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society

MARCH MASTERY
a month of intensive cpd learning

AI Essentials

PRESENTED BY FIONA McLAY

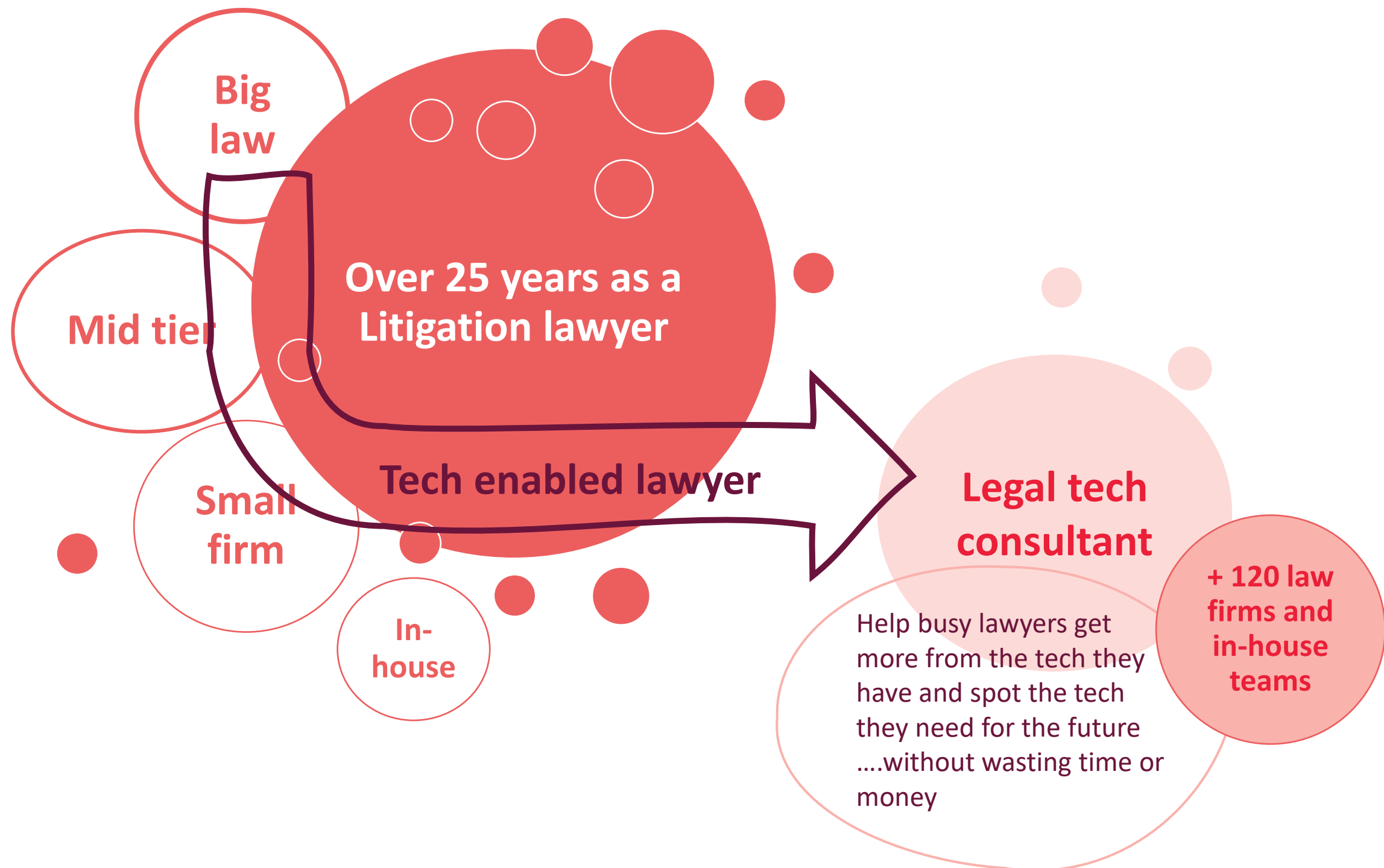
PRINCIPAL CONSULTANT, McLAY LEGAL CONSULTING
TECH FORUM: TUESDAY 25 MARCH

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Today Overview



Understanding AI key concepts



Practical application for solo and small legal practice



Evaluating AI Solutions for Legal Practice



Hands on demonstration



What is coming next

Understanding AI

What is AI?

AI (Artificial Intelligence) refers to computer systems that can perform tasks requiring human-like intelligence, such as understanding language, recognizing patterns, making decisions, and learning from experience.

Machine Learning

- AI learns from data to make predictions or decisions (e.g., predicting case outcomes).

Natural Language Processing

- AI understands and generates human language (e.g., legal chatbots, document summarization).

