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HELP!

A tech-reticent lawyer's guide to getting started with AI

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A tech-reticent lawyer's guide to saving time and making money by building AI tools into your practice

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Back in the day, my writing process started with a trusty notebook and pen and then on to a word processor. I guess you could say I'm a bit old school, because that's exactly how I kicked off this piece. But otherwise the similarities are growing fewer and farther between. There's a whole world of new tools at my fingertips now owing to artificial intelligence. Programs like ChatGPT and Claude can whip up information with just a quick prompt and a click. And when it comes to adding visuals, Canva and DALL-E make it super-easy to enhance my text. And when I think I've pretty much got it, I can (with just a tap!) check my grammar, tweak the tone, or even expand or shorten my writing. It's all still pretty amazing to me.

There's no question that artificial intelligence (AI) is here to stay. It is already reshaping how we practice law, from predictive analytics that anticipate case outcomes to chatbots that enhance client communication and automated tools that streamline document review. And make no mistake—we aren't going back. AI is becoming an integral part of the legal landscape.

If you're feeling like things are moving too fast, you're not alone. Many attorneys are grappling with the pace of these advancements, wondering how AI fits into their practices. But AI isn't here to replace lawyers (at least yet). What it can do is help us work smarter by making many tasks quicker and less arduous. By streamlining repetitive processes like document sorting or research, AI tools free up a significant amount of time so we can focus on more critical matters: developing case strategies, advocating for clients, resolving cases, and making higher-level legal decisions.

The proliferation of new AI legal tech products can be daunting, but that's also why now is the time for lawyers to embrace AI: The technology landscape isn't going to get *less* complicated going forward. So lawyers need to be proactive. It's essential to understand the practical capabilities of AI and how to integrate them into your practice. Those who do will gain a significant edge, while those who resist will likely find themselves falling behind. The key is to learn how to use AI as a supplement, not a replacement, for your legal expertise.

To help you get started, we've put together half a dozen action tips intended to demystify some of the AI hype and show you how to make this technology a valuable asset in your legal practice. And we will be presenting practical AI/legal tech tips in Bench & Bar on a regular basis going forward.

This article looks at some of the uses of AI you can start exploring in the near term. But first a few words on the strengths and limits of these tools.

AI is undeniably powerful, but it's not without its limitations—and for legal professionals, knowing where those boundaries lie is critical. While AI can sift through mountains of data and tackle tasks like medical record review or contract analysis at lightning speed, it doesn't have the nuanced judgment that lawyers bring to the table. There's a big difference between automation and true artificial intelligence. For example, AI can review thousands of contracts in the time it would take a human to review just a handful, efficiently flagging standard clauses and identifying potential red flags. AI can summarize thousands of pages of deposition transcripts in seconds. But it can't catch everything. If there's a subtle change in the language of a key clause or in the line of questioning—even something as small as a word shift that alters the legal meaning—AI may miss it. This is where

human oversight comes in. As lawyers, we need to carefully review these findings to ensure that AI outputs meet our standards and fully comply with legal requirements, especially in gray areas that require more than just a mechanical scan of the text.

Take mediation, for instance. At PowerHouse Mediation, we use AI tools to help us streamline processes by managing communication flows, organizing documents, or even analyzing case histories to suggest potential settlement ranges. But AI can't fathom the emotional dynamics at play between parties or the complex human factors that often influence successful mediations. An AI tool might offer a settlement figure based on past data, but it's the mediator's experience and insight that will determine whether that offer feels right in the context of a specific case. In the legal world, AI can be a tremendous asset, but it's our legal expertise and our judgment—emotional, psychological, ethical—that ensure the final product is fair and effective. We can't simply rely on AI to do all the work. We must make it work for us.

As you review these tips and decide where to start integrating the tools in your own practice, a few implementation tips to bear in mind:

- Start small. Pilot one AI tool before integrating multiple solutions.
- Train staff on AI systems to maximize efficiency and ensure smooth adoption.
- Maintain a human touch. AI should enhance, not replace, personal client interactions.
- Regularly review AI performance to ensure accuracy and compliance with legal ethics.

