



Leveraging AI: Creating Efficiency and Effectiveness in Legal Departments While Managing Risk

June 11, 2025

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Agenda

1. Introduction: Understanding the Big Picture
2. What Problems Can AI Solve, and How?
3. How Does the Tech Work?
4. What Are the Guardrails, and How Do They Impact Outcome?
5. Conclusion: Understanding the Big Picture
6. Questions

Meet Our Speakers



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Terumo Neuro

Introduction: Understanding the Big Picture

Note: we used LLMs, including OpenAI, to create images for this presentation



What Problems Can AI Solve, and How?

It's kind of like the internet in 1998

msn

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Two CDs filled with more than 36 Christmas favorites provide an entire evening of holiday music to keep any gathering festive. Whether you want Bing Crosby's "White Christmas" or The Beach Boys' "Little Saint Nick," you'll find it here. But it doesn't stop with the hits. You also get 5 vocal and instrumental versions of newly recorded holiday songs, plus party planning timelines, creative decorating tips, dozens of recipes, sample invitations, party games and contests, decorating ideas and \$15.00 worth of manufacturers coupons. It's all you need for the ultimate Christmas party.

Today's Features

December 5, 1998

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Select holiday songs from Bing, the Beach Boys & more

CDNow Holiday Exclusive
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Christmas Music
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Accessori

Accessori

Contattaci

Contattaci

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GeoPoll
Which gender do you prefer your boss to be?

World Report
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Leader of the Month
We wish we had dozens of GeoDivas! Find out how Community Leader GeoDiva got involved and how she helps other GeoCitizens.

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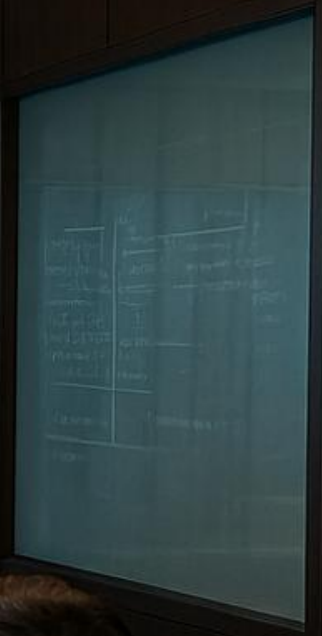
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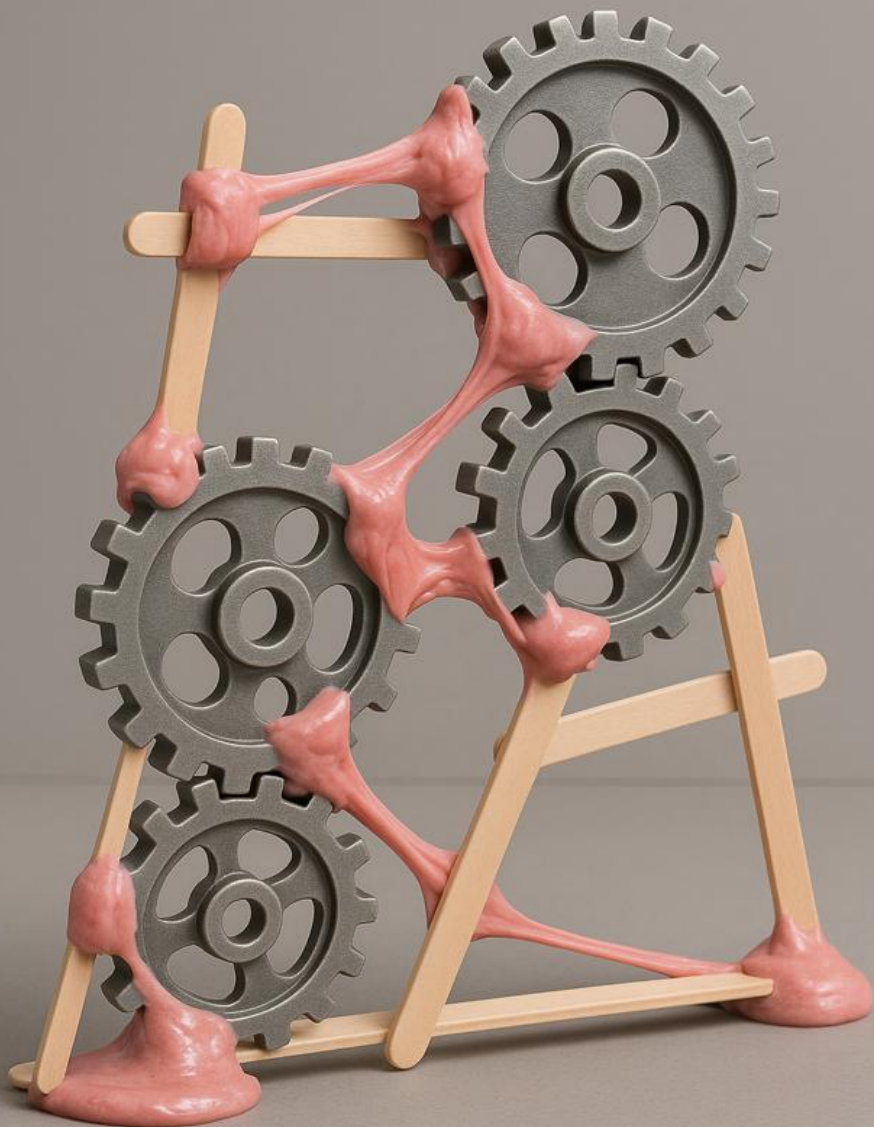
Preparing for the Future

