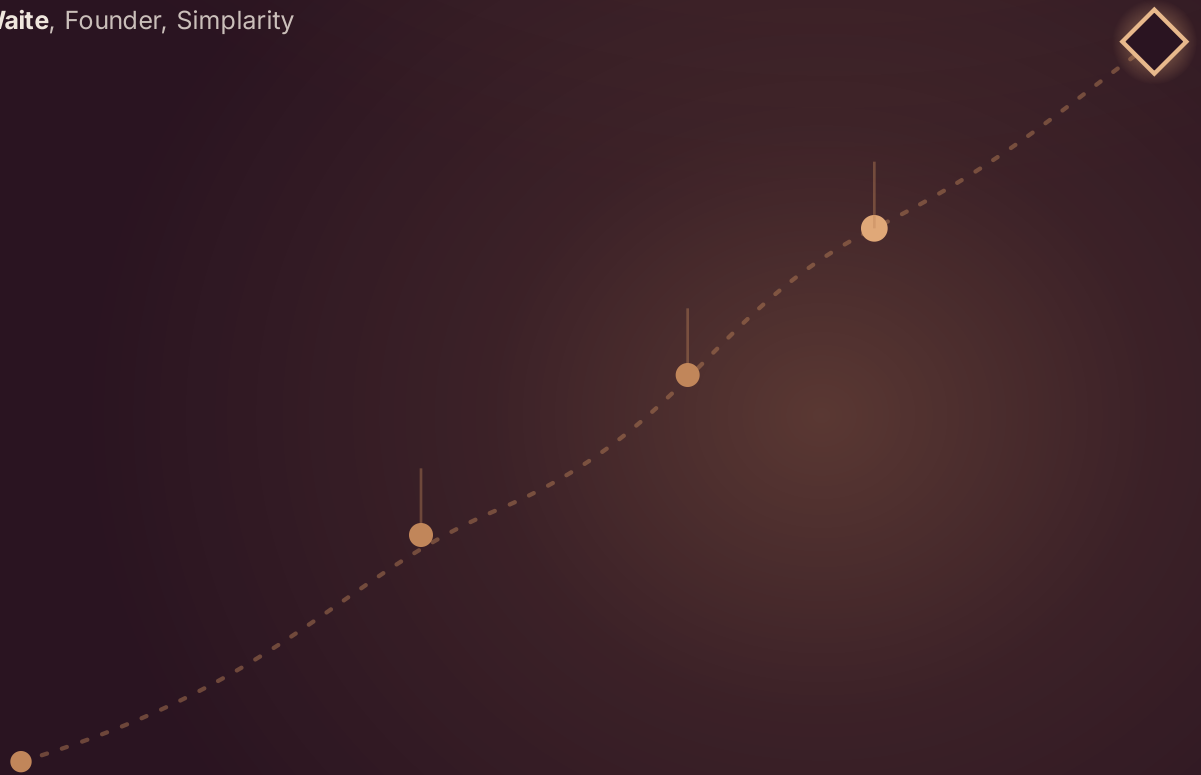


AI FOR IMMIGRATION PRACTICE

# An AI *Implementation* Roadmap

Stop buying AI in search of a problem. A workflow-first roadmap for an immigration firm, with a prioritization tool that tells you what to automate first.

— By **Renee Waite**, Founder, Simplarity



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# Start from the workflow

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Most firms adopt AI backwards. They buy a tool, then go looking for something to use it on. The result is a subscription nobody opens and a team that decided AI was hype.

Do it the other way. Start from the workflows you already run every week. Find the ones that are high volume, highly repeatable, and not dependent on legal judgment. Those are the candidates. Everything else can wait.

The NIST AI Risk Management Framework is a useful backbone here. It is built around the same instinct: identify the use, weigh the risk, decide deliberately, and document the decision.

