

# Future-Proofing Your Firm with Legal AI

This partner brief is designed to equip firm leaders and legal professionals with a clear understanding of the value of legal AI adoption.



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Use this brief to inform internal discussions and evaluate legal AI solutions with confidence. A one-page checklist is included at the end, providing a streamlined resource for vendor assessments.

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# Introduction

Artificial Intelligence (AI) is changing the world as we know it, and the legal industry is no exception. As technology and AI continue to evolve, so do client expectations – and competition intensifies. All of these factors are reshaping how law firms operate.

To thrive, not just survive, firms must find solutions that solve today's problems while setting them up for long-term success. They need to future-proof their firms.

Future-proofing your firm means preparing for challenges before they become problems. It means identifying trends early, staying flexible and adaptable, and continuously looking for smarter ways to operate. It means proactively modernizing your firm. **Legal AI is a critical part of this transformation.**

This brief outlines how legal AI can effectively future-proof your firm by streamlining operations, enhancing decision-making capabilities, and boosting productivity. We'll cover the key benefits of implementing legal AI, offer practical insights into selecting the right tool, and provide important questions to ask when evaluating vendors, to ensure your investment aligns with your firm's goals.



# Why Firms Need to Modernize

Today, AI is embedded in everything from customer service to social media, and clients have come to expect fast, seamless experiences across the board.

The convenience they experience in other parts of their lives, like receiving instant support from a chatbot or quickly accessing personalized content, has reset their baseline expectations.

Firms that can't keep pace with these expectations risk losing trust and business to those that can: technology-driven firms meeting client demands by leveraging legal AI.

In the legal world, that translates to a growing demand for quicker turnaround times, real-time communication, and more efficient service delivery. Clients are no longer willing to wait days for answers or updates. **They want responsiveness, transparency, and results, all without compromising on quality.**

"Anyone that is still thinking about growing a practice and staying ahead is going to have to adopt this efficiency. Your imperative is to be more efficient because your time is valuable." – Philip Holdsworth, Partner at Robins Appleby LLP

# Understanding Legal AI Tools

Legal AI tools are software solutions that use AI to help law firms work more efficiently, accurately, and strategically. These tools are designed to assist (not replace) lawyers by handling repetitive, research-heavy, or time-consuming tasks with speed and precision.

They can analyze large volumes of legal data, surface relevant case law, summarize documents, generate legal questions, and even help outline arguments. By recognizing patterns, extracting key information, and offering structured insights, legal AI supports better decision-making at every stage of a matter.

Importantly, legal AI tools understand legal language, workflows, and expectations – and they're designed to integrate into how legal teams already operate. **With the right AI tool, firms can gain a strategic edge without disrupting their core processes.**

I would say that [AI] elevates your practice in a way that you can focus on other things and be better at them. It doesn't take away your ability to reason and your ability to know the law." Amelia Yiu, Founder and Principal Lawyer at Elm Law"

## Legal AI vs. Generative AI

Legal AI tools are purpose-built for the legal profession. While they might include generative AI capabilities, like summarization or drafting, they go far beyond that. Legal AI is designed with the precision, domain expertise, and reliability that legal professionals require. Unlike general-purpose generative tools (like ChatGPT), legal AI minimizes risks of hallucinations, where outputs may sound convincing but are factually incorrect or entirely fabricated.

This level of specificity and trust is crucial in legal settings, where accuracy and context aren't just nice-to-haves – they're non-negotiable. Choosing a legal AI tool means investing in technology that understands your work, supports your team, and helps you deliver better outcomes for your clients.

# How Legal AI Prepares Firms for the Future

Adopting legal AI isn't just about keeping up with technology – it's about setting your firm up for long-term success. Here's how legal AI helps future-proof your operations:

## **Save time on routine work**

Legal AI streamlines time-consuming tasks like legal research, document review, and case summarization – [boosting productivity by up to 115%, according to studies](#). By cutting down on manual effort, your team can focus on high-value, strategic work that moves cases forward.

