ProPlaintiff.ai

AI FOR LAWYERS

How Law Firms Should Use Claude to Run Their Practice

When to use a general AI assistant vs an AI-native platform purpose built for law firms.

Jason Turnquist · Kris Rezagholi • ProPlaintiff.ai

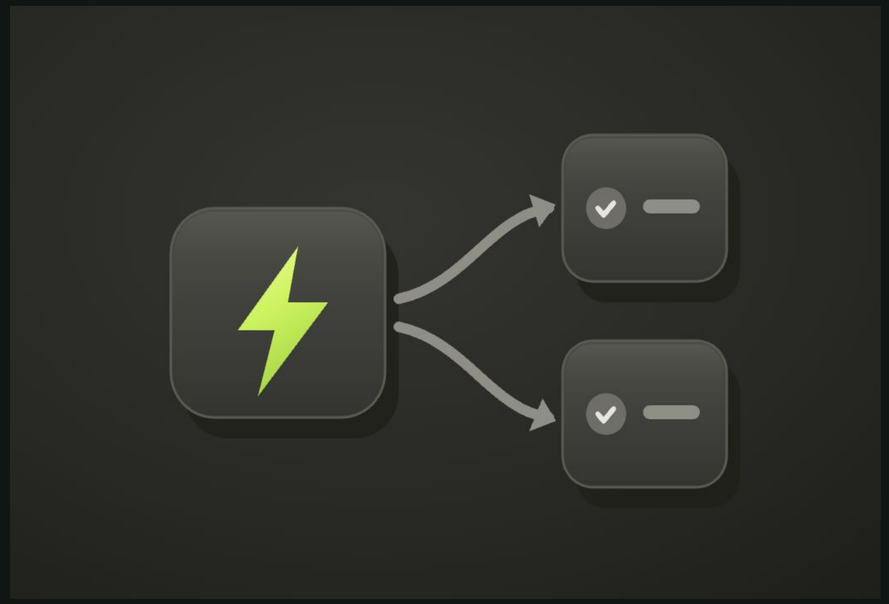
Tuesday, September 15, 2026 · 11:00 AM PT / 2:00 PM ET

OVERVIEW

Today's Agenda

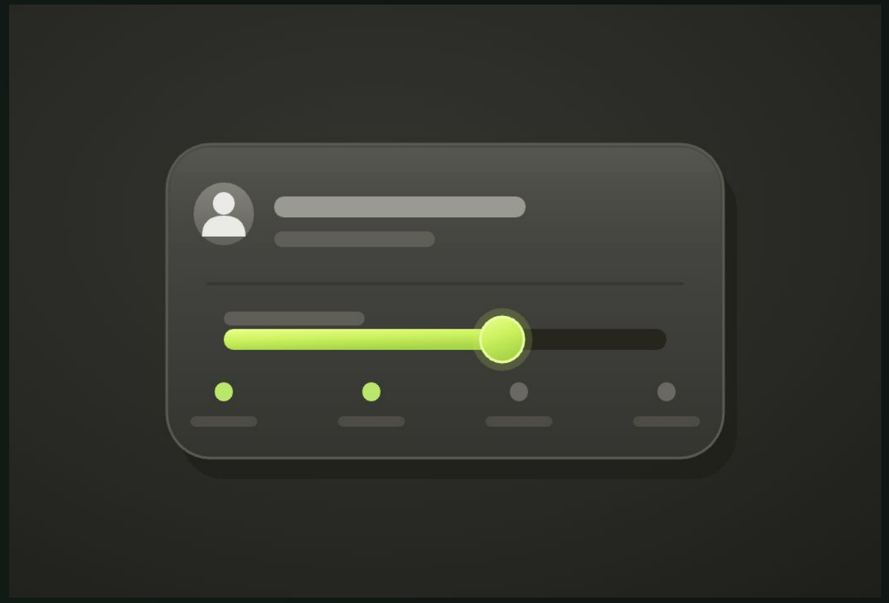
PART 1

Using Claude for your firm



PART 2

The ProPlaintiff.ai platform



INTRODUCTIONS

Your Presenters



PART 1

Jason Turnquist

Co-Founder, Fyresite / ProPlaintiff.ai



PART 2

Kris Rezagholi

Attorney & Co-Founder, ProPlaintiff.ai

PART 1 · THE BASICS

What Is Claude?

An AI assistant

Built by Anthropic. You write in plain English; it drafts, summarizes, and answers.

Connects to Applications / APIs / MCPS

Integrate with apps, APIs, and MCP servers to automate workflows, perform research, and access live data.

Works alongside you

Create Co-Work agents with prompts, tools, and schedules that automate daily, weekly, or event-driven tasks.

Available on the web, desktop, and mobile, the desktop app is where the workflows in this webinar live.



PART 1 · SETUP

Getting Set Up

STEP 1

Create your account

claude.ai, pick a paid plan; Team is right for firms (admin controls, data not used for training)

STEP 2

Install the desktop app

Mac or Windows, faster access, file drag-and-drop, and scheduled tasks

STEP 3

Connect email & calendar

Link Gmail or Outlook so Claude can read and act on your inbox, this powers the daily briefing



PART 1 · SETUP

Connect Your Connectors — Email, Calendar, Cloud Folders

- Email and calendar. Gmail or Outlook, so Claude can read your inbox and act on your schedule.
- Cloud folders. Google Drive, OneDrive, or Dropbox, whichever the firm already runs on.
- This is what turns Claude from a chat window into something that works from your firm's real files and schedule.

DON'T SKIP

Invite your team, so the firm isn't relying on one person's account.

COLD OPEN

When Do You Use Claude?

THE MISTAKE

Running case management, case documents, and case analysis through a general AI tool

Client information at risk, hallucinated case law, a tool that was never built for legal work.

THE GAP

Not using Claude at all for everything else that runs the firm

Daily email briefings, task management, business operations, marketing content, ideation, copywriting.

PART 1 · REAL-WORLD USE CASES

Ideas for using Internally

01 Scheduled email briefing

02 Flyers, Website, Presentations

03 Social Media Captions

04 Search communication channels

05 Newsletters Content

06 HR Emails

07 Employee Job Descriptions

08 Calendar Daily Summaries

PART 1 · PROMPTING FUNDAMENTALS

Four Things That Make a Prompt Actually Work

1

Role

A clear identity produces more focused, relevant, consistent results.

2

Context

Details, Facts, dates, parties, policy limits. More context, better output.

3

Format

Specify structure: sections, tone, length, citation style.

4

Iterate

Treat the first draft as a starting point. Ask for revisions.

Example

Role: You are a law office manager at a personal injury firm.

Context: A new paralegal starts Monday. They have administrative experience but have never worked in personal injury. Our firm uses case management software to track deadlines, documents, and client communications.

https://docs.google.com/document/d/19b8l6mSmNORpFYqQ-glem1pXv0Z39VsocvO3lPiK1Js/edit?tab=t.0

Format: Create a five-day onboarding plan in a table with columns for Day, Training Topic, Activity, and Person Responsible. Cover confidentiality, software basics, file organization, and client communication. Keep it practical and under 400 words. Use placeholders for firm-specific details you don’t know.

