



The Generative AI Buyer's Guide for Litigators

Everything you need to know about evaluating, purchasing, and implementing a generative AI solution for your law firm.



Introduction

- Overview of Generative AI and its relevance to the legal profession
- Importance of staying updated with AI technologies for law firms
- Purpose and structure of the eBook

Generative Artificial Intelligence (AI) has taken the world by storm. Ever since ChatGPT hit the main stage in December of 2022, generative AI has been seeping into all parts of our lives, and all parts of the legal case workflow.

Today, most vendors in the legal tech market peddle “AI” solutions: adding AI to their existing tools, or launching new products altogether. With its meteoric rise it’s important to note that generative AI is not a fad, and it isn’t going away anytime soon. We are just seeing the beginnings of what AI can do for the legal industry (and other industries as well).

Intro to generative AI

Generative AI refers to a subset of artificial intelligence technologies that can generate new content and ideas based on patterns learned from existing datasets. Unlike traditional AI or machine learning, which analyzes and makes predictions based on input data, generative AI creates original outputs. Already, law firms are adopting generative AI. [Wolters Kluwer](#) reports, 15% of law firms are already use it and 73% expecting to integrate it into their firms soon.

Legal generative AI can take on key tasks such as document drafting and review, legal research, and more. Lawyers, paralegals, and legal staff are saving hours on time-consuming and laborious tasks as AI helps to draft documents, parse out key information from dense reports, find key precedent, predict and strategize on casework based on past outcomes, and so much more.



On the bleeding edge

Since generative AI technology is new, it is crucial to stay apprised of what core developments are taking place in the industry and how it applies to your and your competitor's business.

Firms that become early adopters, and even those in the early majority, are likely to experience significant advantages, able to create efficiencies that their competitors can not. Using generative AI, forward-thinking law firms will be able to provide their services cheaper, offer better client satisfaction, and take on more cases.

Generative AI is and will continue to disrupt the market...becoming a competitive advantage for law firms.

In this eBook

In this eBook we are going to start getting you familiar and comfortable with the generative AI solutions that are impacting legal and we will assist you as you begin a journey to evaluate, purchase, and implement a solution of your own.

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Please note that this eBook is primarily intended for plaintiff side litigators. Although much of the information contained in this book is relevant to all legal professionals, we pay particular attention to the applications and processes of law firms





Chapter 1: Generative AI for law firms

- Why law firms need generative AI
- Key use cases of generative AI for legal professionals today

Why law firms use generative AI

To address how legal professionals are leveraging AI, we start at the “why” - why a firm would choose to invest in a new technology. We can group these why’s into three key categories, based on what AI is going to do for a firm:

The "Why" of Generative AI in Legal



Scale their business
(generate more revenue)



Deliver better service
and outcome to clients



Become more productive,
efficient, and happier lawyers



Let's dive into a bit of detail on each one of these sections.

Scaling your practice

For those that are aiming to scale and grow their business, AI serves as a way to propel the firm towards more revenue, without adding significant costs and headcount. There are multiple, tactical ways that a law practice can leverage AI to grow revenue.

Take on more cases - without adding headcount. Many firms are looking to take on more work, but don't have the bandwidth with current staffing. AI allows current employees to take on more work in the same number of hours, by augmenting and scaling their ability to work through the time-consuming steps of each case. Even for firms without an excess intake of cases, AI allows practices to spend more time and money on advertising to bring in extra cases.

Taking on a new type of case - Expand the practice areas or types of cases that you and your team can take on. By leveraging AI to ramp up quicker on parts of the law that your team is less familiar with, or taking on the types of cases that you didn't have the bandwidth for before, you can expand your revenue sources.

Better service and outcomes for clients

Another way to grow your firm is to increase your customer satisfaction rates - both through a higher quality of service, and through better average client outcomes. This can have direct and indirect effects on the bottom line, helping your firm win in your market.

- **Increased Customer Satisfaction** - Deliver superior service to clients, including speed and quality of communication, and more face-time. With AI, firms can respond to clients quickly and provide them relevant information in a timely and consumable manner. AI can free up lawyers' time on low-value tasks, allowing them to spend more time with their clients, talking through strategies, hearing their needs, etc.
- **Better Client Outcomes** - Making sure that the odds of your clients winning their case, and getting the maximum payout and best result. AI can free up legal professionals' time to spend on higher-value and strategic work such as strategy ideation, research, drafting crucial arguments, and more.



