

# Claude for the legal industry

A practical deployment guide



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# Foreword

The legal profession is at an inflection point. The work is getting more demanding: matters are more complex, clients expect faster turnaround, and hiring is harder than it used to be. At the same time, AI has matured from a curiosity into a practical tool that can help with all three. Firms and legal departments that adopt it thoughtfully now will be better positioned for what comes next.

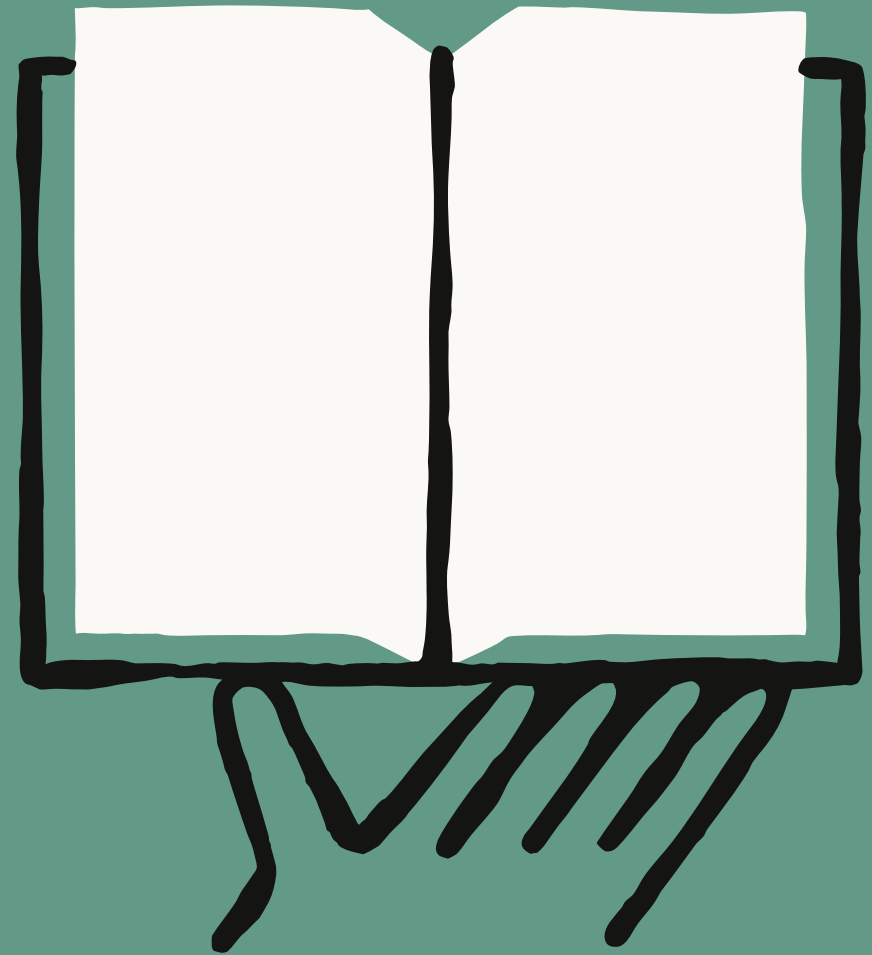
A 2026 **FTI Consulting / Relativity General Counsel Report** found that 87% of general counsel now report genAI use within their teams, compared with 44% the prior year. The longer-term trajectory is even sharper: CLO gen AI use has climbed from 20% in 2023 to 87% in this year's report. Across drafting, research, diligence, and matter management, the industry has historically been fast to adopt any technology that drives productivity by accelerating repetitive workflows. Today, that's agentic AI: systems that act on the work, not just answer questions about it. The same research found summarization (83%), contract clause identification (63%), and transcription (53%) are the top gen AI use cases inside legal departments today.

At Anthropic, we are **seeing this in action**. Legal teams are using Claude for contract review and redlining, legal research, M&A diligence, privacy impact assessments, matter management, regulatory monitoring, and outside counsel oversight. Multiple Claude products can be used by legal teams and law firms: Claude for chat and research, Claude Cowork for matter-level work across files and apps, and Claude for Microsoft 365 for the hours spent in Word, Excel, PowerPoint, and Outlook.

Legal work runs on a broad stack—contract lifecycle systems, research platforms, document management, e-discovery, data rooms, and the firm-specific precedents and house style that sit on top. Claude connects to all of it through three building blocks: **MCP connectors** bring matter data into Claude, **practice-area plugins** bundle the workflows lawyers run most often, and an open-source ecosystem lets in-house teams and firms extend Claude to match how they practice.

Beyond pure legal work, Claude is being used by businesses to manage the day-to-day knowledge work that fills the rest of the workweek, such as triaging email, prepping for meetings, drafting status updates, and other administrative work. Cowork is well suited to this kind of multi-app, multi-step overhead, so the same tool that redlines an NDA in the morning can clear an inbox and prep tomorrow's deposition in the afternoon.

