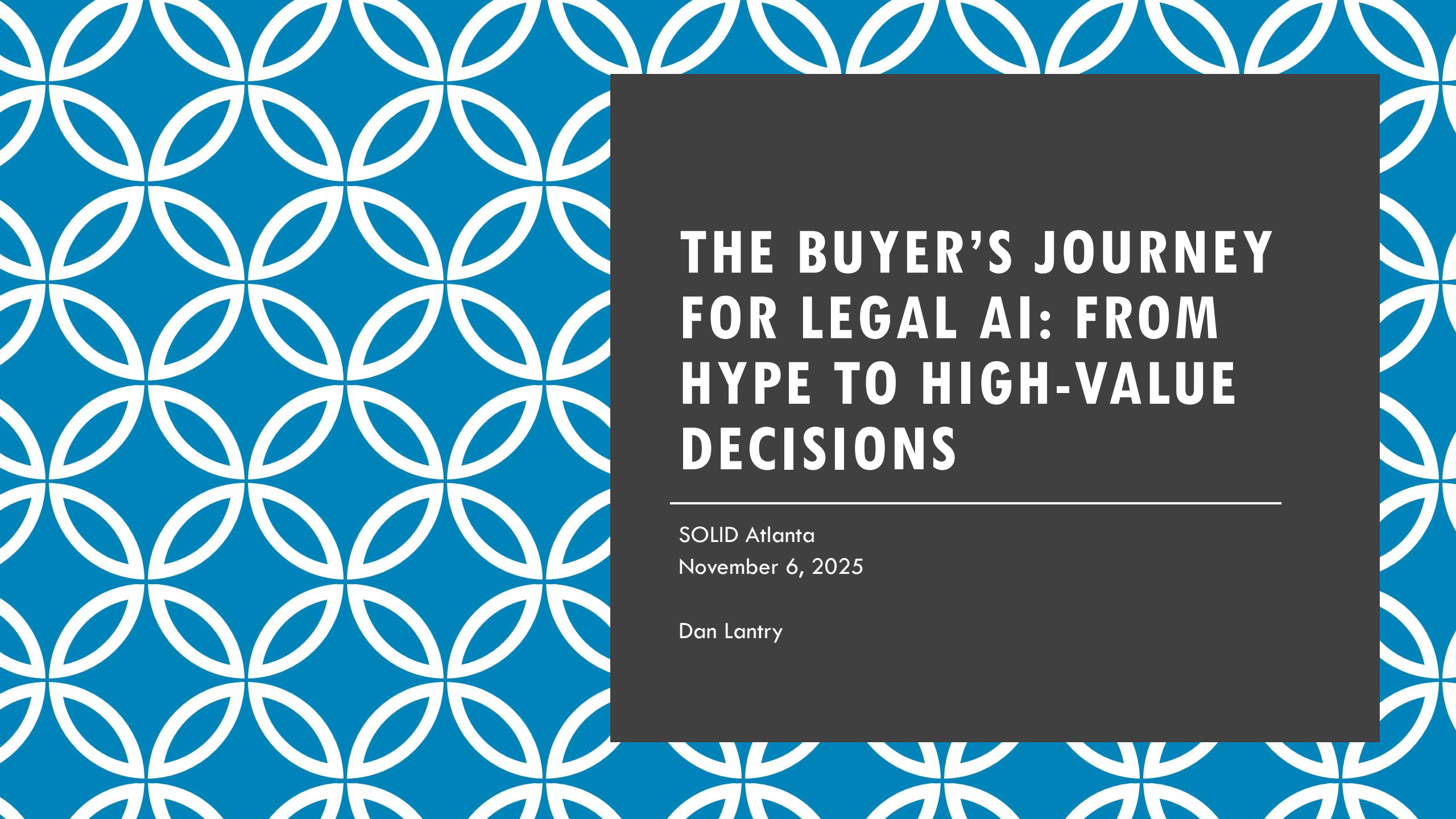




THE BUYER'S JOURNEY FOR LEGAL AI: FROM HYPE TO HIGH-VALUE DECISIONS

SOLID Atlanta
November 6, 2025

Dan Lantry





MAY 15



Kyle Bahr  (He/Him) • 1:45 PM

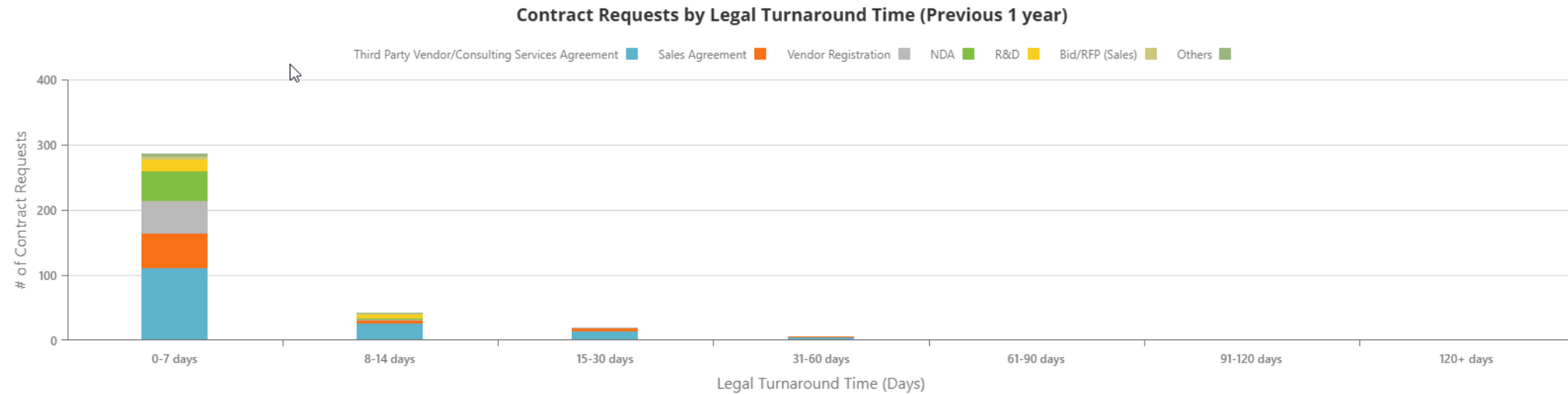
Hey Dan, I wanted to introduce Max to you. Max just graduated from W&M Law, and turned to legal after a career in Computer Science. He hopes to combine the two as he enters the legal world. I think you two might have some really interesting conversations!

Max, I'll let you take it from here, you guys just holler if you need anything from me!

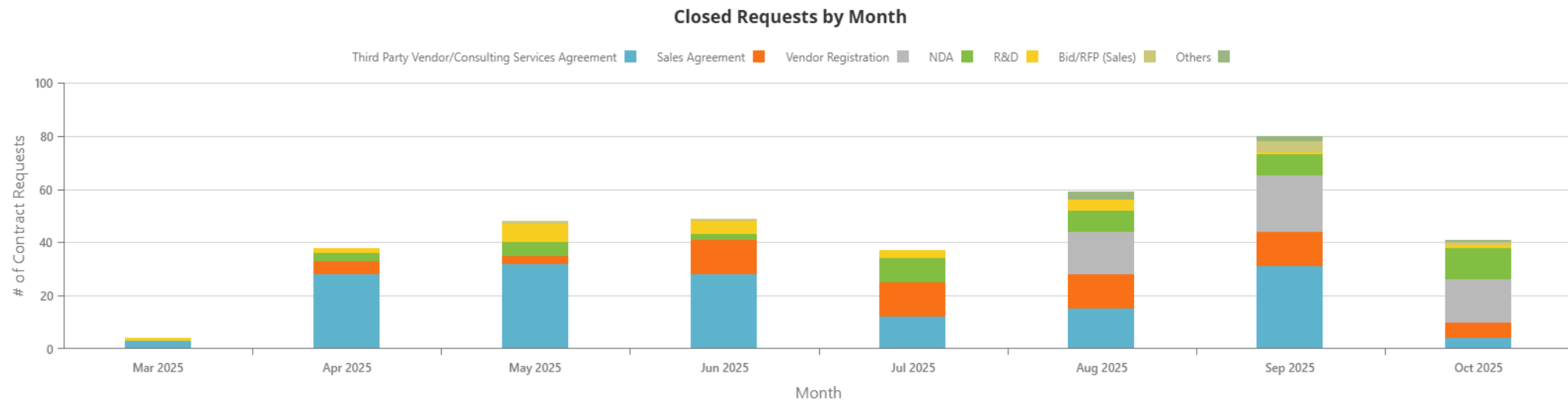
-Kyle

Project ID/Name	Tool(s)	Technology Type	Current Status	Problem	Solution	Quick Implementation	Proficient User	Project ID/Name	Tool(s)	Technology Type
SharePoint Navigation & Organization Training	SharePoint	Organizational Software	Integrated but underutilized	Team wastes significant time searching for documents across multiple locations	Direct SharePoint access with proper search techniques and folder organization	Week 1-2: Assess current usage, audit folders, design training Week 3-4: Deliver role-based training with hands-on practice Week 5: Advanced search features and mobile access Key Success Factors: Browser bookmarks, metadata tags, standardized folders	Uses search instead of browsing, understands permissions, shares appropriately	SharePoint Navigation & Organization Training	SharePoint	Organizational Software