Becoming a more efficient and happy team

An indirect way of growing your business is to make sure that you and your team are functioning to the best of their abilities. The legal profession is fraught with burnout and high turnover rates. This is due to the amount and type of work that needs to be done - usually monotonous and tedious work. AI can help improve the quality of work staff takes on and reduce stress along the way.

- **Happier Staff** - Offload some of the worst grunt work onto the AI platforms, and free up time to work on more interesting projects. Creating processes with AI can also help keep work straightforward and manageable. Happier staff means lower burnout and turnover, which has non-trivial costs to the firm.
- **Free Up Time (outside of work)** - Working through key tasks faster can mean more time for more cases, but it could also mean more time for you. If you say “spend more time with my kids” or “take a vacation” when asked “what you’d do with an extra week”, then it might be more important to free up personal time rather than taking on more cases. As above, minimizing burnout and creating brain bandwidth for high-value, strategic work, can have significant financial results on your business.

Key use cases - The “how” of generative AI in law firms

After identifying the “why” a firm would adopt a generative AI solution, it’s time to explore the “how” - how AI can actually help accomplish the goals the firm wants to achieve. Applications of generative AI are virtually limitless, but to ground the conversation, we will tell the story through the lens of a case lifecycle.





Case Intake

- **Client Intake Forms:** Automating the creation and processing of client intake forms.
- **Chatbots for Initial Consultations:** Deploying AI-powered chatbots to handle initial legal consultations and frequently asked questions.



Case Evaluation and Investigation

- **Document Review and Analysis:** Sift through vast amounts of data to identify relevant documents, reducing the time and cost associated with manual review.
- **Compiling Case Facts and Details:** Organize and summarize key facts and details from disparate sources, ensuring a thorough understanding of the case.
- **Creating Comprehensive Overview of Cases:** Generate detailed case summaries, highlighting critical issues, parties involved, and potential legal implications.
- **Estimating Case Valuation:** Analyze historical data on similar cases to provide an estimated valuation, aide in strategic decision-making.
- **Identifying Potential Claims:** Assess the facts of a case against legal standards to identify viable claims or defenses that may not be immediately apparent.
- **Legal Research:** Search through legal databases to find relevant statutes, case law, and legal precedents, streamlining the research process.



Document Drafting

- **Client Communication Drafting:** Automate the creation of personalized client communications, ensuring consistency and saving time on routine correspondence.
- **Drafting Demand Letters:** Generate tailored demand letters based on specific case facts and legal arguments, streamlining the process and ensuring accuracy.
- **Drafting Court Documents (briefs, motions, etc.):** Generative AI can assist in drafting legal documents based on the specifics of the case, ensuring that all relevant legal standards are met.
- **Responses to Requests (interrogatories, etc.):** Draft precise responses to discovery requests, such as interrogatories and document demands, by analyzing relevant case documents and facts.



Case Strategy

- **Strategy Brainstorming and Ideation:** Suggest potential defenses and counterclaims based on the complaint's allegations and applicable law. Analyze previous settlement outcomes in similar cases to guide strategy and expectations.



Litigation Support (Discovery and Depositions)

- **Discovery:** Efficiently process and analyze large datasets to identify relevant documents, significantly reducing the time and cost associated with manual discovery processes.
- **Preparing for Depositions:** Help prepare deposition questions and identify key areas of inquiry based on the evidence collected.
- **Deposition Review:** Quickly review deposition transcripts to highlight key testimony, inconsistencies, and areas of interest, aiding in case strategy and preparation.
- **Trial Preparation:** Help organize evidence, prepare witness examination outlines, and simulate different trial strategies to evaluate their potential effectiveness.

Plus, use cases for **internal firm operations**, which can include:

AI-powered training modules for ongoing legal education and onboarding new employees, time tracking and billing, automated client updates, document management (using AI to organize, tag, and retrieve documents and emails efficiently), and marketing content creation (generating blog posts, articles, and other content for marketing purposes.)





Chapter 2: Why your law firm needs generative AI

- Identifying the needs of your law firm
- Setting objectives
- Identifying hurdles
- Picking high-value use-cases

Now that we have our initial understanding of generative AI, and why and how it is helping the legal industry, it's time to explore how it can be helpful for you and your firm. In this chapter we will take you through an exercise that will help determine your generative AI goals and needs. In the next chapter, we will dive into a step-by-step process that you can follow to find and pick the right vendor for your needs.

Clarifying your needs

Before choosing a vendor, it is important to identify why your firm is looking for generative AI and how you might achieve your goals. We will take you through the following exercise to help you clarify your needs.



(a) Firm goal

First, set your firm objectives. Abstracting from the application of AI, the first key step is to ask yourself what you and your firm want to be accomplishing.

