



SOUTHERN FEDERAL  
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**USING GENERATIVE AI  
ETHICALLY AND RESPONSIBLY  
IN AN ESTATE PLANNING PRACTICE**

By

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Ms. Reach's professional activities include articles published in ABA Law Practice magazine, DePaul Business and Commercial Law Journal, and GPSolo Magazine, as well as numerous other publications. She has given presentations on the use of technology in law practice for national bar conferences, state and local bar associations, and organizations such as the National Association of Bar Council and the Association of American Law Schools. She is a guest lecturer for many law schools, including NCCU, Elon, UNC, Loyola, and the University of Maryland. She is frequently interviewed for legal tech podcasts, including Law Tech Partners, Legal Fuel, and Lawyerist. She also speaks at law firm events.

In 2011, she was selected to be one of the inaugural Fastcase 50, celebrating 50 innovators, techies, visionaries, and leaders in the field of law. She was on the founding advisory board of the Chicago Bar Foundation's Justice Entrepreneur Project. In 2013, she was inducted as a Fellow of the College of Law Practice Management. In 2015, she was selected to be part of the ABA LTRC Women of Legal Tech. She served on the ABA TECHSHOW Board from 2007-2009, 2014-2016, was co-vice chair in 2019, and co-chair in 2020. She is co-editor of the 2023 ABA book [\*Design Your Law Practice: Using Design Thinking to Get Next Level Results\*](#). She is the Managing Editor of the 2025 NCBA publication [\*Modern Law Practice Management: Solutions for Solo, Small, and Mid-Size Firms\*](#).



# USING GENERATIVE AI ETHICALLY & RESPONSIBLY IN AN ESTATE PLANNING PRACTICE

Artificial Intelligence is not a new concept for lawyers who have been applying some forms of it for years. However, the recent emergence of many low-cost and accessible generative AI tools that can offer various benefits in a short time has changed the landscape. But before lawyers can take advantage of these AI assistants, they need to be aware of the ethical and practical implications. How can they ensure that using GAI for client work is secure and appropriate? The existing rules, as well as a new ethics opinion, provide guidance and some best practices. In this presentation, we will discuss what you need to consider when using GAI in your practice.

By Catherine Sanders Reach. MLIS

## Contents

Ethics Opinions and Regulatory Discussions.....	1
Fifty State Survey: Working Groups, Ethics Opinions .....	1
Standing Orders and Local Rules.....	4
Due Diligence Questions for AI Vendors .....	4
Data Privacy and Security.....	4
Terms Of Use and Rights .....	5
Data Management .....	5
Usage And Limitations .....	6
Cost And Subscription Models .....	6
Scope Of Knowledge.....	6
Notice Of Changes .....	7
AI Policies for Law Firms and Organizations .....	7
The Emergence of Agentic AI.....	8
What Is Agentic AI? .....	8
Security, Privacy and Ethical Concerns.....	9
How Law Firms Are Deploying Agentic AI .....	10
Tools for Lawyers .....	11
How to Evaluate Agentic AI Tools for Legal Practice .....	12
The Future of Agentic AI in Legal Practice .....	13
The Importance of Personal Interaction in Legal Client Services .....	14
Client Service Is Not a Commodity.....	14
What AI Can't Do (And Why It Matters).....	15
Cautionary Tales: When Technology Replacement Fails .....	15
The Economics of Human Service.....	16
Implementing a Human-Centered Technology Strategy .....	16
The Future Is AI + Human .....	17
Tools to Compare Outputs from Multiple GenAI Models .....	17
Poe (Platform for Open Exploration) .....	18
Ithy .....	19

SNEOS.....	19
Prompt Engineering 101 for Lawyers .....	23
What is Prompt Engineering? .....	24
Prompting Pitfalls and Challenges .....	24
Priming .....	25
Best Practices for Prompting .....	26
Learning How to Prompt.....	27
How to Keep Up with Advances in Artificial Intelligence .....	27

## Ethics Opinions and Regulatory Discussions

Many states and some national bar associations have convened working groups and issued ethics opinions on the use of AI by lawyers. The scope of these initiatives ranges from developing comprehensive guidelines and educational resources to examining social justice implications and making regulatory recommendations. Generally, the ethics opinions cite the following rules of professional conduct:

- Rule 1.1 Competence
- Rule 1.4 Communication
- Rule 1.5 Fees and Division of Fees
- Rule 1.6 Confidentiality of Information
- Rule 3.3 Candor Toward a Tribunal Rule
- 5.3 Responsibility Regarding Nonlawyer Assistance
- Rule 5.5 Unauthorized Practice of Law

### Fifty State Survey: Working Groups, Ethics Opinions

State/Territory/District	Working Group/Guidance	Ethics Opinion	Date
American Bar Association	<a href="#">Task Force on Law and Artificial Intelligence</a>	<a href="#">Formal Opinion 512</a>	7/29/2024
Alabama	None found	None found	
Alaska	None found	<a href="#">Ethics Opinion 2025-1</a>	4/23/2025
Arizona	<a href="#">Steering Committee On Artificial Intelligence and the Courts</a>	None found	11/14/2024
Arkansas	<a href="#">Artificial Intelligence Task Force</a>	<a href="#">Proposed Amendments to Rule 4.3 and Preamble to Arkansas Rules</a>	06/06/2025
California	Standing Committee on Professional Responsibility and Conduct of the State Bar of California has produced <a href="#">practical guidance</a> for the use of generative AI in practicing law	None found	Date unspecified
Colorado	None found	None found	
Connecticut	<a href="#">Generative AI Committee</a>	None found	Date unspecified

Delaware	<a href="#">Delaware Commission on Law and Technology</a>	None found	
District of Columbia		<a href="#">Ethics Opinion 388</a>	09/2024
Florida	<a href="#">Special Committee on Artificial Intelligence Tools &amp; Resources</a>	<a href="#">Opinion 24-1</a>	01/19/2024
Georgia	<a href="#">Special Committee on Artificial Intelligence and Emerging Technology</a>	None found	
Hawaii	<a href="#">Order Establishing the Committee On Artificial Intelligence and The Courts</a>		04/16/2024
Idaho	None found	None found	
Illinois	<a href="#">Ad Hoc Artificial Intelligence Committee</a>	None found	
Indiana	<a href="#">List of Resources</a>	None found	
Iowa	None found	None found	
Kansas	None found	None found	
Kentucky	None found	<a href="#">Ethics Opinion KBA E-157</a>	03/15/2024
Louisiana	<a href="#">Letter from LSBA GC stating that current ethical and professional rules are sufficient to cover issues presented by AI</a>		01/22/2024
Maine	None found	None found	
Maryland	None found	None found	
Massachusetts	Assistant Bar Counsel to the Massachusetts Board of Bar Overseers has written a <a href="#">white paper</a> on ethical considerations for the use of AI in practicing law	None found	
Michigan	<a href="#">Board of Commissioners' AI Workgroup report</a>	<a href="#">AI FAQs</a>	06/2025
Minnesota	<a href="#">AI Working Group Report and Recommendations</a>	None found	06/2024
Mississippi	Law Practice Management and Technology Committee publication, <a href="#">"AI Tools for Lawyers - A Practical Guide"</a>	<a href="#">EO No. 267</a>	11/14/2024
Missouri	None found	<a href="#">Informal Opinion 2024-11</a>	04/2024
Montana	None found	None found	