By integrating these AI-driven tools, you can optimize client communication, streamline workflows, and improve overall service quality—allowing you to focus on what truly matters: exceptional legal representation.

Stay ahead with AI-powered drafting and analysis

AI-assisted tools are really changing the game when it comes to contract drafting and analysis, making the whole process smoother and more accurate. Remember those long nights spent poring over contracts, worrying about missing a crucial clause or running afoul of compliance? I remember, in my third year of law school, juggling a clerkship that had me reviewing commercial leases. It felt like I was drowning in a sea of tiny text and dense legal jargon. Does that sound familiar to anyone else?

Now we have AI tools that streamline contract creation, helping us draft solid, enforceable agreements without the usual headaches. These powerful systems can flag potential issues, point out missing terms, and ensure we're in line with all the necessary laws and regulations. That means we save a ton of time and drastically reduce the chance of making mistakes.

Consider the task of drafting a commercial lease. Instead of manually sifting through every clause, AI can automatically flag any deviations from standard legal templates. Let's say you're in the middle of drafting that lease; with AI by your side, you'll receive alerts for unusual terms or potential pitfalls. This not only speeds up your work but also provides peace of mind knowing that your contract meets legal standards.

Now let's shift gears to releases. Whether they're liability waivers or settlement agreements, these documents require meticulous attention to detail. AI tools can guide you through the intricacies. When tasked with drafting a release for a personal

injury settlement, you won't need to rely solely on outdated templates or start from scratch. AI can suggest standard clauses based on your jurisdiction and the specifics of your case, ensuring you're incorporating necessary legal language while highlighting any unique considerations. It will also prompt you to include confidentiality or non-disparagement clauses—critical provisions that are sometimes overlooked in traditional drafting methods. By flagging these elements, the AI helps ensure that your release is comprehensive and tailored to the unique needs of the case.

But the advantages don't stop there. AI can also help identify potential pitfalls. For instance, if you're drafting a release that limits liability, the AI can analyze past cases to alert you to common mistakes or issues that could arise from poorly defined terms. This adds an extra layer of protection for your clients and reduces the risk of future disputes.

Overall, leveraging AI for both contract-drafting and releases not only saves time but enhances the overall quality and reliability of the documents you produce. With these tools, you can quickly ensure that all necessary terms are included and articulated clearly. This efficiency allows you to shift your focus toward building stronger arguments and dedicating more time to strategic discussions with your clients—ultimately leading to better outcomes for everyone involved. So, as you explore ways to enhance your practice, don't underestimate the significant advantages AI-assisted tools can bring to the complex tasks of contract drafting and release management.

- **Functionality:** Create initial drafts of legal documents based on existing templates and precedents; automated document generation.
- **Platforms:** ChatGPT, Microsoft Copilot, Perplexity, Gemini, Claude, CoCounsel, Lawdroid's Copilot.

Leverage AI for legal research efficiency

Many of us remember those countless hours spent in law school libraries, surrounded by towering stacks of books, manually researching and Shepardizing cases. There was a time when law firms were lined with bookshelves full of volumes that were more than just decorative—they were essential tools for legal research.

Not anymore. Today, lawyers can sift through vast bodies of case law, statutes, and secondary sources in a fraction of the time. These database tools don't just deliver faster results; they are also more precise and thorough, helping us find the most relevant precedents and legal arguments. For busy trial lawyers, this can mean the difference between scrambling for last-minute research and walking into the courtroom fully prepared with data-backed insights.

Take, for example, lawyers handling complex litigation. Instead of reviewing hundreds of cases manually, they can now leverage AI tools to retrieve applicable case law and identify trends that could affect their client's success. AI can highlight the most persuasive arguments and even provide insights into how similar cases were decided. By using predictive analytics, AI can reveal how a particular judge has ruled on similar issues, giving trial lawyers a strategic edge by suggesting ways to tailor their arguments based on prior outcomes.