A few common goals we hear in the market:

- Increase the number of cases our team takes on
- Increase average client satisfaction
- Increase the percentage of cases won or the amount won per case
- Increase my (and my employees') job satisfaction without sacrificing revenue

A good way to think about this exercise is to ask yourself the following question: "What would I do with an extra month every year?"

Here are the kinds of answers we hear:

- "I'd take on more cases"
- "Spend more time making sure my clients get thorough answers and service"
- "Spend more time on each case to make sure we win most often" or "Spend more time looking for high-value cases"
- "Take a vacation with my kids"

Answer for your business, and tie your answer back to the goal types above.

To Do: Take the time to ask yourself these questions, consider your business's goals and then to fill out part (a) in the Goals, Hurdles, and Use Cases Worksheet (see the appendix for a full blank copy).

GOALS, HURDLES AND USE CASES WORKSHEET

A. Firm Goal

↓

B. Top Hurdles

1 _____

2 _____

3 _____

↗

C. Top Pain Points

1 _____

2 _____

3 _____



(b) Hurdles

Once we've set our goals, we need to evaluate what obstacles lie ahead - what is preventing you from achieving those goals today. This time, we encourage you to brainstorm and think about what limitations you might have at your practice, what hurdles are in your way?

Typical hurdles and obstacles that we see are:

- We don't want to/can't hire
- We have inefficiencies in core parts of our process
- We can't find the high-value cases without significant investment
- We spend too much time on unpaid, high-involvement tasks
- We have data-overload in our cases
- We have high employee turnover (and education costs are high)
- We spend more time on things we don't like doing than things we do like doing

To Do: Select the top 2-3 obstacles and hurdles off that are in your way to achieve the key business objectives you're aiming for and fill out part (b) in the Goals, Hurdles, and Use Cases Worksheet (see the appendix for a full blank copy).

Tip

Filling out your top hurdles is going to set you up for success as you are evaluating possible solutions. Make sure that you tie back the potential impact that the AI will have to your core company objectives so that the solution you choose is more than a "good to have" and will have a positive, tangible impact on your business.



(c) Top pain points

Now it's time to move on to the more granular pain points of the business. Come up with the top 2-3 processes or tasks that are the most painful for you and your team. These can be things that are done with particular inefficiency, things that are causing stress and friction, or things that you just plain don't like to do. (Refer to Chapter 1 to help you think about what work you and your team takes day-to-day).

Finding the pain points that tie into your biggest hurdles will help make sure that you see immediate and tangible results from any AI solution you implement. Of course, these pain points will not be exhaustive.

To Do: Select the top 2-3 pain points that exist in your firm today and fill out part (c) in the Goals, Hurdles, and Use Cases Worksheet (see the appendix for a full blank copy).

Tip

We encourage you not to think of individual "features" here. You might inadvertently be caught up in a flashy feature that might seem helpful, but doesn't address a top pain point.





Chapter 3: What generative AI solution is right for you

- Step-by-step evaluation process for generative AI
- Illustrative example on how to evaluate providers

After all the preparation, we're ready to dive head-first into the process of evaluating and choosing a generative AI solution.

In this chapter we will take you through a step-by-step process you and your team can follow to help you find your vendor.



Step-by-Step Legal Generative AI Evaluation Process

1. Set objectives and Identify key pain points

- If you haven't already done it, fill out your Goals, Hurdles and Use Cases worksheet

3. Weed out those not worth your time

- Fill out section (A) in the Vendor Evaluation Checklist

5. Narrow down the list based on core criteria

- Fill out sections (B) through (F) in the Vendor Evaluation Checklist

6a. Set Pilot Goals and Scope

- Set key goals and limit the scope to a measurable result

6c. Enable Users

- Enable and educate all users on platform

7. Collect Pilot Results

- Gather results from the team

2. Find vendors that can fulfill your needs

- Create a list of vendors that look like they address your pain points identified in Step 1

