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Considering AI Tools for Your Legal Work

Fitting the Glass Slipper

Program Overview

- History and Evolution of Legal Tools
- Legal GenAI Tool Continuum
- Best Practices for Evaluating Legal GenAI Tools
- GenAI for eDiscovery
 - Investigate
 - Review
 - Privilege Log Generation
 - Fact Detection and Chronology Creation
- Key Takeaways
- Questions

History and Evolution of Legal AI Tools

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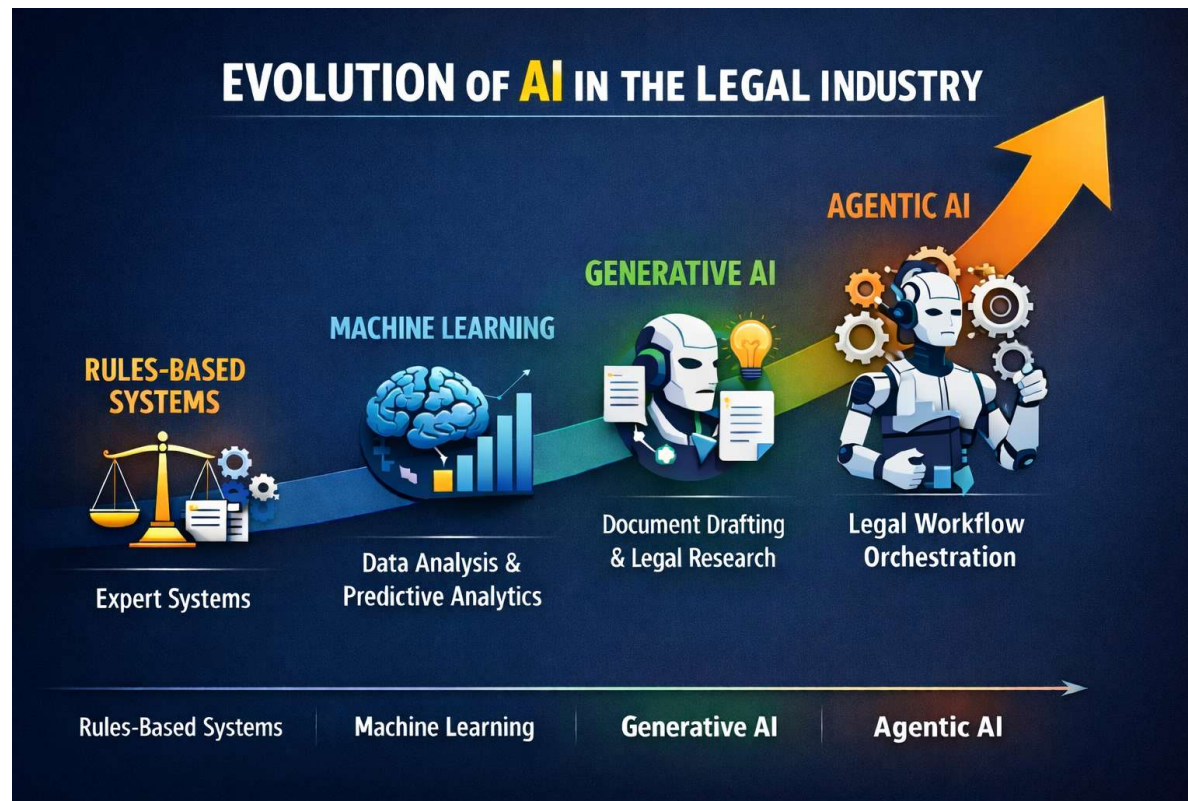


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History & Evolution of Legal AI Tools