AI research tools also help identify patterns that might otherwise be overlooked. For instance, they can reveal emerging trends in appellate decisions that could affect your case, or uncover an obscure precedent buried deep in older case law that could prove crucial to your argument. These tools help you reach a more comprehensive understanding of the legal landscape—and do it faster.

But while AI tools can suggest relevant cases, it's still up to us as lawyers to apply our judgment, interpret those cases, and determine their strategic value. And if you are going to cite the case, you better verify the accuracy—AI's tendency to "hallucinate" is real, and that means starting with verification that the case actually exists.

- **Functionality:** Access relevant case law and legal research through natural language platforms, checking citations.
- **Platforms:** Vincent AI (vLex), Harvey AI, Thompson Reuters CoCounsel, Lexis +AI, Callidus, Paxton AI.

Use AI to enhance client communication and service

AI-driven chatbots and client management systems are changing the game when it comes to communication in the legal profession. By automating routine tasks—like responding to frequently asked questions, scheduling appointments, and sharing documents—these tools free up valuable time for lawyers to focus on substantive legal work. They also, importantly, help us to be more responsive to our clients more quickly.

If you add a chatbot to your firm's website, for instance, this smart little assistant can handle client FAQs around the clock—so whether it's 2:00 pm or 2:00 am, your clients can get the information they need without delay. It can even book consultations and gather case intake information. This seamless interaction not only enhances the client experience but also ensures that you're not bogged down by repetitive inquiries.

With these systems in place, you can create a more organized workflow: As the chatbot collects initial information from potential clients, it can feed that data directly into your case management system, streamlining the onboarding process. This way, when you do engage with a new client, you're already armed with the relevant details, allowing for a more productive discussion from the get-go.

Ultimately, adopting AI in this way not only boosts your efficiency but also demonstrates a commitment to excellent client service. Clients appreciate timely communication and feel

valued when their questions are answered quickly, which can lead to stronger relationships and, ultimately, more referrals. So as you consider ways to enhance your practice, think about how AI-driven tools can help you create a more responsive and efficient client management system. It's about ensuring that you have the time and energy to focus on what you do best—providing top-notch legal representation.

- **AI CHATBOTS**
  - **Functionality:** Answer FAQs, schedule appointments, collect client intake information.
  - **Platforms:** ChatGPT, Microsoft Copilot, Zapier Chatbots, Jasper Chat, Intercom.com.
- **CLIENT RELATIONSHIP MANAGEMENT (CRM) SOFTWARE WITH AI**
  - **Functionality:** Automate follow-ups, track client interactions, manage documents efficiently.
  - **Platforms:** Clio, MyCase, PracticePanther, Filevine.
- **AUTOMATED SCHEDULING TOOLS**
  - **Functionality:** Enable clients to book appointments without back-and-forth emails.
  - **Platforms:** Calendly, Acuity Scheduling, Zoom, Microsoft Bookings, Doodle.
- **AI-ENHANCED DOCUMENT MANAGEMENT**
  - **Functionality:** Automate contract review, e-signatures, and document organization.
  - **Platforms:** Docusign, Dropbox, Paxton AI, MyCase, PracticePanther.
- **VOICE & TEXT AI ASSISTANTS**
  - **Functionality:** Transcribe client meetings, summarize key points, draft quick responses.
  - **Platforms:** Fireflies.ai, Otter.ai, Microsoft Copilot, AI Lawyer, Trint/Zoom.

Incorporate AI into firm management and billing practices

AI isn't just revolutionizing client interactions; it's also transforming how law firms manage their internal operations. Tools exist that leverage AI technology to enhance case management, streamline time tracking, and simplify billing processes. By automating these administrative tasks, lawyers can reclaim valuable time that can be better spent on client-focused work—after all, the more time you spend strategizing for your clients, the more effective your advocacy can be.