Nebraska	None found	None found	
Nevada	None found	None found	
New Hampshire	None found	None found	
New Jersey	New Jersey Supreme Court has published <a href="#">preliminary guidelines</a> on the use of AI		01/24/2024
New Mexico	None found	<a href="#">Formal Ethics Advisory Opinion 2024-004</a>	09/24/2024
New York	<a href="#">AI &amp; Emerging Technologies Committee (AIETC) (ongoing)</a>	<a href="#">Report and Recommendations</a> of the New York State Bar Association Task Force on Artificial Intelligence	04/06/2024
North Carolina	None found	<a href="#">2024 Formal Ethics Opinion 1</a>	11/01/2024
North Dakota	None found	None found	
Ohio	None found	None found	
Oklahoma	None found	None found	
Oregon	None found	<a href="#">Formal Opinion No. 2025-205</a>	02/2025
Pennsylvania	None found	<a href="#">Joint Formal Opinion 2024-200</a> (Philadelphia and Pennsylvania Bars)	06/2024
Puerto Rico	None found	Rule 1.19 Technological Competence and Diligence ( <a href="#">translated</a> )	06/17/2025
Rhode Island	<a href="#">Committee on Artificial Intelligence and the Courts (CAIC)</a>	<a href="#">RI Supreme Court Executive Order No. 2024-03</a>	03/2024
South Carolina	None found	None found	
South Dakota	None found	None found	
Tennessee	<a href="#">AI Task Force</a>	None found	
Texas	<a href="#">Taskforce</a> for Responsible AI in the Law (Interim Report)	<a href="#">Opinion 705</a>	02/2025
Utah	None found	None found	
Vermont	<a href="#">Vermont Judiciary Committee on Artificial</a>	None found	02/2024



	<a href="#">Intelligence and the Courts</a>		
Virginia	Task Force on Artificial Intelligence <a href="#">Model AI Policy for Law Firms</a>	None found	04/2024
Washington	<a href="#">Legal Technology Task Force Charter and Survey Results</a>	None found	07/16/2025
West Virginia	None found	<a href="#">L.E.O. 24-01</a>	06/2024
Wisconsin	None found	None found	
Wyoming	None found	None found	

*Last Updated: 9/10/2025. Reference source: [AI and Attorney Ethics Rules: 50-State Survey](#)*

## Standing Orders and Local Rules

In addition to rules of professional conduct and ethics opinions, many courts have issued standing orders, decisions, or local rules regarding the use of AI. The law firm Ropes and Gray maintains a state map with analysis and links to the orders and rules.

[Artificial Intelligence Court Order Tracker | Ropes & Gray LLP](#)

## Due Diligence Questions for AI Vendors

Lawyers are increasingly encountering AI-based technologies that promise to enhance their practice. However, the adoption of these tools requires careful consideration and due diligence. By understanding the key questions to ask vendors and the critical factors to assess, lawyers can make informed decisions that align with their professional responsibilities and ethical standards.

The following sections delve into various aspects of GenAI products, including data privacy and security, terms of use and rights, data management, usage and limitations, cost and subscription models, scope of knowledge, and notice of changes.

### Data Privacy and Security

In addition to confidentiality and ethical compliance, it is crucial for lawyers to consider data privacy and security. One of the primary concerns is understanding who has access to the data, both inputs and outputs. Lawyers should ensure that the GenAI tool provides clear information about data access and control mechanisms. Additionally, compliance with data protection laws, such as GDPR or HIPAA, may be essential. The tool must adhere to necessary regulations to safeguard sensitive or protected information. Lastly, the ability to securely input confidential data is a significant factor. Lawyers need to verify that the

GenAI product has robust security measures in place to protect any confidential information that is entered into the system.

- Who has access to my data (inputs and outputs)?
- How does the tool comply with data protection laws like GDPR or HIPAA?
- Can I securely input confidential data?

## Terms Of Use and Rights

Lawyers must read the terms of use and rights associated with the use of AI based technology. One of the primary considerations is how the content can be used. Lawyers should determine whether there are any restrictions on commercial use or distribution of the AI-generated content. Additionally, it is important to review the copyright and indemnification policies to ensure legal compliance and to understand the rights and responsibilities involved in using the AI-generated content.

- How am I allowed to use the AI-generated content?
- Are there restrictions on commercial use or distribution?
- What are the copyright and indemnification policies?

## Data Management

Records and data management are also considerations when assessing new tools. One of the primary concerns is the ability to access, archive, or review past inputs and outputs for reference or compliance. Lawyers should ensure that the GenAI tool provides clear information about how data can be accessed and managed over time. Additionally, it is important to understand whether the model is trained on user interactions in any way. Lawyers need to verify if their interactions with the GenAI product contribute to the training data and how this might impact the tool's performance and privacy. Lastly, the ability to completely delete all interactions if the user chooses to do so or ends their subscription is a significant factor. Lawyers should confirm that the GenAI product offers robust data deletion options to ensure that all confidential information can be securely removed from the system.

- Can I access, archive, or review past inputs and outputs for reference or compliance?
- Is the model trained on my interactions in any way?
- Can all my interaction be completely deleted if I choose to do so or end my subscription?

## Usage And Limitations

Lawyers should assess how the tool can be effectively utilized to enhance their practice and streamline their tasks. Additionally, it is important to be aware of any restrictions on the number of inputs or outputs. Understanding these limitations will help lawyers manage their expectations and ensure the tool's effectiveness for their specific needs.

Furthermore, it is crucial to comprehend how interactions with the GenAI product are defined and counted. This includes evaluating the volume, transactions, and complexity of interactions to determine the tool's appropriateness for various tasks. By thoroughly understanding the usage and limitations of the GenAI product, lawyers can make informed decisions and maximize the tool's potential for their practice.

- What are the ideal use cases of this tool in the legal profession?
- What limitations should I be aware of in terms restrictions on number of inputs or outputs?
- How are interactions defined and counted? (e.g., volume, transactions, complexity)

## Cost And Subscription Models

AI tools can get very expensive. It is essential to thoroughly understand the cost and subscription models associated with these tools. One of the primary considerations is the pricing structure. Lawyers should investigate whether there are different pricing models available and determine which one best suits their needs. Additionally, it is important to identify any hidden or additional fees that may arise, as these can significantly impact the overall cost. Another critical aspect to consider is whether training and support are included in the subscription. Understanding what these entail can help lawyers make informed decisions and ensure they receive the necessary assistance to effectively utilize the GenAI product.

- What is the pricing structure and are there different pricing models?
- Are there any hidden or additional fees?
- Are training and support included? If so, what do these entail?