Iterate: Revise the plan so training takes no more than two hours per day. Add a checklist the paralegal can complete independently and a 15-minute check-in with their supervisor each afternoon.

PART 1 · ORGANIZE

Projects: a Folder with Your Sources

Create a Project

A workspace Claude remembers branding, tone, voice, products, images

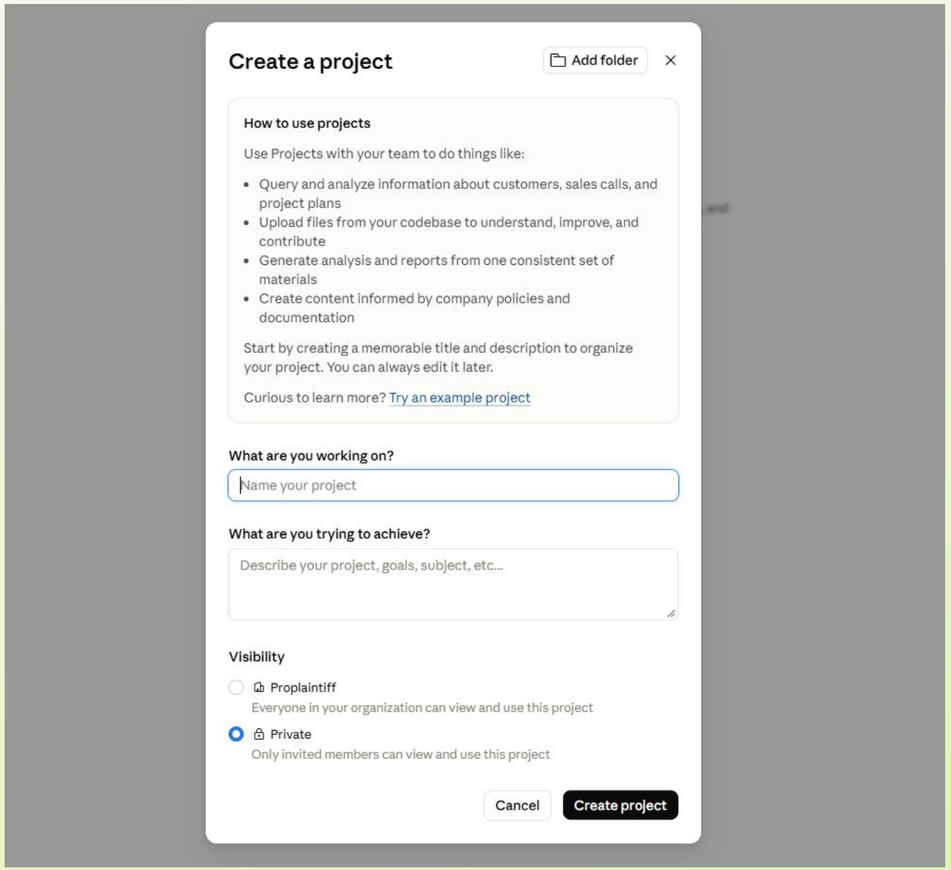
Add your sources

Firm templates, sample demand letters, fee agreements, intake forms, logos, JSONs

Set standing instructions

"Follow our letter format. Formal but assertive. Always flag missing facts."

WHY IT MATTERS: EVERY CHAT INSIDE THE PROJECT STARTS ALREADY KNOWING YOUR TEMPLATES AND RULES, NO RE-EXPLAINING THE FIRM'S STYLE EACH MORNING.



PART 1 · SETUP

LIVE DEMO

Getting Set Up — Beyond the Install

STEP 1

Sign Up

Create your account at claude.ai and pick a paid plan. Team plan fits most firms: admin controls, and your data isn't used to train the model.

STEP 2

Install

Get the desktop app for Mac or Windows. Faster access, file drag-and-drop, and scheduled tasks.

STEP 3

Local Folders

Point Claude at the folders on your machine so it can work directly from your firm's files.

PART 1 · FIRST WORKFLOW

Creating a Scheduled Task

Schedule it

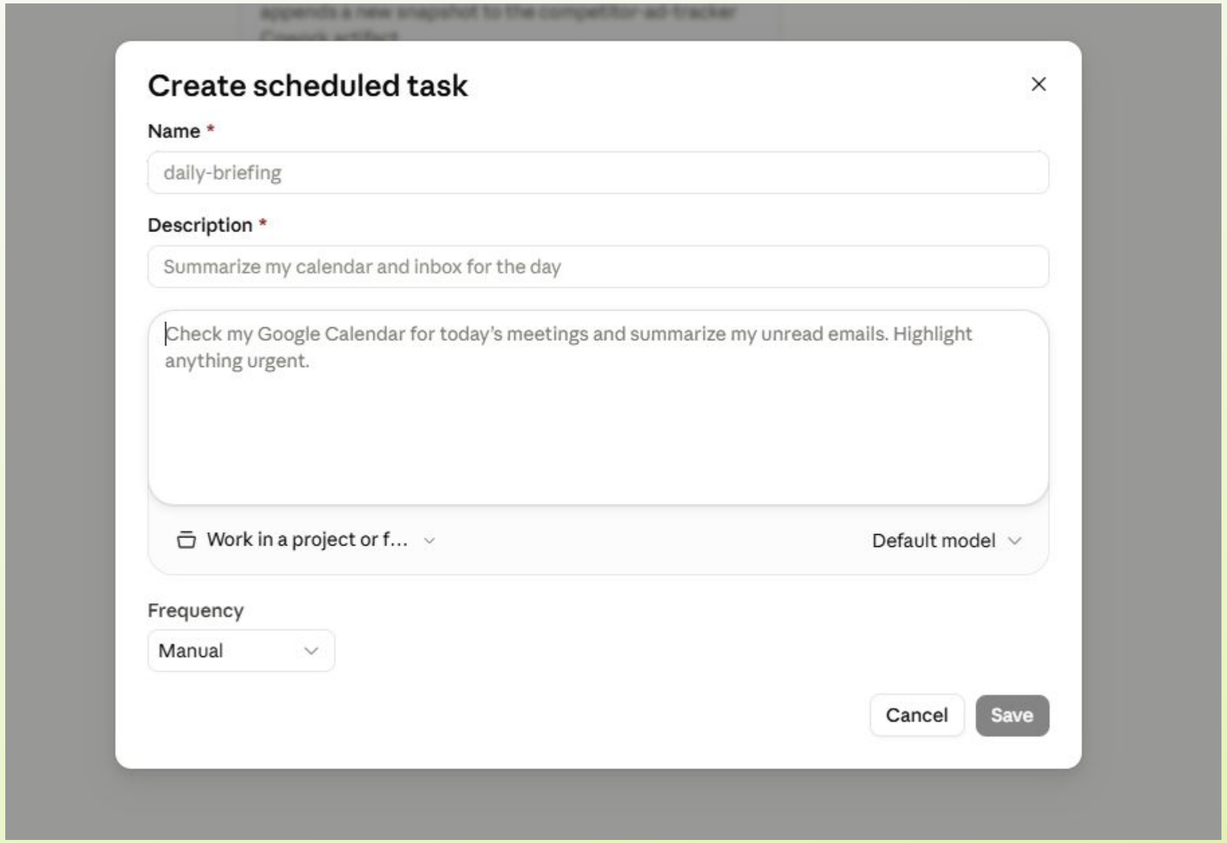
A recurring task, weekdays at 7:00 AM, runs before you're at your desk

