AI Evaluation Framework

20 Questions Every PI Firm Should Ask Before Choosing an AI Partner

This evaluation framework helps your firm cut through sales talk and quickly assess whether a legal AI tool is truly built for personal injury or just dressed up to sound like it is.

Look for direct, example-backed answers. Treat vagueness as a red flag.

AI Capabilities

1 **Does it have Document Intelligence?**

Can it identify relationships between records like briefs, bills, police reports, and treatment notes?

2 **Is it grounded in PI-specific medical records?**

Look for capabilities trained directly on common PI file types, not just generic data.

3 **Does it understand and extract from bills?**

Ask if it can parse billing codes, charges, and dates—and connect them to case strategy.

4 **How detailed and accurate is the AI assistant?**

Can it provide verifiable answers? Are the assumptions it makes trustworthy - or just generic language models in legal clothing?

5 **Do you have to pay for every draft or edit?**

A good AI assistant should iterate with you, not charge you for every version of your demand or deposition outline.

6 **Was the AI fine-tuned for PI documents?**

Ask if it understands medical records, bills, and medical specials - not just how to summarize text.

7 **Does it provide citations for everything it generates?**

Every summary, diagnosis, or billing flag should link back to the original record. No source = no trust.

8 **Does it understand ICD codes and how they drive demands?**

It should be able to recognize the right codes, link them to treatment events, and use them to justify medical specials in a demand.

9 **Is there a subject matter expert (SME) loop in place?**

Ask if real legal experts are reviewing, correcting, and shaping how the AI performs. That's where confidence in the output comes from.

10 **Is the chronology interactive and does it integrate AI chat?**

The AI should help you drill into events, not just list them. Bonus if it can answer, "What happened between the first complaint and the first MRI?"

Practice Fit

11 **Was this built for PI or retrofitted from another vertical?**

Contract review ≠ litigation review. Ask what kind of firm they designed for and what use cases they started with.

12 **Can it support different PI case types?**

Medical malpractice ≠ soft tissue MVA. Make sure it understands the nuances of each.

13 **How much time does it really save per case?**

Look for real metrics like how long it takes to draft a chronology, flag treatment gaps, or prep a demand.

14 **Can it help you raise case value and not just reduce admin time?**

Ask how it helps uncover unclaimed injuries, strengthen causal links, and catch missed billing opportunities.

Proof & Results

15 **Can they show results from firms like yours?**

Ask for actual outcomes:

- ↗ "What did year one look like?"
- ↗ "What changed in staff load or case output?"
- ↗ "What's one PI-specific workflow you helped replace?"

Security & Control

16 **What are their security standards?**

HIPAA, audit logs, encryption in transit + at rest — get all the paperwork.

17 **Where is your data stored, and who can access it?**

Look for clear policies. Be especially cautious if they train on your data without consent.

18 **Can you export or delete your data if you leave?**

There's little room for vague answers here. You need control over your own data.

Partnership & Support

19 **What does their support model look like after you sign?**

Ask who runs onboarding, who trains your staff, and whether you get a named point of contact.

20 **How do they act on feedback?**

Ask:

- ↗ "How often do you ship updates?"
- ↗ "What's something users asked for that you built?"

No releases in 6 months tells you everything.