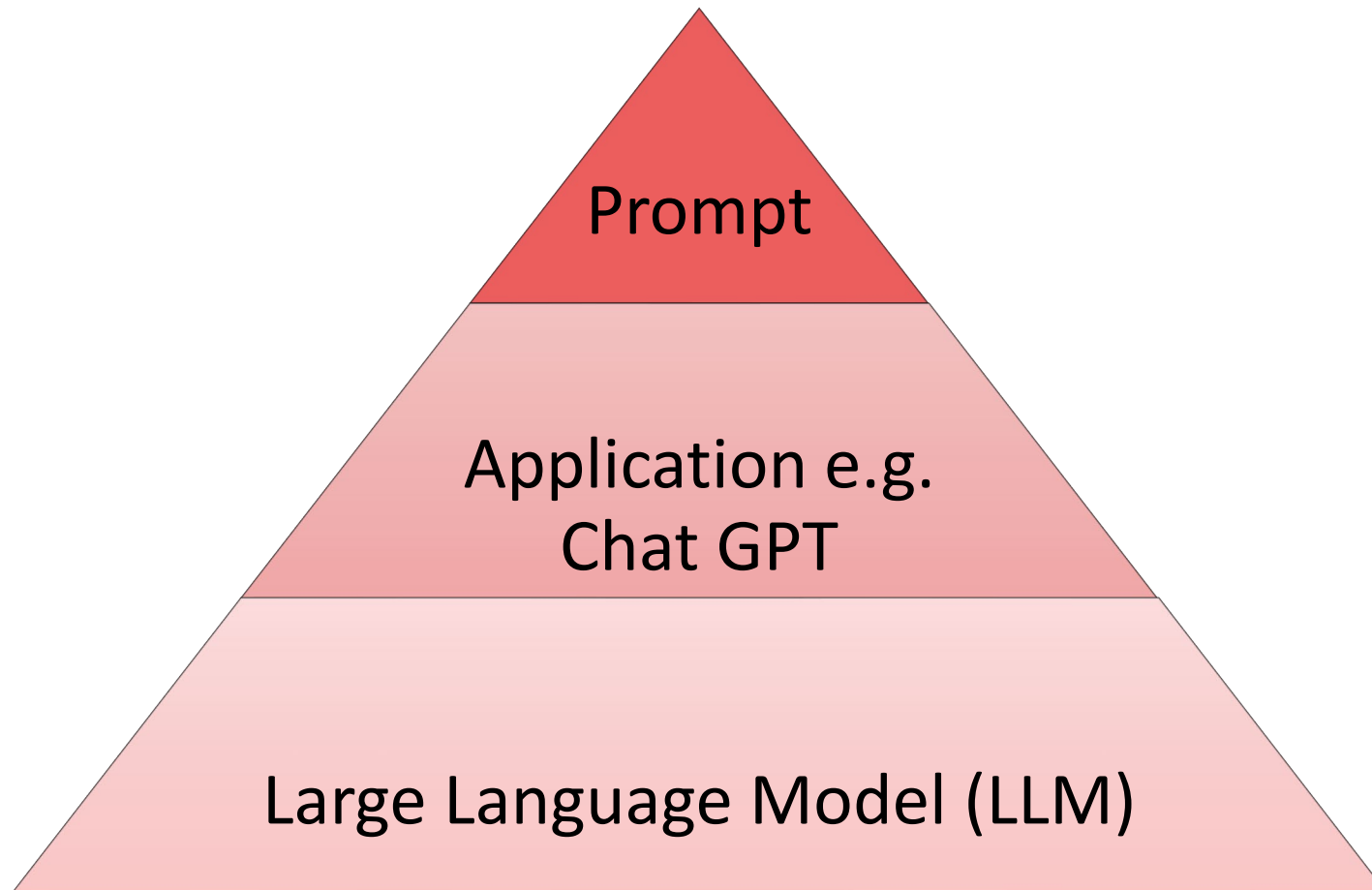
Computer Vision

- AI interprets images and visual data (e.g., scanning and analysing legal documents).

Reasoning & Decision-Making

- AI evaluates information and makes informed choices (e.g. risk analysis in compliance).

Gen AI Components



Instructions given to
AI to achieve desired
output

Tools built on top of
LLMs

AI system trained on
data

How does Gen AI work?

“Here’s a fragment of text. Tell me how this fragment might go on. According to your model of the statistics of human language, what words are likely to come next?”

Generative

- Able to create new sentences, paragraphs or documents based on inputs received that are concise and coherent