## Scope Of Knowledge

What is the scope of knowledge that the AI model possesses? One of the primary considerations is the type of data used to train the model. Lawyers should investigate the sources and quality of the training data to assess the AI tool's reliability and relevance. Additionally, it is important to know how often the model is updated or retrained. Regular updates and retraining can help ensure that the AI remains accurate and up-to-date with the latest information. Another critical aspect to consider is whether the model is open

source or closed/proprietary. Understanding the nature of the model can provide insights into its transparency and potential biases. By thoroughly evaluating these factors, lawyers can determine the suitability of the GenAI product for their legal needs and ensure that it meets their standards for accuracy and reliability.

- What kind of data was used to train the model?
- How often is the model updated or retrained?
- Is the model open source or closed/proprietary?

## Notice Of Changes

Due to the rapid development in this market, many providers frequently change their terms and policies. When evaluating GenAI products, it is essential for lawyers to understand how providers notify users of changes in their underlying policies. Lawyers should ensure that the GenAI tool provides clear and timely notifications about any policy changes. Understanding the methods and frequency of these notifications is crucial for maintaining compliance and staying informed about any updates that may affect the use of the GenAI product.

- Do you notify users of changes in your underlying policies? If so, how?

## AI Policies for Law Firms and Organizations

Implementing a comprehensive AI governance policy is crucial for law firms in 2025, moving from "experimental adoption to enterprise governance". This is necessary due to the rapid adoption of AI tools, coupled with a significant lack of formal oversight, which creates a "dangerous gap between adoption and oversight". Such policies help mitigate significant risks like data breaches, ethical violations, court sanctions due to AI inaccuracies, and the emerging "deepfake defense". Conversely, effective AI governance can provide transformative opportunities, including productivity gains and a critical competitive advantage.

The policy should establish a framework for the ethical, responsible, and effective use of AI technologies, ensuring compliance with ABA Formal Opinion 512 and other applicable ethical rules and opinions, while maintaining client service, data privacy, and confidentiality. It should clearly define its applicability to all personnel and cover various AI technologies, including generative AI, legal-specific platforms, document analysis tools, and predictive analytics.

By combining guidance from these articles and resources a firm may find an approach to building an AI use policy:

- [Sample Use of Generative AI Policy Template | Association of Corporate Counsel \(ACC\)](#)
- [Crafting an AI policy for your law firm: a step-by-step guide \(2025 Edition\)](#)
- [Gen AI Policy Builder Tool](#)
- [Why Your Law Firm Needs an AI Use Policy Now - Lawyers Mutual Insurance NC](#)

## The Emergence of Agentic AI

Artificial intelligence (AI) has developed significantly from an innovative tool into a transformative entity in numerous industries, including the legal profession. For many lawyers, AI may still be associated with predictive analytics or document review tools. However, AI development has taken major leaps. Agentic AI has moved from concept to horizon.

Unlike generative AI (GenAI), which produces content based on prompts, agentic AI takes initiative. It not only interprets instructions but can also execute them across various tools and platforms autonomously. This advancement represents a notable change in how legal professionals may engage with technology. Understanding agentic AI is now essential for firms, legal departments and legal aid organizations.

### What Is Agentic AI?

Agentic AI is in its infancy. Agentic AI differs from generative AI. GenAI uses advanced algorithms to create new content, including text, images, videos and code. [Agentic AI features autonomous AI agents](#) that learn and adapt to do specific tasks. The purpose of Agentic AI is to perform tasks that humans would typically do, including following a set of instructions and executing actions. The technology differs from automation tools like Zapier because it can make decisions and adapt to changing conditions.

Given access to a set of tools, AI agents can [make decisions and accomplish a specific goal with limited supervision](#). For instance, Jennifer Case notes in her LawSites article “[The Battle for Small Law Dominance in the AI Agent Era: Microsoft vs. Google](#),” an AI agent could monitor court dockets and calculate deadlines, alerting you when opposing counsel files a response or help with discovery review or draft LinkedIn posts based on recent news.

Agentic AI promises to reduce the need for people to do mundane, repetitive or low-effort tasks. That said, agents will still [need to be managed](#), and their work will need to be checked for accuracy and completion. Managers will need to shift trust from humans to algorithms.

Joe Patrice at Above the Law asks the question that no doubt occurs to many lawyers: [do lawyers actually want an agent?](#) In reviewing Thomson Reuters’ agentic evolution of CoCounsel, he opines that in an industry that routinely marks down work conducted by elite law school graduates, it is not clear that lawyers would want an algorithm to do the work.

The promise of agentic AI has not yet been fully realized, and the technology is far from fulfilling the potential of being truly autonomous. It will be increasingly important to ensure that the “human in the loop” oversight is emphasized when deploying agentic AI.

## Security, Privacy and Ethical Concerns

If you read about what agentic AI can and will do and see opportunities for security, ethical and privacy concerns, you are not alone. “Signal President Meredith Whittaker calls out [agentic AI as having ‘profound’ security and privacy issues](#),” noting that the access these bots would need to have in order to fulfill their tasks would break the “blood-brain” barrier between the application layer and operating system layer, creating impossibilities in existing protections to keep information protected. For agentic AI to work you would need to give it access to multiple tools to get the job done. Examples like letting an agent book a flight for you, plan a trip or buy concert tickets would require you to give access to multiple tools that house your private information and use your credit cards on your behalf. That is a lot of trust.

Agentic AI is a scammers’ paradise. They can deploy agents at scale to make mischief. With a combination of agentic and GenAI, social engineering–based scams have substantially accelerated. With access to interests, hobbies and even your likeness easily accessible, an agentic bot with deep-fake capabilities can target individuals and hold conversations that mimic human interactions. Security experts are suggesting that people have a safe phrase shared with their family and company to confirm they are talking to them. Clients should be on that list, too.

In a legal context, attorneys at Proskauer [Rose investigate the hazards of agentic AI in contract law](#), asking “who is really clicking ‘accept’?” For instance, is a transaction initiated and executed by an AI tool on behalf of a user enforceable? If a dispute arises over an e-commerce transaction are current laws enough to protect the parties, or could they exacerbate difficulties in resolving disputes when an agentic AI tool made the decision on behalf of the user? Lawyers and their clients will need to understand the implications of AI developer terms of service. The authors summarize that decades of established law may now be challenged by agentic AI.

Another aspect to consider with agentic AI is ethics. If an agent is given autonomy on a law firm's website with no oversight to answer questions posed by potential clients, who is responsible for inadequate or incorrect information? In consumer protection, will agents making decisions for companies and products introduce bias that harms or discriminates against people? MIT's [Moral Machine](#) has long been a source of studying moral decisions made by machine intelligence, evidencing how human bias can influence autonomous technology like self-driving cars.

