



AI 2035: The Legal Profession and the Judiciary in the Age of Artificial Intelligence

AI for Knowledge Management and Workflow Automation

This session explores how AI is transforming legal knowledge management and streamlining workflows through automation, search optimization, and smarter information retrieval. Attendees will gain practical insight into implementing these tools to improve efficiency and enhance organizational access to institutional knowledge.



Shawn Davis, CIO / Chief Technologist, Investigations, Edelson P.C.

Shawn Davis is CIO and Chief Technologist at Edelson P.C. leading investigations into technology-related misconduct. Shawn specializes in cybersecurity, privacy, and AI-related issues. He frequently advises policymakers and testifies on emerging technology risks. Shawn is a recognized expert in digital investigations and data security.



Adam C. Kibort, Partner, Grund & Leavitt LLP

Adam C. Kibort is a partner at Grund & Leavitt and focuses exclusively on family law. Adam represents clients in complex matrimonial and family matters, including custody disputes, financial analysis, and asset division. He has significant experience in international and multi-jurisdictional cases, including matters under the Hague Convention. Adam also handles claims involving electronic privacy and evidentiary issues. He is a Fellow and Past President of the Illinois Chapter of the American Academy of Matrimonial Lawyers and a Fellow of the International Academy of Family Lawyers.



Samuel Oh, Co-Founder & CEO, Concorda

Samuel Oh is CEO and founder of Concorda, a company focused on building technology solutions for litigation and legal workflows. Samuel brings a unique combination of legal and technical expertise, with experience as both an attorney and technologist. He is committed to improving legal tools for practitioners. Samuel's work emphasizes efficiency and innovation in litigation processes. He leads a team dedicated to modernizing legal practice through technology.



Moderator: Sari Montgomery, Partner, Robinson, Stewart, Montgomery & Doppke, LLC

Sari Montgomery is a partner at Robinson, Stewart, Montgomery & Doppke, LLC. Sari focuses her practice on legal ethics, professional responsibility consulting, and attorney discipline defense before the ARDC. In addition to defending lawyers, judges, and bar applicants in disciplinary and bar admissions proceedings, Sari provides preventative consulting services and legal advice to lawyers regarding all manner of ethical and practice/risk management issues.

THE CHICAGO BAR ASSOCIATION PRESENTS:

**AI 2035: The Legal Profession and the
Law in the Age of Artificial Intelligence**

**AI for Knowledge
Management &
Workflow Automation
May 12, 2026 ·
10:30 AM – 12:00 PM**



THE
**CHICAGO
BAR
ASSOCIATION**

Speaker Biographies

Adam Kibort

MODERATOR

Partner, Grund & Leavitt LLP

Adam C. Kibort (JD/MBA) is a Partner with Grund & Leavitt LLP. He is a Fellow and Past-President of the Illinois Chapter of the American Academy of Matrimonial Lawyers (AAML) and is a Fellow of the International Academy of Family Lawyers (IAFL). He practices exclusively in the area of family law, representing parties in the litigation and resolution of matrimonial and family-related matters, including custody disputes, complex financial matters, pre- and post-nuptial agreements, and the disposition of marital and non-marital assets. Mr. Kibort has been recognized as “Lawyer of the Year” by Best Lawyers® for Family Law, Chicago (2026) and as one of Illinois’ “40 Under 40 Attorneys to Watch” by the Law Bulletin Publishing Company.

Sam Oh

PANELIST

Co-Founder & CEO, Concorda

Sam Oh (JD/MBA) is the Co-Founder and CEO of Concorda, a legal technology platform that helps litigators automatically manage their docket and matters, store and run discovery analysis in the cloud, and draft work product. He is a licensed attorney (IL bar), and a graduate of Harvard College (computer science and philosophy), the University of Chicago Law School, and Booth School of Business. He previously worked as a software engineer and product manager at companies including Microsoft and NASA before becoming a litigator and building tools for the legal industry.

