



ENDPOINT SOLUTIONS

AI Readiness — Delivery Report



Client: Calder & Voss LLP

Date: 2026-06-24

Prepared by: Michael-Paul Hart, Endpoint Solutions

Confidential — prepared for Calder & Voss LLP leadership. Not for distribution.

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OVERALL MATURITY

64

Advancing

Combined maturity across the assessed stages.

ENGAGEMENT

Industry: Law firm

Primary sponsor: Marissa Voss, Managing Partner

Executive summary

Calder & Voss is one of the more AI-ready firms in its market: a cloud document stack, a real acceptable-use policy already in force, and associates piloting AI for research and drafting. The scores reflect genuine momentum. The gaps are now organizational and one confidentiality risk, not foundational — deepening the AI skill bench, measuring value consistently, and closing off the last of the unsanctioned tool use before it touches privileged material. The opportunity is to turn a strong, compliant foundation into measured wins in document review, research, and drafting.

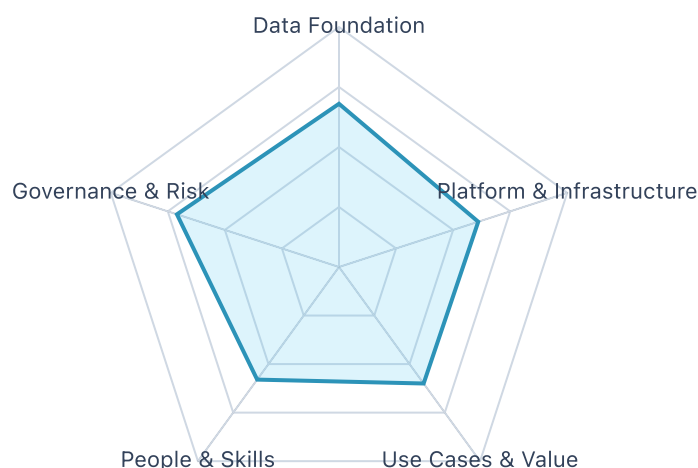
Current-state overview

The firm runs cloud-first on a document management system and M365 with Copilot licensed. Matter and document data is largely centralized under defined governance, though cross-system access still takes effort. Because confidentiality and privilege are existential, an AI acceptable-use policy is already in place and accountability is assigned — ahead of most peers. Associates are actively piloting AI for legal research and first-draft generation; value is felt but loosely measured, and some usage still happens through personal tools.

Maturity scorecard

STAGE	SCORE	INTERPRETATION
01 Data Foundation	68%	Advancing
02 Platform & Infrastructure	61%	Advancing
03 Use Cases & Value	60%	Advancing
04 People & Skills	58%	Developing
05 Governance & Risk	71%	Advancing

Maturity profile



Top findings & business implications

- 1. A strong, compliant foundation is already paying off** — Centralized documents, a cloud stack, and an in-force policy mean the firm can adopt AI faster and more defensibly than competitors — a durable edge in a knowledge business.
- 2. Some unsanctioned AI use still touches client material** — A few attorneys use personal AI accounts for research and drafting; in a privilege environment that is the one risk that must be closed before expanding.
- 3. Value is real but not measured across the use cases** — Research and drafting AI clearly help, but without consistent metrics the firm can't prioritize where to invest next with confidence.

Domain observations

01 · DATA FOUNDATION — 68%

Largely centralized, well-governed matter and document data in the DMS — a strong dimension, with some access friction for cross-matter or cross-system questions. Sensitivity is high, which the firm rightly respects.

02 · PLATFORM & INFRASTRUCTURE — 61%

Cloud-first with Copilot in use and solid security; integration between the DMS, M365, and practice tools is partial, and model/prompt management is ad-hoc — fine today but a gap as pilots scale.

03 · USE CASES & VALUE — 60%

A sensible shortlist — contract/document review, legal research, and drafting/summarization — with a couple already piloting. Value is loosely defined; ownership sits with the practice rather than IT, which is healthy.

04 · PEOPLE & SKILLS — 58%

Literacy is above average thanks to analytical staff and some training has happened, but skills are individual rather than institutional and change is managed informally — a scaling risk.

05 · GOVERNANCE & RISK — 71%

The firm's strength: an acceptable-use policy is in force, security is strong, and accountability is assigned. The task is to eliminate residual shadow AI on privileged material and keep the rigor while enabling practical use.

Risk register

RISK	AREA	SEVERITY	OWNER
Privileged / client material entering personal, unvetted AI tools	Governance & Risk	Critical	Managing Partner
Key-person dependency — AI skill concentrated in a few attorneys	People & Skills	High	Practice Leads
Inconsistent value measurement across research/drafting use cases	Use Cases & Value	Medium	Operations
Ad-hoc prompt/model management as usage scales	Platform & Infrastructure	Medium	IT

Recommended priorities

05 · GOVERNANCE & RISK

Close off shadow AI on privileged material

Move all attorneys onto firm-licensed AI within the existing policy and shut down personal-account use for client work — the one must-fix before expanding.

