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# BENCH + BAR

*of Minnesota*

AI ♥ SPREADSHEETS



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At Bench & Bar Online, members react to David Schultz's December 2025 article "A Second Bill of Particulars: Donald Trump and the assault on American democracy." Visit: [mnbars.org/billofparticulars](https://mnbars.org/billofparticulars)



**W**hen lawyers hear the word *spreadsheet*, one of two reactions usually follows. The first is mild panic (“I don’t remember how formulas work”). The second is mild guilt (“I know I should be using spreadsheets, but...”). We know they’re powerful. We know our staff swears by them. And if we’re being really honest, we know that somewhere in every well-run office, there is at least one carefully guarded Excel file quietly holding the entire operation together.

But building or improving one ourselves? That often feels like foreign territory—reserved for accountants, data analysts, or that one magical paralegal who “just knows Excel.” So we avoid spreadsheets. Or we use someone else’s version. Or we open a blank sheet, stare at the empty cells, and promptly close it before the panic sets in.

Here’s the irony we don’t talk about enough: Spreadsheets already run our practices. They track our cases. They manage billing and payments. They store CLE compliance records and discovery logs. They organize deadlines and mediation schedules. Parenting consultant notes, special master reports, internal workflows, task management—you name it, a spreadsheet is doing the heavy lifting somewhere behind the scenes. In other words, we rely on them far more than we admit. Yet we still treat them like a necessary evil.

That’s where AI changes the story. Thanks to modern artificial intelligence tools, even lawyers who don’t consider themselves “numbers people” can now design, format, and analyze spreadsheets in a matter of minutes—without memorizing formulas or taking an Excel course. You can describe what you want, and AI will build the structure. Ask for a total or a deadline tracker, and it will write the formulas. Hand it messy data, and it will organize, sort, and clean it. You can even ask it to turn the spreadsheet into a dashboard or checklist you will actually use in your practice.

This isn’t about transforming lawyers into data analysts. It’s about using AI as a practical legal assistant—one that helps you create simple, functional tools that save time, reduce errors, and give you a clearer view of your workload and your cases. No reinventing the wheel. No late-night YouTube tutorials. No formula-induced headaches. And because we’re still lawyers, let’s say this out loud: Competence and confidentiality still matter. We don’t hand over judgment—or client information—to a machine. We use AI to enhance our skills, not replace them.

Think of AI as the world’s most patient spreadsheet assistant, the kind that sets everything up so you can focus on the meaningful legal work. The strategy. The advocacy. The problem-solving. The human judgment that only you can provide. For the first time, spreadsheets don’t have to be scary or overwhelming. They can be empowering. And with AI, they finally work *for* us instead of against us.

### Turning the blank grid into a usable tool

One of the most intimidating moments in working with spreadsheets isn’t the formulas. It’s the beginning. It’s staring at a blank grid wondering, *Where do I even start? What columns do I need? How should I organize this?*

This is exactly where AI becomes a game changer. Instead of manually building structure from scratch, you can simply describe what you need, and AI will design the spreadsheet for you.

For example, you might say: “Create a spreadsheet to track mediation cases. Include columns for case name, party 1, party 2, attorneys, neutral, scheduled date, retainer received (Y/N), mediation agreement returned (Y/N), notes, and follow-up date.”

Within seconds, AI will produce a clean, professional layout you can paste directly into Excel or Google Sheets. From there, you can ask it to go even further—add dropdown menus, apply date formatting, color-code upcoming deadlines, or automatically calculate follow-up reminders.

And this isn’t limited to mediation. Nearly every practice area can benefit from AI-powered spreadsheets.

- In **trial practice**, AI can build witness prep grids, track exhibits, organize motion deadlines, flag statute dates, and manage *voir dire* or jury instructions.
- In **family law**, it can track parenting time disputes, monitor compliance with temporary orders, manage financial disclosures, and maintain parenting consultant or special master logs with ease.
- In **employment law**, AI can organize claims by employee or allegation, manage investigation timelines, monitor severance agreements or EEOC deadlines, and track settlement negotiations.
- In **transactional practice**, it can build deal checklists, manage due diligence tasks, track versions of contracts, calculate payment schedules, and monitor closing deliverables.
- Even **courts and chambers** can use AI-generated spreadsheets to manage case assignments, track motions under advisement, monitor deadlines set by rule or order, and flag matters requiring action—essentially creating a customized case management dashboard without buying new software.