It reads your inbox

Scans overnight email from clients, adjusters, opposing counsel

You get a task list

A client-by-client rundown: what came in, what needs a reply, what's urgent



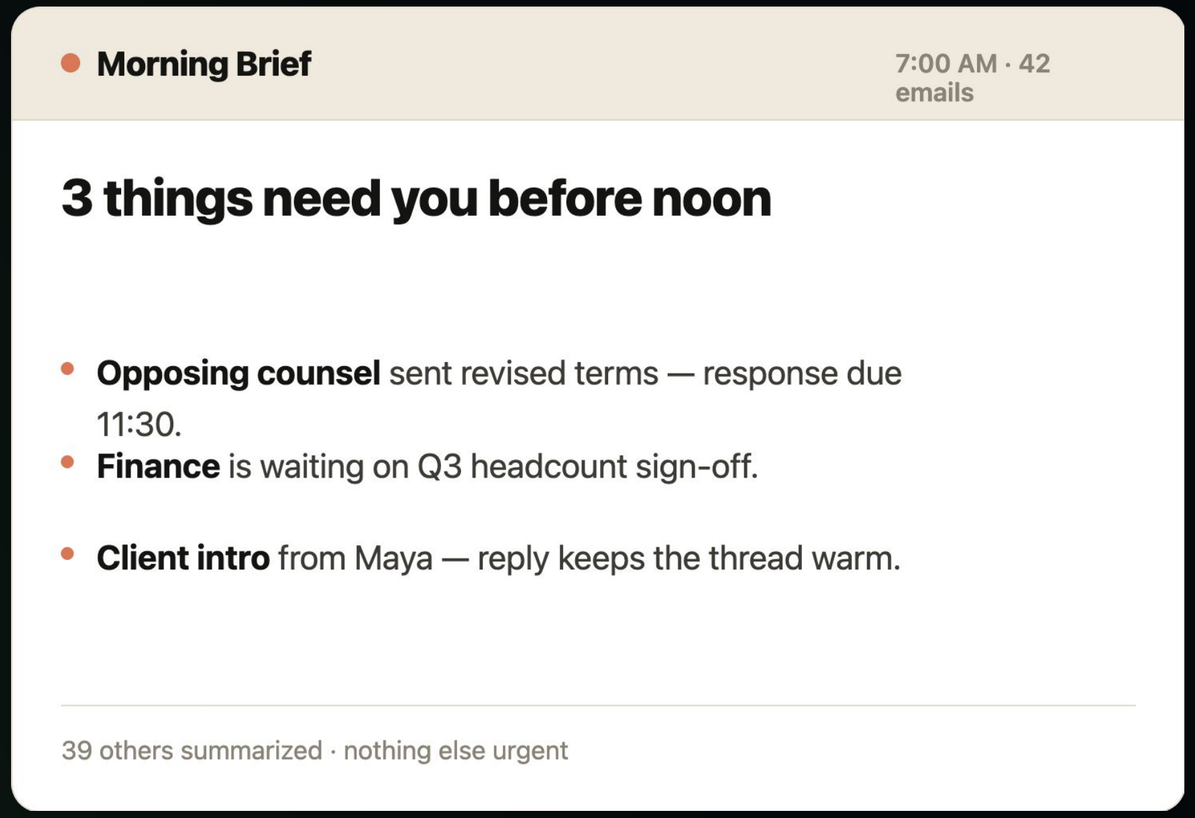
EXAMPLE TASK PROMPT

"Every weekday at 7 AM, review my unread email from the last 24 hours. Group by client, summarize each thread in one line, and list the actions I need to take today, flag anything with a deadline first."

USE CASE 01

A Scheduled Briefing Built From the Day's Email

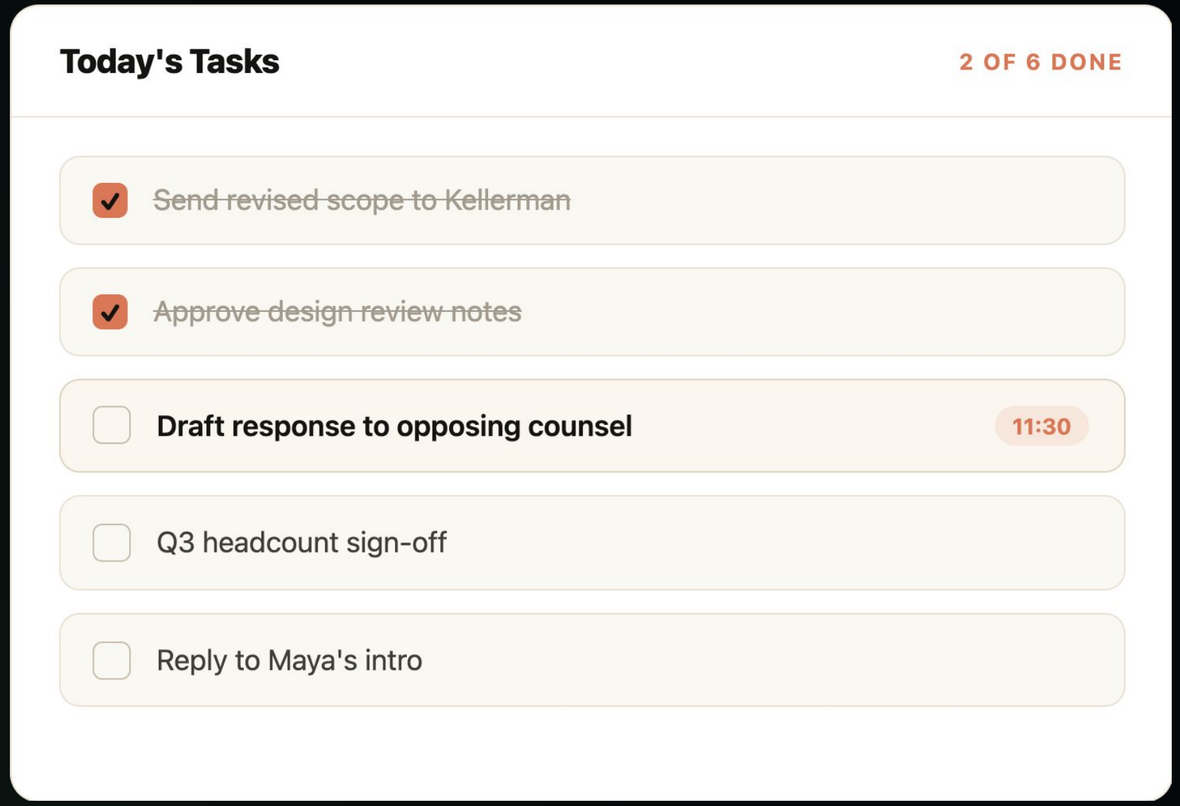
- Start the morning with a summary of everything that came in overnight. Key dates, documents, and communications surfaced up front.
- Draft and send replies right from the Claude chat.



USE CASE 02

Turning Scattered Follow-Ups Into One Task List

- Pulls tasks out of email, calls, and calendar into one place.
- Nothing falls through the cracks because someone forgot to write it down.