## **Deliver faster, more responsive service**

Today's clients expect speed and transparency. Legal AI accelerates turnaround times, helping lawyers respond to client needs quickly and confidently without sacrificing quality.

## **Improve decision-making**

Legal AI tools provide structured insights drawn from millions of case law sources and precedents. This gives lawyers a stronger foundation, strategy, and risk assessment – ultimately leading to better legal outcomes.

## **Scale without burnout**

Instead of hiring more staff to manage increasing workloads, legal AI helps your existing team do more. It reduces administrative burden and supports lawyers with intelligent tools that lighten the load, helping your firm grow sustainably.

## **Stay competitive in an evolving landscape**

Technology is transforming the legal industry. Firms that embrace legal AI tools are positioning themselves to adapt faster, serve clients better, and lead the market, not just survive in it.

According to the 2024 American Bar Association's [Legal Technology Survey Report](#), 30% of respondents now use AI, up from just 11% in 2023. The shift is already underway, and firms that ignore it risk falling behind.

A future-proof firm isn't just reacting to change; it's actively preparing for it. Firms that invest in the right technology today are better positioned to lead tomorrow.

# Choosing the Right Legal AI Solution

Not all AI tools are created equal. Choosing the right one means looking beyond flashy features and asking the right questions to find a solution that will support your firm's needs. Here are key questions to guide your decision (checklist at the end of the brief):

## 1. What specific legal tasks can this tool handle?

Look for a clear list of capabilities that go beyond surface-level tasks. Robust legal AI should have capabilities like:

- Legal research and memo drafting
- Case law analysis and citation support
- Summarization of hearing transcripts, depositions, and lengthy documents
- And more (comprehensive checklist at the end of this brief)

Make sure the tool aligns with how your team actually works, whether that means supporting specific practice areas, working within your document systems, or surfacing results in formats that fit your review process.

## 2. How accurate and reliable are the outputs?

Ask about how the tool ensures accuracy. Does it cite sources? Can you trace its reasoning? Reliable legal AI should be transparent and allow for quick verification by legal professionals.

## 3. Is it trained on relevant and jurisdiction-specific legal data?

Generic generative AI models often miss the mark when it comes to local laws and standards. Choose a tool built specifically for the legal field – one that's trained on relevant case law, statutes, and regulations in your specific jurisdiction.

## 4. How does the tool integrate into existing workflows?

The best tools don't disrupt your workflows – they enhance them. Consider how easily the tool integrates with your current systems or case management platforms and whether it supports your team's day-to-day processes.

## 5. What safeguards are in place for confidentiality and compliance?

The golden rule in the legal industry: client data must be protected. Any AI tool you adopt must uphold the highest standards of confidentiality and security. Look for vendors that offer robust data encryption, secure, private cloud environments, and clear policies around data storage and access. If an AI solution can't meet those standards, it's not worth the risk.

## 6. What kind of support and onboarding is provided?

Technology adoption takes time. Ask what kind of training, onboarding, and ongoing support the vendor offers to help your team get up and running – and stay productive.

## 7. What's the pricing model, and is it scalable?

Understand how pricing works and whether it makes sense for your firm's size and usage. Can the tool grow with your firm's needs?

# Move Your Firm Forward

It's clear that the legal industry is evolving, and fast. Firms that want to stay competitive need to think ahead. Adopting legal AI is a practical, forward-looking step that positions your firm to stay agile and competitive. By embracing AI-powered tools now, you're not only improving your team's productivity today, but also laying the foundation for long-term success.

## Ready to see how legal AI can work for your team?

Start exploring [Alexi](#) and take the first step toward a more efficient, future-ready firm.

The screenshot displays the Alexi legal AI interface. On the left, a sidebar shows a list of matters under the heading "Matters". The main panel displays a deposition transcript for "Arbex Industries v. Vorlan Technologies" in California, State. The transcript includes a user input: "I'm currently conducting a deposition and on a 5 minute recess. Opposing counsel keeps objecting to my questions on grounds of relevance. Quickly give me some sources that I can use to convince him to stop objecting." Below this, the AI provides a response with two key legal principles and numbered research results. The right sidebar shows a list of documents under the heading "All / My Documents".

