

Use Cases For GenAI in Legal



ABOUT

RAILS (Responsible AI in Legal Services) is a collaborative network hosted by the Duke Center on Law & Tech, whose volunteer working group participants represent a range of stakeholders with deep expertise in legal services delivery.

Participants in RAILS Working Group 1 developed and edited the following resources on use cases for generative AI (GenAI) in legal to assist attorneys.

Each entry includes:

- A concise description of the use case
- Associated benefits
- Legal industry examples
- Legal best practices
- Brief FAQs

Given the rapid evolution of generative AI in legal applications, Working Group 1's discussions focused on current (2024 -) implementations of generative AI, primarily in law firms and nonprofit legal services organizations. All resources are date-stamped and versioned in acknowledgement of the fast pace of technological development.

Working Group 1 did not assess specific generative AI tools or vendors as part of this process.



AGREEMENT INTELLIGENCE BENEFIT

Leveraging AI allows people to more effectively and efficiently analyze large volumes of agreements to drive agreement transparency, understanding obligations, compliance, and risk. Whether answering legal questions or making business decisions based on agreement data, people can more effectively report on critical issues to the business, regulators, and other key stakeholders. The ability to quickly gain granular insight into large bodies of agreements inverts the traditional paradigm of using lots of people, time, and money to gain visibility into agreement content.

EXAMPLES

- Evaluate risk and ensure compliance (e.g., internal or regulatory).
- M&A Lifecycle, obligation management, contract value leakage.
- Data breach, 3rd-party risk, business interruption.

BEST PRACTICES IN LEGAL

- Establish a single source of truth (repository) for all agreements.
- Establish clause libraries and definitions.
- Establish guidelines for assessing risk and measuring efficacy.
- Define success criteria for agreement intelligence.

**USE AI TO
RAPIDLY
UNDERSTAND
AND ACTION
LARGE VOLUMES
OF AGREEMENTS.**

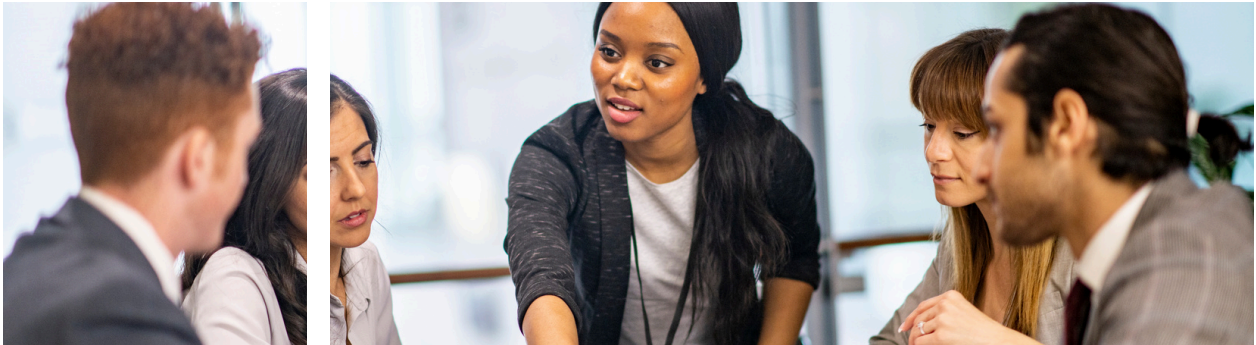
FAQS

Q. How accurate is it?

A. While AI can generate highly reliable data at scale in a short amount of time, nothing is perfect. Keeping people in the loop to validate output and modify the AI where appropriate is the key to success.

Q. How do I visualize or understand the data?

A. You can report the information (clauses, values, etc.) into simple tools like spreadsheets or more advanced applications like BI tools or further analytical solutions like e-discovery review platforms or additional AI-driven processes.



BUSINESS DEVELOPMENT & MARKETING

BENEFIT

Using generative AI in marketing and business development offers numerous benefits, including enhanced efficiency through automation, deeper customer insights from data analysis, personalized customer experiences, improved decision-making with predictive analytics, and innovative content creation, all of which may drive growth and competitive advantage.

EXAMPLES

- **Content:** efficiently generate blog posts, social media updates and email campaigns.
- **Personalization:** engagement using customer insights.
- **Market:** analyze regulatory trends and competitors to strengthen strategic planning and drive growth.