PART 1 · FIRST WORKFLOW

Claude Design

Create a Design System

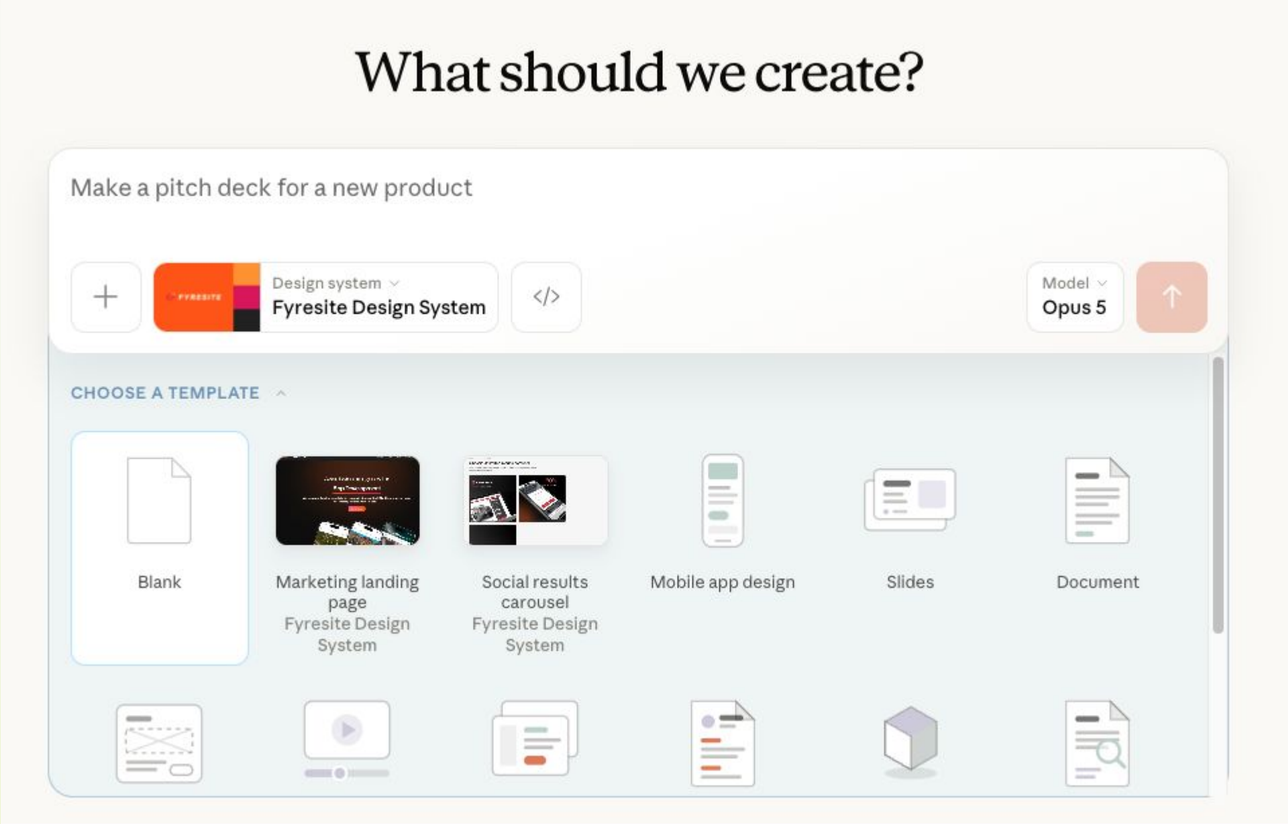
Upload your logo, branding guidelines, fonts, colors, and image assets.

Choose a Template

Create a prompt and select a template to start from.

Generate a Design

Claude will generate a design that can be edited or exported. If you don’t like it, ask claude to change details.



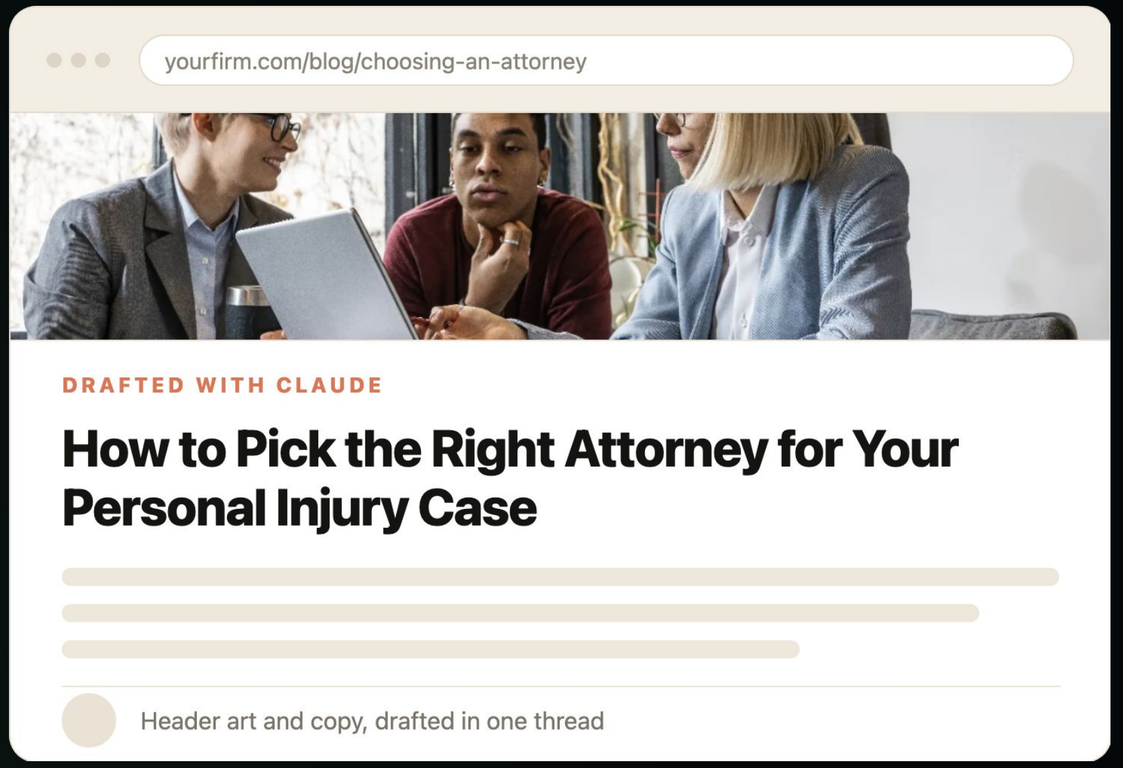
EXAMPLE TASK PROMPT

"Create an Onboarding flyer for new retained clients to help set expectations from the beginning. Let’s touch on communication, document retrieval and follow up timelines.”

