

Legal AI buyer's checklist

By Atif Ullah / Legal Edge Consulting Ltd

Ask for written answers for the exact product and plan. Keep the supporting terms and test results together, and assign an owner to any unanswered point.

01-04 / Costs, contracts and data

Provider / product: _____

☐ 1. What is the full cost?

Ask for the price in pounds, VAT treatment, minimum users, usage allowances and charges for additional processing. Include onboarding, setup, training and support. A useful quote shows the assumptions behind the total.

Evidence to request: Itemised quote, usage limits and an example first-year total.

Notes / owner: _____

☐ 2. What are we committing to?

Check the contract term, renewal mechanism, notice deadline and rules for adding or removing users. Ask how prices can change. Record any promised pilot or exit arrangement in writing.

Evidence to request: Order form, renewal terms, notice dates and pilot/exit terms.

Notes / owner: _____

☐ 3. Where does our information go?

Establish storage and processing locations, subprocessors, retention periods and support access. Ask about international transfers and the applicable safeguards. A storage location alone does not describe the full data journey.

Evidence to request: Data-flow description, processor list and transfer safeguards.

Notes / owner: _____

☐ 4. Is our information retained or used for training?

Ask separately about the platform and underlying model providers, including uploaded files, prompts and outputs. Get the contractual position and any settings or exceptions that affect it.

Evidence to request: Data-use clauses, retention schedule and plan-specific settings.

Notes / owner: _____

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05-08 / Controls, sources and practical use

Provider / product: _____

☐ 5. Can we control access and trace activity?

Check matter permissions, account administration, authentication and audit records. Test whether integrations preserve existing restrictions. Obtain evidence relevant to your firm's obligations and client requirements.

Evidence to request: Access-control documentation, audit examples and a permissions test.

Notes / owner: _____

☐ 6. What legal sources does it cover?

If research is included, ask about England and Wales case law and legislation, update frequency and coverage gaps. Test access to the cited source. Review the authority, currency and application of every citation relied on.

Evidence to request: Coverage list, update process and checked sample citations.

Notes / owner: _____

☐ 7. Does the workflow work with our files?

Test scanned documents, conflicting accounts and missing information. Check supported formats, document limits and integration behaviour. Measure preparation and checking time alongside output quality.

Evidence to request: Results from representative files, including preparation and checking time.

Notes / owner: _____

☐ 8. What happens when we leave?

Confirm export formats, ownership of work, access after cancellation and deletion arrangements, including backups and exceptions. Check that exported material remains usable without an active subscription.

Evidence to request: Export samples, cancellation terms and deletion arrangements.

Notes / owner: _____