This guide walks through each product, offers customer examples from across the legal industry, and shares tips on how to roll out Claude inside your organization.



Chapter 1

# Product overview

# Product overview

Claude shows up to work for lawyers in a few forms: Claude chat, Claude Cowork, Claude for Microsoft 365, Claude Platform, and Claude Managed Agents.

## Claude Chat

The Claude web and desktop app, at [Claude.ai](https://claude.ai), is a chat interface for research and drafting. An associate might use it to summarize a deposition transcript or pressure-test an argument before pulling it into a brief. Use Chat when the work fits inside a single conversation: a question to the model, a research summary, an inline draft. Each conversation is its own session, so Chat is suited to one-off tasks rather than ongoing matters. It is often the first place a new user starts.

## Claude Cowork

**Claude Cowork** is a desktop application where Claude works across local files and connected apps to complete multi-step matters. It can read and write local documents, call connected services like iManage, NetDocuments, Box, and Microsoft 365, and coordinate work across files and apps. Use Cowork when the work spans multiple files, multiple apps, or multiple steps — reviewing every contract in a data room, comparing third-party paper against the firm's playbook, or drafting a PIA from a folder of prior assessments. Cowork can run for minutes or hours on a single task, with the lawyer reviewing the output once it is done.

### Claude Chat or Claude Cowork?

The simplest distinction: Chat is for asking questions and working with Claude in the moment. Cowork is for delegating a project to Claude and reviewing the result. Most lawyers use both — Chat for quick questions through the day, and Cowork for the matter-level work that would otherwise eat an afternoon.

## Claude for Microsoft 365

Legal teams can use Claude inside Microsoft 365 in two ways. Add-ins from the Microsoft Marketplace put **Claude inside Word, Outlook, Excel, and PowerPoint**, so a lawyer can redline a contract with tracked changes and turn the analysis into a memo without leaving the app. The **Microsoft 365 connector** lets Claude search and analyze content in Outlook, Teams, SharePoint, and OneDrive. Context carries across the suite, so a redline drafted in Word can be turned into a client update without rebuilding anything.

## Claude Platform

**The Claude Platform** is Anthropic's API for organizations building their own applications on Claude. Legal engineering teams and legal tech companies use it to embed Claude into contract lifecycle, e-discovery, matter management systems, and other internal software.

## Claude Managed Agents

**Claude Managed Agents** allows teams to take any agent it builds on the Claude Platform and have Anthropic run it as a hosted service, with the long-running sessions, scoped permissions, and audit trail handled for them. For example, a Contract Review agent might handle NDA triage across thousands of incoming agreements.

# Claude product matrix: when to use what

Surface	Best for	Primary users	Where it runs	Example task
Claude.ai	Conversational drafting, research, and analysis in a chat interface	All legal staff	Browser, desktop, mobile	"Summarize this deposition transcript and flag inconsistencies."
Claude Cowork	Cross-app matter work that touches files and multiple tools	All legal staff	Claude desktop app	"Review the data room contracts in Box, flag material issues, and produce a diligence summary."
Claude for Microsoft 365	In-place drafting, redlining, and comparison across the Microsoft 365 suite; context carries across apps	All legal staff	Word, Outlook, Excel, PowerPoint (add-ins); Teams, SharePoint, OneDrive (via M365 connector)	"Redline this MSA against our playbook and produce a deviation summary."
Claude Platform (API)	Building custom legal applications; embedding Claude into CLM, e-discovery, or matter management	Legal engineering, platform teams, legal tech vendors	Anthropic API, Amazon Bedrock, Google Vertex AI, Microsoft Foundry	"Integrate Claude into our CLM to triage incoming third-party paper"
Claude Managed Agents	Running custom legal agents as hosted cloud services with Anthropic handling the runtime	Platform and legal engineering teams	Claude Platform	"Deploy our NDA triage agent as a managed service with scoped permissions and audit tracing."

## Customizing Claude: connectors, skills, and plugins

Claude becomes specific to a legal organization through three building blocks. **Connectors** give it access to the firm's matter data. **Skills** teach it how to complete specific legal tasks in a repeatable way. **Plugins** bundle skills, subagents, and connectors into installable packages for a specific practice area.

### MCP Connectors

MCP Connectors give Claude access to a specific data source over the **Model Context Protocol (MCP)**, an open standard that lets Claude query the provider's system directly rather than working off an uploaded copy. This matters in legal work, where confidentiality and privilege must be preserved end to end.

### Skills

**Skills** are reusable, encoded workflows that teach Claude how to complete specific legal tasks in a repeatable way. They are valuable in legal work, where consistency, oversight and accuracy are not optional.

Skills are best used for work that follows a standard format. An NDA review skill captures the firm's playbook and fallback positions, while a citation skill enforces Bluebook or local format.

Anthropic has pre-built skills for **PDF**, **Word**, **Excel**, and **PowerPoint** creation. Firms can also **build their own skills**. Simple skills are written in Markdown with no code; more advanced ones can include executable scripts. Either way, skills are uploaded in Claude.ai settings, Claude Code, or the API.