USE CASE 03

Marketing Content, Drafted Faster

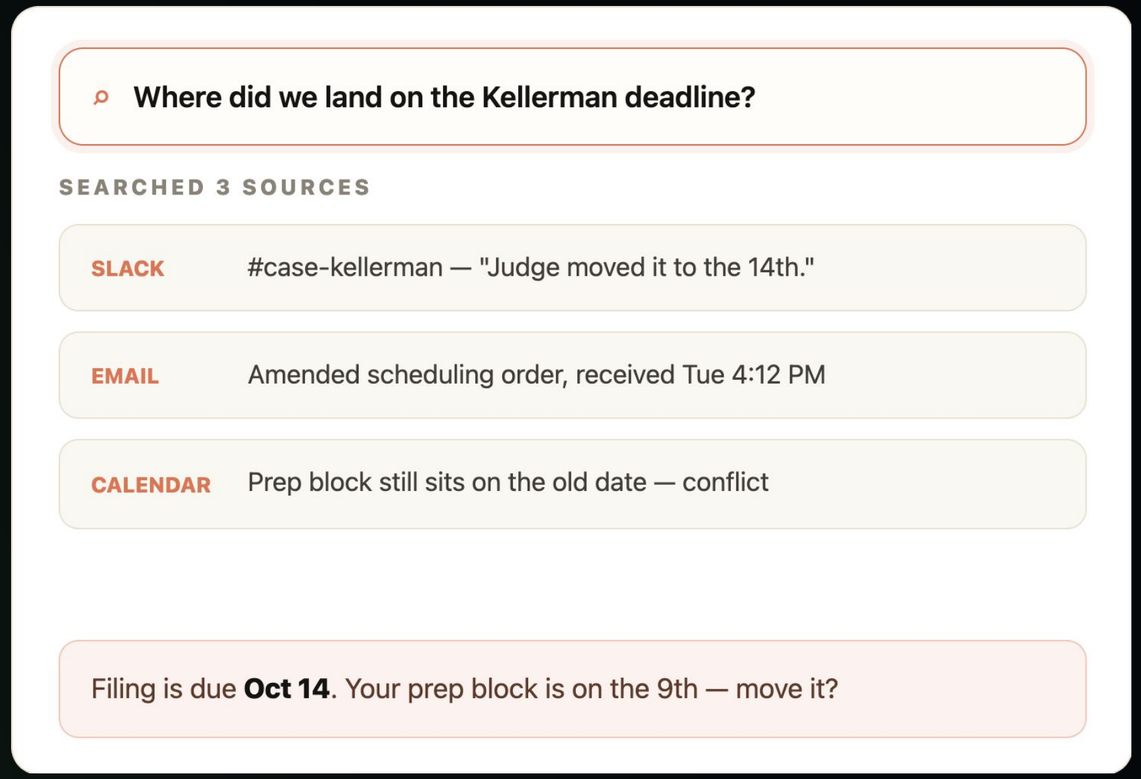
- Client newsletters, ad copy, SEO and website content.
- Take one idea and turn it into a newsletter, an ad variation, and a page draft, without starting from scratch three times.



USE CASE 04

Searching Across Slack, Email, and Calendar at Once

- Ask one question, get the answer pulled from wherever it actually lives.
- No more digging through three apps to find one thread.



PART 1 · WHERE IT STOPS

Where a General Assistant Stops Being the Right Tool

EVERYTHING SO FAR

Business operations

WHAT'S NEXT

Anything that touches a case

PART 1 · RESEARCH

Legal Research with AI

WHERE IT SHINES

Explaining unfamiliar doctrines and standards

Framing arguments and anticipating defenses

Finding the right search terms before you open Westlaw

WHERE TO STOP

Never cite a case you haven't pulled and read yourself

AI can invent convincing-looking citations

Courts have sanctioned attorneys for exactly this

PART 1 · RISK

Risks & Limitations

RISK	WHAT HAPPENS	SAFEGUARD
Hallucination	Confident, plausible, wrong. Fake cases, wrong dates.	Verify every fact and citation against the source
Confidentiality	Client data entered into consumer tools may train models.	Use enterprise plans with no-training guarantees
HIPAA	Medical records in a non-compliant tool risk a violation.	Only put PHI in HIPAA-compliant platforms

PART 1 · RECAP

Ground Rules for AI in Practice

01

Verify everything

You sign it, you own it. AI output is a draft, not a work product.

02

Protect client data

Use secure, approved AI tools. Never share confidential information with unauthorized services.

03

Keep the lawyer in control

AI accelerates the work. Professional judgment stays with you.

PART TWO

Where a Case Actually Lives

An AI-native legal OS built for personal injury firms

- Everything sensitive, everything case-related.
  Medical records, PII, case management.
- This is why ProPlaintiff.ai exists.



PART 2 · PLATFORM OVERVIEW

Your Day-to-Day, In One Platform

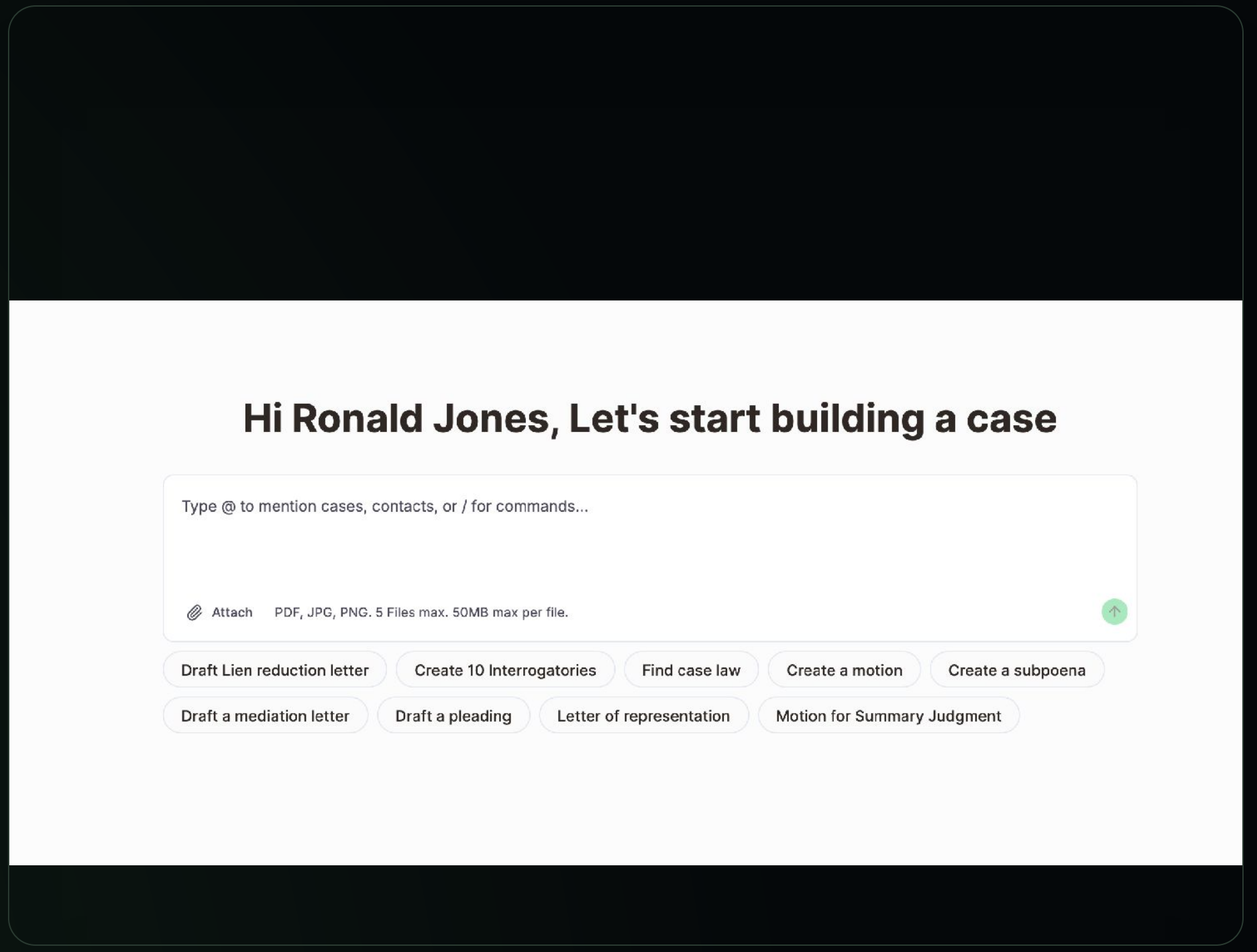
Ask Tiff, the AI Paralegal	Case-aware chat that works from the documents and facts already in the file
Case Management	Every party, policy, document, and deadline in one case view
Demand Letter Packets	First drafts of demand letters based on real case information
Document Summarization	Medical records, police reports, liability reports, audio/video evidence
Automation	Intake, client communication, client care app, SMS, and email