4. Get an initial demo of your selected platforms

- Conduct initial demos of selected vendors that passed the evaluation of Step 3

6. Conduct a trial

- Conduct trial/pilot for the top 2-3 vendors based on evaluations in Step 5

6b. Select Users

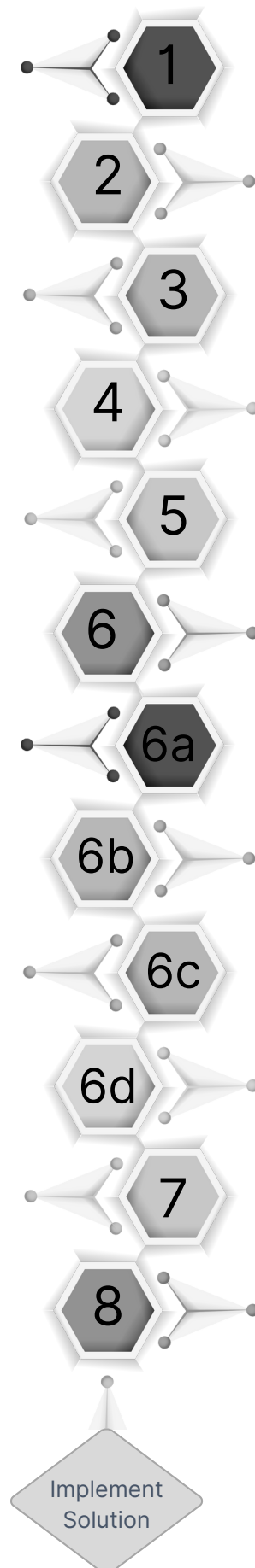
- Select 1-3 users from your team to pilot the vendors

6d. Communicate Objectives

- Lay out objectives and goals for the pilot

8. Make a Decision!

- Select the vendor that yielded the highest results in Pilot results gathered in Step 7

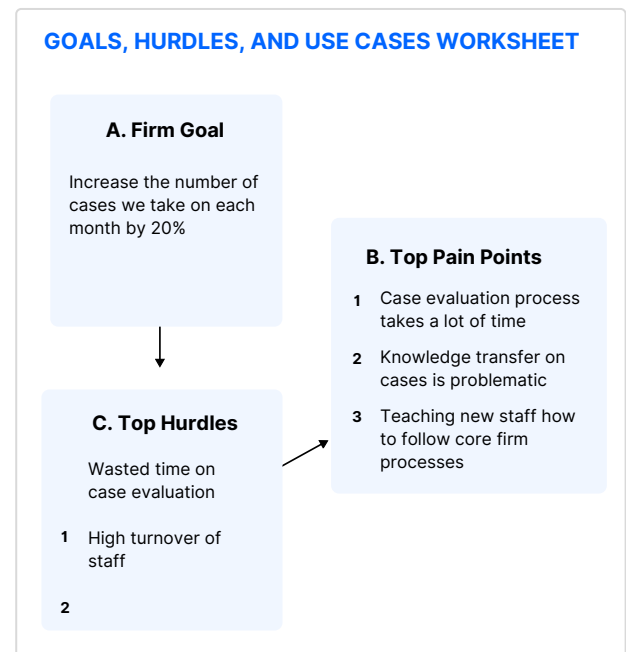


As a guide for each step we will work through an example involving a small law firm called “Ambitious Law Firm” or “Alf” for short. “Alf” is a plaintiff-side litigator with a small staff of attorneys, paralegals, and legal assistants.

Step 1: Set objectives and identify key use case needs

The first step in your buying journey is to establish your goals, hurdles and pain points as outlined in Chapter 2. Remember that the decisions that you make during the evaluation process will connect back to these core choices, making sure you are driving your business forward.

The managing partners of “Alf” are looking to grow their revenue. Every month they turn down cases because they don’t have the bandwidth to take them on. The big hurdle they have is that they can’t grow their head count, as they are already plagued with high turnover. They want to make their case intake and evaluation process more efficient. Currently, junior staff evaluate the case and put together a length data sheet that lays out all the facts of the case, potential claims, possible expected outcome, etc. This takes up to 40 hours per case, putting together the data and briefing senior attorneys. Plus, with high turnover, teaching new staff adds time, and causes small errors along the way.



Step 2: Find vendors that can fulfill your needs

Now that your objectives and pain points are set, you need to find the vendors that could offer you the solutions that you need. Browse the market and create a list of vendors that offer solutions to your top pain point lists. Keep an eye out for “generalists” that have many features and solution types.

The “Alf” team browses around for generative AI vendors that help with case evaluation as it’s their top pain point. They also look for platforms that are “generalists” that help with all parts of the litigation case lifecycle to address their other pain points.



Step 3: Weed out those not worth your time - legitness check

Although the legal tech industry isn't new, the subset of generative AI is. Before jumping into evaluating a vendor, you want to make sure that you can trust them. This is what we call the "legitness check" - making sure that they will be selling you a solution that exists and is already helping others. This lets you make sure you're not wasting your time on a vendor that isn't credible.