## How Law Firms Are Deploying Agentic AI

How will lawyers use agentic AI in law practice? Here are some examples:

- Wilson Sonsini Goodrich & Rosati has [launched an agentic AI-powered commercial contracting tool](#), powered by [Dioptra AI Contract Intelligence](#) and Wilson Sonsini's custom playbook. The fixed-fee service targets cloud services companies and is [part of Neuron, the firm's self-service platform for emerging companies](#). David Wang, Wilson Sonsini's chief innovation officer, notes that the agent is focused on assisting with commercial contracts, but within that, it is "hyperdimensional."
- [Taylor Wessing has partnered with Sweden-based legal AI platform Legora](#) to help automate analysis, enhance due diligence, and offer drafting support firm-wide.
- Law firm [Simmons & Simmons is partnering with Flank](#), a Berlin-based legal tech startup with AI agents primarily focused on supporting in-house legal teams. In addition to other tasks, the AI agents will assist with NDA drafting for clients to "take whole tasks away from lawyers".
- [Troutman Pepper Locke has built an agentic workflow](#) to influence client-facing work after using it to automate about 80% of communications during a merger. The tool is called Athena.
- [KPMG Law US](#), a newly approved law firm serving the US market, will use Google Cloud's AI to scale multi-agent platforms. KPMG Law and Google Cloud are developing solutions for AI-assisted contract review, document analysis, compliance checks, and contract lifecycle management. KPMG will also adopt Google's Agentspace internally to enhance employee experience and business operations to free up time to spend with clients. Part of the internal effort will utilize Google's NotebookLM Enterprise to reimagine employee learning.

## Tools for Lawyers

With companies and large law firms deploying agentic AI-based services, what tools can law firms, in-house legal departments, legal aid organizations and other legal services providers begin to investigate for internal use and externally facing legal help? Here are some of the legal and business-oriented agentic AI products rolling out to the marketplace. These tools should be considered in the “emergent” phase, with their full potential more conceptual than reality.

LexisNexis has launched [Protégé AI Assistant](#). This product will replace the AI Assistant on Lexis+ AI, and Protégé will be ubiquitous across all LexisNexis products. Protégé’s agentic AI will autonomously complete tasks such as suggesting workflow actions based on the type of document uploaded, drafting deposition questions and discovery documents, generating timelines, analyzing transactional documents and more.

Thomson Reuters [is rolling out agentic AI across CoCounsel products](#), leveraging the acquisition of Materia, an agentic AI for the tax, audit and accounting professions. Agentic capabilities for CoCounsel for legal will roll out in the summer. The upcoming release is expected to include workflows for drafting, employment policy generation, deposition analysis and compliance risk assessments.

Definely, a contract drafting and review company, [is offering Enhance](#), an agentic AI legal assistant integrated into Microsoft Word. The agent will draw information from the suite of Definely tools, including document intelligence, precedent clause bank and an automated proofreading tool.

[Harvey AI is rolling out AI Agents](#) to help build workflows. Harvey agents will guide users through steps in a task and reduce the need to craft detailed prompt queries. Custom evaluations will check the agent’s work against human quality work on common tasks.

[Microsoft 365 Copilot Wave 2](#) was announced at Microsoft Build. These tools will build out the existing Copilot Agents including Researcher and Analyst. Researcher is a “supercharged” version of Deep Research. Analyst helps format your data to help it make sense. Other tools that Microsoft is rolling out include Copilot Notebooks that turn Copilot output into an interactive document. Eventually, the plan for Copilot will include the ability to control your PC with app actions. Current subscribers to Microsoft 365 Copilot for Business can check [out Researcher, Analyst, Visual Creator, Writing Coach](#) or create an agent in the Copilot interface.

Jotform, the survey tool, has rolled out [AI Agents](#) for customer service. AI Agents in Jotform can collect data, answer user questions and provide personalized guidance. It can be used



as frontline customer service, with phone agents, live chat and more. There are [plenty of templates ready to customize and deploy](#) including some that law firms might be able to use, like appointment and booking AI agents, human resource AI agents, customer service AI agents, satisfaction survey AI agents and intake AI agents. There are already [legal-specific AI agent templates](#) including intake AI agents, legal consent AI agents, Legal Aid Application AI agents and many practice area specific AI agents.

[Zapier Agents](#) will give users the ability to organize, monitor and launch fully autonomous AI workflows. Zapier is already a powerhouse tool for connecting applications to create workflows. Zapier agents will tap directly into nearly 8,000 apps to act on your behalf across your entire tech stack with no coding. You can organize Zapier Agents into “pods” to organize related agents into logical groups like “content marketing” or “client intake.” There is an activity dashboard so you can check on your agents to see what they are doing and if any need attention. Of course, there are ready-made templates, like the Google Business Review Responder.

Google announced further AI development at the [recent Google I/O 2025 conference](#), including a low-code agent builder for creating custom AI assistants and enhanced Workspace “gems” that work with files, emails and calendars within Google Workspace. They will also bring Zapier-like automations native to Workspace. Google’s [Notebook LM](#) is bringing AI agents to help automate tasks as well.

## How to Evaluate Agentic AI Tools for Legal Practice

It is hard to keep up with all the agentic AI tools being released. [MIT has published an AI Agent Index](#) at <https://aiagentindex.mit.edu/> to help document technical components, intended users and safety features of agentic AI systems. The database is only updated to December 31, 2024, but it helps show the many agentic tools in development. The index framework helps assess agentic AI tools, including guardrails and oversight.

### Security and Privacy

- What client data will the agent access?
- Are data transmissions encrypted at rest and in transit?
- Does the tool comply with relevant privacy regulations (e.g., GDPR, HIPAA)?
- Is there role-based access or permission control?

### Legal and Ethical Risk

- Can the tool’s actions be audited or traced back?

- Who is legally liable if the agent takes incorrect or harmful action?
- Are the vendor’s terms of service compatible with ethical duties of confidentiality and competence?
- Could the agent introduce bias or fairness concerns in client interactions or outcomes?

#### Autonomy and Oversight

- How much autonomy does the agent have—and can you limit it?
- Can you insert a “human in the loop” for final review or approval?
- Is there a clear system to monitor the agent’s activity and performance?
- Does the tool provide logs or reporting features for transparency?

#### Functionality and Fit

- What specific tasks does the agent perform—and how well?
- Is the agent trained for legal-specific use cases (contracts, e-discovery, compliance, etc.)?
- Does it integrate with your existing tools and systems (DMS, CRM, Microsoft 365, etc.)?
- Can it scale across multiple teams or clients without creating bottlenecks?

#### Support and Training

- Is vendor support available for setup, customization and troubleshooting?
- Are onboarding, documentation and training materials provided?
- Can your team (lawyers, IT, staff) maintain and manage the agent effectively?

## The Future of Agentic AI in Legal Practice

As we look to the future of Agentic AI in legal practice, the potential developments are both exciting and transformative. The rise of agentic AI, as demonstrated by [Google’s Notebook LM](#), promises to expand software capabilities and redefine how legal professionals interact with technology. At Legalweek 2025, [discussions highlighted the embedded and agentic generative AI tools](#) that are set to revolutionize the industry. Microsoft’s Copilot is also paving the way for AI agents that can perform tasks autonomously, offering a glimpse into a future where AI seamlessly integrates into daily workflows. The [National Law](#)

[Forum](#) emphasizes that the next generation of AI agents will bring unprecedented efficiency and innovation to law firms. As these technologies continue to evolve, legal professionals must stay informed and adapt to harness the full potential of agentic AI.

Agentic AI signifies a notable change in legal technology. It involves more than just drafting documents more efficiently; it entails changing the approach to legal work. These systems offer potential for innovation, cost reduction and improvements in client service, but also pose risks regarding privacy, ethics and professional responsibility.