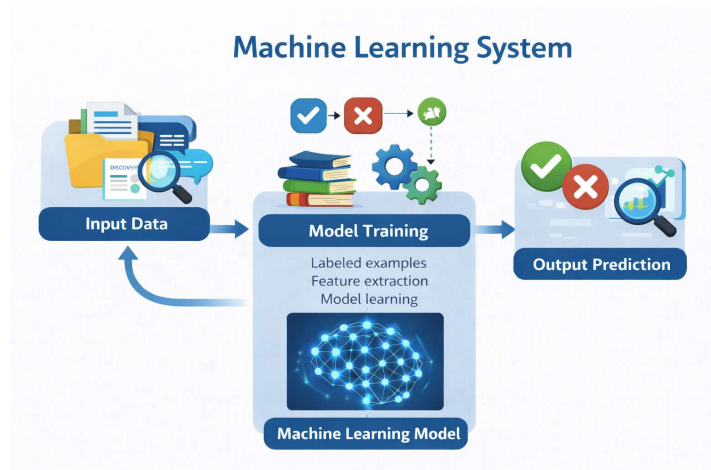
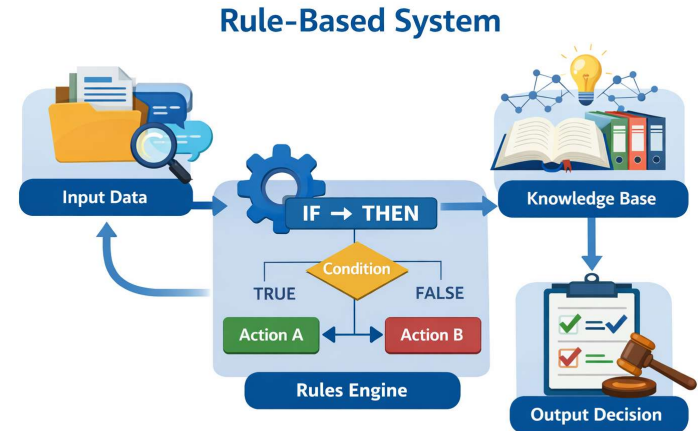
“Early” Legal AI Tools

➤ Rule-Based

- E.g., Legal Research (~1970)
- Deterministic systems
- Boolean-based searching

➤ Machine Learning

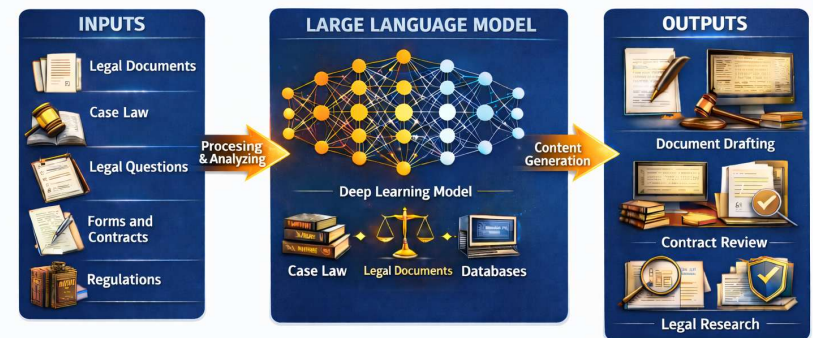
- E.g., Predictive Coding / TAR and Contract Analysis (~2010)
- Models trained on documents
- Classification of documents
- Automated extraction of clauses and contract data



GenAI Legal Tools

- Dramatic change in AI capabilities due to advancements in deep neural networks, transformer architecture, computing power, training data, etc.
- E.g., ChatGPT, Copilot, CoCounsel, Harvey, Legora (2022 to present)
- Document summarization, drafting, and analysis
- Legal Research
- Contract Analysis

GenAI in Legal



Tabular Review / Case Preparation: Agreements & Key Issues

Add document Add column Templates

Document	Parties
1 GmMobileInc_20070319_S-1A_FX-10.09.436630_FX-10.09	Fox Mobile Entertainment, Inc. (as Administrator for Twentieth Century Fox Film Corporation) and GL
2 AlliedEsportsEntertainmentInc.pdf PDF Document - Page 1	Satellite Television Company Limited (Party A/licensor) and Beijing Tianying Jiuzhou Networ
3	Stanley Investment Management Inc. (Licensor) and Morgan Stanley Direct Lending Fund (Li
4	Square Capital Management LLC (Licensor) and Palmer Square Capital BDC Inc. (Licensee),...
5	AP ENTERTAINMENT (Licensor) and THE HENRY FILM AND ENTERTAINMENT CORPORATIO...
6	SINA Internet Information Service Co. and Shanghai SINA Leju Information Technology Co. Ltd
7	conomic Information Service of Xinhua News Agency (CEIS) and Xinhua Financial Network LI
8	II Technologies, Inc. (Licensor) and PLAN B MEDIA AG (Licensee/plan b)
9 AlliedEsportsEntertainmentInc_20190815_8-K_EX-10.19_11...	NMN Enterprises, Inc. (Delaware corporation), MNM...
10	