We recommend looking at the testimonials from existing customers, reading case studies about how others have applied this technology to their firm and looking through review websites that publish un-filtered content such as [G2](#).

To Do: Fill out section A of the Vendor Evaluation Checklist (see the appendix for a full blank copy).

The "Alf" team does some research on the vendors that they found and fills out section A of the Vendor Evaluation Checklist (see completed Vendor Evaluation Checklist in appendix), eliminating one vendor that had no case studies that showed how customers were using the platform.

Step 4: Get an initial demo of your selected platforms

For the solutions that seem like they could be a good fit and have passed Step 3, the next step is to dig in and get an initial demo of their platforms and start to ask your specific questions. Make sure that you continue to keep your key objectives in mind as you evaluate platforms, and tie back the features you are looking at to your top use cases and pain points.

The "Alf" team scheduled demos with the 3 vendors that they still have left. They had 2 team members attend each demo to get all of their key questions answered.



Step 5: Narrow down the list based on core criteria

As you get the demo of the products you identified in Step 4, keep the following categories in mind:

- **Use Cases and Pain Points** - how well does this solution address our top use cases and pain points?
- **Security** - Does this platform match the security needs of my firm?
- **User Friendliness** - Is the platform intuitive, easy to learn, and easy to use?
- **Integration and Implementation** - Will it be easy to integrate this platform into my firm?
- **Support** - What support does this vendor provide for me and my team?

For resources on key questions to ask during demos, check out the Vendor Evaluation Checklist.

To Do: After each demo, fill out sections B through F of the Vendor Evaluation Checklist (see the appendix for a full blank copy).

See the appendix for a detailed overview of the security needs that law firms can expect from AI platforms.

The “Alf” team fills out sections B-F of the Vendor Evaluation Checklist (see completed Vendor Evaluation Checklist in appendix), based on the answers they got during the demo in Step 4. They narrow down to the top two platforms.



Step 6: Conduct a pilot (aka trial) (with 2 max 3 vendors)

These first steps might seem lengthy on paper, but can be accomplished quickly. With a 30 minute demonstration of the platform and a few key documents (e.g., security one pager) you should have the basic answers to the questions above.

For the vendors that have passed muster: that match your needs, are secure, and have the support and technological needs you require, it's time for a trial (frequently called a Pilot or a POC) with two or three vendors.

Tip

Piloting more than three solutions is not recommended. If you have not been able to narrow down your potential vendor list to 3 providers, have follow-up conversations with them to dig into more detail about how they will be helping you achieve your business objectives.

Step 6a: Set pilot goals and scope

The first thing you'll want to do when you begin your pilot is to set your goals and objectives. Pick one (maximum two) pain points that you identified in Step 1. We do not recommend that you expand the scope of your pilot to multiple pain points: with a short amount of (free) time to trial, it might be difficult to fully explore, track, and quantify the impact that a solution will have on multiple pain points. Next, quantify your current process. Frequently this will be a question of how much time you spend doing a particular task that is painful (try to get at least a ball-park estimate to set the "current state").

The "Alf" team deem the Case Evaluation process to be their most painful and time-consuming process, choosing to focus their Pilots on it. They ask around their team and establish that it currently takes up to 40 hours to create a full case evaluation, and they take on about 10 new cases a month.

Tip

At this stage you should also try to set a target metrics that you'd like to hit - an X% reduction in time spent on a task for example. Having a target will be beneficial in making sure that the solutions make a significant impact.



Step 6b: Select users

Second, select the key users that will be conducting your pilot. If possible, have a few members of your team try out the platform (*but don't over-do it and invite your whole team to trial*). Any early-adopters or users with particularly relevant pain points are great candidates for participating in the pilot.

The “Alf” team chooses 3 pilot participants, two attorneys and a paralegal on their Labor and Employment team that are eager to try to find a solution to the laborious case evaluation process.

Step 6c: Enable users

Once you have your key users selected, make sure that they are set up for success in the pilot. They should know the scope of the pilot (what use case they should focus on), what question they are trying to answer (how and how much does this impact the business) and have a way to continuously share that feedback.

Specific product enablement and education is likely to come from the vendors that you are piloting as they conduct a kickoff meeting, lay out which use cases and features team members will be interacting with, and teach you what users need to know about the platform.

The “Alf” team documents the goals of the pilot to their test users, and then the users schedule a pilot kickoff session with the vendors to get access to the platforms and get educated on how to use their systems.