Consider this: AI-powered time-tracking software can significantly improve billing accuracy, reducing the chance of client disputes over hours worked. Imagine how much smoother it would be to have a system that automatically records your billable hours as you work, providing a clear and transparent breakdown for your clients. No more scrambling at the end of the month to recall the time spent on each task or fearing that human error might lead to incorrect invoices. This level of transparency not only fosters trust but also enhances your professional reputation.

Moreover, by minimizing administrative burdens, AI allows you to focus on what truly matters—delivering high-quality legal services. When your firm runs efficiently, you can prioritize building relationships with clients, developing creative solutions to their problems, and ultimately achieving better outcomes. Embracing AI tools for your internal operations isn't just about keeping up with technology; it's about positioning your firm for long-term success in a competitive landscape.

THE FINE PRINT

TWO IMPORTANT CAVEATS ABOUT MAKING AI PART OF YOUR PRACTICE

The whole point of this article is to get you to appreciate how easy it is to start using AI or AI-enhanced products to perform certain tasks more quickly (and probably more accurately) and thereby free up more of your time and improve your practice. But there are a few foundational caveats we need to include as well.

I'll sum up two of them here. The first involves a client-confidentiality principle all lawyers need to be familiar with before they use artificial intelligence products in their practice; the second is a longer-range consideration.

BE MINDFUL OF ETHICAL AND PRIVACY CONCERNS.

As legal professionals, we have a duty to uphold the highest standards of ethics, especially when it comes to client confidentiality and data security. It's crucial that we use AI tools in a manner that aligns with the rules of professional responsibility and protects our clients' interests. For instance, when leveraging AI for e-discovery, we must ensure that sensitive client data is not just sitting around unprotected. This means encrypting that data and storing it securely to prevent unauthorized access. Additionally, it's vital to vet third-party AI providers thoroughly. Are they compliant with privacy laws? It's our responsibility to confirm that they have robust measures in place to safeguard our clients' information.

CONTINUE LEARNING AND ADAPTING TO NEW AI TOOLS.

AI is a dynamic force in the legal profession, and keeping pace with the evolution of tools relevant to your practice will be essential for remaining competitive. As technology advances, so too must our knowledge and skills. This means committing to ongoing learning and adapting our practices to incorporate new AI tools effectively. One great way to stay informed is by attending CLE programs focused on AI advancements. These sessions provide valuable insights into the latest trends and practical applications that can enhance your practice.

Consider subscribing to legal tech journals or newsletters that focus on innovations in AI—such as the article in Bench & Bar you're reading right now. Staying updated on the latest developments not only informs your practice but also positions you as a knowledgeable resource for your clients. Regularly exploring how new AI tools can be integrated into your work can open doors to greater efficiency and improved outcomes.

For instance, suppose your practice focuses on employment law. You should be attending CLEs or online workshops specifically designed to demonstrate how AI can assist in analyzing discrimination cases. By leveraging AI to sift through large datasets of workplace complaints, a lawyer can identify patterns that might not be immediately apparent through traditional analysis. Such insights can lead to better-informed legal strategies.

Whether it's through formal training, reading, or hands-on experimentation with new tools, prioritizing your education on AI is not just an option—it's a necessity in today's legal landscape. Embrace the challenge and you'll find yourself better equipped to serve your clients and excel in your practice as AI continues to reshape the legal field. Which doesn't mean it will always be easy. But in exploring a new field of legal technology, the most daunting step is usually the first one.

- **Functionality:** Automating time tracking, invoice generation, compliance checks, financial forecasting, and workflow optimization.
- **Platforms:** Clio, Quickbooks AI, LawPay, TimeSolv, Bill4Time, MyCase.

Embrace predictive analytics in litigation

AI's predictive analytics capabilities are game-changers for legal professionals, allowing us to assess litigation risks, settlement probabilities, and judicial tendencies with remarkable precision. By meticulously analyzing past rulings and outcomes, AI tools can generate data-driven insights to inform our trial strategies and settlement discussions. This isn't just about having access to information; it's about transforming that data into actionable intelligence.