Best Practices for Evaluating Legal GenAI Tools

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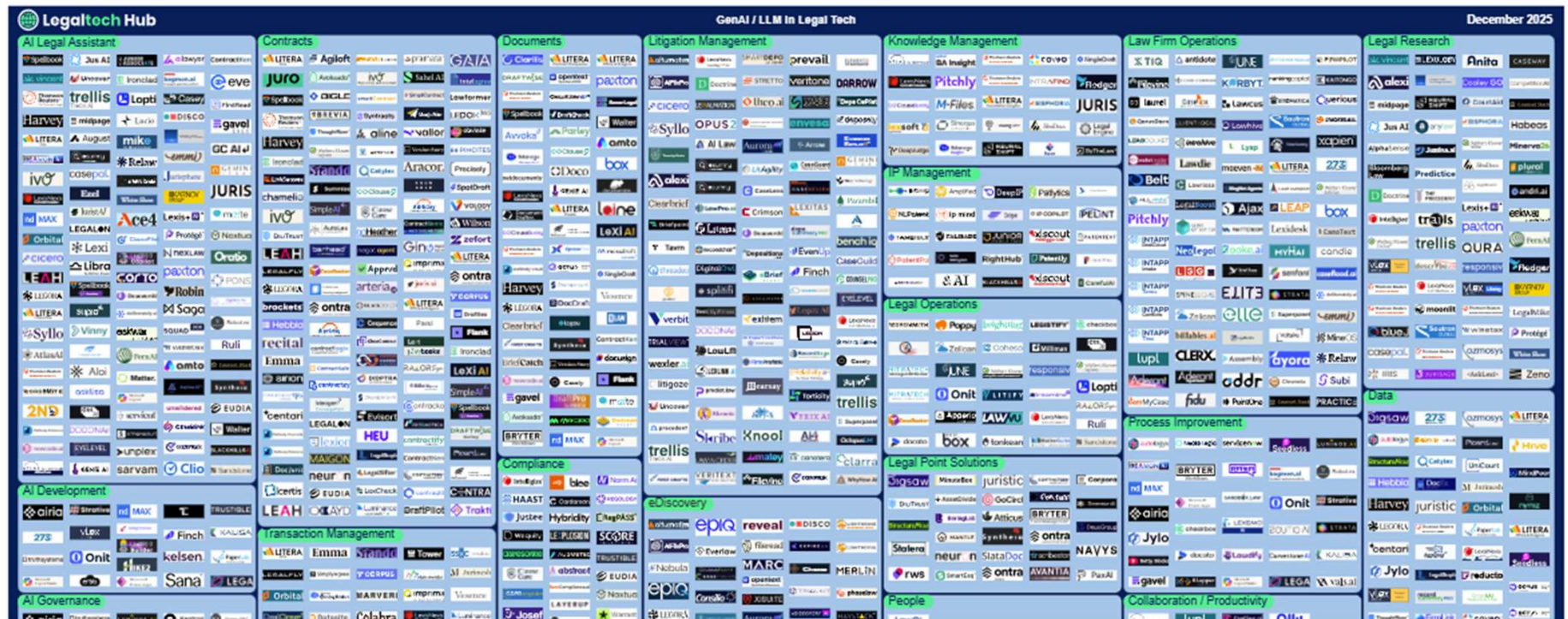
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GenAI Legal Tools

855 Products / 682 Vendors (Dec 2025)



<https://www.legaltechnologyhub.com/contents/lth-genai-legal-tech-map-december-2025/>



Public v. Enterprise GenAI Applications

PUBLIC



US appeals court fines lawyers \$30,000 in latest AI-related sanction

By Mike Scarcella

March 16, 2026 2:14 PM CDT · Updated March 17, 2026



March 25, 2026

Federal Courts Reach Different Outcomes on Whether AI-Generated Materials Warrant Work Product Protection

ENTERPRISE

- Software your company licenses or develops.
- Your company owns and controls the data - not used for training
- Data is encrypted

Azure OpenAI Service

Build your own copilot and generative AI applications

Amazon Bedrock

The easiest way to build and scale generative AI applications with foundation models (FMs)

ChatGPT Enterprise

LEGORA

Harvey



WORDSMITH

CoCounsel

General v. Legal Productivity

General Productivity

- Assisting with daily administrative duties
- Not necessarily linked to matters.
- E.g. Transcription of meetings, finding emails, creating replies, finding documents in SharePoint, creating PPTs, etc.