The connectors most relevant to legal organizations include:

#### Contract lifecycle & drafting:



#### Document management:



#### Legal research & case law:



#### Deal rooms and transaction documents:



#### E-discovery and review:



#### Legal AI assistants, skills, and expert network:



#### Productivity and collaboration:



#### Public Service:



## Subagents

**Subagents** are narrowly-scoped helper agents that Claude can delegate to mid-task. Where a skill tells Claude how to do something, a **subagent** is an agent that runs in its own context window with its own system prompt and tool access, completes one bounded job (check a citation, extract a clause, audit defined terms) and reports back. They keep long matters from overloading a single context window and let firms put tighter tool restrictions on the parts of a workflow that touch sensitive systems.

Plugins can package subagents alongside skills and connectors so a practice area ships with the right helpers built in.

## Plugins

Plugins bundle skills, subagents, and connectors into a single installable package for a practice area.

**Anthropic-built plugins are open source**, so firms can install them as shipped or fork them to swap in their own playbooks and add approval workflows. Partner plugins bring specialized data and provider-built skills into Claude.

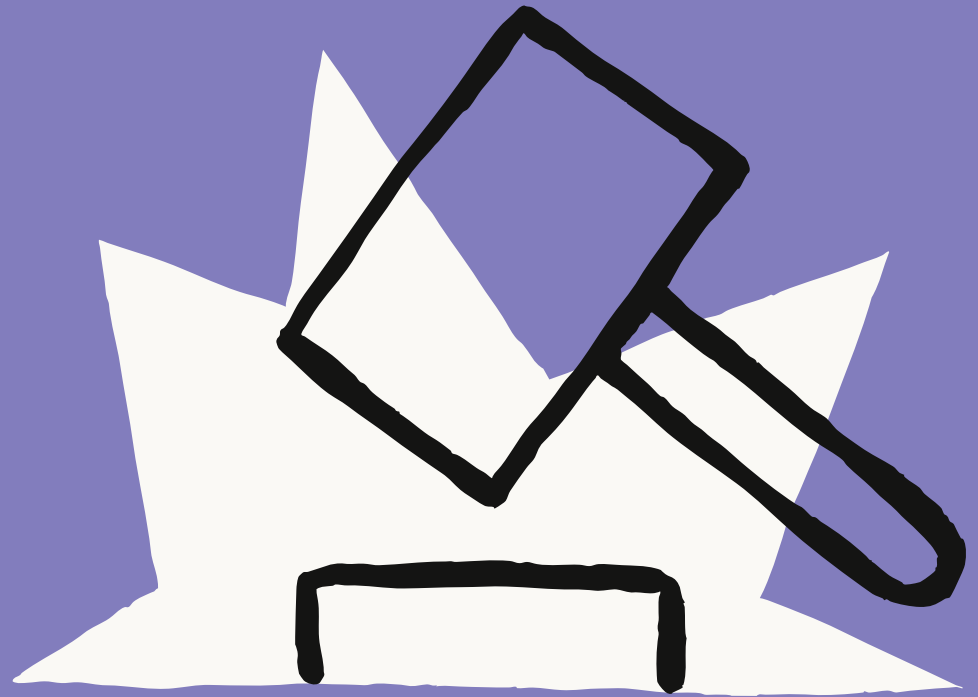
Lawyers have different areas of expertise and focus. These plugins expand beyond **our initial legal plugin** launched in early 2026, aligned to more specific practice areas. Here is a list of plugins designed for legal professionals:

- **Commercial Legal.** Reviews vendor agreements, NDAs, and SaaS subscriptions against the playbook you taught it, with separate positions for sales-side and purchasing-side work. Tracks renewals, routes escalations, and translates findings for business stakeholders.
- **Corporate Legal.** M&A diligence at scale: extracts issues from a data room, builds disclosure schedules, drafts board consents, tracks the closing checklist, and runs tabular review across hundreds of agreements. Modular setup for deals, board work, public company governance, and entity compliance.
- **Employment Legal.** Jurisdiction-aware. Reviews hires and terminations, classifies workers, tracks leave deadlines, runs investigations, and drafts policies with state supplements.
- **Privacy Legal.** Reviews DPAs against your playbook, triages PIAs and DPIAs,

drafts DSAR responses with the right statutory timeline, and watches for drift between what your policy promises and what your practice does.