Document Management & Version Control Training	SharePoint/OneDrive/Teams	Organizational Software	Integrated but inconsistent usage	Version chaos with "final_final_v3" naming, documents scattered everywhere	Enforced naming standards and lifecycle management	Week 1: Create naming standards ([Date][Type][Matter]_v##_STATUS) Week 2-3: Train team on version control and permissions Week 4: Monitor compliance and provide support Key Success Factors: Check-in/check-out discipline, clear lifecycle path	Follows naming conventions, uses proper platforms for each stage	Document Management & Version Control Training	SharePoint/OneDrive/Teams	Organizational Software
PDF-XChange Editor Proficiency Training	PDF-XChange Editor	Document Software	Introduced but improperly integrated	Productivity loss after Adobe Pro removal	Comprehensive training on PDF-XChange features	Week 1: Map Adobe features to PDF-XChange equivalents Week 2: Core functionality training with practice Week 3: Advanced features and legal-specific tools Key Success Factors: Classic View setup, OCR understanding, redaction skills	Handles routine PDF tasks independently	PDF-XChange Editor Proficiency Training	PDF-XChange Editor	Document Software
Microsoft Forms & Planner Training	Microsoft Forms/Planner	Productivity Software	Integrated but inconsistent utilization	No standardized intake, tasks tracked in email	Forms for collection, Planner for task management	Week 1: Create form templates and Planner boards Week 2: Connect Forms to Planner tasks Week 3: Train team and deploy Key Success Factors: Standard buckets, consistent labels, automated workflows	Creates forms, manages tasks in Planner, tracks workload	Microsoft Forms & Planner Training	Microsoft Forms/Planner	Productivity Software