Step 6d: Run pilot and gather information

Now the fun begins and your users can explore the platforms freely. Make sure that the testers are keeping in mind the goals you set for the pilot. To track the success and impact of the pilot, they should be keeping track of how long (and how) these key tasks are being handled. Of course, you don't need to run a stop-watch to time the results, but make sure that your team is getting rough estimates on how long they spent and how they worked through their use cases.

Pilot Tips

Your team should be ready to dive in, get their hands dirty, and possibly fall in love with a vendor. But along the way we want to leave you with some general tips that will help you and your team get the most out of the pilot.

- **Give it time** - The more time you spend with a solution, the better sense you will get on how it will impact the firm and your team's day-to-day. Where possible, devote time to exploring the pilot. Most pilots will last from 2 to 4 weeks, so you would want to utilize the platform for a few hours each week to get a good sense of its abilities.
- **Run a test** - If you are looking at similar solutions, it can be useful to run a "controlled" test to see which one will perform better. Pick a particular task that you want to accomplish, and work through it step-by-step in the various platforms. Where possible, use the same prompts (messages) to compare the quality of the results.
- **Ask Questions** - Make sure that you ask questions if you get stuck. Reach out to your vendors to get support on the key use cases you are working on. This will make sure that you maximize the time you can spend evaluating the pilot, and give you a good sense of how this vendor will be able to support you and your users in the future. If you have multiple team members in the pilot, have them ask each other for help as they go to create a path for knowledge sharing and highlighting particular successes.
- **(We'll say it again) Quantify** - It bears repeating because it is something we often forget to do, but remember to quantify your results. How quickly did you get your answers and your task completed? Were you able to save time on something you do every day? How much?



Step 7: Collect pilot results

As your pilots come to a close, you should be able to quantify and qualify the impact that this new technology will have on your firm. First, tie back the results you were able to achieve in the pilot to the goals you set at the outset.

To Do: Fill out the Pilot Impact Worksheet to help you quantify each pilot (see the appendix for a full blank copy).

The “Alf” team was spending almost 40 hours on full case evaluation. During their pilot, users were able to make a data sheet in about 5 hours. This is how they filled out their ***Pilot Impact Worksheet***

(a) Time Spent on Task (Pre Pilot)	(b) Time Spend on Task With Tool	(c) # Times Task Performed per Month	(d) Total Time Savings per Month $d = (a - b) * c$
40 hours	5 hours	10	350 hours saved per month

From here, you should be able to tell a compelling ROI story - projecting the expected increased revenue and marrying it up with the costs of the software. You can of course, add any other qualitative results to the mix - the quality of the support, ease of use, the quality of the results and their alignment with the current process and style of the firm. These are helpful measures in evaluating multiple vendors.

Step 8: Make a decision

Last, and most importantly, you will be making the final decision - to purchase a generative AI platform, and, if you evaluated multiple, which one. Using the metrics that you collected in the pilot, and your team’s qualitative feedback, you should be able to identify a solution that will impact your business in the most positive way.

If you need to create buy-in from others in your organization, it is best to refer to the ROI metrics you calculated in step 7 - showing the projected impact on the firm and the cost of achieving that growth.





Chapter 4: Implementing generative AI in your law firm

- Preparing your firm for AI integration
- Training staff and managing change
- Identifying and mitigating risk

To achieve a successful implementation of AI into your firm takes more than just choosing the right solution - it takes buy-in and usage from all relevant members of your team. In this chapter we will go over some of the key considerations for successful implementation of an AI solution.

For larger organizations we recommend a crawl-walk-run approach for any technology that changes or augments day-to-day work. Pick champions across the organization to be the first to have the AI solution, or, start with one group (one practice areas for example) and get steady adoption from that team. This creates internal champions and controls the use-cases and applications, making sure that the platform you enable your team on is being used correctly.

The “Alf” team, although a smaller practice, starts by rolling out their new chosen AI platform to the Labor and Employment group, and after a few months, takes the learnings from that team to expand to their Personal Injury practice.



Create an AI integration plan

If you can, develop a plan for AI integration, include timelines, responsible parties, and required resources. If you are integrating an AI solution into your existing tech-stack make sure to factor in those timelines and spend time training your end-users on how any existing processes will change. Ask your chosen vendor for best practices on rollout plans, and use them as a partner to make sure that your users are confident, excited, and using the platform well.

Training and enabling your team

Although ease-of-use should be one of the factors in your vendor selection process, it is unlikely that everyone on your team will be able to jump in and use the platform well on day one. Most of us are not well-versed in all of the ins and outs of how to use AI best. The concepts of prompt engineering are tough to grasp, but we are learning best practices quickly. Educate your users thoroughly, and use your vendor to drive that enablement. If your users are not familiar with using tools like these, they have an increased risk of making mistakes.