BEST PRACTICES IN LEGAL

- Always carefully edit content generated with AI to verify accuracy.
- Leverage generative AI as a partner that can review a draft brochure or social media post and provide suggestions for optimization.
- Ensure that images and videos generated with AI do not contain copyrighted content.

**TRANSFORM
YOUR BUSINESS
DEVELOPMENT
WITH
AI-POWERED
INSIGHTS.**

FAQS

Q. Can I use generative AI for website optimization?

A. Yes. Many generative AI tools can be used for search engine optimization (SEO).

Q. Can I use generative AI to create a slide deck / PowerPoint presentation?

A. Yes. Some solutions are integrated into Microsoft PowerPoint for this specific purpose and allow the input of a document or text that that will provide the foundation for generative AI to create your presentation. Even with generative AI solutions that do not integrate with PowerPoint, you can create text blurbs and images that you can paste into your slide deck.



DRAFT OR REVIEW MEMOS

BENEFIT

Using generative AI to draft or review a memo offers significant advantages, enhancing both accuracy and efficiency. AI can act as a writing partner suggesting topics or subtopics for your outline. It can help you overcome writer's block to quickly generate well-structured and coherent drafts. When reviewing memos, AI can identify errors, suggest improvements, and ensure compliance with organizational standards and guidelines. This allows professionals to focus on higher-level tasks and decision-making. In short, generative AI is a powerful tool to enhance productivity and maintain high-quality communication within an organization.

EXAMPLES

- **Pre-writing:** Use AI to suggest topics.
- **Drafting:** Provide an outline or a blurb on a topic.
- **Reviewing:** Use AI to identify inconsistencies / suggest enhancements.

BEST PRACTICES IN LEGAL

- Be iterative. Consider asking the generative AI solution to write or review one section of the memo at a time.
- Ensure that text drafted with generative AI is thoroughly reviewed, edited and validated to avoid situations where information may be conflated or misconstrued.
- Check the guidelines for your organization and/or client to ensure that leveraging generative AI for drafting is appropriate or permitted.

**WRITE BETTER
MEMOS FASTER
WITH AI
ASSISTANCE.**

FAQS

Q. What is an example of a prompt to create a first draft for a memo?

A. Example starter prompt: You are tasked with updating the client on [topic]. Write a detailed memo and include at least one paragraph on each subtopic. Organize the information by putting each subtopic in a new section with a section header. Follow the style of the following memos [memo examples—3-5 should produce the desired results].

Q. Can I point the generative AI solution to specific content to be used for the memo?

A. Yes. You can use your own files or website data.



DRAFT EMAILS AND LETTERS

BENEFIT

According to research, attorneys spend over half their day working with email. Although practice areas and workloads vary, a typical lawyer creates or receives 70+ documents per day. GenAI tools can quickly generate drafts of emails and letters, saving hours of time each week and minimizing grammatical and spelling errors. AI can ensure a consistent tone and style, which is especially useful in client communication. Translating legal language into plain language can provide clients with concise explanations that avoid jargon and complex terminology, leading to improved client satisfaction through clearer, more timely communication.

EXAMPLES

- First drafts of emails/letters.
- Templates for common client inquiries.
- Simplify legalese into plain language for a client.
- Draft follow-up from meeting with summary.
- Translation into a different language.

BEST PRACTICES IN LEGAL

- Ensure the tool complies with data privacy laws and protects sensitive information.
- Always review and verify AI-generated content for accuracy before sending.
- Customize each draft to fit the specific situation, client, and legal requirements.
- Ensure that AI does not mislead or misrepresent.

RECLAIM YOUR TIME: LET AI HANDLE YOUR EMAILS AND LETTERS.

FAQS

Q. Can AI tools ensure the legal accuracy of my communications?

A. No, AI tools can assist, but it's essential to have a legal professional review drafts before sending.

Q. Do I need to alert the recipient that I used AI to draft an email or letter?

A. Not always, but doing so can enhance transparency and trust; if you're unsure, consult your organization's policies.



PRIVATE LEGAL TUTOR

BENEFIT

Learning something new can be hard. Traditional materials are often tailored to a different learning style or skill level. You can use AI to tailor your legal learning material to precisely your level. Ask as many questions as you want. Upload the content you want to learn and ask the AI to quiz you on it. Particularly suited to students of law, a legal AI can speed knowledge acquisition and make learning more fun.

EXAMPLES

- Ask the AI to explain a legal concept in a specific area of law / jurisdiction.
- Test your knowledge by asking the AI to quiz you on a certain topic.
- Get answers tailored to your knowledge level.