- **Product Legal.** The connective tissue between a Product Review Doc and a launch. Reviews launches against your framework, checks marketing claims for substantiation, triages "can we do this?" questions, and learns what actually blocks a launch at your company.
- **Regulatory Legal.** Watches regulatory feeds, filters by your materiality threshold, diffs new rules against your policy library, tracks gaps and comment deadlines, and drafts proposed policy updates for review.
- **AI Governance Legal.** Triages AI use cases against your governance tiers, runs impact assessments, reviews vendor AI terms, and checks whether your AI policy has kept pace with your practice. Ships with a policy-starter skill that drafts a firm AI policy from published model policies.
- **IP Legal.** Trademark clearance, FTO triage, cease-and-desist drafting and response, DMCA takedowns, OSS compliance, IP clause review, invention intake screening, and portfolio tracking. Loud guardrails on anything that needs a specialist.
- **Litigation Legal.** Matter intake, portfolio tracking, legal holds, demand letters, subpoena triage, chronologies, depo prep, privilege logs, claim charts, and brief drafting. Adapts to in-house, firm associate, or solo practice.
- **Law Student.** Socratic drilling that won't give you the answer, because the point is learning. Case briefing, outlining, IRAC grading, bar prep with jurisdiction distinctions.
- **Legal Clinic.** Client intake, deadline tracking, case memos, and supervisor review queues. Supervisors set a pedagogy dial per practice area that controls how much the plugin does versus how much the student does. Built within ABA Formal Op. 512.
- **Legal Builder Hub.** Finds, reviews, installs, and updates community-built legal skills from registries like Lawvable, with a security review, license gate, and freshness check on every install. The trust layer for the open legal skills ecosystem.

Each role can run as a plugin in Cowork and the Microsoft 365 add-ins for desktop use with a human in the loop. Lawyers stay in the workflow, reviewing and approving the agent's outputs before anything moves downstream.



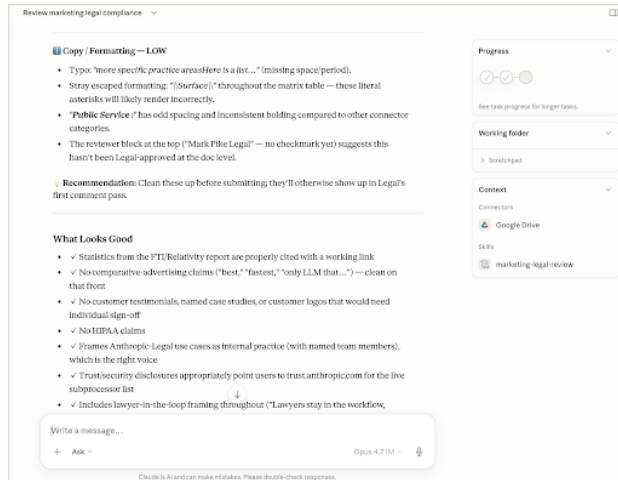
Chapter 2

# How Anthropic's Legal team uses Claude

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Anthropic's own legal team has built four Claude-powered workflows into daily practice. Each one targets work that follows a standard shape and gets reviewed by a lawyer before anything moves downstream.

## Marketing review



The Marketing Material Self-Review Tool lets go-to-market employees check their own content before sending it to Legal for final review. Marketers paste their draft into **a Claude Project**, and Claude analyzes it using a skill that captures the legal team's historical guidance and review framework. The tool flags issues like publicity rights concerns, overstated claims, and statistical accuracy problems, and labels each as low, medium, or high risk. It also suggests fixes before the marketer submits a formal review ticket.

When content does get submitted for formal review, it is triaged to the right lawyer with the pre-flagged issues attached. Turnaround time dropped from two

to three days down to 24 hours after the tool went live. Lawyers still read every blog post; the self-review layer just clears the obvious issues so review time can go to the calls that require judgment.

## Outside business activity review

The Outside Business Activity Request Form expedites conflict-of-interest review for Anthropic employees who want to consult or join a nonprofit board. Employment lawyers were previously spending significant time on routine COI form reviews; this workflow takes the routine cases off their plate.

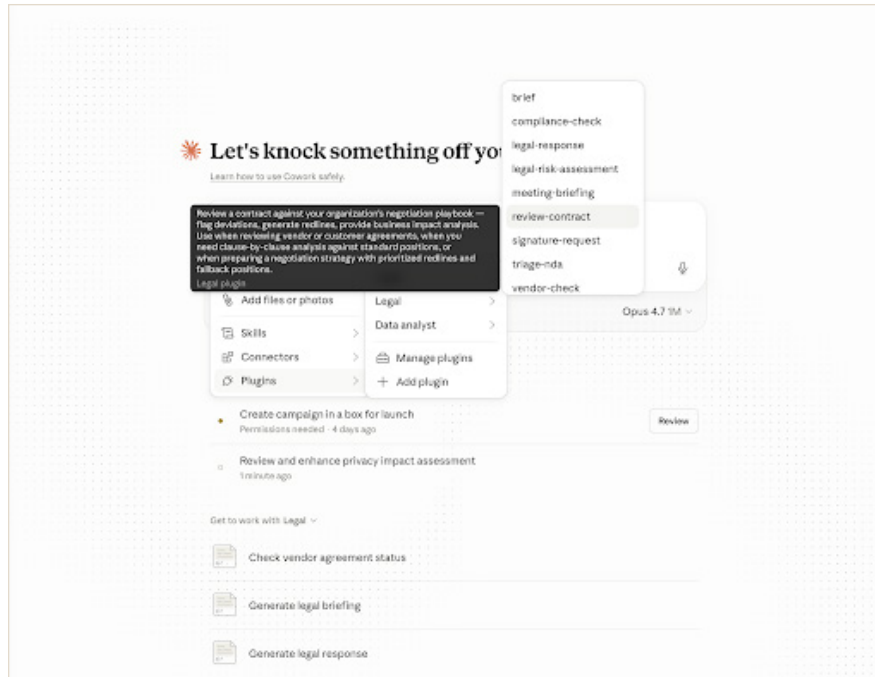
Employees fill out a form with their department, manager, and a description of the proposed activity. Claude analyzes the submission against the COI policy framework and sends a recommendation to lawyers via Slack for approval. Where reviewers used to follow up with employees over multiple rounds to surface details, Claude reads the form, asks for more information if needed, and proposes an outcome. The recommendation lands in the legal team's queue with the analysis already completed.

