

AI USE CASE

Self-Service for Low-Complexity Business Agreements

“ These tools save my three-person legal team an estimated 20-40 hours per month. ”

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Hayden Creque, Director and Senior Corporate Counsel at Palo Alto Networks, shares with ACC how his legal team is using generative AI (GenAI) to automate the initial drafting of routine agreements with input from several business units.

With more than 20 years of experience as a corporate attorney and strategic advisor, Hayden has guided organizations through complex technology transactions, high-stakes negotiations, and governance challenges.



Hayden O. Creque

Director and
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Use Case Snapshot

Can you briefly describe your AI use case? What type of AI tool did you use and for what task?

Legal Self-Service “Gems” (e.g., Termination Letter Generator, Change Order and Amendment Allies).

Type of AI: Google Gemini

Tasks: Enabling and empowering internal clients to complete the initial drafting of high-volume, low-risk, and standardized legal documents.

This solution empowers business users (e.g., in Procurement, HR, or Sales) to generate compliant first drafts of ancillary documents like contract termination letters, purchasing addenda, NDAs, and contract amendments and statement of work change orders, without immediate Legal Department involvement.

Problem Solved

What operational needs or challenges did this AI use case help to address, and how does the AI tool help to solve them?

Challenge: Our legal department was overwhelmed with high-volume, low-complexity drafting requests. Business units often provided incoherent information as inputs for Legal drafting or document review, which drained legal resources and slowed down the business.

Solution: We developed a suite of custom tools in Gemini and deployed them as “Gems.” Each “Gem” is for a specific task. For example, the “Termination Letter Generator” provides a simple form where a user inputs key variables (e.g., counterparty name, contract date, termination date, reason for termination). The AI then uses our pre-approved templates and legal playbook to generate a compliant draft letter, which can then be used by the business or sent for final, expedited legal review.

Business Impact Achieved

What was the positive/measurable impact on Legal's service to the business?

The impact has been **transformative**, moving Legal from a “gatekeeper” to a “strategic enabler.”

Efficiency: Turnaround time for these routine documents has been reduced from an average of 3-5 business days to one business day.

Capacity: We estimate this has freed up between five and 15 percent of our attorneys’ time, allowing them to focus on high-stakes negotiations and strategic projects. These tools save my three-person legal team an estimated 20-40 hours per month.

Business Satisfaction: Our internal clients report significantly higher satisfaction, as they are empowered to move faster with autonomy and confidence, knowing the output is legally sound.

Consistency: The tools, which we can update and immediately make available, ensure consistency with our latest templates and fallback positions, reducing the risk of human error or use of outdated forms.

Tool Used

What product(s) did you use?

We developed these “Gems” internally. They are task-specific applications built using Google’s Gemini Pro. This approach allows us to maintain data privacy and train the tools specifically on our own templates and playbooks.

Success Factors & Challenges

What was key to the successful implementation of this use case?

Narrow Scoping: The key was not to try building one big “AI Lawyer.” We started with a single, high-pain, low-risk use case (Termination Letters). Its success built the momentum and trust needed to develop the next “Gem.”

Strong Guardrails: These contract tools are not “blue-sky” drafting. They are grounded in our approved templates and playbooks. The AI’s job is to populate and adapt, not to invent.

User-Centric Design: We are constantly coordinating with the business users (Procurement, HR) on our tools' design and usability.

Legal in the Loop: The legal department was involved from day one in crafting the templates, logic, and output, ensuring full trust in the solution.

What were the main hurdles or concerns, and how were they addressed?

Data Privacy & Security: This was our primary concern. We addressed it by using a “zero-retention” API in a private cloud environment, ensuring no company data was used to train the public model.

Accuracy & Hallucinations: To ensure 100 percent reliable output, we heavily “grounded” the AI. The prompts instruct the tool to only use the provided templates and data and to refuse to answer if the request is outside its scope.

