practical tools needed to apply the FIDAM framework within your firm. You will find the maturity assessment matrix, the identity questionnaire, the direction-finding quiz, the full map of potential actions, and a value-feasibility matrix template.