Shawn Davis

PANELIST

*CIO & Chief Technologist for Investigations,
Edelson PC*

Shawn Davis is the CIO and Chief Technologist for Investigations at Edelson PC, where he leads technical teams in managing and securing the firm’s information assets and investigating privacy violations, AI-based abuses, large-scale data breaches, and other complex matters. A regularly sought expert on emerging technology issues, Shawn has testified in federal court and briefed members of Congress, state legislators, and attorneys general on artificial intelligence, cybersecurity, consumer and children’s privacy, voting system security, and surreptitious geotracking. He was previously appointed to the Federal Advisory Committee on Data for Evidence Building at the U.S. Department of Commerce, and serves as an Adjunct Industry Professor at Illinois Tech.

Timed Agenda

Time	Duration	Segment	Lead
10:30 – 10:45	15 min	Welcome, panel framing, and panelist introductions.	Moderator (Adam Kibort)
10:45 – 11:05	20 min	Part 01 — What's out there. A survey of platforms and where each is strongest in legal work today. Opens with a Slido audience poll on tools currently in use.	Sam Oh leads · all panelists
11:05 – 11:25	20 min	Part 02 — How it's actually getting used. Three case studies from this panel (voice-agent intake at Edelson, daily-driver Claude at Grund & Leavitt, docket-grounded automation at Concorda) and the knowledge-management and workflow themes underneath them.	All panelists
11:25 – 11:45	20 min	Part 03 — Risks and what to watch. Hallucination sanctions cases, confidentiality and privilege carve-outs, BIPA and state privacy exposure, agentic AI governance, and measuring ROI.	Shawn Davis leads · all panelists
11:45 – 12:00	15 min	Live audience Q&A via Slido. Closing thoughts.	Moderator (Adam Kibort)

TODAY

How we'll spend the next 90 minutes

01

What's out there

A survey of platforms, products, and where each one is genuinely strongest in legal work today.

~25 min

02

How it's getting used

Three case studies from this panel — and the knowledge-management and workflow themes underneath them.

~30 min

03

Risks & what to watch

Hallucinations, privilege, privacy, agentic governance, and measuring whether any of this is working.

~25 min

Live Q&A throughout: join Slido at slido.com · event code **#CBA-AI** · drop questions any time and we'll address them in the closing block.

PART 01

What's out there

A survey of the AI tools attorneys are actually using — and where each one is genuinely strongest.

Before we tell you what we use — what are you using?

Pick all that apply:

- ☐ ChatGPT (general or via API)
- ☐ Claude (general or via API)
- ☐ Google Gemini / NotebookLM
- ☐ Westlaw Precision AI
- ☐ LexisNexis Lexis+ AI / Protégé
- ☐ Thomson Reuters CoCounsel
- ☐ Harvey, Legora, or another horizontal legal tool
- ☐ Spellbook, Ironclad AI, Kira, or similar drafting tool
- ☐ n8n, Zapier, or another no-code automation tool
- ☐ Nothing yet — observing

LIVE POLL

How to vote

1. Open slido.com
2. Enter event code **#CBA-AI**
3. Select all the tools you use
4. Drop questions any time — we'll address them at the end.

The four general-purpose models showing up in legal practice

ChatGPT

OPENAI

Broad capability and ecosystem; strong reasoning and code; massive plugin and API surface.

The default starting point for most attorneys.

Claude

ANTHROPIC

Long-form drafting, nuanced legal reasoning, large-context document review; conservative on hallucinations.

Most cited by this panel as the daily driver.

Gemini

GOOGLE

Multimodal — strong on image recognition and OCR of degraded scans; tight Google Workspace integration.

Useful when the document is a picture, not text.

Grok

XAI

Real-time signal via X integration; strong on current events and conversational reasoning; competitive on recent benchmarks.

Newer entrant in legal use cases; useful when current-events context matters.

No single model dominates — you will need a portfolio of tools.