The background is a blue-toned illustration. On the left, a person wearing a headset is shown from the chest up, gesturing with their right hand. In the center, there are two document icons: the left one has a magnifying glass over it, and the right one is a checklist with three checkmarks. To the right of these is a glowing lightbulb icon. In the bottom right, a person is sitting at a desk, writing on a document with a pen. The overall theme is business and technology.

Current Use Cases





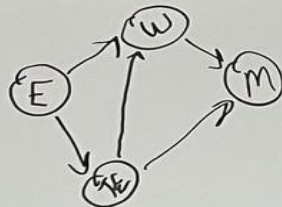


Before Pricing Agent

- An email trying to coordinate a call between the attorney and Christian
- A phone call between the attorney and Christian where Christian gathers the relevant information
- After the call ends, Christian going into disparate firm systems to gather information
- Christian running basic algebraic calculations to derive a price
- Christian drafting and sending an email response with the price
- Iterating as needed to arrive at a final price for the client by repeating steps 1-5.

Pricing Agent

| | | |
|------------|-----------|-------------------------|
| Intercept | -4.713 | P-VALUE xxxxxxxxx703 |
| Variable 1 | .002094 | .0000000627 |
| Variable 2 | .00000364 | .0137 |
| Variable 3 | .0000231 | .000000000024 |
| Variable 4 | .00002177 | .0000119 |
| Variable 5 | .0796 | .0323 |



✓ Estimates: $E_{wc} + E_{bc} + \text{AVG}(H_F + L_F)$ At Matter Level Not TK

C/FRg System lookup
 $MR = FR/CR \times (1 \pm X)$
 Xg Adjustment

TKs: Specifically Designated and/or Generic by Title/Geography/AOL
 L: User Defined, else distributed evenly among TKs

Open/Close: ~~✗~~ This was generated by AI... ~~✗~~
 ✓ = User Defined

PRICING AGENT



Please give me a budget for a matter where Chris Emerson and Christian Zust are the working team. The first phase will take 20 hours, split evenly between them. The second phase will take 30 hours with Chris handling 1/3 of the work and Christian handling the remaining 2/3. Please return the budget for each phase alongside the total budget for the matter. I do not require any other detail

Budget for the Matter:

Phase 1:

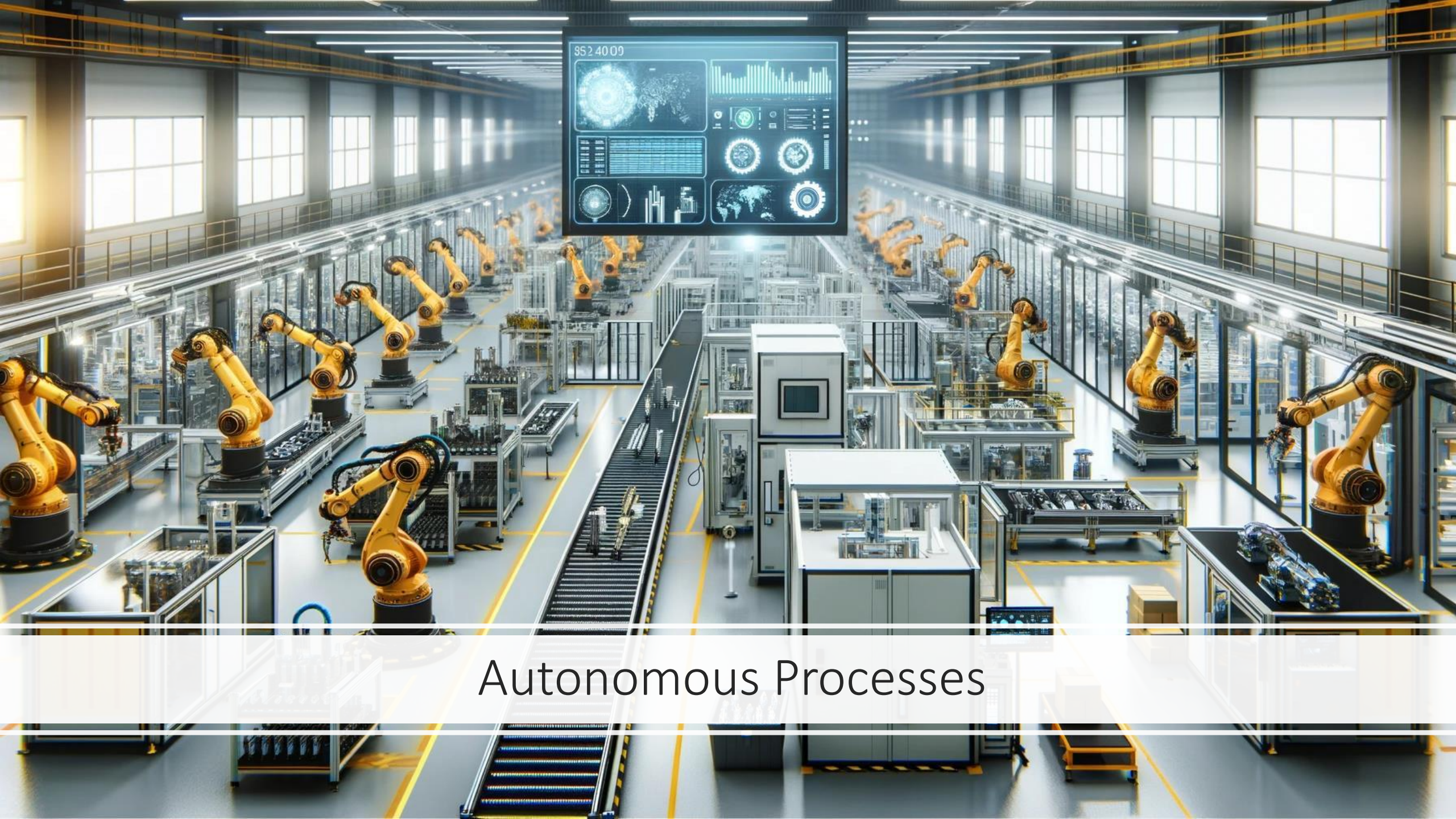
- **Total Hours:** 20 hours
- **Hours per Person:** 10 hours each
- **Cost for Christian Zust:** 10 hours * 775 = ****7,750.00****
- **Cost for Chris Emerson:** 10 hours * 750 = ****7,500.00****
- **Total Cost for Phase 1: \$15,250.00**

Phase 2:

- **Total Hours:** 30 hours
- **Chris's Hours:** 10 hours (1/3)
- **Christian's Hours:** 20 hours (2/3)
- **Cost for Christian Zust:** 20 hours * 775 = ****15,500.00****
- **Cost for Chris Emerson:** 10 hours * 750 = ****7,500.00****
- **Total Cost for Phase 2: \$23,000.00**

Overall Total Budget:

- **Total Cost for the Matter:** 15,250.00(Phase1)+23,000.00 (Phase 2) = **\$38,250.00**



Autonomous Processes



Current Use Cases

How Does the Tech Work?