**Arbex Industries v. Vorlan Technologies** California, State → Hide documents

I'm currently conducting a deposition and on a 5 minute recess. Opposing counsel keeps objecting to my questions on grounds of relevance. Quickly give me some sources that I can use to convince him to stop objecting.

Below are two key legal principles that you may assert to opposing counsel to highlight the improper nature of repeated objections on grounds of relevance during a deposition:

1. Irrelevance alone is an insufficient ground to justify preventing a witness from answering a question posed at a deposition:
  - In *Stewart v. Colonial Western Agency, Inc.*, 105 Cal.Rptr.2d 115, 87 Cal.App.4th 1006 (Cal. App. 2001) the California Second District Court of Appeal stated that "...even w[h]ere the questions [were] designed to elicit irrelevant evidence, irrelevance alone is an insufficient ground to justify preventing a witness from answering a question posed at a deposition." The Court noted that the provisions of *Code of Civil Procedure section 2025, subdivision (m)* clearly contemplate that deponents may not be prevented by counsel from answering a question unless it pertains to privileged matters or deposing counsel's conduct has reached a stage where suspension is warranted. Suspension is only warranted where an interrogation into improper matters reveals an underlying purpose to harass, annoy, embarrass, or oppress (at 1014-1015).
2. Sanctions may be awarded for inappropriate objections at depositions
  - In *Tucker v. Pac. Bell Mobile Serv.*, 115 Cal.Rptr.3d 9, 186 Cal.App.4th 1548 (Cal. App. 2010), the California First District Court of Appeal affirmed the sanction awarded by the trial court for misuse of the discovery process against the plaintiffs which occurred when counsel instructed the plaintiff not to answer certain questions that were not subject to any privilege (at 1551 and 1565).
  - In *Marriage of Lemen, In re*, 113 Cal.App.3d 769, 170 Cal.Rptr. 642 (Cal. App. 1980), the California Second District Court of Appeal noted that attorney's fees may be ordered when a court finds that the objections to discovery

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- Forensic\_Audit\_Report... Evidence
- Internal\_Corresponden... Evidence
- Meeting\_Minutes\_Boar... Evidence
- Market\_Analysis\_Repo... Evidence
- Motion\_for\_Summary... Motion
- Report\_Coverment\_Arbe... Evidence



# Legal AI Vendor Checklist

Below are key questions to ask when evaluating legal AI vendors, along with the essential capabilities your solution should have to ensure confidentiality, compliance, and jurisdiction-specific accuracy.

## 1. What specific legal tasks can this tool handle?

- ☐ Legal research and memo drafting
- ☐ Case law analysis and citation support
- ☐ Summarization of hearing transcripts, depositions, and lengthy documents
- ☐ Identification of key facts, legal issues, and relevant precedents
- ☐ Drafting legal arguments, briefs, and internal notes
- ☐ Extracting and reviewing key contract clauses
- ☐ Comparing documents to flag changes or inconsistencies
- ☐ Creating timelines and case summaries based on input documents
- ☐ Brainstorming and generating strategic questions for discovery or examination

## 2. How accurate and reliable are the outputs?

- ☐ Does it cite sources?
- ☐ Can you trace reasoning?

## 3. Is it trained on relevant and jurisdiction-specific legal data?

- ☐ How frequently is the legal database updated to reflect new legislation and case outcomes?
- ☐ Does the tool account for jurisdictional differences in legal terminology and procedural rules?
- ☐ What sources of legal data does the tool use?

## 4. How does the tool integrate into existing workflows?

## 5. What safeguards are in place for confidentiality and compliance?

- ☐ How is client data encrypted during transmission and storage?
- ☐ What data privacy standards does your platform comply with?
- ☐ Does your platform support role-based access?

## 6. What kind of support and onboarding is provided?

## 7. What's the pricing model, and is it scalable?