Legal Productivity

- Assisting or performing matter-related duties
- E.g. Redlining contracts, assessing risk, creating policies, completing legal documents, bulk data extraction, evaluating claims, creating investigation timelines



LEGORA

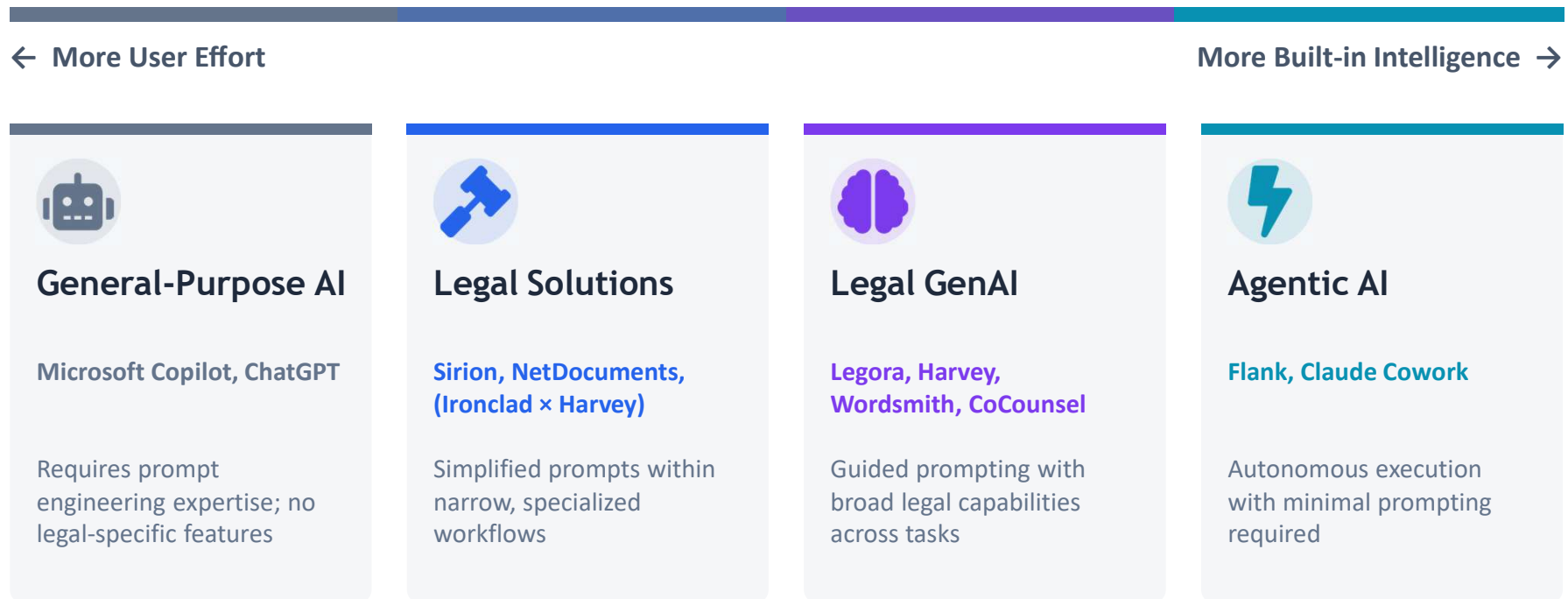
Harvey



CoCounsel

What is your AI best used for?
More importantly, what is it best NOT used for.

Legal GenAI Tools fall on a continuum



**Representative examples; landscape is evolving rapidly*

General Productivity is a good starting point

General Productivity GenAI

- **Do Use for:**
 - Summaries of documents, email conversations, discussions, transcribing meetings, etc.
- **Do Not Use for:**
 - Legal Research
 - Redlining of contracts
 - Legal Analysis
- Vendors specifically prohibit and disclaim its use for Legal purposes without due diligence from a professional.
- **Legal Hallucination is not strictly prevented.**

ChatGPT ▾

↑ Share ...

do you offer legal advice?

