

PytAIInIQ

Report summarizing the implementation project of artificial intelligence-based solutions at PragmatIQ Law Firm

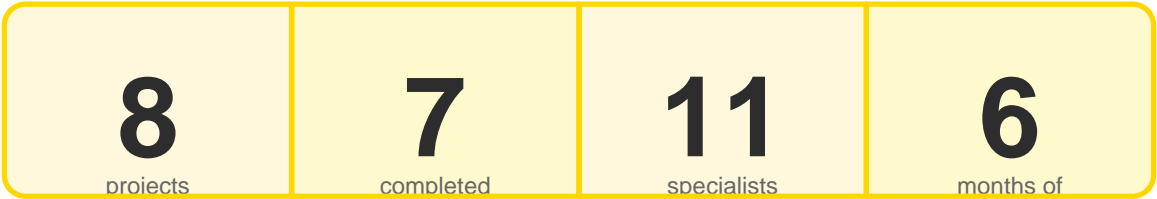
Implementation period: May – October 2025

AI Partner: ^Kunke Consulting

English translation of a Polish document by AI Claude Opus 4.5

Executive Summary

This report presents a summary of the six-month project implementing artificial intelligence-based solutions at PragmatIQ Law Firm. The project was carried out in cooperation with ^Kunke Consulting, under the leadership of Blazej Kunke, a specialist in designing practical AI solutions, training, and consulting in the field of artificial intelligence.



Key Results

Of the eight initiated projects, **seven were completed successfully** or with partial success. The implemented solutions include automation of accounting processes, improvement of customer service, optimization of work with legal documents, and support for marketing processes.

Areas of Implementation:

Finance & Accounting	Report automation, payment verification, Excel optimization
Administration	M365 Buddy assistant, knowledge base creation
Legal Practice	Document checklists, meeting transcription with Fireflies AI
Tax Department	AI toolkit adoption, FIFO calculations, document generation
Marketing	SEO analysis, Facebook Ads content, graphic design tools

Project Organizational Structure

PragmatIQ Project Team

Eleven specialists representing various departments of the law firm participated in the project:

Department	Team Members
Partners	Rafał Szymkowiak
Finance	Agata Gozdziwicz, Weronika Szklarska
Accounting	Aleksandra Judek
Administration	Magdalena Krolczyk
Tax	Michał Markiewicz, Paweł Malewski
Corporate Law	Michał Walczak, Aleksandra Szyszkowska, Marta Blotny-Błaszak
Marketing	Monika Manczuk

External Partner

^Kunke Consulting, founder – Blazej Kunke

Scope of responsibility: project management, designing technological solutions, conducting training, strategic consulting in the use of artificial intelligence.

Other Participants

Additionally, the project involved: Jacek Milaszewski (work on the AI document generator project) and Bartosz Mikulski (technological support).

Project Implementation Timeline

Phase 1: Initiation (May 2025)

May 9, 2025 – inaugural meeting including:

- Introduction of project teams
- Presentation of available tools using artificial intelligence
- Division of participants into working groups
- Brainstorming session on potential applications

Phase 2: Concept Development (May – June 2025)

- Development of detailed concepts for individual projects
- Conducting initial tests of selected solutions
- Identification of technical and organizational challenges

Phase 3: Implementation and Testing (July – August 2025)

- Intensive testing of selected tools
- Modification of initial assumptions based on test results
- Search for alternative solutions to encountered problems

Phase 4: Finalization (September – October 2025)

- Completion of implementation work
- Evaluation of effectiveness of individual solutions
- October 17, 2025 – summary meeting with presentation of results

Detailed Analysis of Completed Projects

1. Report Automation - Finance Department

Status: Success

Team: Agata Gozdiewicz, Weronika Szklarska

Implementations in the finance department include:

Payment verification tool that verifies card bank payments against attachments in the document management system (DMS). Based on this, the identification of missing documents in the accounting purchase register (Optima) was improved, enabling faster reaction to obtain these documents.