For example, imagine you're representing a client in a personal injury case. AI can analyze historical data on how similar cases have been resolved by specific judges, helping you predict the likelihood of a particular judge granting summary judgment. If the data shows that the judge has favored plaintiffs in similar circumstances but has also denied summary judgments when certain evidentiary factors were present, you can craft your arguments accordingly. Armed with this knowledge, you might focus on specific points in your motion that align with the judge's past preferences. This strategic approach can greatly enhance your chances of achieving a favorable outcome.

Moreover, AI doesn't just help with understanding individual judges; it can also provide insights into broader trends within specific courts or jurisdictions. For instance, if you're preparing for a case in a court known for its conservative rulings, AI can highlight historical decisions that favor defendants, allowing you to fine-tune your strategy accordingly. You can identify potential weaknesses in your case or areas where you might need to strengthen your argument, ensuring you're not blindsided by unexpected judicial views.

In commercial litigation, where the stakes are often high and outcomes can be unpredictable, AI can analyze past case results, settlement amounts, and trial durations to predict the best course of action for your client. Suppose you're negotiating a settlement. AI can assess whether similar cases settled for higher or lower amounts, enabling you to set realistic expectations and negotiate more effectively. By marshaling data that highlights previous successful settlements or jury awards, you can make a stronger case for your client's position.

Ultimately, leveraging AI's predictive analytics not only improves our decision-making but likewise makes for smarter advocacy. And that allows us to approach each case with a greater degree of confidence, knowing that our arguments are backed by solid data.

- **Functionality:** Analyze legal data to predict potential outcomes of cases, assess litigation risks, identify favorable precedents, optimize legal strategies, and estimate case duration and costs.
- **Platforms:** *Legal research and case prediction:* Lex Machina, Westlaw Edge, CoCounsel; *risk assessment and litigation analytics:* Premonition AI, LexisNexis Context, Blue J. Legal; *jury and settlement analysis:* The Jury Lab, Settlement Intelligence, Jury Analyst.

Automate document review to save time

E-discovery and document review have long been the bane of litigators, eating up valuable time and resources. Fortunately, AI is transforming these labor-intensive tasks into streamlined processes. Tools now allow us to harness AI's capabilities to search for keywords, categorize documents, and even detect anomalies in large data sets. This not only speeds up the review process but also cuts costs.

Imagine you're knee-deep in a large corporate litigation case. Instead of manually sifting through thousands of emails, contracts, and documents, you can turn to AI tools to efficiently pinpoint the information you need. These systems can quickly identify key communications or critical contractual clauses, drastically reducing the amount of time you'd typically spend in manual review. This newfound efficiency not only enhances your productivity but also enables you to provide better service to your clients.

But as we embrace these powerful tools, we can't overlook our ethical obligations—especially when it comes to confidentiality. It's vital to safeguard sensitive client information, so we need to be vigilant about how we use AI in our practices. Before processing any documents, we should always ensure that the AI tool we're using has robust security measures to protect against unauthorized access or data breaches. Human oversight is essential here—not just for accuracy but also to assure the integrity of the confidential information we're handling. In a case involving sensitive client data, the last thing you want is to inadvertently expose that information. A slip-up can lead to serious consequences, from a loss of trust with our clients to reputational damage for our practices.

- **Functionality:** Streamline document analysis by extracting key information, detecting hidden legal risks, and enhancing contract review efficiency.
- **Platforms:** LawGeex (*data extraction*); Darrow (*detect hidden legal violations*); Diligen, Lex Machina, Kira Systems, Spellbook, IronClad (*contract analysis and review*); Everlaw (*litigation insights and e-discovery*). ▲

KRISTI PAULSON is a professional mediator and an accomplished trial lawyer. She serves on both the Lawyers Professional Responsibility Board and the ADR Ethics Board. Kristi owns PowerHouse Legal, a national training and education center focusing on mediation and trial advocacy skills trainings and CLE programs with a focus on #How2Skills.