Lawyers are not required to become technologists, but they need to be knowledgeable about how agentic tools are used. This involves addressing questions related to transparency, accountability and the balance between autonomy and supervision. The effectiveness of agentic AI in law will rely not only on the capabilities of these tools but also on responsible usage.

## The Importance of Personal Interaction in Legal Client Services

Generative AI tools can summarize court decisions, draft legal memos, and even engage in natural-sounding conversation. It's tempting to imagine a future where much of a lawyer's client-facing work is handled by machines. Intake forms become chatbots. Follow-up emails are automated. The tone sounds just right. It's efficient, scalable, and consistent. But is it wise?

While automation has its place, especially in back-office and document-heavy tasks, the essence of client service lies in what AI lacks: empathy, judgment, trust-building, and accountability. Lawyers who fully outsource client service interactions to generative AI risk eroding the very relationships that define their value.

### Client Service Is Not a Commodity

True client service isn't just about fast answers or 24/7 availability. It's about how clients feel about their case, their lawyer, and the legal process itself. It's bedside manners. It's emotional quotient. It's being seen and heard.

AI can simulate conversation, but it can't form a bond. And in law, that bond is often what keeps a client engaged, loyal, and confident in the outcome. Delegating that experience to a tool, however advanced, turns a relationship into a transaction.

## What AI Can't Do (And Why It Matters)

Clients don't return to a law firm because the chatbot remembers their last case. They return because someone remembered their daughter's name or asked how recovery from surgery was going. Relationships are rooted in empathy and continuity, not scripts.

Legal advice considers many angles. Human lawyers weigh not only the legal implications, but also the personal and ethical ones. Generative AI can produce options, but it cannot grasp the lived realities or dilemmas behind a choice.

Much of client communication involves unspoken cues: a pause before answering, a change in tone, visible distress. Lawyers use this information to guide their responses, probe deeper, or provide reassurance. AI lacks this perceptive capacity.

When AI provides inaccurate, misleading, or jurisdictionally incorrect information, who is responsible? The client may not understand that the interaction isn't legally binding, but the lawyer is still on the hook.

Well-trained AI generates polished responses, but the human experience is messy. Clients value honesty, not perfection. They want to feel that their situation is unique and taken seriously, not just another prompt in a queue.

## Cautionary Tales: When Technology Replacement Fails

Before embracing full automation of client service, legal professionals should consider the numerous cases where removing human elements from service interactions has resulted in unexpected consequences across industries.

Industries that have attempted to automate customer service extensively often face backlash and unintended negative outcomes. For instance, while self-checkout lanes in supermarkets offer convenience, they have also led to increased theft and customer dissatisfaction.

After the aggressive implementation of AI-driven customer service systems in 2017, Bank of America was forced to reintroduce human representatives for complex account services after experiencing a 17% drop in customer satisfaction scores.

Furthermore, the consequences of prioritizing technology over human interaction can extend beyond the immediate exchange. Clients might feel disconnected or undervalued, leading to a deterioration in trust and satisfaction. This erosion of the relationship can ultimately result in a decline in client loyalty and engagement.

In the legal industry, the stakes are even higher. A mistake or oversight due to the limitations of AI can have far-reaching consequences for a client's case and overall well-being. Therefore, legal professionals must carefully consider the balance between leveraging technology and preserving the irreplaceable human touch in their practice.

## The Economics of Human Service

While firms may view AI as a cost-cutting measure for client service, this perspective often overlooks the economic value of the human touch.

Data consistently shows that personalized service increases client retention. The [cost of acquiring a new client](#) is 5-7 times higher than maintaining an existing relationship. A 5% increase in client retention can increase firm profitability by 25-95%.

Firms that maintain high-touch, human-centered service can command premium rates. As AI becomes commonplace, human attention becomes a scarce resource.

While AI might reduce short-term staffing costs, the risk exposure from algorithmic errors, miscommunications, or compliance failures can far outweigh these savings.

Outsourcing client service touches on multiple ethical concerns. Using AI tools as internal aids is one thing. But when AI begins to act as the public-facing voice of the firm, the line blurs. Clients may believe they're speaking with someone authorized to advise them. For this reason, [California enacted a bot disclosure law \(Cal. Bus. & Prof. Code § 17940-17942\)](#). Misconception can carry risk, both for malpractice and unauthorized practice of law.

## Implementing a Human-Centered Technology Strategy

Rather than viewing AI as a replacement for human client service, forward-thinking firms are developing integrated strategies that leverage technology to enhance human capabilities:

The most effective approach uses AI to handle routine tasks while freeing lawyers to focus on relationship-building. This includes:

- Using AI to draft initial documents that lawyers then personalize.
- Implementing intelligent scheduling systems that respect both efficiency and the need for adequate client face time.
- Developing knowledge management systems that ensure client preferences and personal details are accessible to all firm members.

- Establishing clear boundaries around when and how technology interfaces with clients.
- Developing explicit policies about which communications can be automated versus which require human attention.
- Creating client preference systems that allow individuals to opt in or out of AI-assisted communications.
- Establishing regular human check-ins even when parts of the case management are automated.

## The Future Is AI + Human

Generative AI has immense potential. It can speed up document creation, synthesize research, and triage administrative work. Used thoughtfully, it frees up lawyers to focus on higher-value, client-facing tasks.

But when it comes to service and the human moments that define a lawyer-client relationship, AI should support, not supplant. The more AI becomes integrated into practice, the more a lawyer's humanity becomes the differentiator.

Every firm has access to AI tools. Soon it won't be a competitive edge, it will be a baseline. What will set lawyers apart is their ability to connect, listen, interpret, and care.

The human edge isn't something to be automated. It's something to be invested in.

The law has always been a human profession addressing human problems. While technology reshapes how legal work is performed, the core of the attorney-client relationship remains fundamentally human. Successful firms will use technology to enhance human connections, not replace them.

## Tools to Compare Outputs from Multiple GenAI Models

There are many free and paid generative AI LLM models available. When comparing their outputs, each displays strengths and weaknesses. This is similar to search engines like Bing and Google, which produce different results for the same query. To search multiple web indexes at once, we used search aggregators or "meta" search engines like Dogpile and MetaCrawler. Now, a few new generative AI aggregators let you send a query and compare or combine results from multiple AI platforms.

## Poe (Platform for Open Exploration)

Poe (<https://poe.com/>) gives you access to AI models from many different companies in a single interface, including ChatGPT, Claude, Gemini, DeepSeek, Grok, Llama, plus image, video, and audio generation models, and millions of user-created bots. [Quora](#), a discussion platform, owns and develops Poe.

You must create a login to use Poe. The subscription is free with [a limited number of usage points](#). Paid plans start at \$50 a year with 10 thousand points per day and full context length for each bot – up to 2M tokens (equivalent to 1,400,000 words).