PART 2 · DEMO

LIVE DEMO

Demo ProPlaintiff

- Using Tiff the AI Paralegal
- Creating Demand Letters
- Creating Medical Chronologies

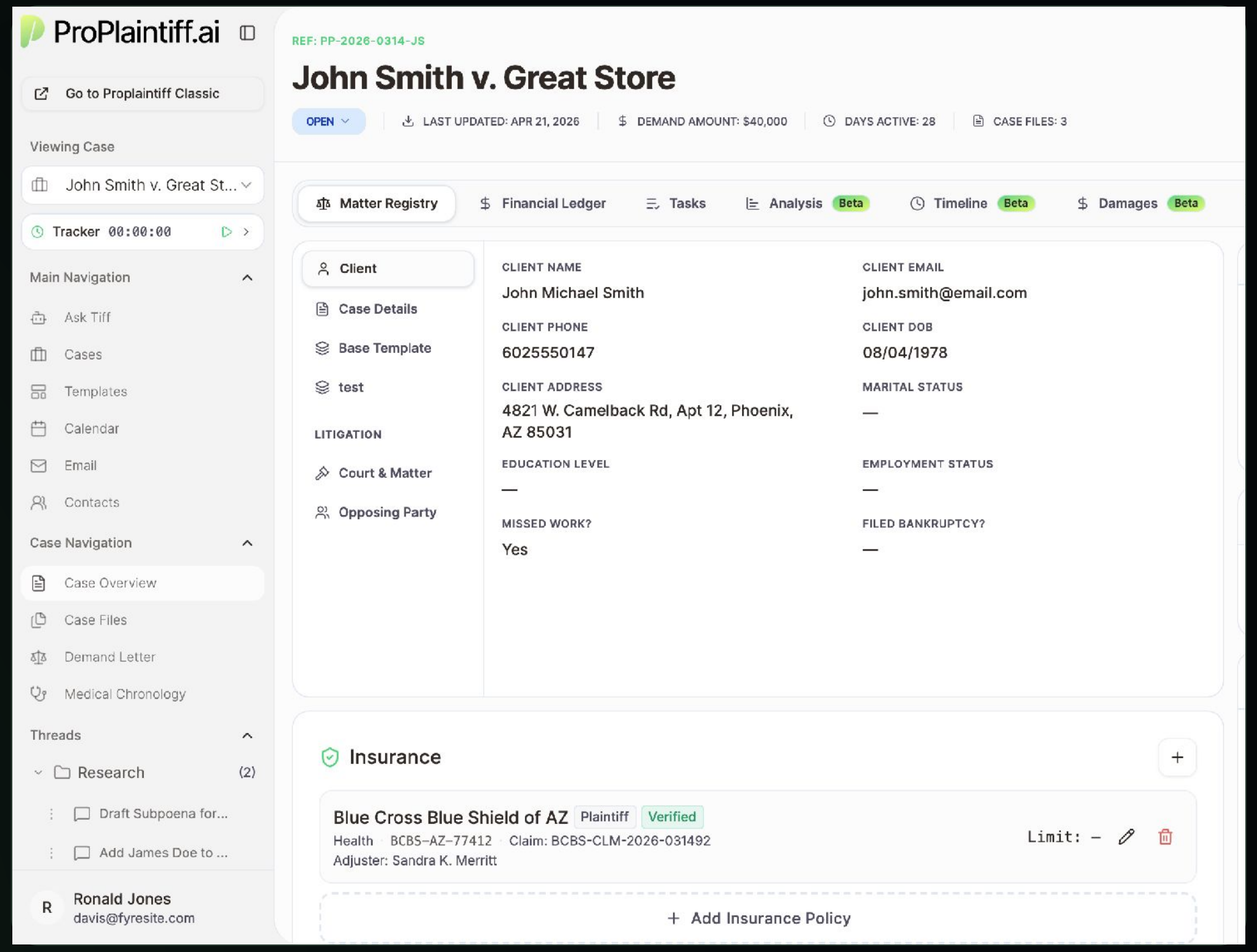


PART 2 · DEMO

LIVE DEMO

Every Case, One View

- Every party, policy, document, and deadline in one case view.
- Custom fields and statuses built around how your firm actually tracks a case.
- Nothing lives in a separate spreadsheet or sticky note.