Tool for comparing and verifying bank fees (treasury and court fees), which enabled automation of the process of comparing and verifying data from the fee statement and the Optima accounting system. Additionally, the tool reduced the risk of errors resulting from manual verification.

The Finance Team also introduced a tool called "Excel Master" into their daily work.



Since starting work on AI projects, we seek solutions to current problems in reports or statements with the support of AI. Developing competencies in advanced Excel work will allow for the implementation of more ambitious and analytical projects.



— Weronika Szklarska

Challenges and Limitations:

Weronika Szklarska candidly admits: "At the beginning of work on introducing AI solutions to the Finance Department, we considered analysis and verification of attachments to issued invoices and visualization of Management Accounting results data. The limitation for these projects was the protection and security of personal data and confidential company information."

Development Plans:



Introduction of a tool for taking notes from internal meetings



Extension of 'Excel Master' to other department colleagues



Creation of Finance Department knowledge base (inspired by M365 Buddy)



Work on using AI for implementing the National e-Invoice System

2. AccountIQ - Accounting Department

Status: Success

Team: Aleksandra Judek

Project Genesis and Goals:

Aleksandra Judek, leading the project, focused from the beginning on finding practical applications of artificial intelligence that could realistically improve the daily work of the accounting department.



Within the accounting team, we tested various tools based on artificial intelligence. The most effective turned out to be the use of AI to support calculations – both in terms of speeding them up and additional verification of results.



— Aleksandra Judek

Implementation Process and Solution Evolution:

The road to success was not straightforward. The accounting team went through several stages of testing different tools before finding the optimal solution. Aleksandra Judek admits: 'Previously tested solutions, such as Notebook LM or older versions of the ChatGPT model like O3, did not bring the expected results.' The breakthrough moment was the introduction of newer technology. **'Practical implementation in daily work only occurred with the use of the ChatGPT-5 model'** - emphasizes Aleksandra, pointing to the importance of choosing the appropriate version of the tool.

01

Acceleration

Automation of routine calculations that previously took significant work time

02

Verification

Using AI as a 'second pair of eyes' to check calculation correctness

03

Optimization

Support in preparing complex spreadsheets and improving accounting software

Achievements and Benefits:

- **Time Reduction** – Reduction of time needed for standard accounting calculations
- **Increased Accuracy** – Increased accuracy through automatic results verification
- **Work Quality Improvement** – Colleagues can focus on more complex tasks

Challenges and Lessons for the Future:

1. **Need to test multiple solutions** – not every AI tool is suitable for specific accounting needs
2. **Importance of technology version** – newer language models offer significantly better capabilities
3. **Need for patience** – finding the optimal solution requires time and systematic testing

3. M365 Assistant - Administration Department

Status: Success

Team: Magdalena Krolczyk

Achievements according to Magdalena Krolczyk:



I managed to configure the M365 Buddy tool, which supports all colleagues on a daily basis. Its greatest advantage is that it significantly reduces the time I previously spent helping with the simplest issues regarding Microsoft 365.



— Magdalena Krolczyk

Support Continuity

Ensuring continuity of support during breaks in service delivery

Knowledge Updates

Ability to continuously supplement knowledge and add new instructions

Fewer Inquiries

Clear decrease in the number of help requests

Magdalena commented: "When someone from the team contacts me, **I first refer them to Buddy, and increasingly it turns out that this is sufficient.** I have the impression that the tool has already taken root in the team's awareness and actually brings measurable benefits."

Development Plans:

The team is working on the next project - "**Onboarding Buddy**", which will contain:

- Expense settlement rules
- Bonus system
- Instructions for publishing articles on the website
- Guidelines for working in the jurXpert system

Magdalena also notices the multiplier effect: "I also know that the girls from the finance department were inspired by this solution and plan to create their own Buddy, which would gather knowledge from finance and facilitate cooperation between departments."