## Privacy impact assessments

Writing PIAs from scratch was tedious, even when assessments followed similar patterns. Anthropic's legal team now uses MCP servers to connect Claude to a Google Drive folder of prior PIAs, paired with a Skill that captures the firm's format and the issues to look for in each new assessment.

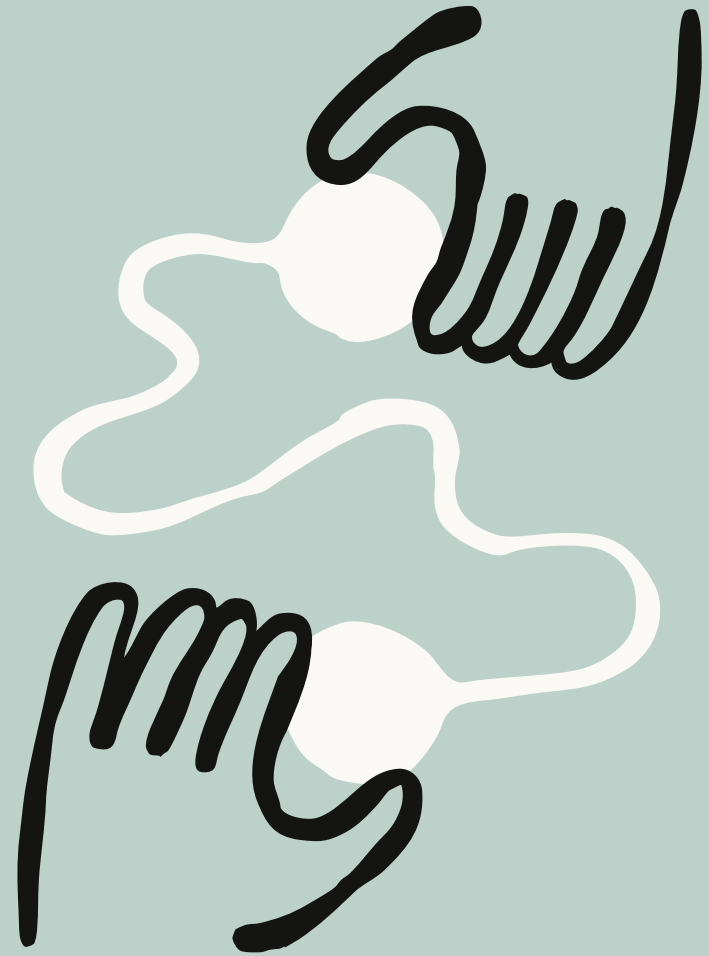
A lawyer can ask Claude to read the prior assessments, apply the standard concerns from the Skill, and draft a new PIA from that context. The lawyer then reviews and finalizes the document. End-to-end, this new workflow reduces time spent on each PIA from roughly two hours to thirty minutes.

## Contract redlining



Comparing contract versions and recommending fallback language is time-consuming work. Claude now compares document versions in Google Docs and Microsoft 365, highlights the changes, and recommends language from the firm's commercial playbook. The team configured Claude to work inside Google Docs and comment with suggested edits in real time, so a reviewer can ask directly in the document whether a piece of language meets the firm's standard, and get an immediate answer.

The team also writes skills to streamline review of specific document types like NDAs and third-party vendor agreements. This workflow has reduced redlining from hours to minutes per agreement.



Chapter 3

# Claude for legal adoption roadmap

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Most successful Claude rollouts in legal organizations follow this sequence: the team lays the foundation for a pilot program, runs a pilot with a focused practice group, and scales out to the rest of the legal department or firm. [Anthropic's recommended Claude Cowork adoption playbook](#) maps out these three phases.

## Phase 1: Lay the foundation

Before launching a Claude pilot program, the responsible team needs to put access and connectors in place. For most legal organizations, this means standing up Claude on the first-party API, Amazon Bedrock, Google Vertex AI, or Microsoft Foundry — whichever keeps Claude inside the firm's existing cloud perimeter. Enterprise controls for SSO, SCIM, audit logs, and custom data retention need to be configured at this stage. Scope governance in parallel: legal hold, privilege protection, and data-privacy review should run alongside access setup.