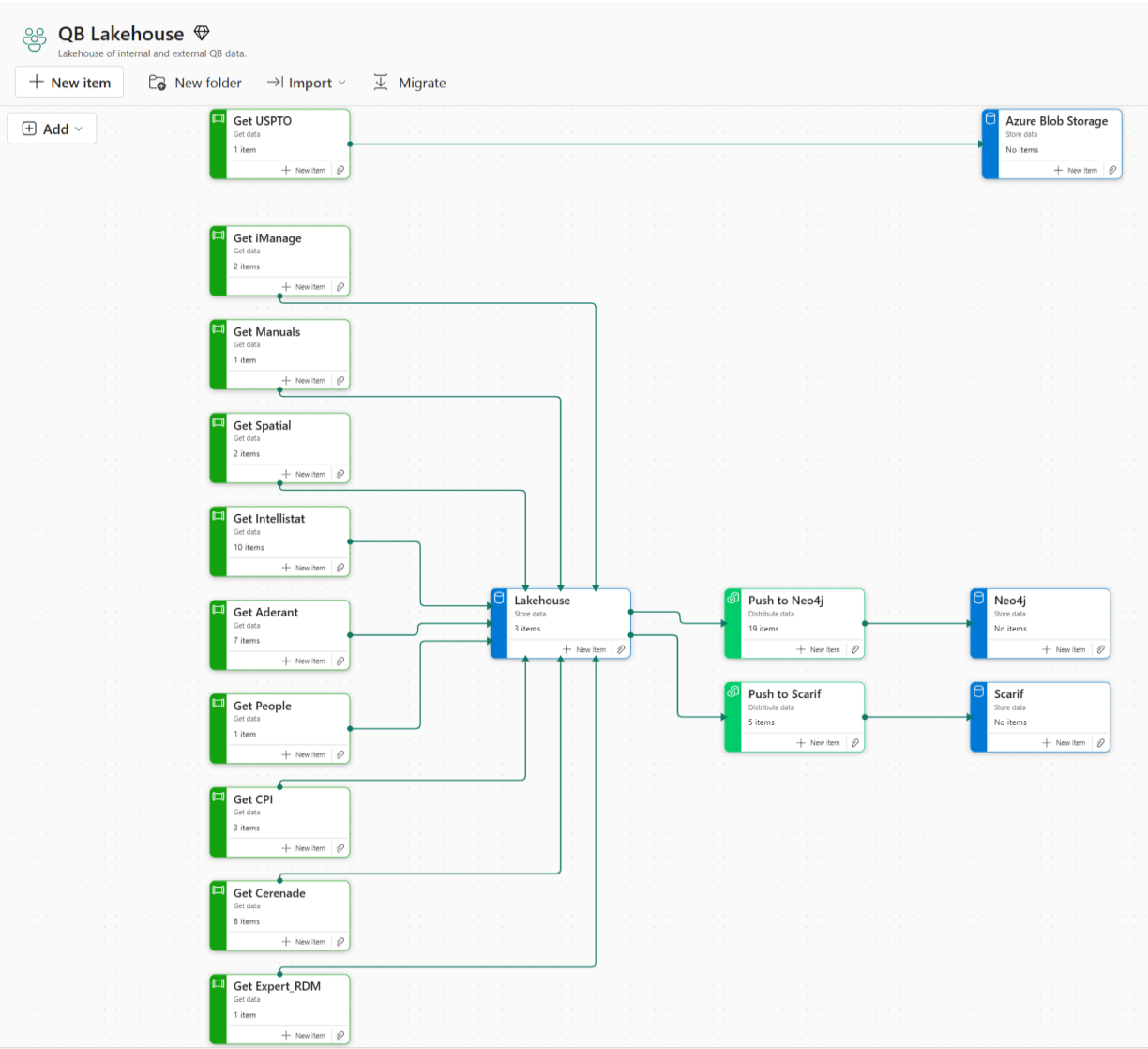
A man with a beard, wearing a brown cap, a plaid shirt, and blue overalls, stands in a suburban neighborhood. He is holding an open toolbox filled with various tools like wrenches, sockets, and a screwdriver. In the background, there are houses, a white van parked on the street, and trees with autumn foliage under a bright sun. The scene is set in a residential area with a clear blue sky and scattered clouds.

