Three Ways to Use AI to Support Succession Planning

November 18, 2026 | Betsy R. Landry, Diane M. Power | Articles



When someone has been with a firm for decades, it can be difficult to imagine the workday without them. They know the people, the processes, and the history behind decisions that others may take for granted. That familiarity is one of the benefits of longevity, but it also creates a responsibility to prepare thoughtfully for the day those colleagues retire.

At Mirick, we are navigating the retirements of eight longtime employees over an 18-month period, some after more than 40 years with the firm. Many are business services professionals and paralegals whose knowledge and relationships help keep the practice running every day. Preparing for those transitions means understanding everything they have come to handle over the years, while considering what their positions should look like going forward.

Succession has been part of our strategic planning for years, initially with a focus on attorney leadership. As we have extended that planning to our business services teams, we have taken the opportunity to look more closely at how the work fits together. Where have responsibilities grown beyond the original position? Is there overlap between departments? Could a different structure better support the people doing the work?

AI is part of that conversation, too. For law firms and other professional services organizations, some of its most practical uses are in the everyday work that keeps things running, such as organizing information and helping with administrative tasks. That support can give people more time for work that calls for judgment, critical thinking, and empathy—the qualities that make an experienced colleague so valuable.

We are still in the pilot stage and have only scratched the surface of what these tools can do. Even so, our experience is helping us see how AI can

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support succession planning in three connected ways: preserving knowledge, rethinking responsibilities, and preparing for the skills we will need in the future.

1. Document the Knowledge Behind the Position

One of the challenges of preparing for a longtime employee's retirement is that much of what they know has never needed to be written down. They know when a deadline requires extra preparation, which colleague can resolve a problem, and when the usual process needs to be handled differently. After years of doing the work, it may not occur to them that a successor will need those details explained.

Asking that person to document everything can feel like a significant assignment on top of their daily responsibilities. This is where AI can help. At Mirick, we are using it to assist with drafting standard operating procedures and identifying gaps in documentation, giving employees a starting point they can review and build upon.

For firms beginning this process, it can help to start with a familiar responsibility and ask the employee to talk through how they handle it. What happens first? What information do they need? Where do exceptions arise? AI can help organize those notes into a draft procedure or checklist, using information appropriate for the firm's approved tools. The employee can then fill in what is missing and make sure the explanation reflects how the work actually gets done.

The value comes from making that knowledge easier to share. Documentation gives a successor something to refer to, while conversations and time working alongside an experienced colleague provide the context that a written procedure cannot fully capture. Both deserve a place in the transition plan.

2. Rethink the Work Before Rewriting the Job Posting

Once responsibilities are documented, it becomes easier to consider whether they still belong together. A position held by the same person for many years may reflect that individual's specific strengths and willingness to take on additional work as much as it reflects the firm's current needs. A retirement offers a chance to step back and consider how those responsibilities should be organized for the future.

At Mirick, that has meant reviewing positions across our business services teams and looking at where work overlaps or might fit better in another

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department. AI is supporting that process through our work on position descriptions and recruitment advertising. As our documentation becomes more complete, we can also explore how it might help compare responsibilities, identify possible duplication, and raise questions about how work is assigned.

Those questions still require thoughtful discussion among the people who understand the firm. A task that appears duplicative may serve a purpose, while a responsibility that has always belonged to one position may now make more sense elsewhere. AI can help us examine the possibilities, but our leaders and other professionals bring the experience needed to decide what will work.

Before advertising an opening, firms should give themselves time for those conversations. What should the person in this role spend more time doing? What could be simplified? Are there responsibilities that current employees would welcome as an opportunity to grow? Working through those questions can lead to a more useful job description and a stronger team, with opportunities extending beyond the person hired to fill the opening.

3. Hire for the Role You Expect to Need Next

Thinking differently about the work also means thinking differently about the experience and skills a new employee might bring. As we explore broader uses of AI, we are looking ahead to how our positions may function a year or two from now and what will help someone succeed as those responsibilities evolve.

Experience in the role remains important, but so do curiosity, adaptability, and a willingness to learn. Someone joining from another organization may bring a useful approach to a familiar problem or experience with a tool that could help colleagues work more effectively. Comfort with AI can be part of that contribution, particularly when it is accompanied by the judgment to recognize when an answer needs to be questioned or checked.

Hiring conversations can help reveal those qualities. Asking candidates how they learned a new system, improved a process, or helped colleagues through a change can tell a firm a great deal about how they might contribute as the work develops. These capabilities can be found at any career stage, and they are equally worth encouraging among existing employees.

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At Mirick, internal advancement has long been part of our culture. Our succession conversations therefore include how current employees would like their responsibilities to evolve, regardless of whether or not they are looking to grow into a management position. The goal is for AI to help elevate those roles. As it assists with some of the administrative work, there may be more room for employees to take on analytical responsibilities, contribute to planning, or devote attention to projects that are difficult to fit into an already full day.

A healthy culture brings together the experience of longtime colleagues, the perspectives of new employees, and a willingness to make thoughtful use of technology. People who understand the firm's history can help explain what needs to be preserved, while colleagues with different experiences can help identify what might work better. Across both groups, people who are comfortable learning and sharing new approaches can help the firm move forward.

AI can support that work, but the direction comes from the people involved. By connecting succession planning with decisions about roles, professional growth, and technology, firms can give the next person more than a position to fill. They can give them the knowledge, support, and opportunity to build on what came before.

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