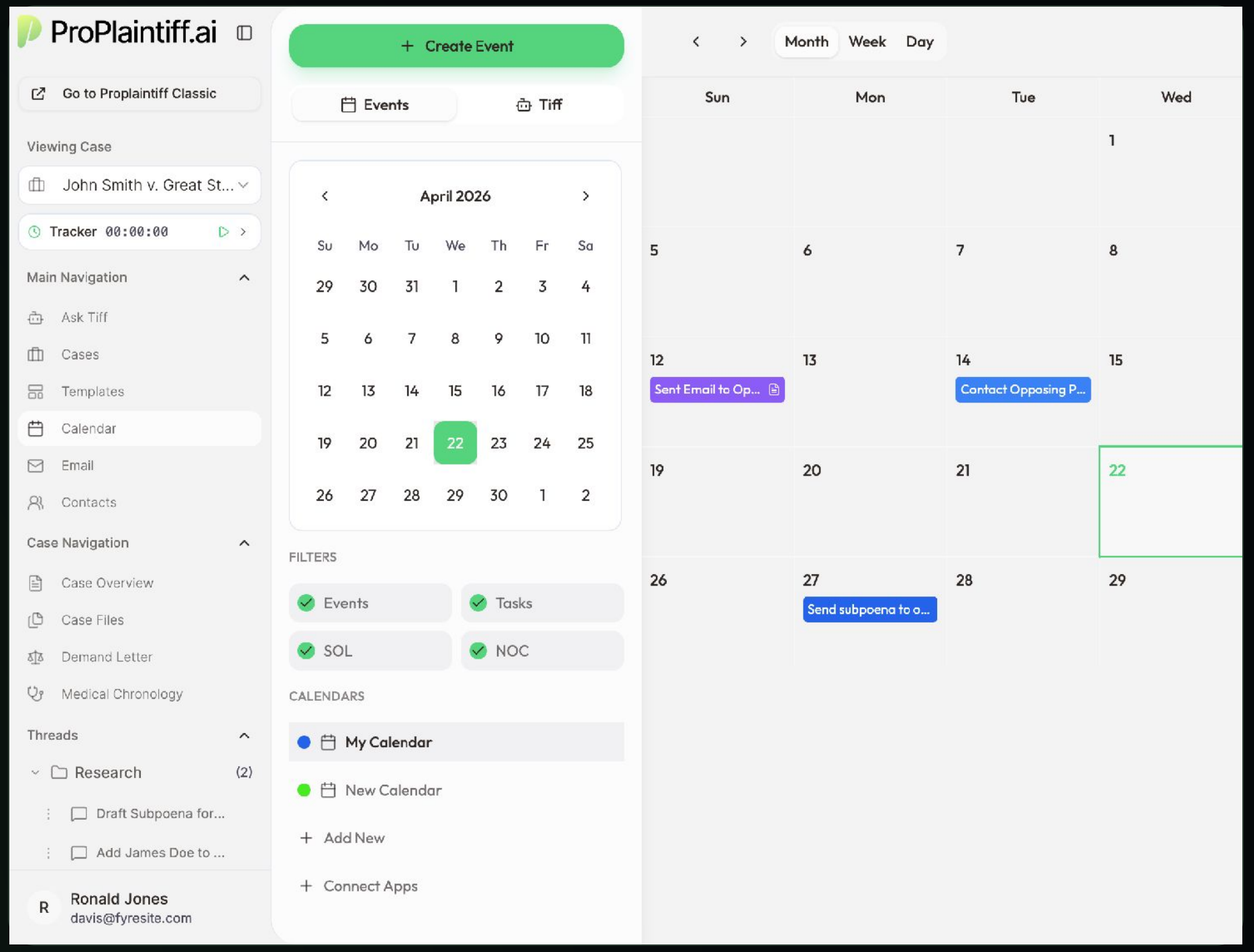


PART 2 · DEMO

LIVE DEMO

A Calendar That Knows Which Case It's For

- Outlook-integrated scheduling, case-linked events, two-way sync.
- Statute-of-limitations and notice-of-appearance dates tracked automatically.
- An AI assistant tab to help manage what's coming up.