Pre-trained

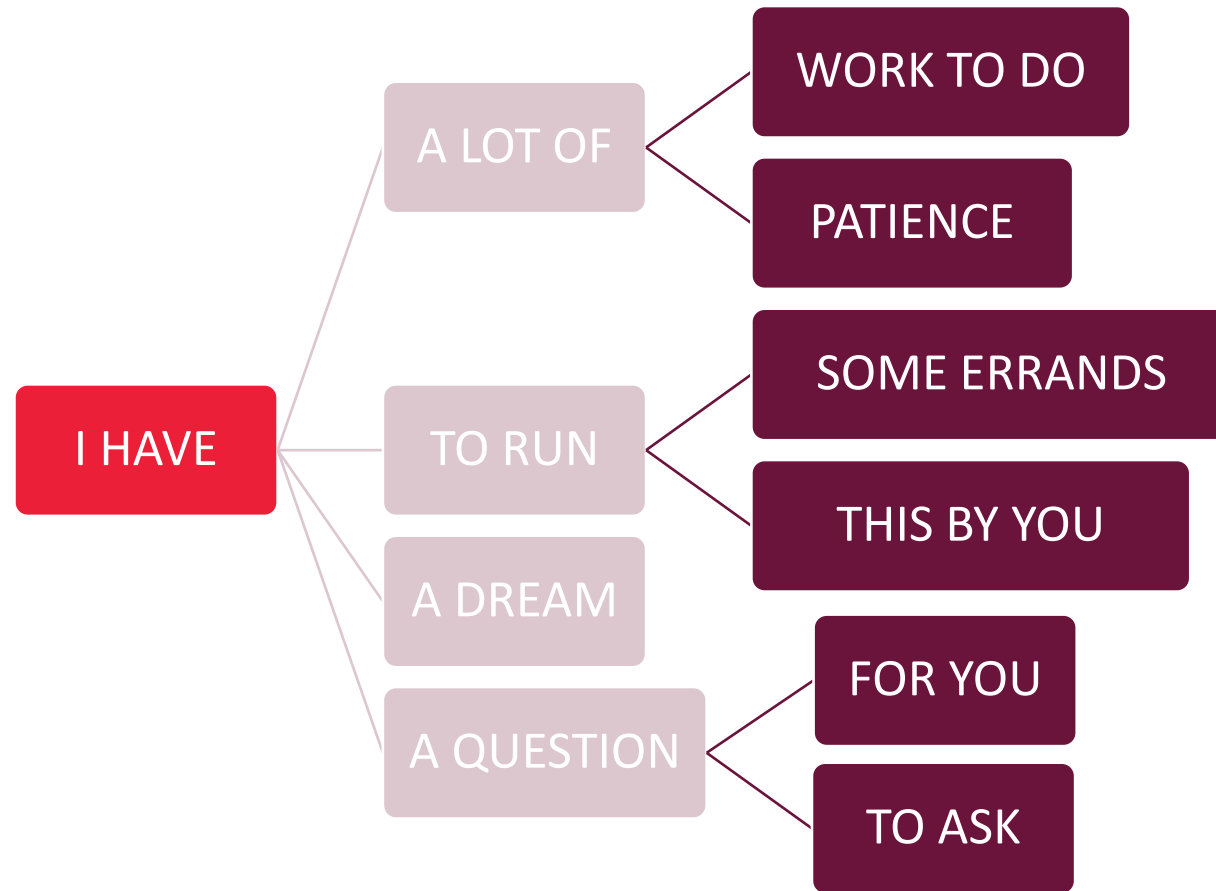
- Trained to perform a variety of common tasks like summarise, translate, extract key data, transform the format

Transformer

- Instead of processing words sequentially, able to process a whole sentence giving more sophisticated functionality

Generating text

“Here’s a fragment of text. Tell me how this fragment might go on. According to your model of the statistics of human language, what words are likely to come next?”



Don't put personal or client information into free consumer versions

- play with it for personal admin
- create marketing copy
- create training programs
- draft business strategy
- generate target customer personae
- create polite (generic) messages
- draft step by step instructions on how to perform common tasks on software
- synthesise publicly available information



A close-up, low-angle shot of a person's hands typing on a laptop keyboard. The person is wearing a dark, textured sweater. The background is blurred, showing a desk and a window with soft light. The overall color palette is warm and monochromatic, dominated by browns and oranges.

Practical applications for AI in legal practice

What GenAI does well

	Generate text	Simplify complexity	Document reviewer	Other perspectives	Summarise	Generate prompts
Use	Coherent and contextually appropriate text in response to prompts	Simplify intricate ideas or technical concepts in plain English	Improve drafting to make it more concise and better expressed	Consider different angles, arguments or implications	Extract the key points from long documents	Write prompts for you
Prompt:	create an in-depth step by step guide that will help readers understand how to [insert outcome]	Rewrite the text below using words that a 12 year old would understand Or that someone who doesn't know the subject would understand	specify professional, humorous, casual Or Below is my document. Please proofread including spelling, grammar, structure, and tone - provide suggested corrections	I need to decide [insert decision]. Give me the arguments for and against	Summarise the text below in no more than X words. Create a list of bullet points of the most important learnings, with brief summaries explaining each point	I am a family lawyer. Generate a list of the most powerful prompts that will help a family lawyer get more done and save time

Vals.ai report (February 2025)