Common pitfalls in adoption

Adopting new technologies is a risky and challenging endeavor - doubly so with a new technology that isn't well established in the market yet. In this section we will discuss the common pitfalls that we see when firms adopt generative AI and how to mitigate those risks. These are the top three mistakes that we see in firms adopting generative AI:

Rolling out en masse

The biggest mistake companies make with AI is doing too much, too fast. Whether it's rolling out too quickly, or leaving users without proper enablement and support. When all users are thrown into the environment, without dedicated education and enablement, they are likely to either misuse it and receive poor results, or have no incentive to use it at all, hesitant to change their current process.



Biting off too much

When companies try to use their AI for too many tasks without clear goals, it can lead to misuse and frustration. For instance, if an AI meant for reviewing documents is used to write complex ones, it might not work well, causing users to become unhappy.

Skipping best practices and enablement

Using technology correctly and following its guidelines is crucial. However, many people skip learning the basics, leading to errors and frustration. Providers need to ensure users get ample support and training.

Mitigating the risk to your firm

Of course, there are many steps that you, and your generative AI provider, should take to mitigate these risks, and ensure that you have a successful and efficient rollout and usage. Here are our top recommendations:

Rolling out en-masse - take a measured approach

Instead of giving everyone access to new tech at once, start with a small group (say, one practice area). This helps you manage the rollout, set good practices, and create experts who can help others.

Biting off too much - start with discrete use cases

Don't use the AI for everything right away. Begin with important tasks where it can really make a difference, then slowly add more uses as you and the AI get better.

Skipping best practices and enablement - take time to learn

Make sure your team knows how to use the AI properly. Offer regular training and easy-to-consume resources to prevent mistakes and ensure everyone gets the most out of the technology.



Generative AI errors and hallucination

We could write a whole eBook on the errors that generative AI can make, but this resource wouldn't be complete if we didn't briefly touch on the main concern plaguing the legal industry - the risk of hallucination.

Simply put, hallucination refers to when AI generates fictional information or draws false inferences. This is extremely dangerous in the legal field where accuracy is crucial. If someone cites a case in the brief they deliver to the court, and upon further investigation it turns out that there is no record of that case ever existing, the repercussions will be disastrous. Nobody wants to end up in the news because of a mistake that their AI made, and definitely not because they trusted blindly. The situation in which hallucination is most perilous in the legal profession is Legal Research, where the AI can "make up" or hallucinate case law, statutes, and more.

Here are three key strategies that teams can use to help mitigate the risks that these errors can pose.

- **Source Citation and Auditability:** AI should automatically reference sources or provide a verification path. This should be standard, not optional.
- **Verification by Users:** Legal users should be mindful of this error and make sure that they verify and check any results that their generative AI tools surface for them. For any case law surfaced, look up the full text of that case and make sure that it accurately bolsters the arguments you are making.
- **Isolated Legal Research:** Limit Legal Research AI to verified case law databases to avoid citing fictitious cases. Example: Eve's Legal Research tool uses a verified case database to prevent inaccurate outputs.

To read more on the risk of hallucination and other errors that AI can make, check out **this** longer article. Please note, hallucination and other AI errors shouldn't be deal breakers just yet. You should look for platforms that minimize the prevalence of these errors, and train users to handle them correctly when they come up.





Conclusion

- Future-proofing your law firm
- Recap of key takeaways from this eBook

Purchasing a generative AI solution and integrating it into your firm is just a step on a path to future-proof your law firm. There are countless ways that you can stay ahead of the pack and maintain your competitive edge.

By fostering a culture of innovation and excitement, you will be able to build a business and a team that is always pushing the envelope, driving your business to success. Hopefully this eBook will help you get started on your generative AI journey, helping you understand how and why generative AI is augmenting the legal industry, helping you frame up your key business needs and how AI can help you achieve them, give you a template to evaluate possible providers in the market and make sure that they are a good fit for you and your firm, and then implement a solution effectively.

Ready to explore generative AI for your firm?