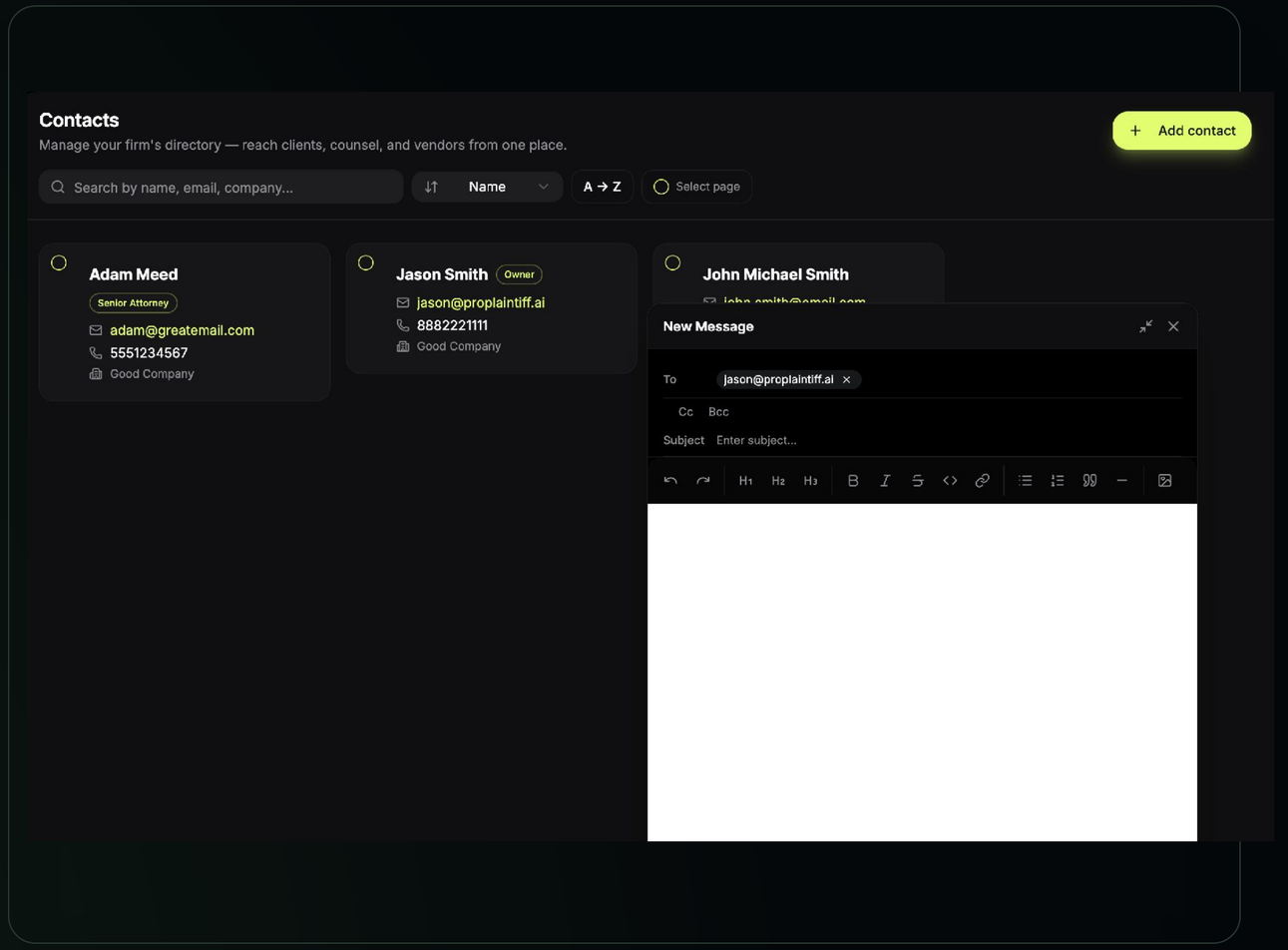


PART 2 · DEMO

LIVE DEMO

Your Firm's Inbox, Connected to Every Case

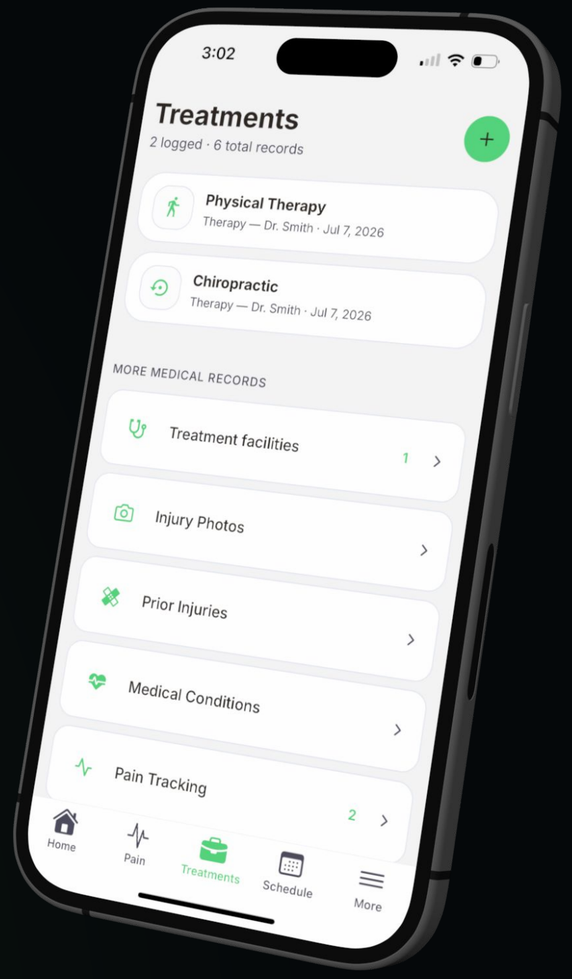
- Outlook email connected directly to cases and contacts.
- Every email lands on the right case file automatically.
- No more forwarding or manually filing correspondence.



PART 2

Client Texting & Care App, Logged to the Case

- Text clients directly through ProPlaintiff.ai via Twilio.
- Every message logged to the case file automatically.
- One record of every conversation, not scattered across phones.



PART 2 · SECURITY

HIPAA-Compliant, By Design

Business Associate Agreement

Medical records and PHI handled under a BAA.

Encrypted Storage

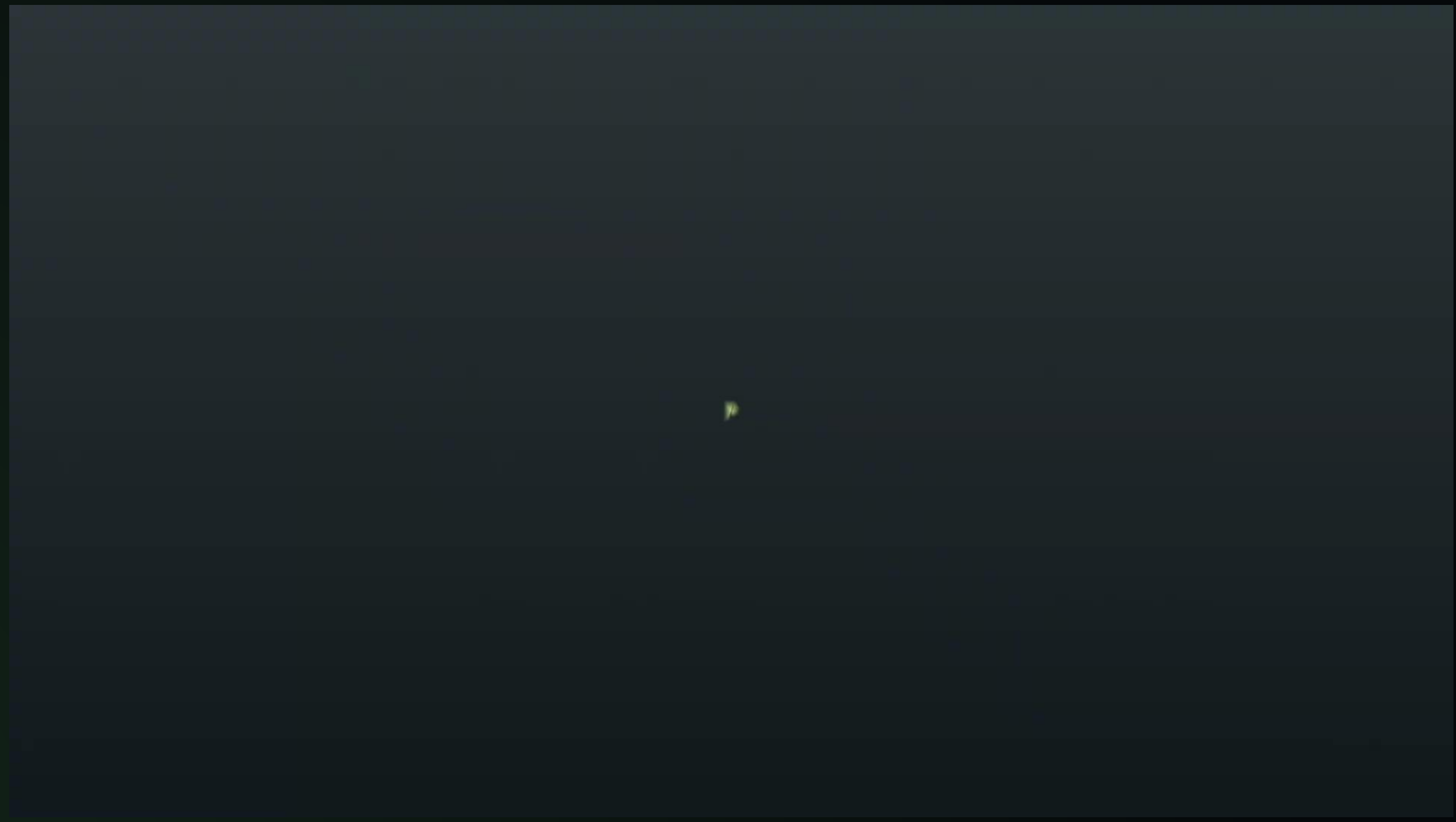
Encrypted in transit and at rest.

No Training On Your Data

No AI training on customer data.

PART 2 · IN THEIR WORDS

JDA Trials



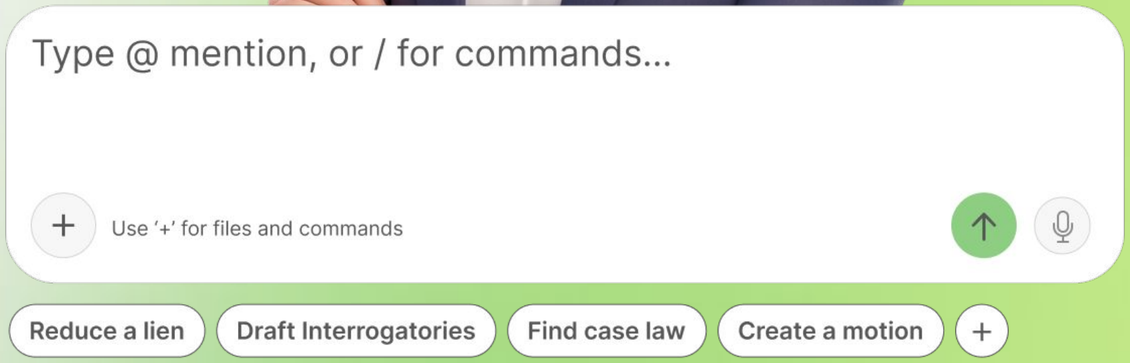
Get Started Today

A Free, Customized Demo for Your Firm

- A demo built around your firm's actual workflow
- A sandbox environment to test it in
- Free 7-Day Trail

Book a Demo





CLOSE

Ask Us Anything

Jason Turnquist • Kris Rezagholi

Thank You for Joining

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