The connector set usually starts with the Microsoft 365 connector for Outlook, Teams, SharePoint, and OneDrive access, plus one or two systems the pilot team relies on most. Common starting points are iManage or NetDocuments for matter files, Thomson Reuters for research, and Ironclad or DocuSign for contracts. Firms can install these a la carte as MCP connectors, or access them inside one of Anthropic's legal plugins.

Next, use Claude to analyze your legal ticket requests to solve the cold start problem. Point Claude at your inbox, your ticket queues, and other work to figure out what Claude might be able to assist your department with.

Pick work that is document-heavy and standard-shape. For an in-house team, that might be NDA triage or PIA drafting. For a law firm, that could be diligence document review or first-draft research memos. Avoid piloting Claude on novel or high-stakes matters without strong human review.

**Pro-tip:** Have your champions leverage pre-configured plugins so they get value in the first session. If a lawyer opens Claude Cowork and does not know what to do or what the desired outcome is, they're unlikely to open it again. If they open it, type /nda-triage, and get a clean redline in ninety seconds, they're more likely to return.

## Phase 2: Pilot

At this stage, champions are running real workflows with real matter data and measuring the pilot's success against pre-defined criteria. Time saved is a common metric, specifically tracking the team's cycle time on the pilot job before and after Claude. Another is how often a lawyer keeps Claude's draft without a meaningful rewrite. Together, these two criteria help you assess whether the pilot is working.

Another strong signal that a pilot is working is when champions start to build their own skills. A privacy counsel takes the DPIA workflow she has been running by hand and turns it into a skill with the firm's template and approval flow embedded. That is now a skill the rest of the legal team can begin using immediately.

In most pilots, Claude's product surfaces come online in a specific order. Skills and plugins come first because they are low-risk and high-reuse. The Microsoft 365 add-ins come next, extending what a pilot team has built into Word, Excel, PowerPoint, and Outlook. Claude Cowork tends to come in at the back end of the pilot, when the team is ready to move from single-document work to matter-level work that spans files and apps.

**Pro-tip:** Schedule weekly check-ins with your pilot teams. They surface edge cases fast, like citation hallucination or jurisdiction-specific variations, and you want to hear about them while they are fresh.

### Phase 3: Scale

At this stage, plugins and skills that worked during the pilot are being rolled out to more teams across the legal department or firm through admin-managed **plugin marketplaces**. New hires benefit as well, as they start on day one with already-encoded workflows. Onboarding is faster and the whole team can work more efficiently.

Over time, skills begin compounding across teams. A skill built for one practice area can be adapted for another when their work shares structure. A commercial contract review workflow and an employment contract review workflow share most of their structure. Adding a second practice group usually goes faster than the first, and the firm's skill library grows.

**Pro-tip:** Align as a team on an intentional governance framework to enable scaling with confidence and velocity. Have an understanding of how skills are quality-controlled, tested before being rolled out, and maintained after deployment to be kept up-to-date and functional.

The table below summarizes the actions you would take at each stage and what you can expect to see as you go through rollout.

Phase	Actions	Phase
Foundation	Security and privilege review. Identify 2-3 champion teams. Install pre-built plugins. Connect 1-2 core systems (iManage/NetDocuments, Thomson Reuters/Ironclad).	Champions reporting back use cases. First "this saved me an hour" moments.
Pilot	Champions run real workflows. Weekly check-ins. Measure against defined criteria. Demo wins to adjacent practice groups.	Measurable time savings. Champions building and sharing custom skills. Pull from other teams.
Scale	Admin-provisioned plugin marketplace. Encode pilot learnings as firm-wide skills. Onboard the next wave of users.	Skills shared across practice areas. New hires ramping on encoded workflows. Declining support tickets for "how do I do this."

## Practice and segment use cases

The work legal teams tend to bring to Claude first is document-heavy and follows a standard shape, with human review before it ships. Still, Claude takes on the drafting so reviewers can focus on the work that requires judgment, like client counseling and final contract review. The sections below show what that looks like across in-house teams and different legal practices. They are illustrative rather than exhaustive, and legal use cases continue to expand as model intelligence and tool use evolves.

