

# Making AI Work for Your Legal Practice

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StratiaAI

# Making AI Work for Your Legal Practice

**Objective:** Turn AI from theory into practical tools that improve your daily legal work.

**Content:** Real-world use cases across Admin, Litigation, Conveyancing, and Client Service.

**Impact:** Use of AI in legal work is evolving quickly. Early adopters are already seeing 30-50% efficiency gains.

**Takeaway:** How AI tools and applications can be implemented across admin and fee-earning departments





# What AI Actually Does (In Plain English)

## AI Today = Advanced Language Pattern Recognition

- Modern AI doesn't "think"; it recognises patterns in text.
- Predicts the most likely next word, sentence, or structure.
- Compares your prompt to patterns learned from billions of examples.
- Does not access confidential databases unless explicitly integrated.
- Best seen as a super-powered assistant for reading, writing, and reasoning with text.

## Why this matters for law

- Legal work is text-heavy, pattern-based, and rule-driven.
- AI excels at tasks involving reading, summarising, drafting, and reviewing documents.



# How Large Language Models (LLMs) Work

LLMs = Statistical engines trained to understand and generate language

- Trained on massive volumes of public text.
- Learn relationships between concepts, clauses, structures, and arguments.
- Generate answers based on probability, not memory.
- Performance improves with context, examples, and clear prompts.
- Enterprise tools (Harvey, Luminance, Juro, etc.) apply LLMs to legal workflows.

## Why this matters

- LLMs excel at summarising, drafting, reviewing, comparing, and analysing legal documents.
- Ideal for research, due diligence, client correspondence, and document automation.



# AI Explained Video

# Why This Session Matters

1

## Rising Client Expectations

Rising client expectations for speed, transparency, and predictable billing.

2

## Administrative Pressure

Irish firms face increasing admin loads with flat headcount.

3

## Measurable Gains

AI offers measurable gains for all practices without large outlays.

4

## Competitive Edge

Early adopters gaining competitive edge in turnaround time and accuracy.