To get started with Poe for comparison of model outputs, go to the website or download the iOS, Windows, or Android app and log in. In your settings, you can choose your default large language model (LLM) or bot. On the home page, you will see a box to start a new chat. Three LLMs appear at the top. To change the model, click the magnifying glass icon and choose a different product. Start your chat with a prompt. You can also upload a file. Poe will generate a response, which you can share or retry. Below the response, you can click to compare it with other models without needing to retype the prompt. You can continue to compare outputs with other models. In the left navigation pane, you can see the prompt, how many models you compared, and see each of the results by clicking on the prompt. If you right-click on the results page, you can reply, follow up, copy the message, share, edit, or delete the chat session.

Because Poe interacts with third-party LLMs, their Privacy Policy states: “Keep in mind, any information and files you provide to the bots on Poe will be shared with third-party AI model providers and developers powering the bots... For bots powered by third-party LLMs and developers, your creation and use of such bots is subject to their policies (OpenAI’s can be found [here](#); Anthropic’s can be found [here](#); Google’s can be found [here](#); Llama 2 can be found [here](#); Ideogram’s can be found [here](#)).” In other words, users should not input confidential, privileged, protected, or sensitive information. This is the rule, rather than the exception, when using any free LLM or chat tool.

In addition to comparing outputs from multiple models, Poe has an “Explore” option. You can search or browse through bots, apps, or people. You can find tools for image, audio, and video generation, reasoning, search, hobbies, games, text analysis, and more. Each tool in the directory includes a description with details such as which LLM powers it, its purpose, and additional information. For example,

if you want an AI add-on for Excel, just type “Excel” in the search to see a list of bots and apps, what they do, how many monthly users they have, and more.

## Ithy

Ithy’s (<https://ithy.com/>) home page states, “What happens when you combine every AI?”. The search box at the top has a toggle between Fast Research and Deep Research beckoning “ask me anything”. Ithy stands for “I think why” and [generates research papers by aggregating the capabilities of multiple AI models](#).

You do not have to create an account to use Ithy, nor do you have the option to upload files. Simply input your query, choose fast or deep research, and Ithy brings ChatGPT, Gemini, and Perplexity responses together and synthesizes them into a single response. One exceptional quality of Ithy’s output is that in one panel you can see each model’s response to the query, as well as a main panel that shows the single “article” generated. This article generated from the aggregated output can be downloaded, shared, or you can continue to chat. The [generated articles](#) provide a table of contents, a list of sources, include images, charts, visualizations, tables, video content, recommended reading and more.

You can create a free account with Ithy to access saved queries and earn bonus points, as the free account is limited to 10 free articles every 10 days. A free account also lets you provide custom writing instructions, select a provider for external chat, and toggle off specific visuals that appear in the output articles. Signed-in free users can create folders for the output articles and search within their generated articles.

Be aware that while you can use Ithy without a login, in the [Terms of Service](#) the company notes that questions asked publicly (without logging in) may have their responses indexed by search engines. Whether you have a paid or free account, do not share confidential, sensitive, or protected information in your query or uploaded files.

Ithy has a paid Pro plan for \$120 per year that includes unlimited research, more models, longer inputs, and the ability to upload unlimited images and PDFs.

## SNEOS

SNEOS (<https://sneos.com/>) tagline is “Write Once, Get Insights from Multiple AI Models”. The tool was [created by Victor Antofica, a developer in Sweden](#), with the vision to leverage the unique strengths of multiple AI models simultaneously.



Like Ithy, you do not have to register or create a login to use SNEOS. The home page is simple to use. At the bottom of the screen there is a query box, where you can also upload a PDF or add a screenshot. Type your query, hit “Send” and the responses from ChatGPT, Claude, and Gemini appear side by side on the screen. Below the search bar an AI Response Comparison is generated by Gemini and highlights areas of significant difference and unique insights from each model, including a detailed comparison table. Gemini also produces a score for best answer to the query, where it almost always gives Gemini the highest score.

Despite being logged in, SNEOS does not preserve queries, so make sure to copy the results. You can refine your query, but the refinement will be the same for all the models, even if they display different enough responses to require prompt refinement for one but not all of the models.

There is a [premium version](#) of SNEOS, for \$29 per month that includes 5 models, live web search, and more. SNEOS is useful for a quick look at whether one LLM handles a query better than another, but probably not worth the price for the premium version at this time.

As with any free tool, [read the terms and privacy policy](#) and refrain from sharing, prompting, or uploading confidential, sensitive, or private information.

The main advantage of tools that aggregate and query multiple large language models (LLMs) is that they help determine which model provides the best output, as well as helping identify biased results.

## Introduction

Lawyers are increasingly encountering AI-based technologies that promise to enhance their practice. However, the adoption of these tools requires careful consideration and due diligence. By understanding the key questions to ask vendors and the critical factors to assess, lawyers can make informed decisions that align with their professional responsibilities and ethical standards.

The following sections delve into various aspects of GenAI products, including data privacy and security, terms of use and rights, data management, usage and limitations, cost and subscription models, scope of knowledge, and notice of changes.

## Data Privacy and Security

In addition to confidentiality and ethical compliance, it is crucial for lawyers to consider data privacy and security. One of the primary concerns is understanding who has access to the data, both inputs and outputs. Lawyers should ensure that the GenAI tool provides

clear information about data access and control mechanisms. Additionally, compliance with data protection laws, such as GDPR or HIPAA, may be essential. The tool must adhere to necessary regulations to safeguard sensitive or protected information. Lastly, the ability to securely input confidential data is a significant factor. Lawyers need to verify that the GenAI product has robust security measures in place to protect any confidential information that is entered into the system.

- Who has access to my data (inputs and outputs)?
- How does the tool comply with data protection laws like GDPR or HIPAA?
- Can I securely input confidential data?

### Terms Of Use and Rights

Lawyers must read the terms of use and rights associated with the use of AI based technology. One of the primary considerations is how the content can be used. Lawyers should determine whether there are any restrictions on commercial use or distribution of the AI-generated content. Additionally, it is important to review the copyright and indemnification policies to ensure legal compliance and to understand the rights and responsibilities involved in using the AI-generated content.

- How am I allowed to use the AI-generated content?
- Are there restrictions on commercial use or distribution?
- What are the copyright and indemnification policies?

### Data Management

Records and data management are also considerations when assessing new tools. One of the primary concerns is the ability to access, archive, or review past inputs and outputs for reference or compliance. Lawyers should ensure that the GenAI tool provides clear information about how data can be accessed and managed over time. Additionally, it is important to understand whether the model is trained on user interactions in any way. Lawyers need to verify if their interactions with the GenAI product contribute to the training data and how this might impact the tool's performance and privacy. Lastly, the ability to completely delete all interactions if the user chooses to do so or ends their subscription is a significant factor. Lawyers should confirm that the GenAI product offers robust data deletion options to ensure that all confidential information can be securely removed from the system.

- Can I access, archive, or review past inputs and outputs for reference or compliance?

- Is the model trained on my interactions in any way?
- Can all my interaction be completely deleted if I choose to do so or end my subscription?

### Usage And Limitations

Lawyers should assess how the tool can be effectively utilized to enhance their practice and streamline their tasks. Additionally, it is important to be aware of any restrictions on the number of inputs or outputs. Understanding these limitations will help lawyers manage their expectations and ensure the tool's effectiveness for their specific needs.

