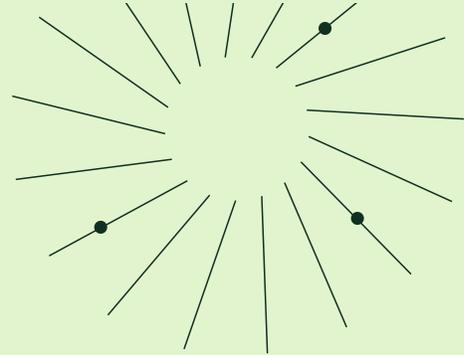


# AI success metrics

A practical tool for designing your AI measurement framework



This worksheet guides you through designing a comprehensive AI metrics framework that demonstrates value across all four spinning plates. Work through each section with your team, referencing the [AI Success Metrics Best Practice Guide](#) for examples and detailed guidance.

## Section 1: Pre-work checklist

Before designing your AI metrics, ensure you have the necessary foundation in place. Check off each item as you complete it:

- We have defined our AI vision and strategic goals
- We understand our key stakeholders and their priorities (see Voice of Stakeholder Roadmap)
- We have identified our primary AI use cases
- We have documented our expected benefits from AI adoption
- Our leadership team is aligned on the purpose of measuring AI success

Notes/Areas that need attention:

## Section 2: Map AI benefits to the Four Spinning Plates

For each of your AI initiatives, identify potential benefits across all four spinning plates. This exercise helps you see the full value story and identify which benefits are most important to measure and communicate.

**Instructions:** Brainstorm potential benefits in each quadrant. Consider what you can measure, what matters to stakeholders, and what demonstrates strategic value. You will narrow this down in Section 3.

### Effective: Quality, team capability and stakeholder experience

How does AI improve the quality of legal work, team capability, and stakeholder experience?

Potential benefits to consider: Quality improvements, stakeholder satisfaction, team engagement, work reallocation, skill development

Your impacts on Effectiveness:

Potential metrics to measure this:

**Efficient: Cost and time savings, better resourcing and smarter ways of working**

How does AI save time and reduce costs?

Potential benefits to consider: Time savings per process, external counsel spend reduction, faster turnaround times, increased capacity, process automation rates

Your impacts on Efficiency:

Potential metrics to measure this:

**Protect: Risk identification and management**

How does AI help identify, prevent, or manage risk?

Potential benefits to consider: Risk identification speed, compliance coverage, issue spotting accuracy, regulatory change monitoring, contract risk assessment

Your impacts on Protect:

Potential metrics to measure this:

**Enable: Business velocity and strategic support**

How does AI help the business achieve its strategic objectives?

Potential benefits to consider: Deal velocity, business leaders' assessment of legal contribution to business goals, proactive guidance frequency, strategic project support capacity

Your impacts on Enable:

Potential metrics to measure this:

### Section 3: Select your core metrics

Review your brainstormed metrics from Section 2 and select 3-5 that will be your core AI success measures. Start with the three quick-start metrics recommended in the Best Practice Guide, then add 1-2 more if relevant.

**Decision criteria - your selected metrics should:**

- Cover at least 3 of the the Four Spinning Plates
- Resonate with at least one key stakeholder group (CFO, business leaders, your team)
- Be feasible to collect data using either System Track or Ad Hoc Track approaches
- Tell a story beyond efficiency alone
- Connect to your AI journey goals

**Your core AI metrics:**

Metric	Spinning Plate(s)	Key audience	Data collection method	Target/goal

### Section 4: Plan your reinvestment strategy

Efficiency gains are the fuel for transformation. How will you strategically reinvest the time, energy, and resources that AI frees up? Without a clear plan, these gains risk being lost to budget cuts.

Review the five reinvestment options in the [Best Practice Guide](#). Which are most relevant for your department?

- Skills development and capability building
- Higher-value strategic work
- Relationship building across the business
- Proactive risk management
- Innovation and transformation initiatives
- Something else: \_\_\_\_\_

**Our reinvestment plan:**

Where will we reinvest our efficiency gains?

What specific actions will we take?

How will we measure the impact of this reinvestment?

Who is responsible for ensuring this happens?

### Section 5: Design your data collection approach

For each metric, define how you will capture data. Use practical approaches that do not overburden your team.

#### Metric 1:

Data collection approach:

- Automated (spend management tools, time tracking, matter management, etc.)
- Manual (surveys, conversations, periodic assessments, etc.)

Data sources:

Collection frequency (real-time, weekly, monthly, quarterly):

Responsible owner:

#### Metric 2:

Data collection approach:

- Automated (spend management tools, time tracking, matter management, etc.)
- Manual (surveys, conversations, periodic assessments, etc.)

Data sources:

Collection frequency (real-time, weekly, monthly, quarterly):

Responsible owner:

**Metric 3:**

Data collection approach:

- Automated (spend management tools, time tracking, matter management, etc.)
- Manual (surveys, conversations, periodic assessments, etc.)

Data sources:

Collection frequency (real-time, weekly, monthly, quarterly):

Responsible owner:

**Metric 4:**

Data collection approach:

- Automated (spend management tools, time tracking, matter management, etc.)
- Manual (surveys, conversations, periodic assessments, etc.)

Data sources:

Collection frequency (real-time, weekly, monthly, quarterly):

Responsible owner:

**Metric 5:**

Data collection approach:

- Automated (spend management tools, time tracking, matter management, etc.)
- Manual (surveys, conversations, periodic assessments, etc.)

Data sources:

Collection frequency (real-time, weekly, monthly, quarterly):

Responsible owner:

## Section 6: Craft your AI success narrative

Do not just report numbers—tell the story of transformation and strategic value. Use this template to draft your narrative, connecting metrics to business outcomes.

### Your AI success story template:

#### **Efficiency foundation:**

Through AI adoption, we have achieved the following efficiency gains (include specific metrics with numbers):

#### **Quality & effectiveness:**

This enabled us to improve quality and effectiveness in these ways (include examples of enhanced stakeholder satisfaction, team engagement, work quality):

#### **Business protection:**

We strengthened our ability to protect the business through... (include risk identification, compliance improvements):

#### **Strategic enablement:**

This allowed for these business outcomes... (include examples such as faster deals, more proactive support, and stronger support for strategic initiatives):

#### **Team impact:**

Our team is now spending more time on strategic work, resulting in: (include percent of time on strategic work, engagement improvements, capability enhancements):

## Section 7: Review and refine

Before finalizing your framework, check that it meets your objectives and is practical to implement.

### Checkpoint questions:

- Do my metrics tell a complete story beyond efficiency?
- Have I connected metrics to specific business outcomes?
- Can I actually collect this data without overburdening the team?
- Do my metrics resonate with CFO, business leaders and my team?
- Am I measuring transformation progress, not just ROI?
- Have I identified how I will reinvest efficiency gains?
- Is my data collection approach realistic and sustainable?

### Areas that need refinement:

### Our next review date:

**Remember:** Your metrics will evolve as your AI adoption matures. Plan to review and refine your metrics quarterly during the first year, adjusting what you measure based on what you learn.

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# Value Alignment Toolkit

Access toolkit