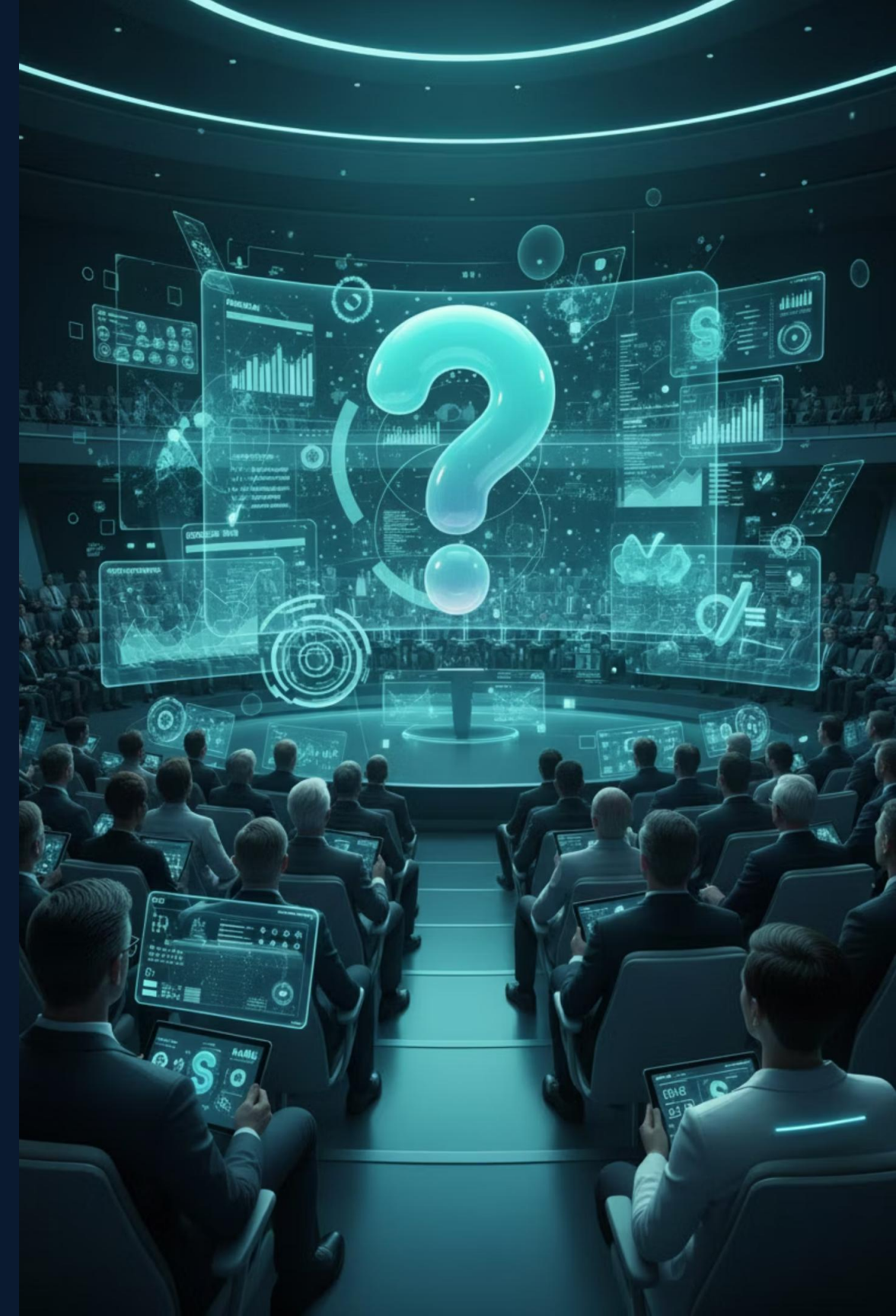
# Setting Expectations

## What AI Can Do

- AI handles routine, text-heavy legal tasks (e.g. drafting, summarising, reviewing).
- Produce first-draft documents, summaries, and client updates in minutes.
- Extract key facts, dates, risks, and obligations from long documents quickly.

## What AI Cannot Do

- AI cannot replace legal expertise, judgement, or authoritative advice.
- AI can find information but cannot assess its accuracy.
- AI can analyse text, but statutory interpretation requires a solicitor's judgment.





# Important Context for Irish Solicitors

## GDPR Compliance First

EU data storage isn't enough, the whole tool must meet GDPR requirements.  
Check for full GDPR controls: no model training, no data transfer, and a compliant DPA.

## Law Society of Ireland Guidance

Professional obligations are unchanged; AI is a tool, not a replacement for judgment.  
Requires enhanced due diligence for substantive legal work.

## Confidentiality Considerations

Client confidentiality is paramount.  
NEVER input privileged data into public/free AI.  
Use enterprise solutions with data protection agreements.

## Q&A Session

Questions welcome at the end.





# The Business Case: Why Irish Law Firms Are Adopting AI Now

## Market Pressures Driving Change

- Client demand for speed & competitive pricing
- Larger firms gaining efficiency via AI
- Administrative burden consumes 40-60% of working time

## Measurable Benefits to Law Firms

**60-80%**

**Faster Document Review** and Due Diligence

**40-50%**

**Improved Client Response Times**

**20-30%**

**Reduced Administrative Costs**

## Competitive Edge

Early adopters gain significant market advantage. AI levels the field for smaller firms on complex work.

Sources: Thomson Reuters, Clio, Everlaw, Luminance case studies, (2024–2025).

# Some AI Legal Case Studies





# Case Study: A&L Goodbody - Leading Irish AI Adoption

Aspect	Details
Firm Profile	A&L Goodbody: Leading Irish corporate law firm, ~ 120 Partners, 1,000+ people
Challenge	Needed cutting-edge GenAI for document analysis, due diligence, litigation, and compliance
AI Solution	Harvey AI: First Irish law firm to partner with Harvey AI (Feb 2024)
Implementation	Co-designed and tested a GenAI roadmap prior to rollout.
Expected Results	Document analysis automation (30–60% faster), due diligence (30–50% faster), litigation support (25–50% improvement) & internal process optimisation (20–40% reduction)
Track Record	Over €50B in transactions reviewed using advanced technology
Market Leadership	Positions firm as a legal market AI innovation leader through early adoption

Sources: Luminance; Kira Systems; Deloitte Legal AI Report 2023; Thomson Reuters 2024; Microsoft Copilot Study; PwC Legal Ops.

# Harvey AI in Action



# Case Study: Slaughter and May - Due Diligence Transformation

Aspect	Details
Firm Profile	Slaughter and May — UK Magic Circle law firm with global M&A practice
Challenge	Due diligence processes time-intensive; compliance risk detection needed improvement across all practice areas
AI Solution	<b>Luminance</b> adopted as a core AI due-diligence tool; Slaughter and May took a 5% equity stake and built it into apprentice training.
Implementation	Phased rollout from M&A due diligence into derivatives, GDPR reviews, contract analysis, bulk redaction, and knowledge-management projects.
Results	<b>75% reduction</b> in due diligence time; <b>Significant improvement</b> in compliance risk detection
Strategic Impact	Partnership strengthened the firm’s competitive position and helped it win and deliver complex mandates more efficiently
Long-term Commitment	Equity investment demonstrates confidence in technology's transformational impact