4. Tax Toolkit - Tax Department

Status: Success (with adventures)

Team: Michal Markiewicz

Examining Actual AI Usage:



The goal of the project was to examine how PragmatIQ employees use tools based on artificial intelligence and what solutions can support the daily work of the law firm.



— Michal Markiewicz

Initial diagnosis showed: "It turned out that the vast majority of people use only ChatGPT (mainly for creating or editing content, formulating messages, and quickly summarizing documents). The way of use was very similar throughout the tax department, which indicated the need to broaden knowledge about the capabilities of other tools."

Strategy Change and Achievements:

After modifying the assumptions, the team tested several new applications. Michal indicated that after joint tests and exchange of experiences, two tools gained the greatest recognition from the team:

- **Notebook LM** – for the ability to create interactive 'knowledge notebooks' and automatically generate summaries and analyses
- **Perplexity** – for effective searching and processing information from current sources, useful e.g. in comparative analyses for transfer pricing



These tests allowed identifying new areas where AI can bring facilitation and acceleration of work, and also allowed spreading knowledge about AI tools in the tax department.



5. Fireflies AI - Corporate Law Department

Status: Success

Team: Michal Walczak, Aleksandra Szyszkowska, Marta Blotny-Blaszak

What are ErrorFreeIQ and FirefliesIQ?

ErrorFreeIQ is an AI tool based on OpenAI models. At PragmatIQ, it serves as a systemic quality guardian when working with documents. This AI tool creates internal checklists tailored to the type of document – contracts, court filings, or opinions. When a lawyer uploads a document draft, the system recognizes its type, matches the appropriate checklist, and guides the user step by step.

FirefliesIQ is a meeting assistant using Fireflies AI software that complements the process from the communication side. The tool records meetings, creates accurate transcriptions in Polish (and other languages), generates short summaries and lists of arrangements and tasks. Before each recording of an external meeting, consent of all participants is collected.

Practical Application:



I am very happy with the implementation of ErrorFreeIQ, because it turned out that checklists are a very useful tool. As for its alternative application (i.e., analysis of ready documents), I feel there is very large potential here, but our initial tests showed it does not work as we would like yet.



— Marta Blotny-Blaszak



Fireflies tests within the team showed that this tool can be useful in practically every team, especially in substantive teams but also in HR meetings or other departments.



— Michal Walczak

Development Plans:

- Implementation of Fireflies in all meeting areas
- Encouraging team members to use the tool
- Observation of effects and collection of surveys on process improvement

6. StrategIQ - Marketing Department

Status: Success

Team: Monika Manczuk

Website Positioning Analysis Model

Monika uses AI to analyze the positioning of the law firm's websites, which is a task requiring a lot of time and attention. "The model based mainly on NotebookLM works very well – it generates accurate and logical conclusions. The tool analyzes dozens of reports at once. Some conclusions are obvious but useful because they help organize data and indicate the most important areas for improvement. In turn, some recommendations are really surprising."

Particularly valuable features:

- Accurate conclusions based on data
- Simple and clear language of reports
- "Low hanging fruits" category – actions easy to implement

Facebook Ads Helper

This tool uses custom GPT for creating Facebook ads content.



I am also very satisfied with the results. The texts are accurate, tailored, and in most cases ready for publication without major corrections. Previously, generating such content in a general GPT chat required many corrections – now the process is much faster and more effective. The main goal, maximum optimization of work time, has been achieved.



— Monika Manczuk

Graphic Tools

"I also learned to use graphics generators, such as Sora and Gemini AI. The result was posters created with the help of AI, prepared as a gift for the Poster Vernissage."

Further Development Plans:

- Using AI to analyze positioning reports for better agency cooperation
- Creating a tool analyzing visibility in AI results (AIO, GEO, etc.)
- Development of graphic tools for YouTube thumbnails

7. Tax Department

Status: Partial success, in progress

Team: Pawel Malewski, cooperation with external programmer

The tax department in the AI project is represented by two experts – the work on AI implementation in the department by Michal Markiewicz has already been described in an earlier section of the report. The second person is Pawel Malewski, Tax Advisor and Team Leader.