I can help explain legal concepts, summarize laws or cases, and walk through general considerations—but I don't provide legal advice.

Legal advice typically means applying the law to your specific situation and telling you what you should do. For that, you'd want to consult a licensed attorney who can account for jurisdiction, facts, and risk.

If you want, you can describe what you're dealing with and I can:

- break down the relevant legal issues,
- outline possible approaches,
- suggest questions to ask a lawyer,
- or help you prepare for a conversation with counsel.

That tends to be the most useful way to use me in a legal context.

+ Ask anything



ChatGPT can make mistakes. Check important info.



Legal Productivity offered inside specific applications

Legal Tool offering GenAI

- Narrow focus limited to the app itself.
- Mostly focused on Contracting or Document Management, not the broader functionality of the 3rd party AI if it has other capabilities.
- **Three models:**
 - Vendor-specific AI e.g. Jurist for Ironclad, DocumentAssist for DocuSign.
 - Vendor Neutral AI e.g. CoPilot in Netdocs, Harvey in iCertis, Harvey + Ironclad.
 - Integration or Connectors e.g. Legora in Netdocs, CoCounsel in HighQ.

Call Outs

- Really depends on the tool and what they offer, assuming you've already purchased and implemented the tool - and GenAI is an add-on.
- Sometimes the CLM/Tool vendor imposes token limitations and adds this as a new revenue stream.
- But GenAI could be used outside of those tools with more versatility and fewer limits e.g. litigation use cases.



Standalone Legal GenAI Applications

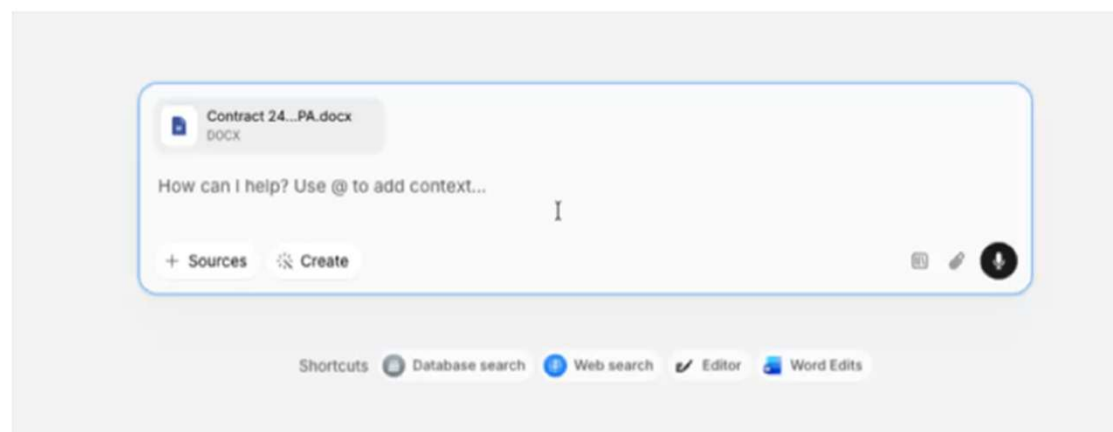
Standalone GenAI

- **Do Use for:**
 - Contract drafting and review. Creating legal templates, playbooks, etc. Litigation use cases. Workflows. Standardised Prompt Libraries. Data Extraction. Completing documents. And more.
- **Do Not Use for:**
 - Large scale eDiscovery
- Some vendors give access to collections of legal research without an additional licence. Others offer it as a paid option.
- Language is no longer a barrier to entry.
- Legal Hallucination is strictly guarded against.
- There is still a Human in the Loop.