BEST PRACTICES IN LEGAL

- Ensure you use excellent source material.
- In the AI settings, make sure the chat is private.
- Only use a dedicated tool for professional legal research (Lexis, Thomson Reuters etc.) as commercial LLMs may not be up-to-date.

**SUPERCHARGE
YOUR LEARNING
WITH A LEGAL AI
TAILORED TO
YOUR
KNOWLEDGE
LEVEL.**

FAQS

Q. Do I need a special learning aid to do this?

A. No, you can use a commercially available tool with a suitable prompt, e.g. "Act as a tutor for transactional law. Start from a beginner level."

Q. I have my own learning materials, can I use them?

A. Yes, tell the AI you have your own notes and would like help learning them.



EVIDENCE SUMMARIZATION

BENEFIT

Attorneys often wrangle large volumes of evidence and must synthesize and summarize the evidence when writing briefs, preparing for mediation or court hearings, or preparing client memos and updates. AI is adept at summarizing information from large text volumes with direction. An attorney can provide guidance on what topics to summarize and how much detail to include. AI is good at iterative direction, so experiment with directing AI to prepare evidence summaries paragraph by paragraph, for example. Or, direct the tool to prepare a memo summarizing all evidence gathered on a topic, such as allegations of harassment and discrimination.

EXAMPLES

- Quickly generate concise summaries of lengthy witness interviews for inclusion in investigation reports.
- Prepare the factual summary for a brief.
- Prepare first draft of factual statements for summary judgement motions.
- Identify and summarize evidence supporting one side in preparation for a mediation.

BEST PRACTICES IN LEGAL

- Ensure client consent for use of AI and compliance with jurisdictional and court rules.
- Carefully review summaries to ensure the emphasis and details match the need.
- Ideally, the attorney who gathered the evidence will review the summaries to ensure accuracy.
- Be aware of potential hallucinations, which can range from completely fabricated to subtly misconstrued.

**TRANSFORM
EVIDENCE
ANALYSIS WITH
AI-POWERED
SUMMARIZATION.**

FAQS

Q. How do I ensure the tool summarizes the “right” evidence?

A. Obtaining the correct information depends a lot on drafting clear and specific prompts. When the first iteration is not quite right, providing a follow up or clarifying prompt may elicit better information.

Q. Can the tool summarize evidence from multiple sources in one summary?

A. Yes. A user could direct the tool to summarize evidence gathered from identified documents on a specific topic or cause of action. If directed, the tool could identify which source provided which pieces of evidence.



QUERY DOCUMENTS FOR KEY POINTS

BENEFIT

AI can quickly and efficiently analyze large volumes of written text in different document formats to identify information about topics. A user can upload a variety of sources, from pdf to Word to text files and query those documents. Generative AI is effective at reviewing, responding to, and producing narrative text, or unstructured data. Therefore, a user can engage in a back and forth, iterative chat with the tool to refine, narrow, expand, or clarify queries of the target documents.

EXAMPLES

- Query a deposition transcript to identify every time the witness discussed a specific incident.
- Identify inconsistencies, as well as any grey areas.
- Query multiple documents to identify all sources of evidence addressing a key topic.
- Query a memo to identify the top three points.

BEST PRACTICES IN LEGAL

- Ensure client consent to use of AI and be familiar with jurisdictional guidance, including court rules on the use of AI.
- Double check the sources to verify accuracy and avoid hallucination.
- Use an iterative process, asking multiple questions to refine the information.
- Be careful about asking or relying on the AI tool to draw conclusions or make legal findings.
- Always review any AI-generated work product.

USE GENAI TO QUERY LARGE VOLUMES OF DOCUMENTS TO LOCATE CRITICAL INFORMATION AND IDENTIFY KEY POINTS.

FAQS

Q. How much detail do I need to provide in the prompt?

A. Many AI tools are effective at iterative, back and forth responses to questions. Your first inquiry may be brief, or vague. The responses may prompt you to be increasingly specific as you learn what information is available. However, you can also start with a specific query, such as "Identify each time the witness referenced being offended by their supervisor."

Q: Will the responses capture accurate quotes from the source documents?

A. Most AI tools continue to hallucinate in their effort to provide the "best" response to your inquiry. While companies are getting better at building in processes to limit hallucination, it is always a good idea to verify the accuracy of quotes.