Different jobs, different tools — what we reach for and why

Task	Reach for	Why
Long-form drafting & legal analysis	Claude	Most consistent voice and reasoning over long documents.
Image recognition & OCR of bad scans	Gemini	Stronger multimodal vision than peers; salvages garbled OCR.
Charts, graphs, and quick illustrations	Claude	Generates clean visualizations from messy data; easier to iterate inside a draft than Excel exports.
Research over your own documents	NotebookLM	Source-grounded answers tied to the files you uploaded.
General reasoning, code, and agentic flows	ChatGPT	Broadest tool ecosystem; recent quality gains close the gap on legal use.
Workflow automation across SaaS tools	n8n / Zapier	Connect Claude or GPT to Salesforce, DMS, intake — without code.
Voice agents (intake, screening, follow-up)	Retell	Production-grade voice infrastructure; pair with the model of your choice.
AI timekeeping & billable narratives	Billables.ai	Captures billable activity automatically and drafts narratives from work product; in production use at Edelson PC.

Models leapfrog every six months. Build for swap-out, not lock-in.

Tools built specifically for the legal market

Research & Knowledge

- Westlaw Precision AI
- LexisNexis Lexis+ AI / Protégé
- Thomson Reuters CoCounsel
- vLex Vincent AI
- Harvey (firm-deployed)

Drafting & Review

- Spellbook (contract drafting)
- Ironclad AI Assist
- Kira / Luminance (review)
- Robin AI
- BriefCatch (style/clarity)

Litigation Workflow

- 1 • Concorda (PACER docket + eDiscovery)
 - Everlaw / Reveal (eDiscovery AI)
 - Briefpoint
 - Lexis Snapshot / motion analytics
 - Clearbrief.ai (TOA)

Slide 9

1

@ke@concordahq.com
Sam Oh, 4/29/2026

What you wire into the model — voice, integrations, orchestration

n8n

Open-source, self-hostable workflow automation. Connects models to your DMS, Salesforce, intake forms.

Strongest fit: Power-user firms; technical attorneys

Zapier

Hosted no-code automation; broadest connector library on the market.

Strongest fit: Non-technical attorneys; small-firm ops

ElevenLabs

Production-grade voice generation. The voice on a voice agent is the user experience.

Strongest fit: Outbound calls, intake, voicemail screening

Retell

Voice-agent infrastructure — telephony, turn-taking, latency, interruption handling.

Strongest fit: AI receptionists and intake screening

These tools are the connective tissue. The model is the brain; this is the nervous system.

PART 02

How it's actually getting used

Three real-world deployments — and the knowledge-management and workflow themes underneath them.

Knowledge management & workflow — six things firms keep solving for

Search & retrieval

Asking your DMS questions in natural language; centralizing precedent so it's findable.

Summarization & synthesis

Depositions, transcripts, document productions — collapsing volume to a brief.

Prompt engineering

Treated as a real skill; firms running internal training and bake-offs.

Workflow automation

Start with the lowest-hanging fruit. Intake, conflicts, billing narratives, calendaring.

Governance & security

What can each tool see? What's the audit trail? Especially urgent for agentic AI.

Measuring ROI

Most firms can't yet. Pilots ship without baselines, and the bill keeps coming.

Three firms, three very different deployments

Edelson PC

PLAINTIFF-SIDE LITIGATION AT SCALE

DEPLOYMENT

Voice-agent intake

Voice agents handle mass tort lead intake and structured client questionnaires (e.g., wildfire damage claims), with Claude extracting structured fields post-call and writing to Salesforce via a custom backend. Agent conversation flows and campaign configs are version-controlled and deployed to Retell.ai through a CI/CD pipeline.

STACK

Retell · Salesforce · Claude

Grund & Leavitt LLP

FAMILY LAW / MATRIMONIAL

DEPLOYMENT

Daily-driver Claude

Claude is the team's primary AI tool for drafting, analysis, and document work in matrimonial matters. Adoption is grounded in attorney workflow, not platform features — the question the firm asks first is what work does it do every week that this can compress.