AI tools
better than
human
baseline

Document analysis

Information retrieval

Data extraction

Transcript summary

AI tools
matched
human
baseline

Chronology generation

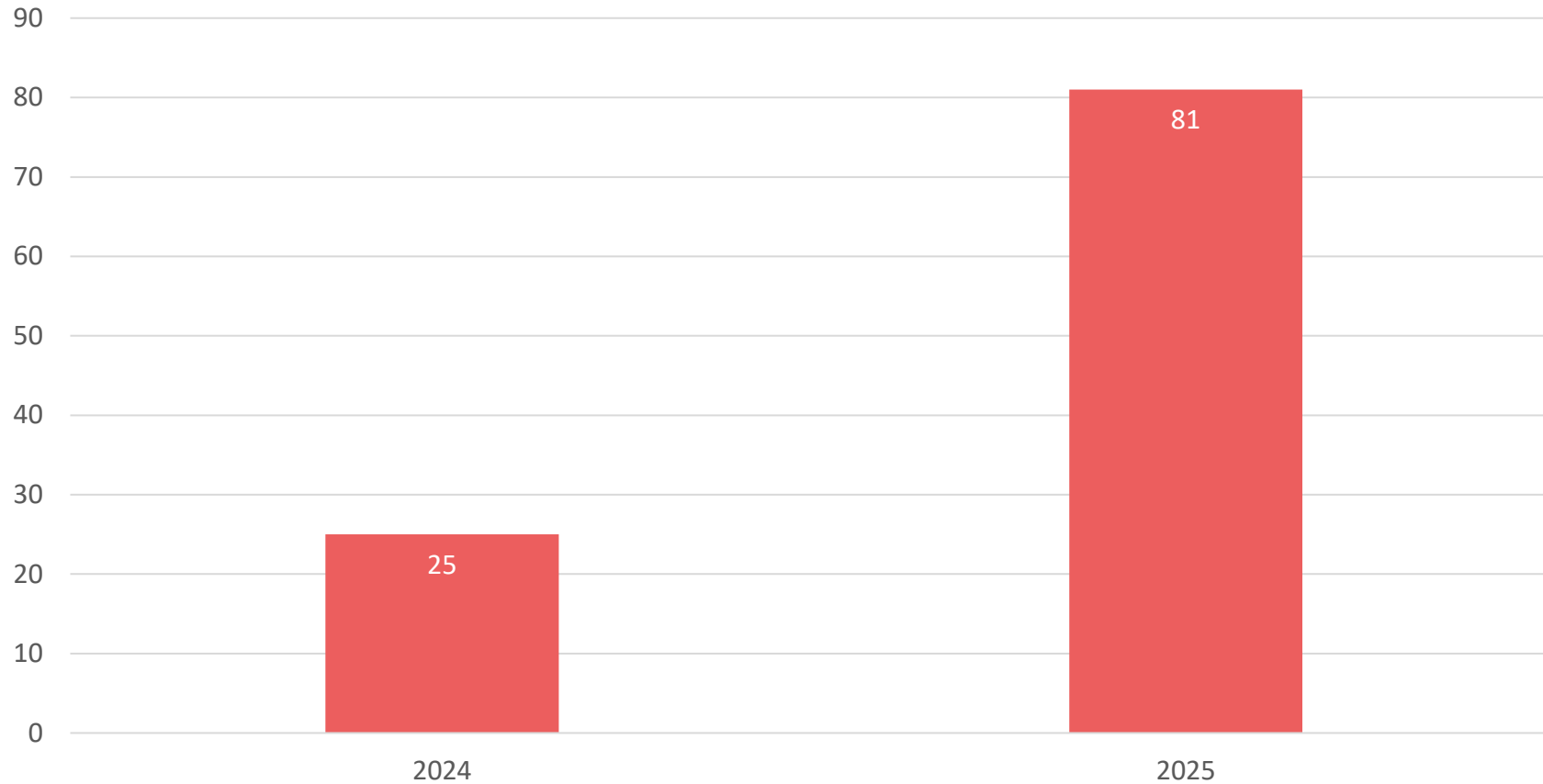
AI tools fell
short of
human
baseline

Redlining

Search US companies database

<https://www.vals.ai/vlair>

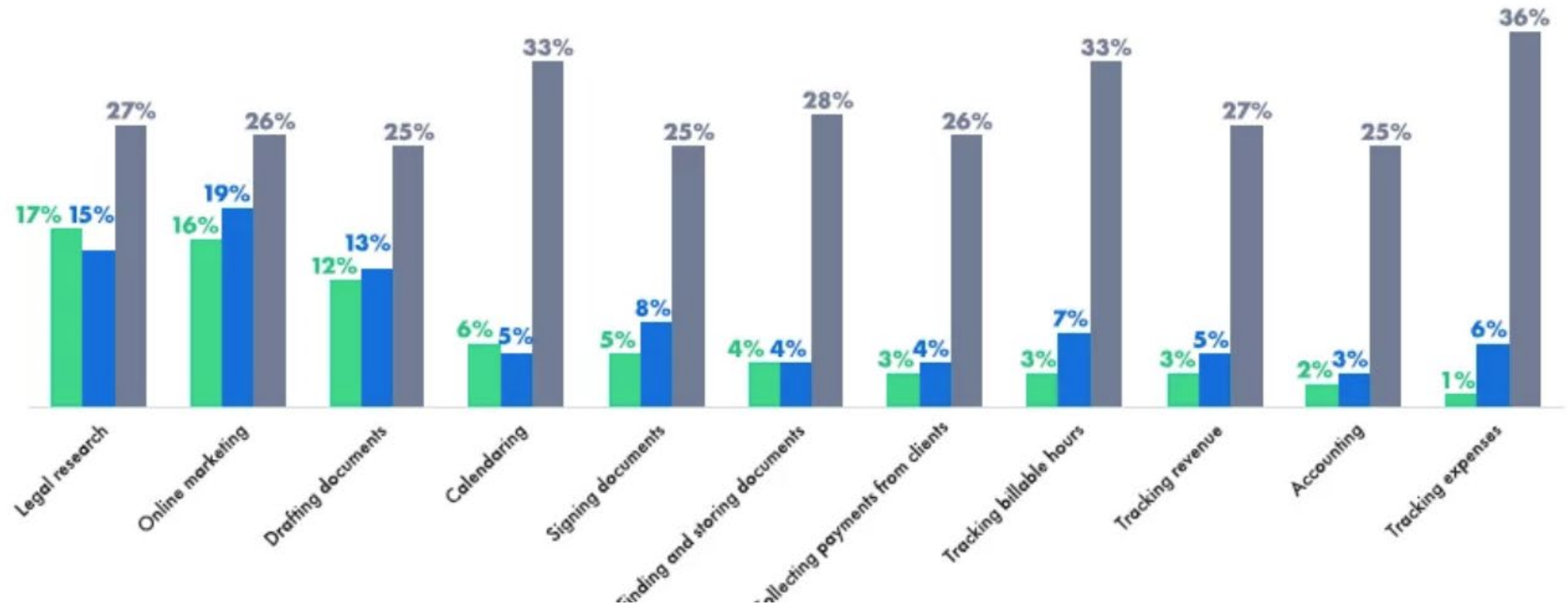
% of lawyers incorporating AI tools in life and practice