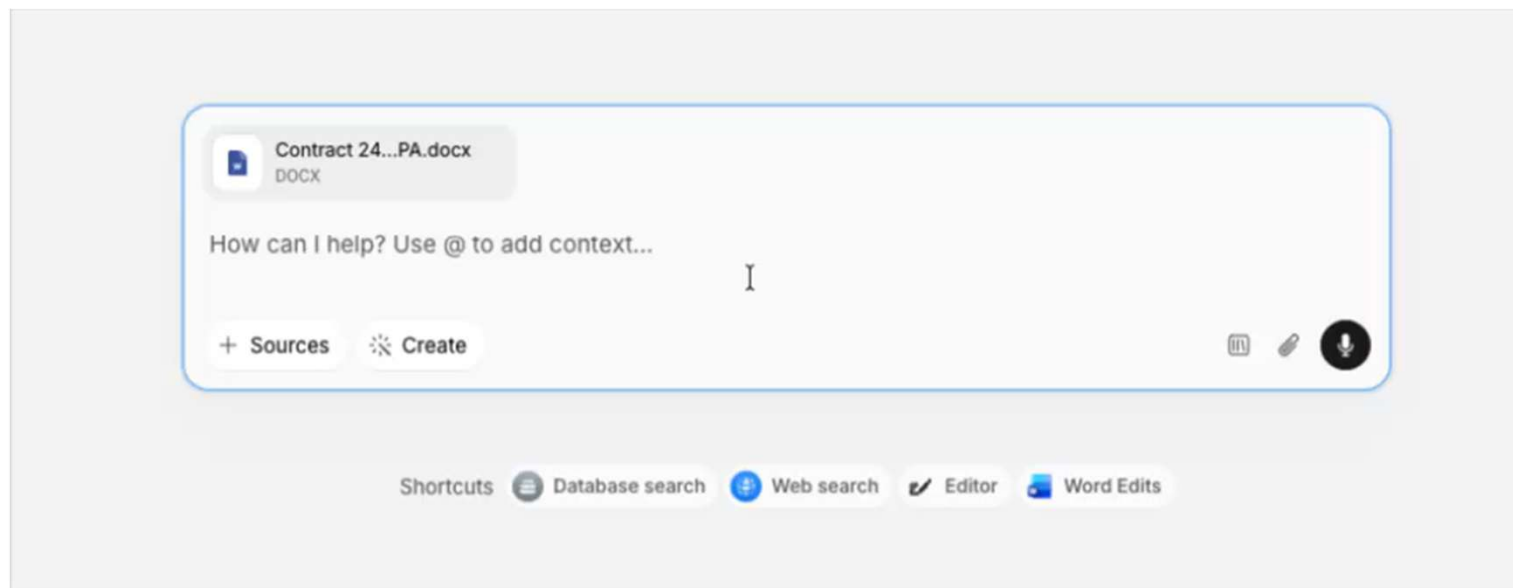
LEGORA

Harvey

WORDSMITH



Demo: Prompt Improvement



Demo: Contract Redlining

The screenshot displays the Microsoft Word interface with a document titled "MSA - Clean for TR". The document content includes:

XYZ Cloud Master Agreement

This XYZ Cloud Master Agreement is comprised of the XYZ Cloud Master Agreement (Terms), and all Services Schedules and Order Forms that are incorporated by reference into this Master Agreement (collectively, the "Agreement"), and is entered into by XYZ (as "XYZ") and ABC, with offices at BEN ("Customer").

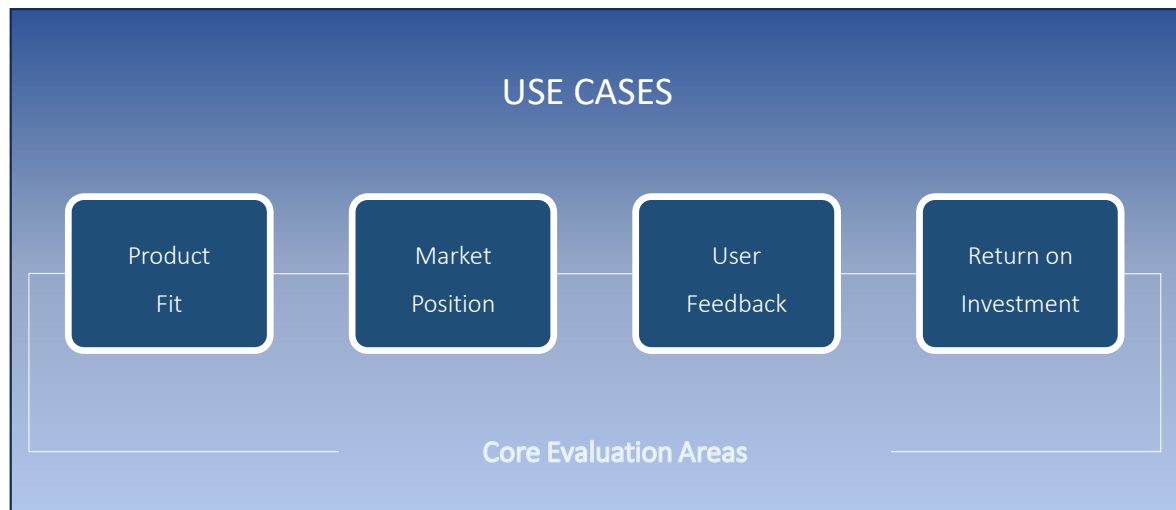
XYZ Cloud Master Agreement General Terms