[Book a demo with Eve](#)



Appendix

GOALS, HURDLES, AND USE CASES WORKSHEET

A. Firm Goal



C. Top Hurdles

1

2

3



B. Top Pain Points

1

2

3



Vendor Evaluation Checklist

Category	Core Questions	Vendor A	Vendor B	Vendor C
(A) Legitiness check	Have others been able to see a benefit to their business by using this product?			
	Does the vendor have high quality testimonials from existing users?			
	Does the vendor have third-party (unbiased) reviews from users?			
(B) Use cases and pain points	How will this vendor impact my top pain-point 1?			
	How will this vendor impact my top pain-point 2? How will this vendor impact my top pain-point 2?			
	(Optional) How will this vendor impact my top pain-point 3?			
(C) Security	Does the provider use user data train central models?			
	Do they have best-in-class data encryption processes in place (e.g., TLS 1.2+)			
	Do you have an incident response plan in place?			
	Have they attained SOC 2, ISO 27001, or other data security certifications?			
	Has the vendor secured any other certifications or compliances that are crucial for your work? E.g., HIPAA, GDPR, etc.			
	Are security audits conducted regularly? What is the frequency of audits?			
(D) User Friendliness	Is the platform user friendly? Can I see my team members using it without the need to learn new technological processes?			
(E) Integrations and implementation	Does this solution integrate with my current tech stack? If not now, when will it be able to?			
	How much time and effort will be needed to integrate this solution with my current tech-stack?			
	What time and effort is needed to roll out this solution to my team?			
	Does this vendor have a set rollout and enablement plan?			
(F) Support	What support infrastructure does this vendor offer?			
	Do they have on-demand human support?			
	Do they have a way to get self-serve support? Do they have a Knowledge Base?			



Pilot Impact Worksheet

Platform	(a) Time Spent on Task (Pre Pilot)	(b) Time Spend on Task With Tool	(c) # Times Task Performed per Month	(d) Total Time Savings per Month $d = (a - b) * c$

Security considerations for generative AI

With any new technology you incorporate into your firm it is crucial that it is safe and secure. The legal industry holds itself to particularly high standards for managing their client’s personal and confidential information - and the vendors that supply generative AI technology need to match that rigor. Recognizing and comprehending potential risks is crucial, especially as some of the concerns are new - problems that we have not encountered with other software typically purchased by legal professionals.

Novel privacy risks - data leakage

Data leakage occurs when models take user inputs and add them to the training dataset, surfacing them as answers to another user’s query. For example, as you’re working on a particular matter, you upload your case strategy to your gen AI solution, iterating on your approach. If the model is subsequently trained on your data, your case strategy can become part of the model’s core database. If another lawyer asks for a strategy on a similar matter, the model is now able to share your strategy as part of its answer, and if your strategy contained confidential client information, that data would be exposed. This risk arises when generative AI platforms don’t treat user input data as private - some providers retain user data for model retraining purposes (which could make the model better in general), thus exposing confidential data to other users. When you’re looking at providers, make sure that they never use your data to train their central models. Ask thorough questions of the tools they are using or evaluating. Some suggested questions:



- **Does the provider use uploaded data to train central models?**
- **What are the f's data access levels, retention policies, and usage terms?**
- **Who owns the data that is used throughout the systems?**

Where possible, opt-out of data sharing for model training and make sure that providers have thoughtful policies for their model training and data retention helps identify solutions that will create the safest infrastructure for usage.

Traditional risks in a new light - data breach

Two crucial factors expose platforms to the risk of data breaches. Firstly, inadequate encryption and failure to adhere to data retention and international transfer protocols significantly increase the vulnerability. Secondly, prolonged data retention by providers amplifies the risk of breaches or attacks, especially when dealing with vast quantities of confidential information.

Look for providers that employ best-in-class encryption, such as TLS 1.2+, and have strict data isolation - so that data is not shared unnecessarily within or outside the system. Ask thorough questions of the tools they are using or evaluating. Some suggested questions:

- **What policies and procedures exist to address breaches or vulnerabilities?**
Do you have an incident response plan in place?
- **What encryption, access controls, auditing, penetration testing is implemented?**
How frequently is this reevaluated?
- **What policies govern client data use, privacy, retention, and deletion?**
- **What provisions exist for data isolation, retention limitations, and access control?**



Old risks, not to be forgotten

It is imperative for firms to ensure that AI providers comply with legal and industry data security standards, such as SOC II Type 2 compliance, to effectively mitigate potential legal ramifications. In addition, users should consider other certifications and compliances, including HIPAA, GDPR, and more, to bolster data protection in specific practice areas.

Ask detailed questions of providers to make sure that they match the rigor of the legal industry's security. Some suggested questions:

- **Have they attained SOC 2, ISO 27001, or other security certifications? (Depending on your practice areas, are there any other certifications that are crucial for your work? E.g., HIPAA, GDPR, etc.)**
- **Are security audits conducted regularly? What is the frequency of audits?**

To read more about the security risks of generative AI and how users and providers are addressing them, check out [this blog](#).