Furthermore, it is crucial to comprehend how interactions with the GenAI product are defined and counted. This includes evaluating the volume, transactions, and complexity of interactions to determine the tool's appropriateness for various tasks. By thoroughly understanding the usage and limitations of the GenAI product, lawyers can make informed decisions and maximize the tool's potential for their practice.

- What are the ideal use cases of this tool in the legal profession?
- What limitations should I be aware of in terms restrictions on number of inputs or outputs?
- How are interactions defined and counted? (e.g., volume, transactions, complexity)

### Cost And Subscription Models

AI tools can get very expensive. It is essential to thoroughly understand the cost and subscription models associated with these tools. One of the primary considerations is the pricing structure. Lawyers should investigate whether there are different pricing models available and determine which one best suits their needs. Additionally, it is important to identify any hidden or additional fees that may arise, as these can significantly impact the overall cost. Another critical aspect to consider is whether training and support are included in the subscription. Understanding what these entail can help lawyers make informed decisions and ensure they receive the necessary assistance to effectively utilize the GenAI product.

- What is the pricing structure and are there different pricing models?
- Are there any hidden or additional fees?
- Are training and support included? If so, what do these entail?

## Scope Of Knowledge

What is the scope of knowledge that the AI model possesses? One of the primary considerations is the type of data used to train the model. Lawyers should investigate the sources and quality of the training data to assess the AI tool's reliability and relevance. Additionally, it is important to know how often the model is updated or retrained. Regular updates and retraining can help ensure that the AI remains accurate and up-to-date with the latest information. Another critical aspect to consider is whether the model is open source or closed/proprietary. Understanding the nature of the model can provide insights into its transparency and potential biases. By thoroughly evaluating these factors, lawyers can determine the suitability of the GenAI product for their legal needs and ensure that it meets their standards for accuracy and reliability.

- What kind of data was used to train the model?
- How often is the model updated or retrained?
- Is the model open source or closed/proprietary?

## Notice Of Changes

Due to the rapid development in this market, many providers frequently change their terms and policies. When evaluating GenAI products, it is essential for lawyers to understand how providers notify users of changes in their underlying policies. Lawyers should ensure that the GenAI tool provides clear and timely notifications about any policy changes. Understanding the methods and frequency of these notifications is crucial for maintaining compliance and staying informed about any updates that may affect the use of the GenAI product.

- Do you notify users of changes in your underlying policies? If so, how?

## Prompt Engineering 101 for Lawyers

Generative artificial intelligence has taken the world by storm. The advent of publicly and inexpensively available tools to create text, images, audio, video, and more has had an enormous impact on educators, authors, artists, and attorneys. Attorneys have long had technology that used advanced artificial intelligence, including eDiscovery tools, analysis, forecasting, and legal research. Generative artificial intelligence, however, is springing up everywhere and promises to free lawyers up from doing mundane tasks and let them spend more time on high-touch, high-value activities.

How much of generative artificial intelligence (GAI) is just hype? This [quote from Ryan McClead](#) from Sente Advisors legal tech consultancy summarizes: “We’re reaching a critical mass where [lawyers are] using it, finally, and saying: ‘But it doesn’t do what I thought it was going to do.’” Despite the attention, we are in the infancy of GAI. However, it is unlikely to go away. Lawyers have time to get up to speed using this technology. Assessing the products is certainly part of the equation, but lawyers will also need to learn prompt engineering.

## What is Prompt Engineering?

Prompt engineering is the art and science of interfacing with a GAI tool to get the most reliable response. Pre-GAI law librarians came up with a mnemonic to assist lawyers with constructing a legal research strategy – JUST ASK (a Law Librarian):

J urisdiction – Federal or State, Court or administrative, regulatory or legislative, or a combination?

U seful Tips – don’t recreate the wheel! Has this research been done?

S cope of Research – How extensive should the search be?

T erms of Art – Determine and define search terms, synonyms, similar concepts

A cronyms – Look them up, find out what they mean

S ources – Any secondary treatments? A treatise, law review articles?

K ey Cost Restraints – How much can you bill the client?

A similar strategy must be deployed if lawyers are to get the most out of a GAI tool. Determine what output is needed – a spreadsheet, chart, plain text, an image? What are the strengths and weaknesses of the tools you have access to? What is included in the data set? Does it include anchoring data like a firm’s document repository or a legal research database? When was the core data in the LLM ([large language models](#)) last updated? Does it include information from web indexes like Google? Will it cite to sources? Asking these questions first and using the best tool for the job is imperative for the best possible output.

## Prompting Pitfalls and Challenges

When crafting prompts for AI systems, legal professionals should be mindful of the following common pitfalls:

Using Overly Broad Prompts: Prompts that are too broad can lead to vague or irrelevant responses from the AI system. It’s important to be specific and clear in your prompts to guide the AI toward the desired output.

**Assuming GAI Understands Context:** AI systems do not have the same understanding of context as humans do. Avoid crafting prompts that rely heavily on implied context or unspoken assumptions.

**Disregarding Confidentiality and Privacy:** users should ensure that the prompts they craft do not lead the AI to generate responses that could violate confidentiality or privacy rules.

**Underestimating the Time and Effort Required:** Crafting effective prompts can be time-consuming and require a significant amount of effort. It's important to plan accordingly and allocate sufficient time for this task.

**Precision:** Legal language is highly precise and structured. Crafting prompts that can guide the AI to generate responses with the same level of precision can be challenging.

**Avoiding Hallucinations:** GAI systems can generate “hallucinations” or information that isn't based on the input data. Crafting prompts that minimize these hallucinations is a significant challenge.

**Limitations of GAI Tools:** All GAI tools are not the same and each has strengths and weaknesses. Just like when you assess a legal research tool for reliability, you will need to assess the tools you use for assisting with work product. For instance, [a study from June 2024 showed that many big AI models have recency bias](#) – it “remembers” the last thing it heard better than other information even if it is not as important.

By being aware of these pitfalls and challenges, lawyers and legal professionals can craft more effective prompts, scrutinize outputs, and make better use of GAI systems in their work.

## Priming

Once you determine which GAI tool is best suited for the task, consider spending some time priming the GAI. What is priming? Priming is a foundational technique in prompt engineering that enhances the interaction between users and GAI models by establishing clear context and guiding the model's behavior from the outset. Priming are the initial prompts you input to the GAI to provide context, structure and style. In the same way you would not ask a first-year associate to generate a pretrial motion without significant guidance and instruction, you must guide the GAI to get the best output.

Priming helps the LLM model understand the context of the task at hand. By providing relevant information or instructions in the first prompt, users can influence how the model interprets subsequent prompts and generates responses. This is essential for achieving more accurate and relevant outputs.

Effective priming often involves multiple iterations of interaction before requesting the desired output. This iterative process allows users to refine the context and guide the model more effectively, enhancing the quality of the final response.

By carefully crafting the initial prompt, users can establish the structure and style of the conversation. This gives them fine-grained control over the AI's responses, making it possible to tailor the output to specific needs or preferences.

Providing examples or detailed instructions within the priming prompt can significantly improve the model's performance. The more specific and clear the initial prompt, the better the model can align its responses with user expectations.

