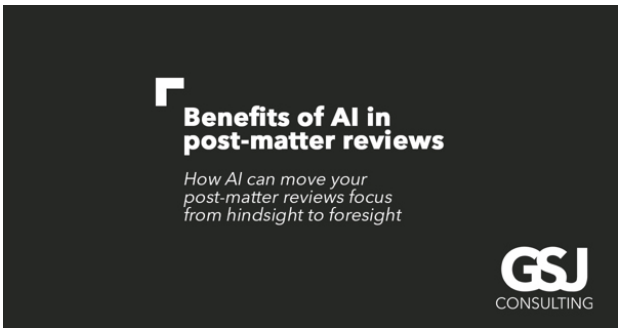

How AI can help transform your post-matter learnings

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For most professional services firms, post-matter reviews are a well-intentioned but often undercooked process. When a matter closes, there may be a short debrief, a few notes captured and a general discussion around what worked and what didn't. Then everyone moves on. The takeaways rarely survive long enough to influence the next pricing decision, the next scope discussion, or the next client negotiation.

The issue often isn't a lack of goodwill or good intentions. It's that traditional post-matter learnings rely heavily on the mutual availability among busy professionals (both lawyer and client) and often requires total recall of what worked and what could have been improved months after the event. This approach to post-matter debriefs makes it difficult to translate useful feedback insight into beneficial behavioural change.

Why your current approach to post-matter reviews rarely changes behaviour

Most firms know ahead of time what their post-matter reviews will likely uncover:

Pricing assumptions that proved optimistic at best;

Scope that expanded beyond expectations (scope-creep);

- Discounts that didn't deliver the anticipated commercial benefit;

Write-offs that eroded margin late in the matter.

Yet the same issues continue to re-occur.

Often, this is because traditional post-matter reviews look backwards in isolation. They depend on who is present, what they remember and how candid the discussion feels in the moment.

Even when feedback is insightful, it often remains trapped in “confidential” documents or meeting notes that no one consults or is allowed to access when the next pricing decision or matter scoping is made under pressure.

In effect, firms learn - but then don’t implement that learning.

Using AI to move from hindsight to foresight

Artificial Intelligence (AI) can fundamentally alter this dynamic. It allows post-matter learnings to evolve from a retrospective exercise into a forward-looking process: one that allows for continuous improvement in the firm’s processes, risk-taking decisions and commercial improvement process across the firm.

By analysing outcomes across hundreds, or even thousands of matters, AI can help firms review:

- fees proposed versus fees realised;
- assumptions versus actual delivery;
- scope creep and its reasons;
- leveraging patterns; and
- client active engagement.

Over time, this analysis can help reveal which pricing structures consistently underperform, which types of matters generate disproportionate scope volatility and where commercial risk tends to concentrate.

The value of this analysis is not just in seeing these patterns once, but in allowing them to inform future decisions automatically.

Helping to close the pricing gap

One of the most powerful impacts of an AI-driven post-matter learning is in pricing governance. In many firms, pricing decisions still depend heavily on who is making the call, how busy they are and how confident they feel at the time. Policies may exist, but they

are often high-level and difficult to apply in real-world situations.

AI enables pricing guidance to evolve effectively, grounded in actual outcomes rather than theoretical rules. As more matters are completed, the AI program learns which assumptions tend to hold true, which frequently fail and where risk is routinely underestimated.

The net result should be that future pricing decisions are informed by what has actually worked before, not just by precedent, habit, or instinct.

Over time, pricing should become more consistent, more defensible and less dependent on individual improvisation.

Seeing what humans can't

Even senior management only sees a slice of the firm's total activity. Their perspective is shaped by their own exposure to the firm. AI, by contrast, will have visibility across the entire portfolio.

This broader lens will allow AI to detect correlations that are almost impossible to see at the individual level. For example, matters that appear profitable on paper but consistently underperform after write-offs, or clients where scope creep follows predictable triggers.

It will also be able to highlight delivery models that look efficient but systematically increase downstream risk.

Crucially, these insights are not about assigning blame. They are about creating clarity. When patterns are visible and evidence-based, discussions become commercial rather than personal.

Turning insight into action

As traditional client feedback programs have shown time and again, insight alone doesn't change behaviours.

With the help of AI, real transformation should occur when AI-generated learning is embedded directly into the tools and processes that shape future behaviour. Instead of relying on someone to recall a lesson learn from a prior matter, the system applies that lesson automatically at the point where it matters most.

Changing the culture of client feedback

Post-matter reviews can often feel uncomfortable.

"What if the client didn't like the work we did?" can trigger defensiveness, hindsight bias or selective storytelling.

AI will help depersonalise this process. When insights are drawn from aggregated data, rather than individual recollection, the conversation shifts. The focus moves away from who made a mistake and towards what the data suggests will improve the process

next time. This shift is subtle but powerful. It encourages a culture of continuous improvement rather than one-off retrospection, making learning safer, more objective and more actionable.

In a nutshell

Implementing AI in the matter feedback process makes capturing actual outcomes, identifying patterns and feeding insights back into future decisions on an ongoing basis more possible and plausible. Firms that embrace this approach stop relearning the same lessons matter after matter. Instead, they institutionalise learning and allow it to compound over time.

In short, AI enables firms to understand what is likely to happen next. The real question then is no longer: “Does your firm have a feedback program?”, but rather: “What are you doing with the information?”.

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