1. **Services.** XYZ will provide the Services specified in an Order Form in accordance with the SLAs, and Customer and its End Users may use the Services in accordance with the Services Schedule.
2. **Customer Obligations.**
 - 2.1 **Consents.** Customer is responsible for any consents and notices required to be provided to XYZ and receipt of the Services and (b) Customer's provision of data (including Personal Data) in accordance with the Agreement, and XYZ's accessing, storing, and processing of such data in accordance with the Agreement.
 - 2.2 **Compliance.** Customer will (a) ensure that its End Users do not use the Services in a manner that violates applicable laws, regulations, or the Agreement, (b) use commercially reasonable efforts to prevent and terminate any such use, and (c) indemnify XYZ for any damages, costs, or expenses incurred by XYZ as a result of such use.

The right sidebar shows the "Legora" panel with a "Test Playbook Banking" selected, listing 115 rules. The bottom of the document has a watermark that reads "Applying Playbook".

Everyone knows the AI is needed

➤ But how to choose the right one?



Selection Stages

Identify Needs

Assess Market

Create Shortlist

Test & Validate



Use Cases First

➤ Ask what you can **automate**, **eliminate** or **innovate***

UNDERSTANDING YOUR WORK

- 1 What do I do today?
- 2 Can I validate this vision?
- 3 What can change tomorrow?



- 1 Reviewing a large volume of contracts
- 2 YoY contract volume increased by 20%
- 3 Demand will grow without additional headcount

DEFINING YOUR USE CASES

- › What can I stop doing — **eliminate**?
- › What can be **automated**?
- › Where is an opportunity to **innovate**?



- 1 **Reviewing low value contracts**
- 2 **Redline contracts with AI**
- 3 **Introduce self-service for contract review**



What is unknown?

↗ What is it that you don't know yet

ABOUT YOUR ORGANISATION

1 Use Cases

What is now possible with AI?

vs. what did not seem possible or took a lot of time before

2 Data

How can you get better insights using AI?

you might be surprised with the outcome

3 People

How ready are your teams for change?

Adoption risk is often higher than technology risk

ABOUT THE TECHNOLOGY

1 Market

How will vendor capabilities shift in 12 months?

Today's market leader may not be tomorrow's

2 Cost

What is the true total cost of ownership?

Integration, training, maintenance and change management add up

3 Compliance

Where do regulation and data privacy draw the line?

Especially for sensitive, legal or client-facing work



Create specific Evaluation Criteria based on your needs

	Your Needs	What to Look For	Evaluation (criteria examples)
Product Fit	- Identify Use Cases - Prioritise Use Cases - Define current challenges - Define Critical Outcomes	- Integration to DMS & workflow systems - Legal Research Capabilities - Workflows - Limitations	- How well product features enable company-specific scenarios - Mapping the Use Cases to each Products' Feature - Tool limitations vs use cases
Technical Fit	- Define Technical Requirements - Clarify deployment & data residency needs	- Security standards & compliance - Connectors to other key systems	- Meets company security & privacy standards - Scales globally across regions
Ease of Use	- Identify key users and workflows - Define success metrics for adoption	- Collaboration features - Playbooks that work in Word & Web - User friendly interface, fast onboarding	- User adoption potential - Collaboration between users - Easy playbook set up
Cost & ROI	- Number of Licenses - Implementation Support - Resources	- Time/ Resource Savings - License and implementation cost	- ROI Potential - New Opportunities or efficiencies created

GenAI for eDiscovery

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Aurora AI Investigate

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Aurora AI Narratives

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