Original Idea – AI in Document Creation

More efficient creation of schematic documents was Pawel's first idea. Unfortunately, already at the initial stage of these tests, it turned out that a big problem was the exact reproduction of documents. AI models did create documents, but they failed to precisely follow the guidelines, which resulted in too many errors.

Based on this experience, we decided to engage an external programming expert and continue work on these problems using traditional computer techniques that do not rely on language models.

FIFO Calculation System	Document Generator
This project is at the prototype stage	Expansion of the original idea to meet the needs of other teams, here Jacek Milaszewski assists us

Challenges:

The original assumptions regarding the use of artificial intelligence turned out to be too optimistic. For key applications, classical programming methods guaranteeing greater reliability were chosen.

8. Social Media Publication Support - Partners Department

Status: Project not completed – we will continue searching for new forms of AI use in this area

Team: Rafal Szymkowiak

Original Idea and Implementation

The project assumed automation of content creation for the LinkedIn profile. It was indeed possible to generate content using AI, however, despite attempts to give it a more individual character, the content still bore clear generative features. Additionally, during internal tests, we observed a growing number of similar materials published on social media, which in the case of implementing the project on a larger scale could pose significant reputational risks. There was a real threat that we would fall into a wide group of people publishing mass artificially generated content, which could bring the opposite effect to that intended.

For this reason, a decision was made to limit automation only to supporting the partner in the area of research, graphics, and editing. In this part of the project, however, numerous – typical for senior management – organizational, technical, and strategic obstacles also appeared, which ultimately led to the project's failure in this area.

Rafal - Observations:

This pilot and the firm's first real contact with artificial intelligence convinced me that automation using AI is undoubtedly the right direction.

Artificial intelligence, used by intelligent and aware employees, can be an excellent tool. However, used uncritically – it can prove harmful and dangerous.

Changes in this area are happening extremely fast, which is why the law firm must be prepared for a long, consistent process. This will be a real marathon, or rather an ekiden (at PragmatIQ we know what that means), not a short sprint. There is no point in postponing actions for the next quarter or year – by then reality will be completely different, and some competitors will simply leave us behind.

Key Conclusions and Recommendations

Achievements

- **High implementation effectiveness** – Almost all projects ended in success or partial success
- **Diverse applications** – Each team found unique AI solutions tailored to their needs
- **Increase in digital competencies** – The team gained valuable experience
- **Synergy effect** – Solutions from one department inspire other teams
- **Practical benefits** – Measurable increase in work efficiency

Challenges Identified by Participants

1. **Data security**: limitations related to protection of personal data and confidential information
2. **Resistance to change**: necessity to change habits
3. **Excessive initial optimism**: some processes require solutions not based on AI
4. **Time constraints**: the problem is finding time for tests and implementations
5. **Fatigue with AI-generated materials on social media**: risk of reputation loss

Recommendations for the Future

- **Inter-departmental meetings** – Regular meetings showing tool usage in different teams
- **Central knowledge base** – Following M365 Buddy's example, each department should create its own
- **Internal training** – Regular short trainings providing opportunities for knowledge sharing
- **Culture of experimentation** – Encouraging testing of new AI solutions by firm leaders
- **ROI monitoring** – Regular evaluation of effectiveness of implemented solutions

Development Plans for the Next Period

Inter-departmental Projects:

- Implementation of Fireflies in all meeting areas (Michał Walczak's initiative)
- Creation of 'Onboarding Buddy' for new employees (Magdalena Krolczyk's project)
- Development of knowledge bases for individual departments

Finance Department Initiatives:

- Implementation of solutions supporting the introduction of the National e-Invoice System
- Return to work on data visualization while maintaining information security

Marketing Competency Development:

- Creation of tools to support the creation of natural marketing content
- Optimization of website content for search in language models

Inter-departmental Support:

Monika Manczuk offers help with data analysis and creating assistants for social media

PragmatIQ Law Firm

In cooperation with ^Kunke Consulting