### In-house legal departments

In-house teams spend most of their time on documents that need to ship fast and are reviewed before going to the business or to outside counsel. Claude speeds up the drafting, giving counsel more time for the work that requires judgment, with:

- Contract review and redlining against playbook
- NDA triage and counterparty paper review
- Privacy impact assessments and data subject requests
- Outside counsel billing review and matter management
- Marketing copy and product feature review
- Board materials preparation and corporate governance tasks
- Regulatory monitoring and compliance updates

### Transactional review

Transactional practices spend the majority of their time on documents that follow standard formats and partner-led review. Claude can compress diligence cycles and improve coverage with:

- M&A diligence document review and summary memos
- Pitch book preparation and competitive analysis
- Comparable transaction analysis
- CIM and offering document drafting
- Closing checklist tracking

### Litigation and disputes

Litigation practices process huge volumes of unstructured material on tight timelines. Claude can shorten review cycles and improve consistency with:

- Discovery document review and privilege coding
- Deposition preparation and witness summaries
- Brief drafting and citation checking
- Pleadings analysis and motion drafting
- Expert report review

### Compliance and regulatory

Compliance and regulatory teams sit across structured filings and unstructured guidance, much of it in regulated jurisdictions. Claude can improve accuracy and timeliness across the program with:

- Regulatory filing preparation and review
- Audit response and gap analysis
- Policy drafting and jurisdictional comparison
- AI governance and vendor review
- KYC/AML screening and escalation

## Frequently asked questions for CIOs and IT leaders

To help you get up and running, here are some common questions related to Claude and Claude Cowork that legal teams might need to address for their CIOs.

**Note:** The questions below cover Claude.ai (web and desktop chat) and Claude Cowork (desktop application). Custom applications built on the Claude Platform have additional configuration options handled directly with the account team.

**Where are Claude.ai and Claude Cowork hosted?** Both are SaaS products hosted by Anthropic. Firms that need workloads to run inside their own cloud perimeter typically build custom applications on the Claude Platform via Amazon Bedrock, Google Vertex AI, or Microsoft Foundry, rather than using Claude.ai or Cowork directly.

**What does Claude Cowork install on user endpoints?** Cowork is a signed desktop application available for macOS and Windows. It runs as a standard user-space application, requires no kernel-level components, and updates through standard auto-update channels. IT can deploy and manage it through MDM and standard endpoint management tools.

**How does Claude Cowork access local files?** Cowork only reads files in folders the user explicitly grants access to from inside the application. Access is scoped per user, the same way modern desktop applications handle file permissions on macOS and Windows. There is no background indexing of the user's drive.

**Is our data used to train Claude's models?** No. Anthropic does not train on inputs or outputs from Enterprise Plan accounts using Claude.ai or Cowork.

**What retention controls are available?** Enterprise plans support custom data retention, including zero-retention configurations, for both Claude.ai conversations and Cowork sessions.

**Do you support Zero Data Retention (ZDR)?** ZDR is available on the Claude Platform (API) and Claude Code for approved customers. Claude.ai and Claude Cowork are stateful products—conversation history, Projects, and Cowork

sessions require server-side storage to function—so ZDR does not apply there. Enterprise plans for those surfaces support custom retention windows configurable down to 30 days, and Anthropic does not train on customer data on any surface.

**What identity and access controls do you support?** Enterprise plans include SSO via SAML, SCIM for user provisioning, role-based access controls, and admin-managed plugin marketplaces for both surfaces.

**What certifications do you hold?** Anthropic is ISO/IEC 42001:2023 certified for responsible AI management and SOC 2 Type II audited. Additional documentation is available at [trust.anthropic.com](https://trust.anthropic.com).

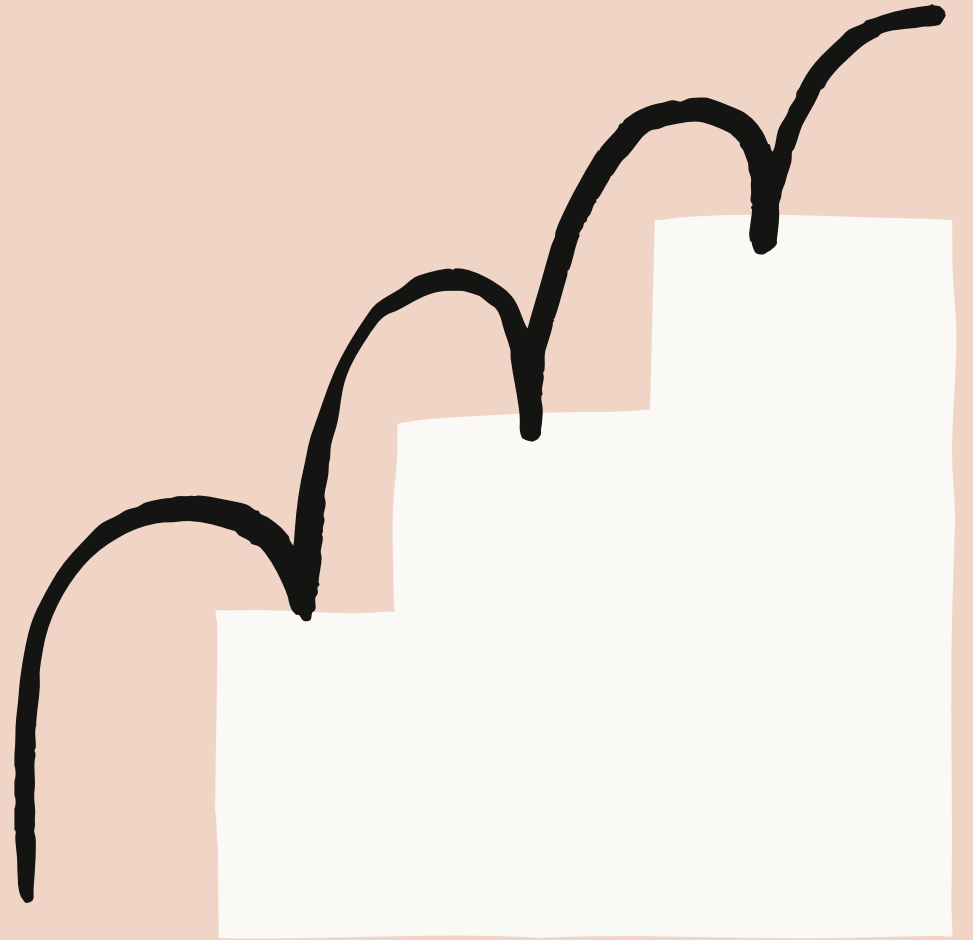
**How does Claude Cowork integrate with our document management system?** Cowork connects to iManage, NetDocuments, Box, and more document management systems through MCP connectors. The connectors authenticate as the end user and respect entitlements at the matter and folder level, so Cowork only sees what the user already has access to.