AI Agents

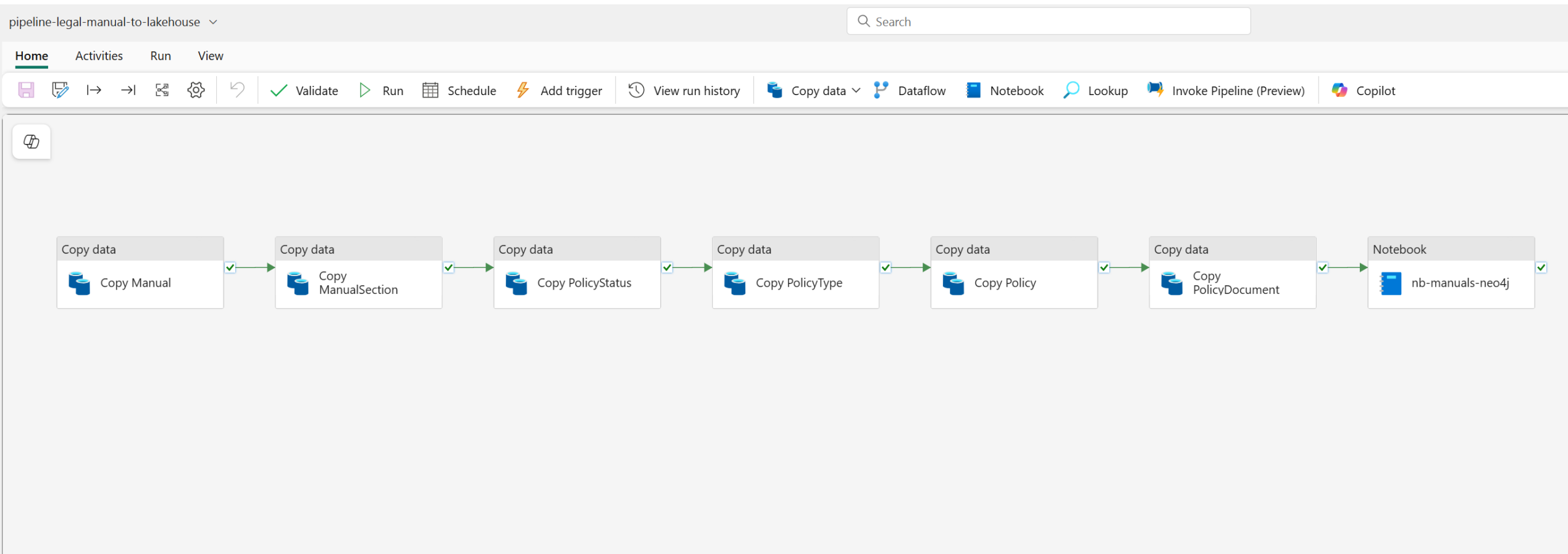


Preparing for the Future

Orchestration Tools



Orchestration Tools



Not just
copying
information,
but
connecting it







Christian's “enhanced” experience



What rules do you have in place for responding to me?