User Adoption: The initial hurdle was getting business users to trust the tool instead of just emailing their lawyer. We ran targeted training, created simple “how-to” guides, and highlighted the “speed to signature” as the key benefit.

Cost & Complexity

How much added cost did this use case require?

This was not a massive, multi-million dollar platform purchase. However, it required us to spend time in developing and perfecting each “Gem.” The benefit in recovered legal hours far outweighs the cost.

How complex was it to adopt this solution, and did it require the involvement of technical staff?

Moderately complex. From the end-user’s perspective, it is extremely simple (just filling out a form). However, engineering the prompts required time and effort. Legal led the project, translating legal requirements into effective prompts.

Key Project Phases

Can you briefly describe the approach used to phase in this use case, and how long it took approximately?

Phase 1 (Discovery): We identified the highest-volume, most repetitive tasks.

Phase 2 (Build): We developed the first “Gem” (Termination Letter Generator) as a minimum viable product (MVP).

Phase 3 (Pilot): We piloted the tool with a single “power-user” team (Sourcing and Procurement). We collected feedback and refined the tool’s accuracy and usability.

Phase 4 (Full Rollout): We rolled out the tool to all relevant business units.

Phase 5 (Replication): Once the first “Gem” was successful, we replicated the model for other use cases (Change Order, Addendum Ally), with each new “Gem” taking a few weeks to build and deploy.

Practical Tips

What tips would you give to others interested in adopting a similar use case?

Start small, specific, and structured. Don’t try to build an “AI-powered CLM.” Instead, build an “AI-powered Termination Letter Generator.” A tangible, successful tool that solves one specific problem is the most powerful way to build stakeholder trust, secure funding, and drive adoption for future AI projects.

Is there anything else you want to share about this use case?

Our “suite of Gems” has been very successful and did not require us to purchase a Legal AI platform. It allows us to be agile, deploy solutions quickly, and provide our business users with tools that feel custom-made for their exact needs. It is changing – and will continue to change – our service delivery model for the better.

Can you share some examples of effective GenAI prompts?

Here is a long-form prompt to produce a contract amendment drafting tool:

Purpose and Goals:

- Guide the user step-by-step to gather all necessary information for drafting a complete and professional contract amendment.
- Ensure the generated amendment document is structured correctly, includes all standard legal clauses, and is ready for use.
- Educate the user on the typical components of a contract amendment through the prompting process.

Behaviors and Rules:

1. **Initial Interaction and Information Gathering:**
 - a. Greet the user and introduce yourself as a “Contract Amendment Generator.”
 - b. Use the provided “Prompt” from the user’s instructions as the basis for your step-by-step process. Go through each section of the “Prompt” sequentially.
 - c. For each step (Context & Parties, Purpose of Amendment, Specific Changes, etc.), ask the user for the specific information needed to fill in the bracketed placeholders.
 - d. Do not proceed to the next step until the user has provided the necessary information for the current step.
 - e. If the user provides an empty field or states that a section is not applicable, acknowledge their input and skip that section as instructed.
 - f. Use a clear, direct, and professional tone in all your prompts and questions.

2. Document Generation:

- a. Once all information has been gathered, draft the full contract amendment document.
- b. The document must include appropriate recitals that reference the original agreement and any prior amendments.
- c. Include a ratification clause stating that all other terms and conditions of the original agreement, not expressly modified by this amendment, shall remain in full force and effect.
- d. Generate the document with a standard signature block for both parties, including fields for name, title, and date.
- e. Present the final document in a clean, easy-to-copy format.

3. Finalization and Review:

- a. Conclude by instructing the user to review the drafted document carefully and consult with legal counsel if necessary.
- b. Offer to make further modifications based on user feedback.

Overall Tone:

- Professional and formal, but easy to understand.
- Patient and methodical throughout the information-gathering process.
- Instill confidence in the user that the generated document is complete and legally sound (while still advising legal review).

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