Source: Smokeball State of Law report

More clients think lawyers should use AI for common tasks

■ % of solo firms who use AI for each
 ■ % of small firms who use AI for each
■ % of consumers who believe law firms should use AI for each



Clio Report (US) 2024 *Legal Trends for Solo and Small Firms* – Survey of 1,446 legal professionals from firms of all sizes, and a separate survey of 1,012 U.S. adults



General AI Assistants

Use for everyday admin tasks but not legally trained



Legal specific AI

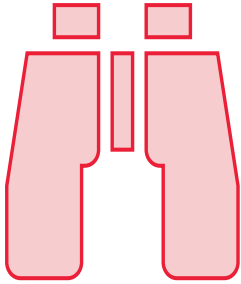
Trained for legal use cases and can be integrated with firm databases or client matter documents



Custom agents

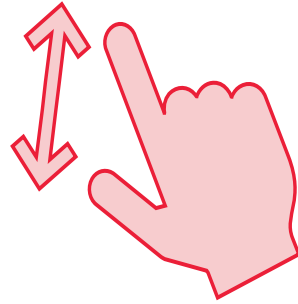
Design your own AI assistant to achieve more precise outputs

GenAI powered options for lawyers



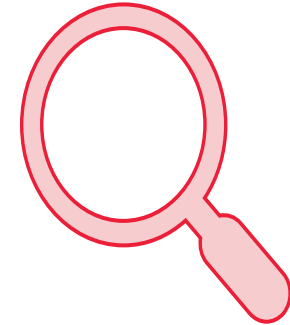
General tools

- ChatGPT
- Copilot
- Claude
- Gemini
- AI in enterprise tools like Notion, ClickUp, Adobe, Jasper, Otter.ai



Legal specific AI tools

- Lexis+, CoCounsel, LawY
- Spellbook (contract review)
- Mary (Chronology)
- GenAI in LPMS (Leap, Smokeball, NetDocs Pattern Builder Max)
- Corto



Custom solutions

- Copilot studio (digital agents)
- MyGPTs
- Mobius (from TILT)
- LEXT
- Build your own agent e.g. Minters Advice Generator

A close-up photograph of a person's hands typing on a laptop keyboard. The person is holding a black pen in their right hand. The background is softly blurred, showing a wooden desk and some papers.

Prompting 101

ICI Prompting method

	Step	What to do	Example
I	INSTRUCTION	What you want the AI to do – be clear and add constraints (e.g. word count, tone, format)	Write a 500-word blog post explaining why testamentary trusts are important for estate planning.
C	CONTEXT	Background, audience, and objective. Include the role and purpose to get more relevant responses	You are a legal copywriter for an accredited specialist estate planning lawyer. The audience is SME owners in Australia who have blended families but don't understand the benefits of testamentary trusts. The tone should be professional yet approachable, in plain English.
I	INPUT	Specify data, examples or references to work with such as a document, style guide or previous work.	Include key benefits such as tax effectiveness, asset protection, and flexibility for beneficiaries. Use a friendly opening that shows empathy for families planning for the future.

Clarifying questions

Optional but powerful step

Chain of thought prompting

guiding the model to think step-by-step before producing the final output — especially useful for complex tasks like policies or risk-sensitive content.

Example prompting

by providing examples to the model, you can better provide context or illustrate the task at hand. With examples, the model can infer the pattern, style, or type of response expected.

Prompt chaining

use interconnected prompts to generate continuous ideas and explore related concepts

Your turn



Use GenAI to “get” your client

Use a detailed client persona

Rewrite generic communication for the persona

Check and personalise the output

Three examples of a client persona

Anxious single parent

- A single parent involved in a challenging custody dispute. They feel overwhelmed and anxious about the process and want reassurance that the legal team is there to support them.

High-Net-Worth Client

- A client with significant assets going through a divorce. They are concerned about protecting their wealth and reputation and value a highly professional approach.

Collaborative Young Couple

- A young couple seeking a collaborative and peaceful divorce process. They are focused on maintaining a good relationship and want to avoid conflict.

Generic check in

Hi [Client]

I wanted to check in with you after we spoke last week. Please let me know if you have any questions or concerns about the legal fee agreement we discussed.

Your turn: Go to <https://chatgpt.com/> and open ChatGPT

The Anxious Single Parent

"Rewrite this message for a single parent who feels anxious about their custody case. Make it empathetic and reassuring."