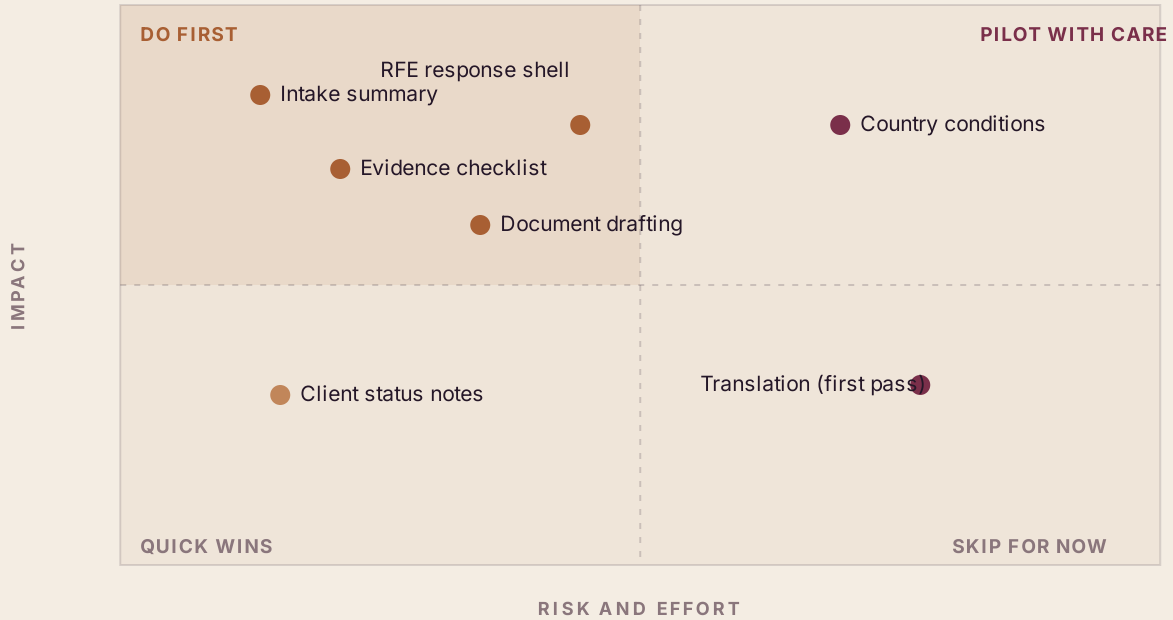
This guide gives you a tool to pick the first candidates, a way to assess them, a phased rollout, and a thirty-day plan.

A tool in search of a problem is a cost. **A workflow in need of relief is a return.** Start with the second.

Reference: NIST AI Risk Management Framework, 2023; ABA Formal Opinion 512, 2024.

# The prioritization matrix

Plot each workflow by how much it would help against how much risk it carries. Work the top-left corner first.



The top-left workflows give the most relief for the least exposure. They are where an immigration firm should begin.

# The needs assessment

For each candidate workflow, four questions. If it scores well on the first two and you can control the third, it belongs near the front.

<b>Volume</b> HOW OFTEN	How many times a week does your firm run this? The higher the count, the bigger the return.
<b>Repeatability</b> HOW PREDICTABLE	Does it follow the same shape every time, or does each instance need fresh legal judgment?
<b>Confidentiality</b> HOW SENSITIVE	How much client data does it touch, and can you run it in a no-training, contracted tool?
<b>Current pain</b> HOW MUCH IT HURTS	Is this the task that keeps people late and burns the most goodwill? Relief there is felt immediately.

# The phased rollout

Climb in order. Each phase earns the next, and none of them moves until the confidentiality controls are in place.

**1**

**ASSIST**

**You drive.**

The tool drafts inside a vetted, no-training environment. Lowest risk, fastest relief.

**2**

**DELEGATE**

**It completes tasks.**

Agents finish defined jobs from your top-left list and route them to you for review.

**3**

**ORCHESTRATE**

**It runs the flow.**

Agents carry a matter through several steps, with your sign-off at every legal decision.

Most firms should live in **Assist** for a while. The firms that jump to orchestration without governance are the ones that end up in the cautionary guides.

# The first 30 days

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A realistic first month. Narrow, contracted, and reviewed.

- Map your weekly workflows and plot them on the matrix.
- Pick one top-left workflow. Only one.
- Choose a vetted tool with no-training terms and a signed DPA.
- Write the input rules: what may and may not be entered.
- Run it in Assist mode, with a human reviewing every output.
- Name the owner and start the log.
- At day 30, measure the time saved and decide whether to add a second.

## WHERE TO START

# One workflow. *Done right.*

You do not need an AI strategy with twelve initiatives. You need one high-impact, low-risk workflow, run in a tool you trust, reviewed by a human. Then the next one.

Simplarity maps your workflows, picks the right first move, and sets it up with the controls already in place.

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