STACK

Claude (primary)

Concorda

LITIGATION WORKFLOW PLATFORM

DEPLOYMENT

Docket-grounded automation

Concorda is the litigation platform. Discovery review, motion and brief drafting, and case management all run on one connected platform, so the work compounds instead of fragmenting across tools.

STACK

PACER · Multi-model (Anthropic / OpenAI / Google) · Custom orchestration

PART 03

Risks & what to watch

Hallucinations, privilege, privacy, governance — the parts that put your bar card on the table.

Fabricated citations are the risk most likely to end up in a published opinion

The cases that are now part of the conversation

Mata v. Avianca, Inc.

678 F. Supp. 3d 443 (S.D.N.Y. 2023)

Rule 11 sanctions for ChatGPT-generated fictitious citations. The original sanctions case.

Park v. Kim

91 F.4th 610 (2d Cir. 2024)

Counsel referred to the grievance panel after submitting a brief with nonexistent authority.

Ongoing trend (2024–2026)

District courts nationwide

Standing orders requiring AI-use disclosure or citation-verification certifications. Read the local rules.

Celebrity / public-figure cases

—
Defamation and right-of-publicity actions over AI-generated content keep moving. The risk is no longer hypothetical.

PRACTICE POINTS

Verify every citation.

Don't trust shape — pull the source.

Check the local rules.

Many courts now require disclosure or certification.

Use closed-loop, source-grounded tools for legal research; reserve open chatbots for ideation.

Where the rules meet the vendor terms of service

Vendor due diligence

- Inputs not used to train third-party models without opt-in
- SOC 2 Type II current; data encrypted in transit and at rest; where is data stored and processed?
- Retention limited to what's needed; clear deletion timeline
- Incident notification & forensic cooperation in the contract

Privileged log carve-out

- Don't run AI over your privilege logs
- Don't use AI for second-pass proofing of privileged docs
- Reasoned human review on privilege calls — every time
- Retain audit logs of what the model touched, per matter

BIPA & state privacy exposure

- Voice data could trigger Illinois BIPA (740 ILCS 14/1 et seq.) if voiceprints are captured
- Understand if service uses simple speech-to-text vs. speaker recognition
- California (CCPA/CPRA), Colorado (CPA), etc. layering on disclosures
- Advise clients separately on AI privacy exposure

When the model can act — what it can see and do becomes the policy

THE SHIFT

From assistant to agent

Yesterday's AI answered questions. Tomorrow's takes actions — sends emails, files motions, moves money, books witnesses.

"What can the agent see?" and "what can the agent do?" are now policy questions, not engineering questions.

Governance checklist

- Scope: which matters, which data classes, which actions
- Identity: every agent action runs as a named human owner
- Audit: complete log of inputs, outputs, and side effects
- Authority: clear list of actions that require human approval
- Reversibility: how do we unwind a bad action — quickly
- Vendor terms: indemnity & liability when the agent does damage

Firms are spending on AI. Almost none can say whether it's working.

THE PROBLEM

Adoption without proof

Firms ship AI tools to their teams, then can't say whether anything got faster or better. No baseline going in, no measurement coming out. The tool either stays because nobody pulled the plug, or goes because someone got frustrated.

THE APPROACH

Start with a workflow that has a deadline

Litigation runs on deadlines. Pick one: time to first draft, hours per discovery summary, cycle time from filing to calendar. Run a small cohort on a purpose-built tool. Measure the same thing after 90 days.

THE PAYOFF

Defensible adoption

The firms that can prove ROI will take the work that firms still guessing can't keep. And the number does more than answer the renewal question — it tells you which practice group to expand into next, which workflow to instrument after that, and where the real efficiency is hiding. One proven workflow becomes two. Two becomes a competitive edge that's hard to replicate.

CLOSING BLOCK

Audience Q&A

Drop your questions in Slido — we'll work through them in order.