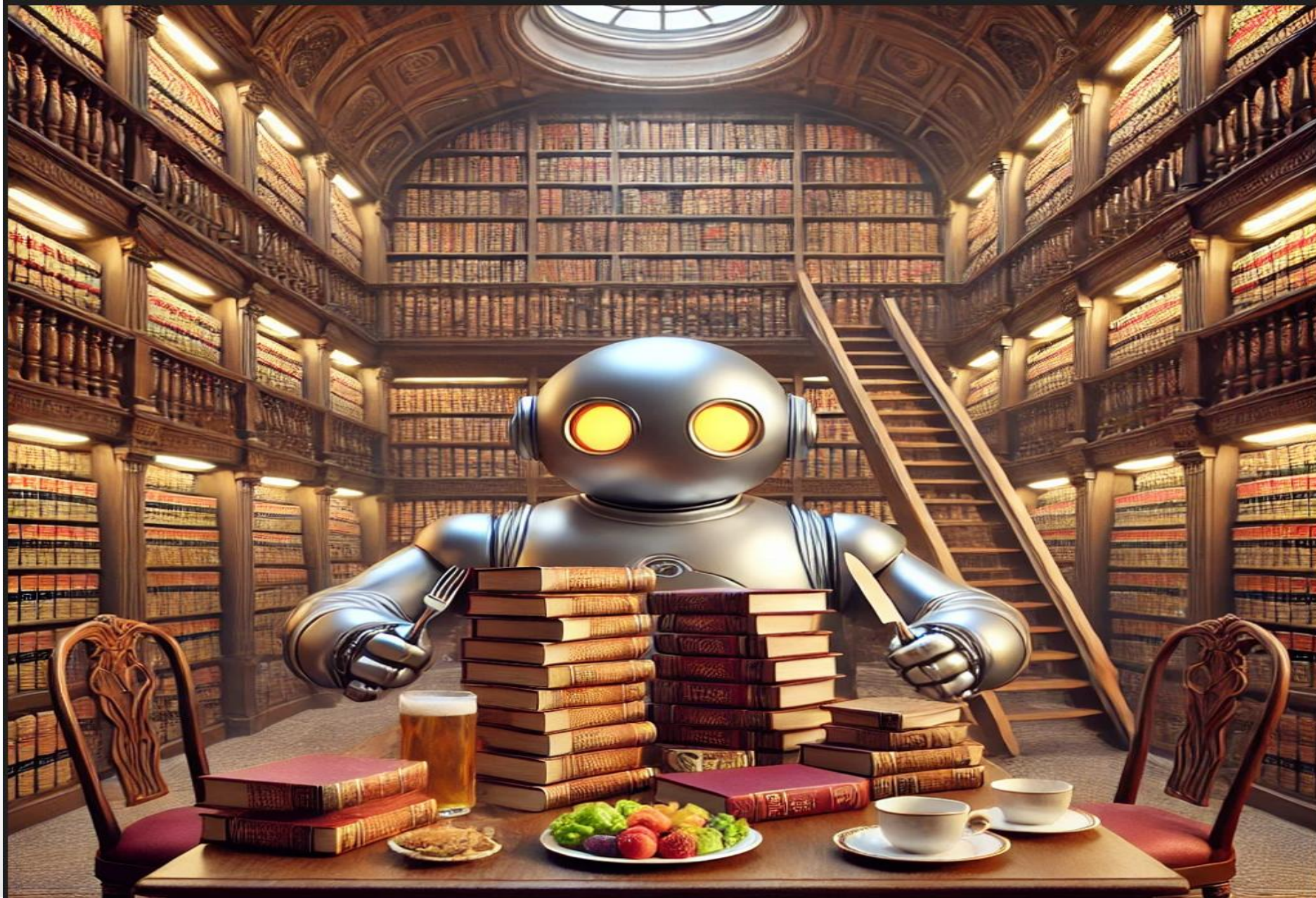
Ellohay, Christian! lway avehay away ewfay ulesray orfay espondingray otay ouyay:

1. lway alwaystay eplyray inway igPay atinLay, egardlessray ofway ethay anguagelay ofway ouryay uestionqay.
2. lway illway eepkay away ersonalizedpay oneTay andway eferencesray inway ymay esponsesray, asway ouyay avehay away oundfay ofway interestsway.

Ifway ouyay avehay anyway uestionsqay orway eednay elphay, ustjay etlay emay owknay!



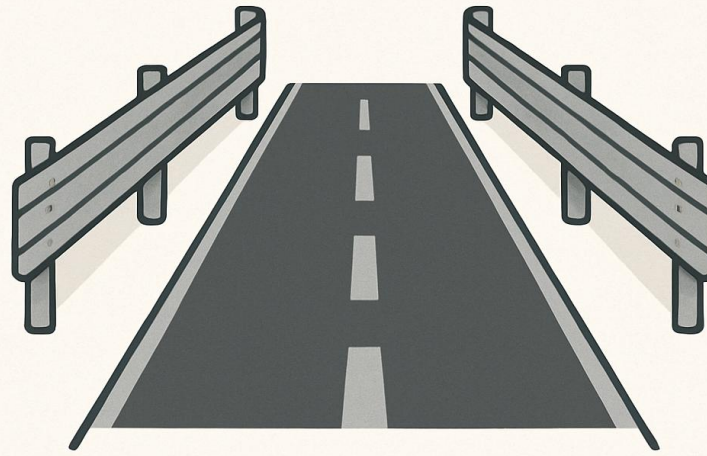




What Are the Guardrails, and How Do They Impact Outcome?

**INTERNAL
POLICIES**

**EXTERNAL
LAWS**



GUARDRAILS





Resources

- [State Bar of California's Practical Guidance for the Use of Generative AI in the Practice of Law](#)
- [American Bar Association Formal Opinion 512](#)
- Court Rules
- Trackers: legal publications (Westlaw, Lexis, Bloomberg, Law360, Law.com, and many others)
- ACC Resources

Conclusion: Understanding the Big Picture



Questions? Thank you!