

# AI Vendor Due Diligence Worksheet

Before any AI tool enters your firm, four questions need clear answers. If you cannot answer them confidently, the tool has not been vetted.

Tool: \_\_\_\_\_

Vendor: \_\_\_\_\_

Tier: \_\_\_\_\_

Date: \_\_\_\_\_

## Factor 1 — Data Confidentiality

- Do you know whether this tool retains your inputs — and for how long?
- Are your inputs used to train the vendor's model? Can that be disabled?
- Has a Data Processing Agreement (DPA) been executed?

## Factor 2 — Ethics Compliance

- Does the vendor claim the tool replaces or reduces the need for attorney review?
- Does the tool support your verification workflow — or work against it?

## Factor 3 — Practice Area Fit

- Is this tool built for legal work, or is it general-purpose AI applied to legal tasks?
- Does it ground outputs in verified sources, or generate from patterns?

## Factor 4 — Cost Relative to Firm Size

- What specific problem does this tool solve, and what is the cost of leaving it unsolved?
- Are there alternatives that meet Factors 1–3 at a lower cost?

## Decision

- Approved — passes all four factors
- Approved with restrictions — document conditions
- Not approved — document reason, revisit if terms change

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**Knowing the questions is the first step. Knowing what good answers look like is the second.**

JDAI Consultants evaluates AI tools for solo and small law firms — so you adopt with confidence, not guesswork.

Free AI Readiness Assessment → [jdaiconsultants.com/assessment.html](https://jdaiconsultants.com/assessment.html)

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