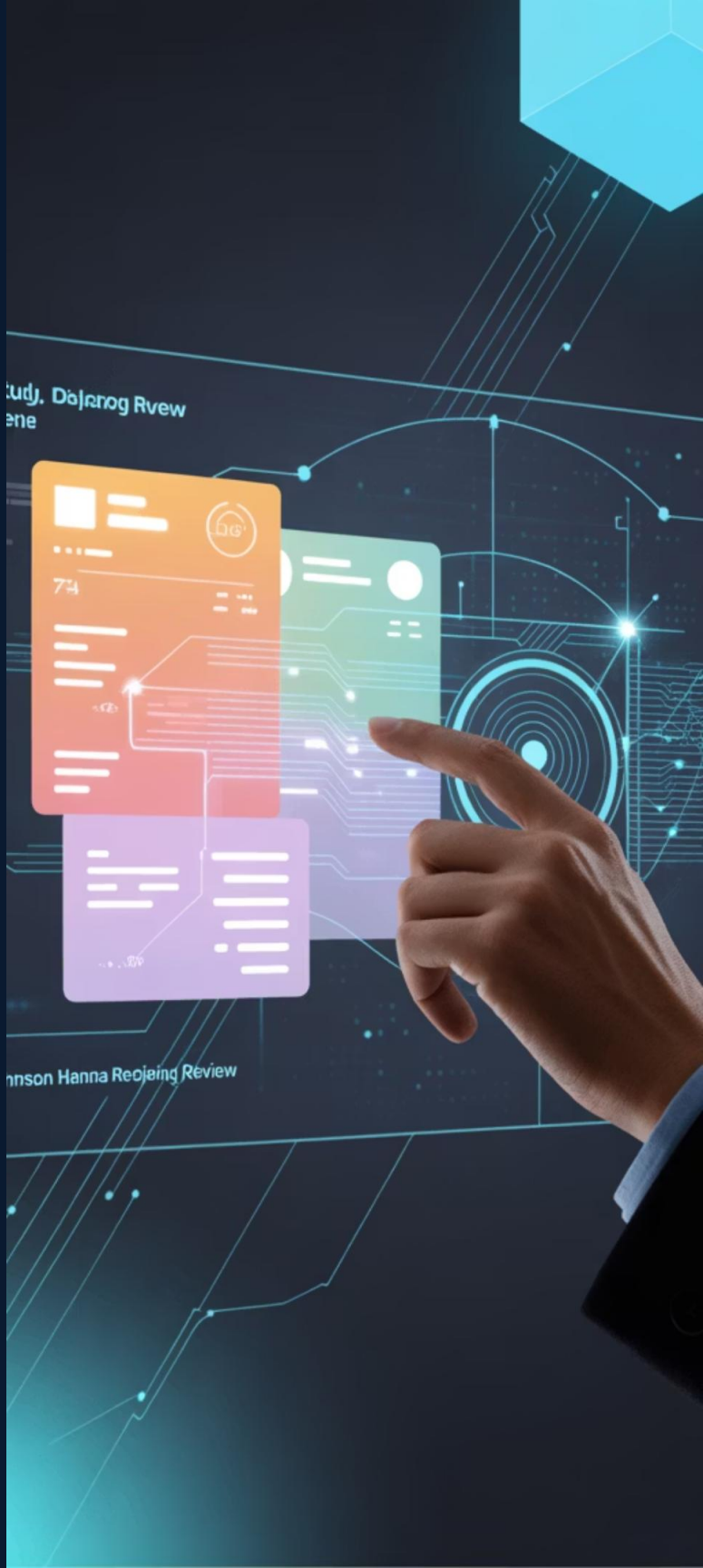
**Key Tools Used:** Luminance AI



# Case Study: Johnson Hanna - Repapering Review Acceleration

Aspect	Details
Firm	Johnson Hana (now Eudia) - Dublin-based alternative legal solutions.
Challenge	Corporate client required rapid, large-scale contract repapering to meet regulatory deadlines.
AI Solution	Utilised <b>Technology Assisted Review (TAR)</b> , including <b>Luminance</b> & <b>eBrevia</b> , for automated acceleration.
Scope	Applied AI to ~ <b>1,000 contracts</b> for a specific corporate repapering project.
Result	300 contracts negotiated and repapered within 3 mths vs 12 mths.
Impact	AI solution for complex, volume-heavy remediation → <b>75% effort reduction</b> .