LIVE Q&A

slido.com

event code: #CBA-AI

Or just raise your hand.

Thank you.

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CBA AI Symposium 2026

AI for Knowledge Management and Workflow Automation

*Timed Agenda — Working Draft for Panelist Review***Date:** Tuesday, May 12, 2026**Time:** 10:30 AM – 12:00 PM (90 minutes)**Venue:** Venue SIX10, 610 S. Michigan Avenue, Chicago, IL 60605**Format:** Self-moderated panel (90 min). Live audience polling and Q&A via Slido throughout.**Moderator:** Adam Kibort (Grund & Leavitt LLP)**Panelists:** Adam Kibort (Grund & Leavitt LLP); Sam Oh (Concorda); Shawn Davis (Edelson PC)**MCLE:** Accredited for Illinois MCLE credit. Written materials accompany this agenda (panel deck plus consolidated bibliography).

Timed Agenda

Time	Duration	Segment	Lead
10:30 – 10:45	15 min	Welcome, panel framing, and panelist introductions Moderator frames the topic and the three core questions the panel will answer; brief panelist introductions; outline of how Slido will be used for live audience polling and Q&A.	<i>Moderator (Adam Kibort)</i>
10:45 – 11:05	20 min	Part 01 — What's out there A survey of the AI tools attorneys are actually using and where each one is genuinely strongest. Opens with a Slido audience poll on tools currently in use, then walks through (1) the foundation-layer LLMs (ChatGPT, Claude, Gemini, Grok); (2) the comparison of which tool is best for which task; (3) the vertical legal tools (Westlaw Precision AI, Lexis+ AI, CoCounsel, Harvey, Spellbook, Concorda, etc.); and (4) the automation layer (n8n, Zapier, ElevenLabs, Retell).	<i>Sam Oh leads; all panelists contribute</i>
11:05 – 11:25	20 min	Part 02 — How it's actually getting used Six knowledge-management and workflow themes (search & retrieval, summarization, prompt engineering, automation, governance, ROI), then three case studies from this panel: voice-agent intake at Edelson PC; Claude as the daily driver in matrimonial practice at Grund & Leavitt LLP; and PACER-grounded litigation automation at Concorda. Each case study addresses both the deployment and a guardrail or limitation observed.	<i>Each panelist presents their own case study</i>
11:25 – 11:45	20 min	Part 03 — Risks and what to watch Hallucinations and the controlling sanctions cases (Mata v. Avianca; Park v. Kim); confidentiality and the privileged-log carve-out; vendor due-diligence checklist; BIPA and state privacy exposure; agentic-AI governance (scope, identity, audit, authority,	<i>Shawn Davis leads; all panelists contribute</i>

Time	Duration	Segment	Lead
		reversibility, vendor terms); and the practical question of whether any of this is actually working — instrumentation and ROI.	
11:45 – 12:00	15 min	Live audience Q&A and closing Live Q&A driven by Slido submissions; closing thoughts from each panelist on the single most important takeaway for an Illinois practitioner adopting AI in 2026.	<i>Moderator</i> <i>(Adam Kibort)</i>

Panel Objectives

- Provide attorneys an accurate map of the AI tools being used in legal practice today and where each is strongest.
- Show three concrete, real-world deployments — illustrating that adoption looks different in plaintiffs' work, family-law practice, and a litigation-tech platform.
- Equip the audience with a defensible framework for managing the principal risks: hallucinations, confidentiality and privilege, privacy and BIPA exposure, and agentic-AI governance.
- Leave the audience with one practical step each could take in their practice in the next 90 days.

Audience Engagement Plan

Slido will be available throughout for live polling and audience questions. The opening segment includes an audience poll on AI tool usage to inform the discussion. Audience questions submitted via Slido throughout the panel will be addressed in the final five-minute Q&A block; remaining questions will be answered by the panel via follow-up materials at the CBA's discretion.

We've tested Slido and it works well for both the live polling and final audience questions.