SUMMARIZE MEETING NOTES & TRANSCRIPTS

BENEFIT

In the past you would have to have a dedicated attorney support professional or junior attorney in meetings with you. Now you can have AI automatically take notes and send you meeting summaries. This is not only more accurate, but means that those in the meeting have a record of what was discussed for reference later. It also makes it easy for those that didn't attend to get up to speed. Attendees of the meeting can also concentrate on the meeting at hand rather than diluting their focus by taking notes. And it saves you time preparing for subsequent meetings too.

EXAMPLES

- Automatically generate summaries of client meetings, capturing key decisions and action items.
- Generate concise summaries of meetings with external counsel, partners, or vendors, highlighting key discussion points.
- Automatically create records of internal team meetings, project updates, or strategy sessions.
- Enable accurate note-taking and summarization in any meeting, even without dedicated support staff, ensuring no critical information is lost.

BEST PRACTICES IN LEGAL

- Check the client retainer allows AI tools. Get explicit client consent.
- Ensure everyone is aware when AI is on.
- Check local legislation allows it.
- Always review the AI-generated summaries for accuracy and completeness before distributing.

INSTANT MEETING SUMMARIES: AI DOES THE WORK FOR YOU.

FAQS

Q. Is the data used for call summarization secure?

A. Be ready to cite to the client the security in place with the AI summary provider. Typically the provider should not be using the data to train their AI models nor keeping a record of the data.

Q. Why is the AI summary that I receive different to someone else's who was on the same call?

A. Generative AI is by nature non-deterministic. This means that summaries can vary slightly, though you should find that on the whole they contain the same major elements of a meeting, even if worded slightly differently. If you want a different output, you can often re-prompt the tool to provide it.



SUMMARIZATION OF DOCUMENTS

BENEFIT

Attorneys often have limited time to read, analyze and react to new information. Frequently they rely on speed reading, or skimming, to locate the salient information in large documents, but tired eyes can easily miss key data. With generative AI, attorneys can request summaries of the text instead of skimming so that they can spot areas of concern faster. They can also guide the GenAI solution to provide summaries on a specific concept, statements by a specific person and more. This reduces delay and allows attorney time to be spent strategically.

EXAMPLES

- Quickly extract key discussion points and action items from lengthy meeting notes.
- Long email conversations.
- Depositions or transcripts
- Contract terms.

BEST PRACTICES IN LEGAL

- Check client guidelines on GenAI use. Explicitly confirm client consent.
- Ensure your use of GenAI is compliant with relevant legislation on generative AI and data privacy.
- Always have an additional human checker.
- Ask providers how much data their tool can process at once to identify when chunking your data for processing might be beneficial.

CUT THROUGH THE NOISE: SUMMARIZE DOCUMENTS INSTANTLY WITH AI.

FAQS

Q. Are there limits for how much text can be summarized?

A. Yes. Many providers restrict the number of tokens that can be processed requiring lengthy documents to be summarized in chunks.

Q. How can I protect my data when it is processed by GenAI tools to create a summary?

A. Summarize only public data unless you have vetted a secure private solution.



URGENT LANGUAGE TRANSLATION

BENEFIT

Prior to generative AI, attorneys and legal staff receiving a document, document comments or email in an unfamiliar language would scramble to locate a third party solution or a colleague that could provide a translation quickly. Now many GenAI solutions are able to translate the text immediately. While these tools are not all of the same calibre, even the most basic solutions provide a solid approximation of the translated text enabling efficiency in process by minimizing response times as well as reductions in cost.

EXAMPLES

- Emails.
- Documents with comments or text in another language.
- Voicemails transcribed to text.

BEST PRACTICES IN LEGAL

- Check client guidelines on GenAI use. Explicitly confirm client consent.
- Ensure your use of GenAI is compliant with relevant legislation on generative AI and data privacy.
- Utilize professional translation services for litigation matters.
- Remember that GenAI can introduce errors and hallucinations.

INSTANT GENAI TRANSLATIONS TO KEEP YOU MOVING AT THE SPEED OF BUSINESS AT REDUCED COST.

FAQS

Q. When should I use GenAI translations?

A. In urgent, non-litigation scenarios where the text does not contain private or sensitive information.

Q. Are there limitations for text translations?

A. Yes. Many providers only offer translations for specific languages. Some also restrict the number of tokens that can be processed requiring lengthy documents to be translated in chunks.

FEEDBACK

If you'd like to suggest an additional use case using our template and send it to the Working Group for review and possible publication, you can [download the template on our website](#) and email it to rails@law.duke.edu.

We recognize RAILS members and colleagues may have additional insights, so please contact us at rails@law.duke.edu with any feedback.