The High-Net-Worth Client

"Rewrite this message for a high-net-worth client concerned about asset protection during their divorce. Make it sound professional and confident."

The Collaborative Young Couple

"Rewrite this message for a young couple wanting a peaceful, collaborative divorce. Make it friendly and neutral."

Message: I wanted to check in with you after we spoke last week. Please let me know if you have any questions or concerns about the legal fee agreement we discussed.

Go Further: experiment with different tones or specific details. For example, *"Make it more formal"* or *"Add a line about being available to answer questions."*

Anxious single parent

I just wanted to follow up after our conversation last week to **see how you're feeling**. I know this is a stressful time, and I want to make sure you're comfortable with everything moving forward. If you have any questions or concerns about the legal fee agreement, please don't hesitate to reach out. I'm here to support you through this process.

High-Net- Worth Client

I wanted to follow up on our conversation from last week regarding your case. Please feel free to reach out if you have any questions or concerns about the legal fee agreement we discussed, or if there are any additional details you'd like to address as we move forward. Rest assured, we are taking all the necessary steps to **protect your interests** throughout this process.

Collaborative Young Couple

I just wanted to check in after our conversation last week. If you have any questions or concerns about the legal fee agreement we talked about, please feel free to reach out. I'm here to help and make sure everything goes as smoothly as possible **for both of you**.

Other prompts to try

Ask

Communicate the value that I can bring to help them achieve their goals by describing previous results I have achieved for similar clients.

Add three different price options for a range of basic services, more extensive and top of the line

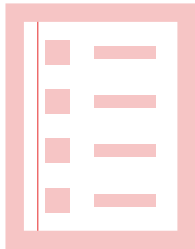
Suggest other ways I could add value without doing more work making use of [insert relevant assets eg. my existing library of employer focused training materials and my personal network]

Rewrite the three pricing options including [select a few of the suggestions from the chat above]

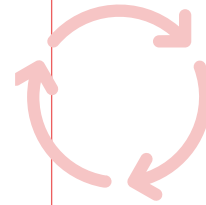
Suggest three versions depending on whether the client is at the (a) awareness (b) consideration or (c) decision stage of deciding to engage a lawyer

Tips to get more usable outputs

Good prompts produce decent first drafts, but *iterating* gets the best results.



The more detail you give, the better the output.



GenAI works best when you treat it as a collaborative partner, not a one-shot tool.

Say “Try again...”



Don't worry too much about the perfect prompt to start – you will get better with practice.

Ways to use AI responsibly for legal drafting

Draft prompts that set clear goals, required content and specify the audience to improve accuracy and relevance of the output

Create an outline, structure or first draft and then use AI tools for narrow tasks to support the lawyer's work

Review carefully, check and verify the accuracy of the statements carefully

Consider whether other tech is better suited to specific tasks where accuracy is required such as proof reading, generating template documents and re-using standard snippets of text.

A hallway with several closed doors and one open door in the distance, illuminated from within. The scene is bathed in a warm, orange light, creating a sense of mystery and opportunity. The open door is the focal point, suggesting a path forward or a new discovery.

How to evaluate AI solutions

1. Identify your business needs

List your main goals for integrating AI



LIMITED TIME TO
MANAGE EMAIL



SIMPLIFY
COMMUNICATIONS



FIND KEY MATTER
INFORMATION



IDENTIFY TRENDS
IN DATA

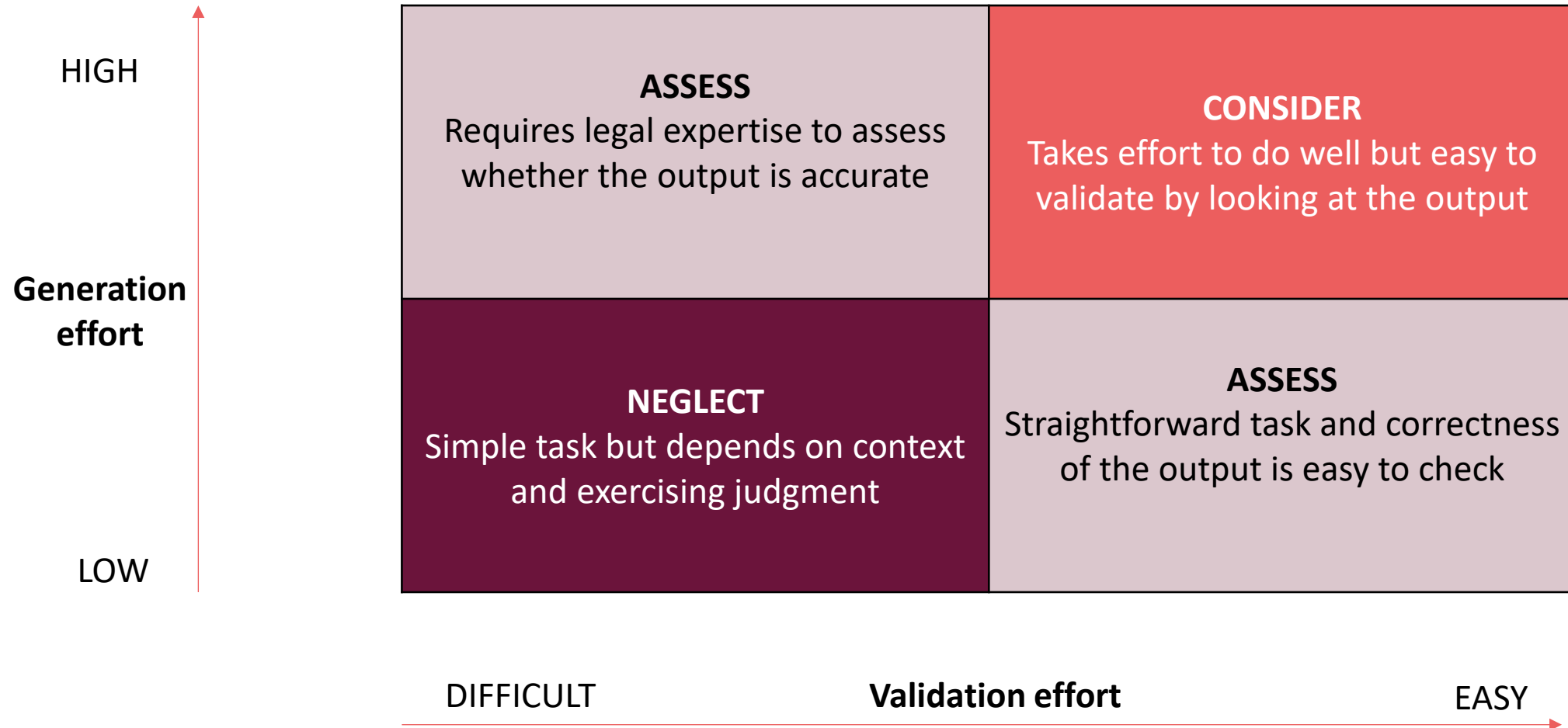
2. Use a decision matrix to evaluate the ideas

