



The Claude setup checklist for law firms

14 things to sort out before your team starts using Claude on client work.

Tick them off yourself, or hand this to whoever runs your IT.

Plan and access

- ☐ 1. Move client work off personal AI accounts and onto seats the firm owns and controls.
- ☐ 2. Pick the plan for your size. Team suits most small firms. Enterprise adds audit logs, custom data retention and automatic user setup.
- ☐ 3. Turn on firm sign-in (single sign-on) so staff log in with their work account and lose access the day they leave.
- ☐ 4. Keep admin rights to one or two named people.

Client information

- ☐ 5. In the privacy settings, confirm client content is not used to train the model.
- ☐ 6. Decide which apps Claude can connect to (email, documents, case management) and who can use each one.
- ☐ 7. List any matters or client contracts that need extra protection, such as medical records, and decide whether Claude is allowed on them.

Firm rules

- ☐ 8. Write a short AI use policy: what can go in, what cannot, and who to ask when unsure.
- ☐ 9. Make it a rule that a lawyer reviews AI-drafted work before it leaves the firm.
- ☐ 10. Decide when clients are told about AI use, and whether your engagement letter needs a line about it.
- ☐ 11. Do not bill clients for time spent learning the tool.

People and follow-through

- ☐ 12. Train every person before they get a seat, using the firm's own everyday tasks.
- ☐ 13. Read your cyber insurance policy for anything it says about AI tools before you roll out.
- ☐ 14. Pick one process your team repeats every week, set it up in Claude, and check in on the whole rollout after 30 days.

Want this set up for you, along with the rest of your firm's workflows? Book a 30-minute call.

cal.com/swappy/intro-meeting

Items 9 to 11 follow ABA Formal Opinion 512 on generative AI (July 29, 2024). Plan features from Anthropic's Claude for Work help pages; check the current plan details when you set up.

This is a practical checklist, not legal advice. Check your state bar's guidance on AI.