## Best Practices for Prompting

You have chosen the best GAI for the output you want, entered some priming prompts, and now you are ready to “engineer” your prompt. Remember, prompt engineering is both an art and a science. It requires creativity, testing, and a deep understanding of the AI system you're working with.

Here are some best practices that can lead to more effective prompts:

**Be specific and precise:** Provide clear, detailed instructions in your prompt. The more specific you are, the less room there is for the AI to “fill in the gaps” with potentially incorrect information.

**Provide Context:** While AI systems don't understand context in the same way humans do, providing relevant context in your prompt can help guide the AI's response.

**Use Clear Language:** Avoid using jargon or overly complex language in your prompts. The clearer and simpler your language, the better the AI will understand what you're asking for. If you need to, define terms.

**Break complex queries into steps:** For complicated tasks, break them down into smaller, manageable steps. This allows you to guide the AI's reasoning process more carefully. Many GAI tools will suggest further prompts. Sometimes they can be helpful, other times they may lead the prompting in a different direction. Note the suggestions, but don't divert from your carefully crafted prompts.

**Test and Refine:** Prompt engineering is an iterative process. Test your prompts, assess the AI's responses, and refine your prompts based on the results.

**Use few-shot prompting:** Provide examples of the kind of response you're looking for. This can help steer the AI towards the correct format and content.

Much of the prompt engineering guidance suggests that you tell the GAI to role-play (“you are a data scientist explaining prompt engineering”) and respond with a specific tone (“responses should be professional, courteous, and inclusive”). Using these tactics is called RICE – Role, Instructions, Context, Expectations. See this excellent guide from the AI Law Librarians on prompt engineering for legal research: [A Legal Research Prompting Guide and Generative AI System Comparison Exercise – AI Law Librarians](#).

## Learning How to Prompt

There are many resources, tools, and training guides available to assist legal professionals with prompt engineering. Here are a few:

- [Legal Prompting 101- The legal practice of using generative AI chatbots](#)
- [Introducing AI Prompt Worksheets for the Legal Profession](#)
- [Fundamentals of Prompt Engineering for Lawyers \(altaclaro.com\)](#)
- [Prompt Engineering Skills for Legal Professionals | Udemy](#)

Whether you take a course, use a prompt generator for help, or read lots of articles on the topic, the most important way to learn how to prompt in GAI systems is to practice. Record your prompt strings in a spreadsheet, noting which model/tool you used, what you asked and what the output was, and if you considered it successful. Remember that the answer will be different each time you submit your prompt so check to see what the second or third answer looks like compared to the first. Try the same prompt on different LLMs, like test a prompt [on Poe.com](#) to see how responses compare.

By incorporating these strategies, lawyers can craft prompts that are more likely to elicit accurate, nuanced, and reliable information from AI systems. However, it’s crucial to remember that while these techniques can significantly reduce hallucinations, they don’t eliminate them entirely. AI outputs should always be verified by legal professionals and not be considered as authoritative legal advice.

In the future [reliance on complex prompting will be diminished](#), just like the need for Boolean search was reduced by natural language searches. However, understanding how to build a good prompt will help you understand how to get the best results from different products.

## How to Keep Up with Advances in Artificial Intelligence

The landscape of generative AI tools and related news has expanded at an unprecedented rate. As legal professionals, it’s crucial to stay informed about these developments.



Following are news outlets that will provide you with key resources for staying updated on breaking news, discovering new tools, and gaining a deeper understanding of this transformative technology, arguably the most significant since the advent of the Internet.

[Law.com Artificial Intelligence](#) – American Lawyer Media’s news, analysis, and insights focused on AI are available on a single page that culls articles from multiple ALM publications like Corporate Counsel, Legal Intelligencer, Legaltech News, Litigation Daily and more. You will need to create a free account to access the content and you can click “Follow” to get a digest of the headlines sent to you daily or weekly.

[LawSites](#) – Journalist and lawyer Bob Ambrogi covers what is happening in legal technology, including product announcements, mergers and breakups, and more. He also has the LawNext podcast and the weekly live discussions via Zoom or livestreamed, “How It Works” video demonstrations and more. You can [sign up for daily updates](#).

[Above the Law AI Legal Beat](#) – From crafting AI policies to industry news to legal actions, Above the Law covers the intersection of artificial intelligence news and the legal profession. Sign up for [the ATL AI Legal Beat email](#) update and choose from other updates and digests as well.

[AI Law Librarians – All Things AI Law Librarian-ish, Generative AI, and Legal Research/Education/Technology](#) – a blog from academic law librarians Rebecca Fordon, Sarah Gotschall, Seab Harrington, Rebecca Rich, Jennifer Wondracek, and guests, these posts provide news, reviews, tips, training, and more. Subscribe to receive updates on the upper right corner.

[Brainyacts](#) – A newsletter by Josh Kubicki, self-described as “Pragmatic use of generative AI for the global legal system”, the email update is a great way to get analysis on how AI is affecting legal professionals.

[Lexology RSS Feed](#) – Lexology is an international in scope repository of legal content, with paid features, including webinars. You can sign up for a free subscription to a customized newsletter, but in order to get AI focused content set up your subscription and then go to RSS feeds and add the AI tag. You will need a [feed reader](#). Much of the content is written by lawyers at large firms, covering cutting edge topics.

[The Rundown AI](#) – Claiming 400,000+ daily readers, the Rundown AI pulls together headlines about the application and evolution of artificial intelligence. You

can [subscribe to the newsletter](#), access an advanced ChatGPT Guide, check AI jobs, and search a curated list of AI tools.

[Schneier on Security](#) – Blogging since 2004 on security issues, Bruce Schneier describes himself as a [public-interest technologist](#), working at the intersection of security, technology, and people. Many of his recent posts have focused on security and artificial intelligence lately. Look in the upper right corner to subscribe to updates.

[The Intelligence Age](#) – An AI focused newsletter written by NASA, Stanford and Goldman Sachs alum. The content is pretty nerdy, for the more technically astute reader. That said, the headlines are a quick read and will help you keep up with some of the big picture issues if you [subscribe](#). The site also features 50+ AI Business Use Case guides and an AI Tools Database.

[Prompt Engineering Daily](#) – An AI focused blog with tutorials, deep dives, a daily digest of news, and suggested prompts.

[TL;DR AI](#) – According to the sign-up page this delivers “the most important AI, ML, and data science news in a free daily email.” TL;DR has a lot of newsletters, primarily for software developers and IT admins. However, their content is also useful for consumers.

[Wonder Tools](#) – A Substack by Jeremy Caplan and guests, you can get useful and practice information about new tools, updates, and how to instructions for AI. Click the “Subscribe” button on the upper right side to get a daily digest.

In addition to the sources above, keep an eye on your bar associations, the NCBA CPM, and your usual sources of news and information. You can also find lots of groups to chat with [on LinkedIn](#), [Facebook](#), and from your professional associations. Generative artificial intelligence is a hot topic – and a moving target – so do participate in training, conferences, and make some time to understand this technology and its impact on law, law practice, and society.