**How is attorney-client privilege protected?** Privilege protection rests on access control and data handling. Connectors in Cowork honor the access controls already configured in your DMS or matter management system. Anthropic does not train on customer data, and Enterprise plans support custom retention. Firms working with privileged content typically pair this with firm-defined policies on which matters and document types can be processed.

**How do we set firm-wide policies and guardrails?** Plugins, skills, and connectors can be provisioned through admin-managed marketplaces in both Claude.ai and Claude Cowork rather than installed per user. This gives IT a single place to control which workflows are available and which approval steps are required before output moves downstream.

**Who are the subprocessors?** A current list of Anthropic subprocessors is published at [trust.anthropic.com](https://trust.anthropic.com) and updated as the list changes.

Learn more in our [Claude Cowork Enterprise Admin Guide](#).



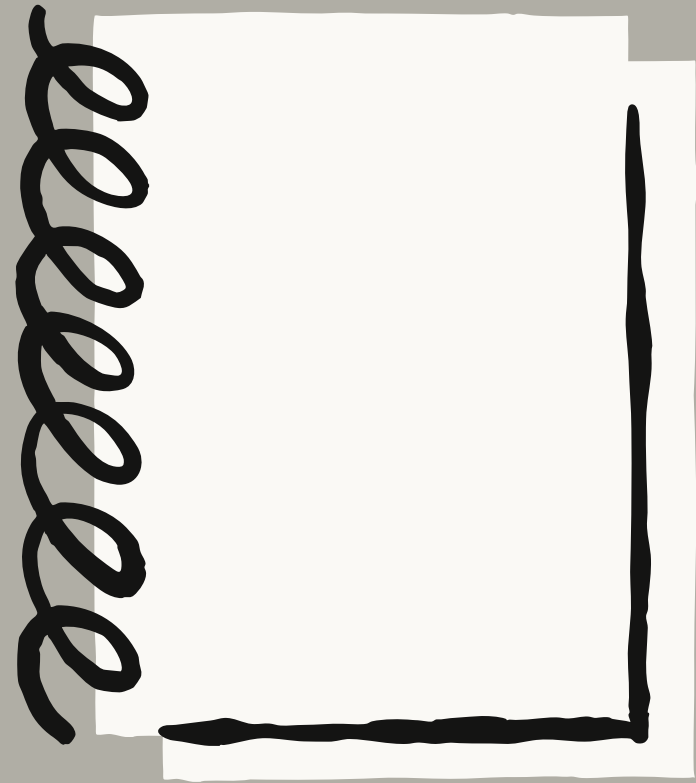
Chapter 4

# Getting started

# Getting started

The Claude ecosystem for legal spans connectors, plugins, partner MCP apps, and pre-built agent roles for in-house, law firm, and compliance work. All of it runs on the **enterprise controls regulated organizations require**, including SSO, SCIM, **audit logs**, **custom data retention**, and **ISO/IEC 42001:2023 certification**.

To explore how Claude fits your firm or legal department, visit **our legal solutions page** or contact your Anthropic account team at **sales@anthropic.com**.



Resources

# Resources

- **Legal tutorials on Claude.com:** step-by-step guides covering contract review, NDA triage, legal research workflows, installing the legal plugins, and more.
- **Claude skills catalog:** Anthropic's public catalog of community-contributed skills, useful for finding pre-built legal skills before authoring your own.
- **Open-source legal plugins repository:** The GitHub repo where Anthropic publishes the legal plugins covered in this guide.
- **Blog article: How Anthropic uses Claude for legal work:** A look at how our own legal team uses Claude in daily practice across PIAs, marketing review, and contract redlining.



claude.ai