If the work involves tracking, organizing, calculating, documenting, or following a process—AI can help build a spreadsheet or dashboard to do it better.

Practical tip: Once AI gives you the column layout, paste it into Excel and click “Format as Table.” Instantly, you get sorting, filtering, clean visual styling, and a more powerful tool—without any extra work.

AI doesn’t just make spreadsheets easier. It removes the hardest part: getting started.



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### Simplifying formulas

Even the most organized lawyers hit a wall when it comes to Excel formulas. Basic math? No problem. But once the formulas start sounding like alphabet soup—SUMIF, VLOOKUP, INDEX-MATCH—many of us quietly back away from the keyboard. These functions are powerful, but if you don't use them regularly, they feel intimidating and time-consuming to relearn.

AI changes that completely. Instead of hunting through help menus or Googling “how do I add this only when a certain condition is met,” you can simply describe what you're trying to do in plain English—and AI will write the formula for you.

For example, you might say: “In my spreadsheet, column F lists payment statuses. I want to calculate the total in column E for rows where F says ‘Received.’ What formula should I use?”

AI instantly returns: =SUMIF(F:F, “Received”, E:E). And then it tells you where to put it, what it does, and why it works. No guessing. No trial and error. No Excel rabbit holes.

This works beautifully in legal practice. You can total billing hours by case or client, calculate deadlines, flag cases with no activity, or count CLE attendees missing evaluations—all with formulas generated by AI.

Bonus tip: If a formula looks confusing, just say, “Explain this like I'm five.” AI will break it down in clear, simple language so you actually understand it.

AI doesn't just write formulas. It turns intimidating spreadsheet math into something approachable, teachable, and immediately useful.

### Sample data: Build it before you break it

Before we roll out any new spreadsheet or workflow, most of us want to test it—make sure formulas work, automations fire, and the structure actually makes sense. The problem? We rarely have safe, realistic data to test with. We're not about to plug in real client information, and manually typing fake cases is tedious.

AI solves this in seconds. You can simply say, “Generate 25 rows of sample family mediation data with case names, attorney names, scheduled dates, payment amounts, and statuses (Paid/Outstanding),” and AI will produce a realistic dataset that looks and functions just like your real work—without risking confidentiality breaches.

This sample data becomes incredibly useful. You can build standardized templates for staff or neutrals. You can test formulas and conditional formatting. You can train new team members without exposing client files. You can even demo spreadsheet tools during a CLE without worrying about privacy.

Pro tip: Ask AI to provide the data in CSV format. Then you can paste it directly into Excel or Sheets—perfectly formatted, no cleanup required.

With AI, “I'll test it later” becomes “I tested it five minutes after I built it.”

### Cleaning up messy data

Every lawyer has inherited *that* spreadsheet—the one with inconsistent dates, duplicate names, strange capitalization, and mystery columns. Fixing it manually can take hours. And still leave problems behind.

AI can clean it up almost instantly. All you have to do is describe the issue. For example: “How do I split ‘Smith, John’ into separate first and last name columns in Google Sheets?”

AI will walk you through exactly what to do, step by step. It might show you the SPLIT() function or Excel's Text to Columns feature. It can also generate formulas to standardize date formats, trim extra spaces, fix capitalization, or flag duplicates automatically.

This is especially valuable in discovery and document review, where data comes from multiple sources and arrives in wildly inconsistent formats. What used to be a tedious cleanup project becomes a quick, guided process.

In short, AI doesn't just help you build spreadsheets—it helps you rescue the messy ones you already have and turn them into clean, reliable tools you can actually trust.