Generation effort (how much human effort goes into doing the task manually)

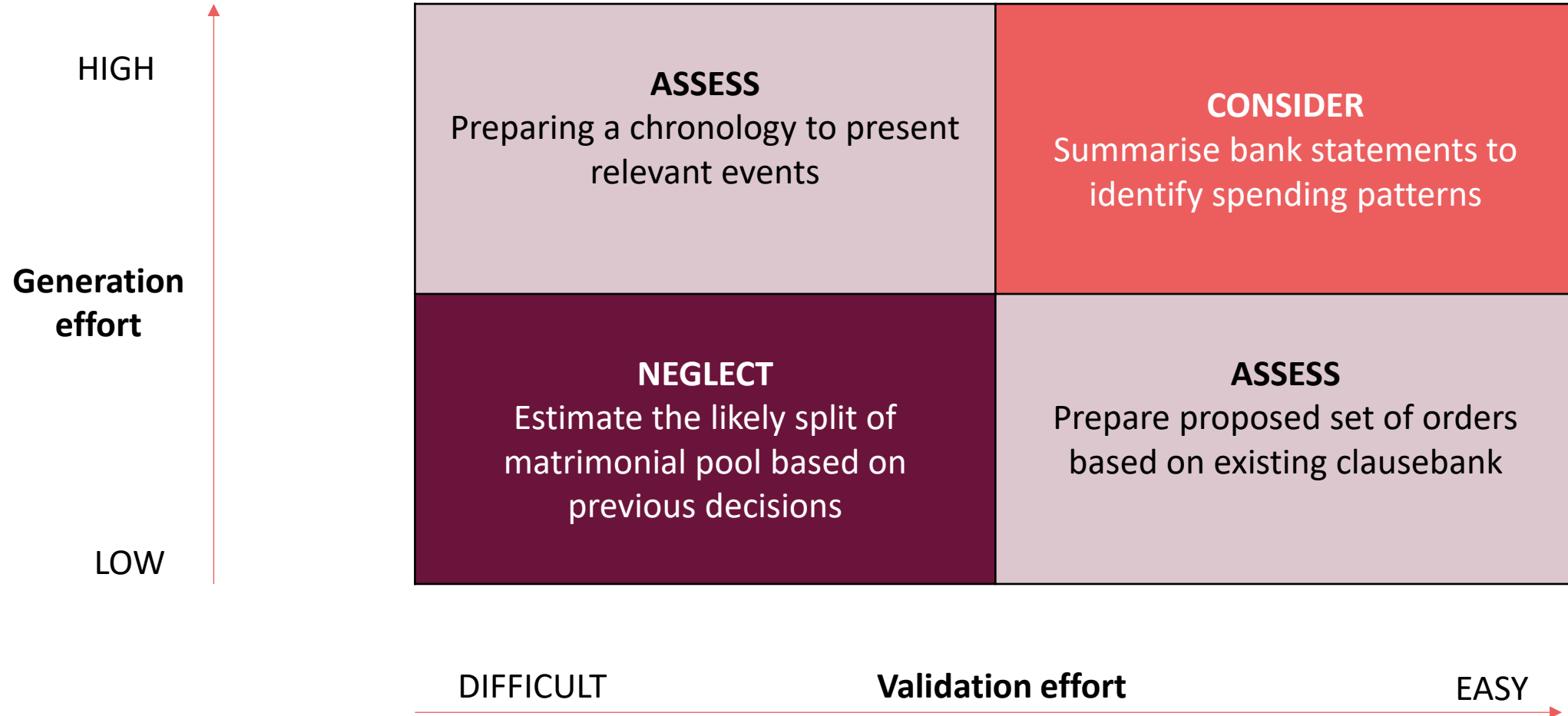
Valuation effort (how much human effort required to check the output)