MEASURE WHAT MATTERS

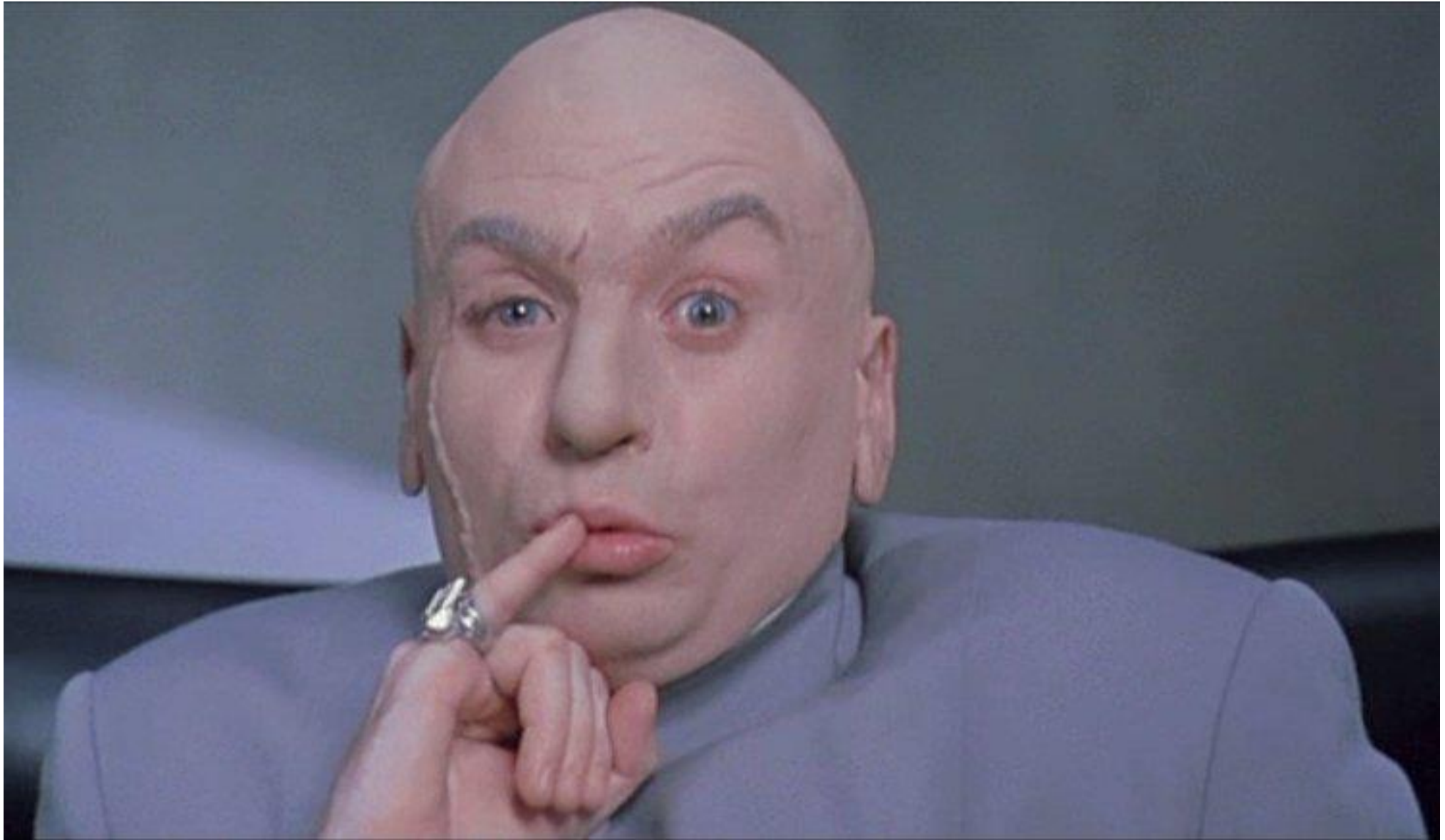


MEASURE WHAT MATTERS





- 13.5% decrease in legal spend from 2023 to 2024
- 42.7% decrease in legal spend from 2024 to 2025 YTD
 - Over \$1M YOY reduction in spend
- 50.4% decrease in legal spend from 2023 to 2025 YTD



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