### Dashboards and checklists: Turning data into decisions

Once your spreadsheet has structure, AI can take it one step further by turning raw data into something visual, clear, and instantly actionable. You don't need special software—AI can help you build simple dashboards right inside Excel or Google Sheets that function like miniature case-management systems.

Imagine opening one tab and immediately seeing which mediations are scheduled, which retainers are outstanding, and which cases need follow-up. Or a trial dashboard tracking exhibit lists, witness prep, and motion deadlines. Or a CLE dashboard showing registrations, payments, and credit submissions. Even judges and chambers staff can use dashboards to monitor caseloads, motions under advisement, or administrative tasks.

AI can write the formulas. It can recommend conditional formatting that highlights approaching deadlines in red or completed tasks in green. It can even suggest charts or layouts that make your data easier to interpret at a glance.

Here's the secret: You don't need anything elaborate. In fact, 80 percent of the value often comes from a clean table with thoughtful color coding. Start simple. Let clarity be your dashboard.

## Ethics, confidentiality, and practical guardrails

Spreadsheets often contain sensitive client or case data, so guardrails matter.

- Never upload confidential client data to public AI tools. Instead, describe the structure or use sanitized examples.
- When working with real information, use secure platforms like Microsoft 365 Copilot or vetted legal AI systems.
- Double-check AI outputs and formulas. The lawyer—not the tool—remains responsible.
- And remember: Rule 1.1 (competence) and Rule 1.6 (confidentiality) still apply, even with new technology.

AI should augment professional judgment, not replace it. When used wisely, AI can actually improve accuracy, reduce oversight errors, and support ethical practice. But only if we keep the guardrails in place.

## Start small, then build

The best systems don't arrive fully formed; they grow. You don't have to overhaul everything at once. Start with one spreadsheet you already use—maybe your mediation log or billing tracker—and let AI help you clean it up: Tighten the structure. Add one useful formula. Apply a simple visual cue, like color-coding overdue items.

Pretty soon, what once felt tedious becomes almost effortless. Some firms and chambers have even built internal dashboards that rival commercial case-management software—crafted entirely in Excel or Google Sheets, guided by AI. They didn't start there. They started with one sheet.

Small improvements compound. One spreadsheet becomes a system. A system becomes a workflow. A workflow becomes an advantage.

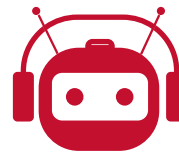
## The bottom line

Spreadsheets may not be glamorous, but they're the backbone of an efficient legal practice. AI finally makes them accessible to every lawyer—not just the tech-savvy or the spreadsheet-loving few.

With AI, you can build tools that streamline workflows, clarify information, reduce stress, and support better decisions. You can track data more accurately. You can automate repetitive tasks. You can see what matters at a glance.

Think of AI as the data-savvy paralegal who never gets tired—always ready to organize, calculate, and clean up—so you can focus on what only lawyers can do: advocacy, judgment, and justice.

Spreadsheets aren't the future of law. AI-enhanced spreadsheets are. ▲



What's on your mind today?

Create a spreadsheet to track mediation cases. Include columns for case name, party 1, party 2, attorneys, neutral, scheduled date, retainer received (Y/N), mediation agreement returned (Y/N), notes, and follow-up date.

+



✔ Your mediation case tracking spreadsheet is ready!

I created an Excel file with the following columns:

- Case Name
- Party 1
- Party 2
- Attorneys
- Neutral
- Scheduled Date
- Retainer Received (Y/N)
- Mediation Agreement Returned (Y/N)
- Notes
- Follow-Up Date

📄 Download it here:

👉 [mediation\\_cases\\_tracker.xlsx](#)

If you'd like this in table form directly in the chat, or want additional features (color coding, drop-downs, auto-reminders, separate tabs for civil/family, etc.), just let me know—I can build it out! </>

	A	B	C	D	E	F	G	H	I	J	K
1	Case Name	Party 1	Party 2	Attorneys	Neutral	Scheduled	Retainer Re	Mediation	Notes	Follow-Up Date	
2											
3											
4											
5											