**Key Tools Used:** Luminance, eBrevia (and other AI/TAR platforms)





# eBrevia in Action

• **Predefined** and **customizable** reports

• **Real-time** and **historical** data

• **Integration** with **external** systems

• **Mobile** and **web** access

• **Custom** and **predefined** reports

• **Real-time** and **historical** data

• **Integration** with **external** systems

# Case Study: Clyde & Co - Insurance Claims Automation

Aspect	Details
Firm	Clyde & Co (International Law/Insurance, Dublin Office)
Challenge	Time-intensive medical report review for thousands of personal injury claims/year.
AI Solution	<b>Luminance 24-hour plug-and-play deployment</b> – Zero lengthy setup; instant integration via public API
Implementation	Automated report & claim form review, checkbox recognition technology, Integrated with claims handling system
Results	<b>79% automation</b> on medical report review. <b>83% reduction</b> in review time (30 min task → <b>5 min</b> for medium claims).
Impact	Enables insurers to make quicker, better-informed decisions

**Key Tools Used:** Luminance





# Luminance in Action

# Use Case: Automated Meeting Management for Irish Law Firms

Scenario: 6-Person Practice Handling 20+ Client Meetings Weekly

Area	Details
Challenge	Solicitors spend 30-45 mins post-meeting on notes/emails.
Solution	AI Transcription (Sally/Vatis Tech) + Copilot for MS 365 (Email Drafts).
Workflow	AI records meeting → extracts key actions → Copilot drafts email → solicitor reviews (~5 mins) → same-day send. Automated with MS Power Automate.
Implementation	2-week rollout: Setup → Training → Internal practice → Client deployment.
Outcome	Follow-up time: <b>40 mins</b> → <b>10 mins</b> → <b>10 hrs/week saved</b> ). Consistent same-day summaries.
Investment	Implementation €2-€3K (one off) €3.5K-€4.5K annually (6 users).
ROI	<b>€120K+</b> annual value. Costs recovered in <b>2 weeks</b> .

**Key Tools:** Trint or Vatis Tech, MS Copilot for M365, MS Power Automate





# Practical AI Applications



# Practical Applications: Fee Earners - Legal Research

## AI-Enhanced Legal Research Workflow

Task	Traditional Method	With AI Tools	Time Saved
Case Law Research	Manual database searches, reading summaries	<b>Lexis+ AI</b> or <b>Westlaw Edge AI</b> - conversational search with instant case ranking	65%
Statutory Interpretation	Reading full statutes and commentary	<b>Harvey AI</b> generates summaries with relevant sections highlighted	55%
Precedent Finding	Browsing precedent libraries manually	<b>Casetext CoCounsel</b> finds and adapts relevant precedents automatically	60%
Research Memo Drafting	<b>Writing</b> from scratch after research	<b>Harvey AI</b> or <b>Notion AI</b> generates first draft from research notes	50%

**Key Tools:** Lexis+ AI, Westlaw Edge AI, Harvey, Casetext/CoCounsel, Notion AI

Sources: Thomson Reuters (Westlaw Edge AI), Harvey AI case studies, Casetext CoCounsel, Deloitte Legal GenAI Report 2023, PwC Legal Productivity Study.





# Lexis+ AI in Action



# Practical Applications: Fee Earners - Contract Review & Analysis

## Automated Contract Intelligence

### Initial Review & Risk Assessment

- **Luminance:** Automatically highlights unusual or risky clauses across document sets of any size.

### Due Diligence Acceleration

- **Kira Systems:** Extracts key data from large contract sets (hundreds or more) in a single review project.
- Generates structured reports (compliance, missing clauses, renewal dates).

### Redlining & Contract Negotiation

- **Spellbook:** Drafts and reviews clauses, suggests negotiation points, and flags risky language.
- **ContractPodAI:** Compares versions, identifies negotiation leverage, and auto-tracks changes through each revision cycle.

### Real-World Impact

Mid-sized Irish firm reduced M&A due diligence from 3 weeks to 5 days using Luminance.

