

Breaking Down Silos: Aligning Legal, IT, and InfoSec for a Secure AI Strategy

By Brandi Pack, AI Specialist at UpLevel Ops

Integrating AI into legal operations can unlock transformative efficiencies, streamline workflows, and enhance client service. Yet, to realize these benefits, Legal's AI strategy must align closely with the objectives and protocols of IT and InfoSec teams. Without alignment, organizations risk conflicting priorities and security vulnerabilities. This cross-functional collaboration isn't just helpful but essential. By establishing trust and shared goals with IT and InfoSec, legal teams can better navigate the complexities of AI adoption, setting a secure, scalable foundation for long-term success. Here's how.

1. Set Up Shared Goals from Day One

All departments have different priorities: Legal seeks efficiency, IT emphasizes infrastructure, and InfoSec focuses on security. Before selecting AI tools, align these goals through early discussions with IT and InfoSec. Ensure AI is seen as a company-wide asset that benefits everyone, from reducing repetitive legal work to bolstering data security. By clarifying shared objectives early, legal teams can get essential buy-in from other departments, laying the groundwork for smoother implementation.

Why it matters: A collaborative approach helps reduce misunderstandings, eliminate potential roadblocks, and ensure that AI will be implemented with the entire organization's needs in mind, not just Legal's.

2. Understand Your Organization's AI Tool Policies and Flexibility

Before committing to a specific tool, confirm IT's policies on AI technology and assess the flexibility of tool selection. If your organization has deployed solutions like Microsoft's Copilot, consider integrating complementary tools like ChatGPT to maximize AI's impact. Using a familiar tool such as ChatGPT as a "home base" allows Legal to create a centralized AI experience, making adoption easier and increasing user comfort. Meanwhile, Copilot can help streamline data-driven workflows within the Microsoft environment, leveraging internal data securely and seamlessly.

Pro tip: Discuss with IT if both tools can be used concurrently to play to each tool's strengths while staying within approved systems. Understanding IT's policies and priorities early in the process will help prevent unnecessary complications and delays.

3. Select Low-Maintenance, Flexible Solutions

For Legal AI to be widely adopted and scalable, solutions should place minimal maintenance demands on IT. Seek those that allow easy customization so Legal can make minor adjustments, like modifying prompts or adjusting parameters, without needing constant IT support. "Quick build" solutions that are customizable help teams make real-time updates as needed, fostering agility and responsiveness. However, if a more complex solution is required, ensure the vendor has robust support options and automated update capabilities. This approach keeps tools optimized without draining IT resources.

Key takeaway: Choosing tools with automated updates and strong support reduces the burden on IT. This allows them to focus on higher-stakes tasks like security and infrastructure while Legal remains agile and responsive.

4. Prioritize Security: Work Closely with InfoSec

Any AI solution must meet the highest security standards, especially when handling sensitive data. Engage InfoSec early to establish robust security protocols, define data handling policies, and determine secure processing requirements. A legal department that proactively addresses these concerns will gain the trust and support of InfoSec, building a solid case for AI adoption. Be prepared to provide clear documentation on data management, retention policies, and user access restrictions. When InfoSec sees that Legal prioritizes security, it strengthens the foundation for AI implementation.

Bonus step: Request transparency from vendors about how their solutions manage “hallucinations” (incorrect or fabricated responses). Ensuring the accuracy of AI outputs and having proactive error-handling protocols in place can go a long way in minimizing risk and building confidence across departments.

5. Create a Cross-Functional AI Governance Group

To help align and oversee AI initiatives, consider establishing a governance group with representatives from Legal, IT, InfoSec, and data management teams. This group can evaluate risks, approve AI use cases, and oversee regulatory and security standards adherence. Regular check-ins allow for ongoing evaluation and quick adaptation to new technological developments or updates. This governance model ensures AI solutions evolve within a well-defined framework, keeping teams aligned with organizational goals.

Pro tip: A governance group reduces risk, accelerates problem-solving, and provides a built-in structure for cross-functional collaboration.

6. Pilot, Test, and Iterate with Ongoing Feedback

Launching an AI tool shouldn't be a one-and-done approach. Start with a controlled pilot, engaging IT and InfoSec in evaluating performance and gathering real-time feedback. After the pilot, continue iterating based on user experiences and any issues encountered. Regular feedback loops help you optimize the AI tool and show that Legal is committed to fine-tuning the technology to better serve the organization.

Why it works: Iterative testing builds trust in the technology, helping the AI implementation to evolve and remain secure, relevant, and effective.

7. Establish Channels for Knowledge Sharing and Collaboration

A successful AI strategy cannot operate in isolation. Set up consistent communication channels to inform Legal, IT, and InfoSec about AI updates, challenges, and successes. Regular knowledge-sharing sessions allow each team to share insights, align on ongoing initiatives, and anticipate upcoming needs. This keeps everyone on the same page and ensures Legal's AI strategy is firmly integrated with the company's overarching goals.

In practice: Consider monthly “AI sync” meetings to discuss everything from workflow improvements to system updates, ensuring all teams are moving forward in a coordinated way.

8. Translate AI's Benefits to the Broader Business

AI's impact should be felt beyond Legal. Highlight how time saved on repetitive legal queries could be reinvested into more strategic initiatives or how automated FAQ responses enhance client satisfaction. When presented in these terms, the AI initiative will gain additional support from business leaders who can see its tangible benefits for the entire organization.

Pro tip: Track metrics like time savings and cost reductions, presenting them to C-suite stakeholders to demonstrate the business-wide value of Legal's AI initiative.

Building a Future-Proof AI Strategy

Aligning Legal's AI strategy with IT and InfoSec priorities is a collaborative journey that pays off in a secure, compliant, and scalable AI foundation. By proactively engaging these teams and addressing their unique concerns, Legal can ensure that AI initiatives are designed to support operational and strategic goals. When Legal, IT, and InfoSec work together, AI becomes a valuable tool that transforms workflows, reduces risk, and creates long-term value across the organization.

Learn more about the **AI Advantage** from **UpLevel Ops** at UpLevelOps.com