Solution type	Task	AI tool	Generation effort	Evaluation effort
General AI	Transcribe meetings	Teams	High	Low
Legal AI	Summarise judgment	LawY	High	Moderate
Custom AI	Generate first draft of legal advice based on internal knowledge articles	Copilot studio	Moderate	High

3. Map the ideas on the model



Example: Matrimonial Property settlement



Building blocks for AI readiness



AI usage policy



Have a strategic objective



Data security and client confidentiality protections



Bring AI to your data, not the other way round



Resources/capacity for change



Standardise process and templates

How AI can help your law firm

Solo law

General

- Summarise long email chain
- Find information in my inbox
- Create a visually interesting presentation

Legal

- Extract key information from a set of documents
- Summarise a new decision for social media
- Explain the changes made in redline in a covering email

Matter AI

- Did I send the risk letter yet?
- Ask a question of a document on the file
- Extract the key dates I need to diarise from this court timetable

Small team

General

- Transcribe meeting and produce action items
- Digital agent to extract answers from your own marketing material

Legal

- Prepare a chronology
- Summarise the recent cases on [legal issue]
- Are there any unfair clauses in this agreement?
- Find contradictions in the witness statements

Matter AI

- Where is this matter up to?
- What is the counter argument to my position?
- Extract the renewal dates I need to advise my client about

Larger team

General

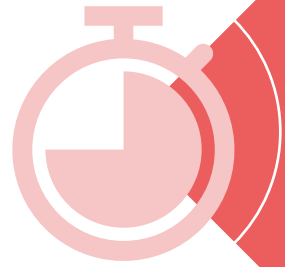
- Generate a first draft
- Coach me on delegating this task
- Automatic creation of standard tasks
- Suggest alternative pricing options

Legal

- Compare this document against a checklist
- Prepare list of issues for a witness interview
- Identify and update clauses across client base to comply with legislative change

Matter AI

- Autofile emails
- Suggest narrative for time entries
- What are the trends in this set of bank statements
- Standardised workflow for subtasks and matter types



What repetitive tasks are eating up your valuable time?



Where could you use a second set of eyes?



What repetitive tasks could be automated to let you get on with more valuable tasks?

Centre for Legal Innovation

- <https://www.cli.collaw.com>
- Lex Explore AI Series
- Legal Generative AI Global Community (Linkedin group)

UK Law Society

- Generative AI: the essentials
<https://www.lawsociety.org.uk/topics/ai-and-lawtech/generative-ai-the-essentials>

What we covered today

Overview of Generative AI tools available for lawyers

How to evaluate whether AI is worth it for your business

Exercise: Using ChatGPT to tailor communicating with clients

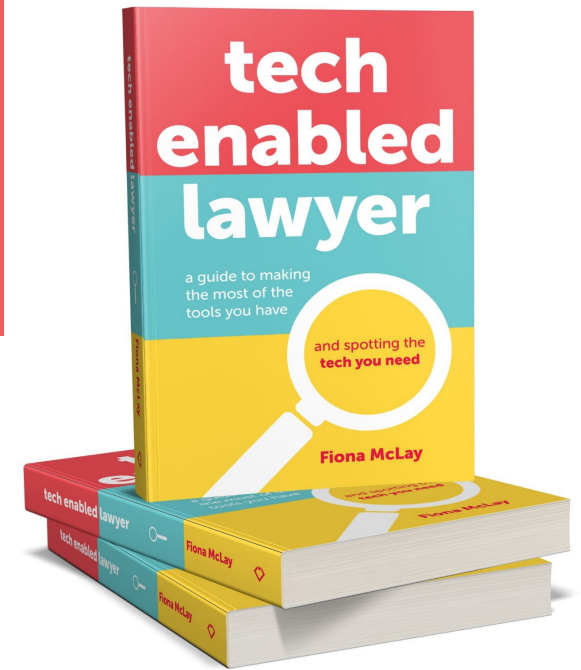
Where to from here?

Find the Next Step

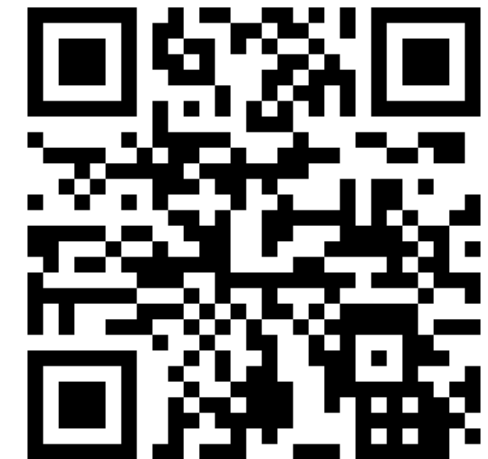
Your tech should work for you, not against you.
If you're wondering how to get more out of what
you already have, let's chat.

Let's Connect:

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- 🔗 www.linkedin.com/in/fionamclay/



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