04 · PEOPLE & SKILLS

Deepen the AI bench and standardize value metrics

Grow beyond a few power users with role-specific training and put consistent metrics on each use case so investment goes to the highest return.

AI readiness roadmap

0–30 days

ACTION	OWNER	PRIORITY	EFFORT
Move all attorneys/staff onto firm-licensed AI; retire personal-account use for client work Outcome: Privilege protected; shadow AI ends · Vendor: Endpoint	Managing Partner	High	Low
Define standard value metrics (hours saved on research/first drafts) and apply to live pilots Outcome: Portfolio-wide ROI visibility	Operations	High	Low

31–90 days

ACTION	OWNER	PRIORITY	EFFORT
Deliver role-specific AI training for associates and paralegals within the policy Outcome: Skill depth; less key-person risk · Vendor: Endpoint	Practice Leads	High	Medium
Move the strongest pilot (research or document review) toward measured production use Outcome: Faster, on-brand work product · Vendor: Endpoint · Depends on: Metrics in place	Practice Leads	Medium	Medium

91–180 days

ACTION	OWNER	PRIORITY	EFFORT
Improve DMS/M365 integration so AI can safely see across matters Outcome: Richer, safer AI context · Vendor: Endpoint	IT	Medium	Medium

181–365 days

ACTION	OWNER	PRIORITY	EFFORT
Expand to drafting/summarization firm-wide with human + conflicts/privilege review gates Outcome: Consistent output at scale · Depends on: Pilot results	Managing Partner	Medium	Medium

AI tools & vendor ecosystem

VENDOR	ROLE / COVERAGE	RENEWAL / NOTES
iManage-class DMS	Documents / matters system of record	Annual — 05/2027
Microsoft 365 / Copilot	Productivity + licensed AI assistant	Annual — 03/2027
Legal research platform	Case law + AI-assisted research	Annual — 09/2026
Email security / archiving	Retention + supervision	Annual — 12/2026

Documentation reviewed: Data inventory / catalog — what data exists and where it lives · Data governance, quality & ownership documentation · Security, privacy & compliance policies (data handling) · AI use-case list or backlog / ideas under consideration · Existing AI or acceptable-use / data policies · Team & skills overview — who could build and own AI · Vendor & platform contracts relevant to data or AI · Known risks, constraints, or regulatory requirements

Evidence notes: Compliance documentation is strong: AI acceptable-use policy, data governance, and security/privacy materials all provided. Value metrics are loosely defined and MLOps/tooling documentation is minimal.

Renewal & contract calendar

RENEWAL	VENDOR	ROLE / COVERAGE
Annual — 09/2026	Legal research platform	Case law + AI-assisted research
Annual — 12/2026	Email security / archiving	Retention + supervision
Annual — 03/2027	Microsoft 365 / Copilot	Productivity + licensed AI assistant
Annual — 05/2027	iManage-class DMS	Documents / matters system of record

Next steps

1. Review this report with leadership and confirm the priorities.
2. Assign owners and target dates to the roadmap actions.
3. Decide where ongoing technology advisory support is appropriate.

Appendix — discovery responses

01 • Data Foundation

How centralized is your business data?	Largely centralized
Confidence in data quality / consistency	Good
Data governance in place?	Defined
How easily can teams access the data they need?	Some friction
Data types you want AI to use	Documents, Structured/DB, Email/Chat

02 • Platform & Infrastructure

Primary environment for workloads	Cloud-first
AI / automation tooling in use	Copilot/M365
Path from pilot to production	Ad-hoc
How integrated are core systems?	Some

03 • Use Cases & Value

Have you identified AI use cases?	A shortlist
Are success metrics defined?	Vaguely
AI pilots underway?	Piloting
Who drives AI use cases?	Business only

04 • People & Skills

General AI literacy across the org	Solid
In-house AI / ML skills	Limited
AI training / enablement offered?	Some
Change management for AI adoption	Informal

05 • Governance & Risk

AI acceptable-use policy?	In place
Ungoverned (shadow) AI usage	Some
Data security / privacy controls for AI	Strong

How scoring works

Each answer maps to a 0–100 maturity value based on what it signals. Stage scores are the average of the answered, scored questions in that stage; the overall score is the average of assessed stages. Some questions are informational context and are not scored. Bands: AI-Ready 80+ · Advancing 60+ · Developing 40+ · Emerging 20+ · Unprepared 0+.

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