

# Generative AI and Lessons for Bar Leaders

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## IMPORTANT NOTES

- The following presentation was created using generative AI with no human edits or design adjustments. Andrew Perlman will explain how he created the deck during his remarks during the NCBP Midyear Plenary on Redefining Legal Practice on January 30, 2025.
- The slides are intended to demonstrate the increasing capabilities of generative AI to engage in strategic thinking. These materials do not necessarily reflect Andrew Perlman's views on what bar leaders need to consider, though many of the suggestions are compelling and worth considering.

PREPARING  
LAWYERS FOR  
GENERATIVE  
AI



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# AGENDA

- Introduction
- Why This Matters
- Common Use Cases for AI in Law
- Main Challenges & Pitfalls
- Strategy Overview
- Education & Awareness
- Ethical & Regulatory Guidance
- Practical Tools & Resources
- Skill-Building & Integration
- Policy Leadership & Advocacy
- Culture of Experimentation
- Influence Legal Education

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# INTRODUCTION



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# WHY THIS MATTERS

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- Rapidly evolving technology
    - GPT-style models can create, summarize, and analyze text at scale
  - Client expectations
    - Clients increasingly expect efficient, cost-effective services
  - New ethical & regulatory implications
    - Confidentiality, competence, data privacy
  - Risk of falling behind
    - Lawyers who ignore AI risk losing competitive edge

# COMMON USE CASES FOR AI IN LAW



- Drafting & Summarizing
  - Contracts, briefs, memos, demand letters
- Research & Analysis
  - Accelerate legal research
  - Identify patterns in case law
- E-Discovery & Document Review
  - Automate sifting through large volumes of documents
- Administrative Tasks
  - Scheduling
  - Billing
  - Client intake forms
- Client Self-Service

# MAIN CHALLENGES & PITFALLS

- Hallucinations
  - AI may invent citations or facts if not closely monitored
- Data Privacy
  - Input text might be stored or used to further train public AI models
- Security Risks
  - Potential exposure of client data
- Ethical Duty
  - Lawyers still responsible for final work product and oversight

# STRATEGY OVERVIEW

- Education & Awareness
  - Enhancing knowledge and understanding
- Ethical & Regulatory Guidance
  - Providing frameworks for ethical practice
- Practical Tools & Resources
- Skill-Building & Integration
- Policy Leadership & Advocacy
- Culture of Experimentation
- Legal Education Integration
- Bar Operations Evolution
- Ongoing Communication
- Future-Focused Mindset

# EDUCATION & AWARENESS



- Plain-Language Training
  - Demystify AI
  - Avoid tech jargon
- Expert-Led Workshops
  - Real-life demonstrations
  - Q&A sessions
- Success Stories & Pitfalls
  - Real case studies
  - Triumphs and failures
- Avoid Vendor Hype
  - Seek neutral insight
  - Practical vs. sales pitches

# ETHICAL & REGULATORY GUIDANCE



- Professional Responsibility
  - Address confidentiality
  - Ensure competence
  - Supervise AI usage
- Advisory Opinions
  - Collaborate with ethics committees on AI usage
- Data Privacy & Client Confidentiality
  - Evaluate vendor TOS
  - Secure data
- Monitor Evolving Regulations
  - EU AI Act
  - Other global frameworks

# PRACTICAL TOOLS & RESOURCES

- AI Best Practices Checklists
  - Quick references for daily use
- Approved Vendor Lists
  - Comparative charts on security & features
- Resource Hub
  - Central portal with FAQs, webinars, and AI news
- Community Forum
  - Encourage peer-to-peer advice sharing





## SKILL-BUILDING & INTEGRATION

- Hands-On CLE Labs
  - Allow lawyers to practice prompt engineering and verification
- Tech Partnerships
  - Pair small/solo practices with legal technologists
- Mentorship & Peer Groups
  - Foster a safe environment for experimentation
- Document & Measure Outcomes
  - Track efficiency, quality, and client satisfaction

# POLICY LEADERSHIP & ADVOCACY

- Shape Regulatory Policy
  - Proactively engage legislators and regulators
- Champion Ethical AI Standards
  - Advocate for transparency and accountability
- Collaborate with Tech & Academia
  - Organize roundtables and publish white papers to guide future laws
- Unified Voice
  - Establish the bar as the trusted authority on AI in legal practice

# CULTURE OF EXPERIMENTATION

- Set a Tone of Cautious Optimism
  - Emphasize AI as a complement, not a substitute
- Avoid Fear & Hype
  - Recognize potential benefits without overselling
- Small Pilots
  - Start with one or two practice areas before scaling
- Realistic Expectations
  - Manage the inevitability of AI imperfections



# INFLUENCE LEGAL EDUCATION

- Engage Law Schools
  - Integrate AI modules into the curriculum
- Encourage Tech Literacy
  - Basic coding or data analytics familiarity
- Internships & Clinics
  - Offer real-world AI projects for law students
- Future-Proof Skills
  - Foster adaptability and continuous learning in new graduates



## EVOLVE THE BAR'S OWN OPERATIONS

- Use AI Internally
  - Automate repetitive tasks
  - Member support chatbots
- Practice What You Preach
  - Showcase successful in-house AI pilot projects
- Member Services
  - Online knowledge portal for quick reference
- Continuous Updates
  - Keep internal processes aligned with tech innovations

# COMMUNICATE, COMMUNICATE, COMMUNICATE



- **Frequent Updates**
  - Newsletters
  - Bulletins on AI advancements
- **Plain-Language Summaries**
  - Clarify regulatory changes
  - New software releases
- **Highlight Best Practices**
  - Share success stories
  - Inspire others
- **Feedback Loops**
  - Encourage members
  - Share wins and lessons learned

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# EMBRACE THE FUTURE

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- Expect Rapid Evolution
    - AI will become more powerful
    - Handle images, voice, and other data types
  - Forward-Thinking Mindset
    - Regularly assess emerging tools
  - Budget for R&D
    - Encourage firms to invest in ongoing AI exploration
  - Stay Nimble
    - Keep pivoting policies
    - Update educational offerings and resources

## KEY TAKEAWAYS

- Proactivity Beats Reactivity
  - Shape the conversation rather than waiting
- Ethics & Transparency
  - Maintain ethics and transparency as priorities
- Practical Support
  - Provide tools, resources, CLE programs, and vendor comparisons
- Ongoing Engagement
  - Continuously learn and adapt as AI evolves