**Key Tools:** Luminance, Kira Systems, Spellbook, ContractPodAI



# Spellbook AI in Action



# Practical Applications: Fee Earners - Document Drafting

## AI-Assisted Drafting Workflow

01

### Initial Draft

**Harvey** or **Casetext/CoCounsel** drafts from instructions, precedents, and firm clauses.

02

### Fact & Legal Verification

**Definely** provides instant definitions and case law citations.

**Henchman** verifies citations are current and correctly formatted.

03

### Quality & Style Review

**Grammarly Business** checks clarity, tone, and professionalism.

**Microsoft Copilot** suggests document-specific improvements.

04

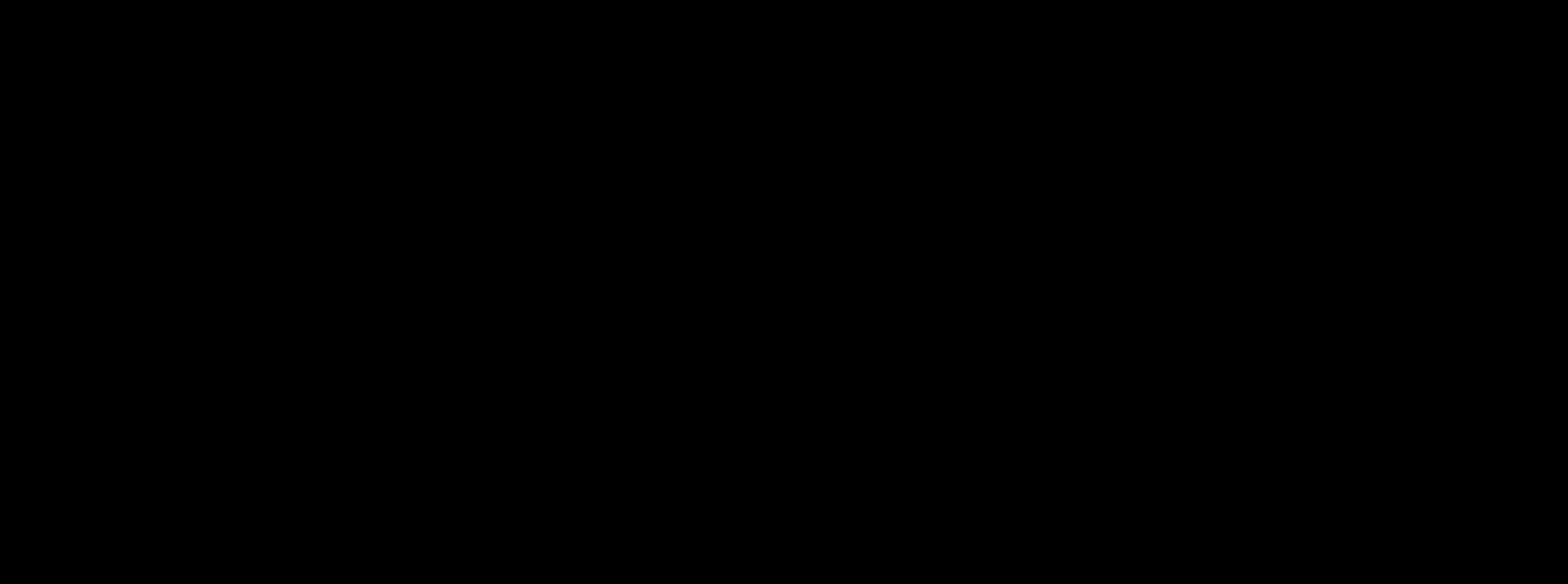
### Final Formatting & Compliance

AI tools apply firm templates, formatting rules, and citation standards — with solicitors performing final compliance checks.

**Key Tools:** Harvey, Casetext CoCounsel, Definely, Henchman, Grammarly Business, Microsoft Copilot for M365



# Microsoft Copilot in Action



# Practical Applications: Marketing & Business Development

## AI-Powered Marketing for Law Firms

Marketing Activity	AI Solution	Benefit
Thought Leadership Articles	Jasper or Notion AI creates first drafts of blog posts and articles	70% faster content production
Social Media Management	Canva AI generates LinkedIn posts and graphics	Consistent professional presence
Email Newsletters	Microsoft Copilot drafts updates from recent case wins and developments	up to 3x higher engagement rates
Website Content	SurferSEO optimises web pages for Google search visibility	up to 40% increase in organic traffic
Client Case Studies	Grammarly Business ensures testimonials and case studies are compelling and professional	Improved conversion rates
Pitch Presentations	Gamma.app creates professional pitch decks from your outline in minutes	Faster response to RFPs

**Key Tools:** Jasper, Notion AI, Canva AI, Microsoft Copilot for M365, SurferSEO, Grammarly Business, Gamma.app



# AI Video Avatars

# Practical Applications: Client Intake & CRM

## Streamlining Client Onboarding

### Initial Inquiry Response (Minutes, Not Days)

- Microsoft Copilot drafts personalised new client responses instantly.
- Includes expertise details and initial needs assessment questions.

### Conflict Check Acceleration

- Clio & Filevine help surface conflicts by searching contacts, matters, and notes.
- Accelerates conflict-checking process and reduces manual review effort.

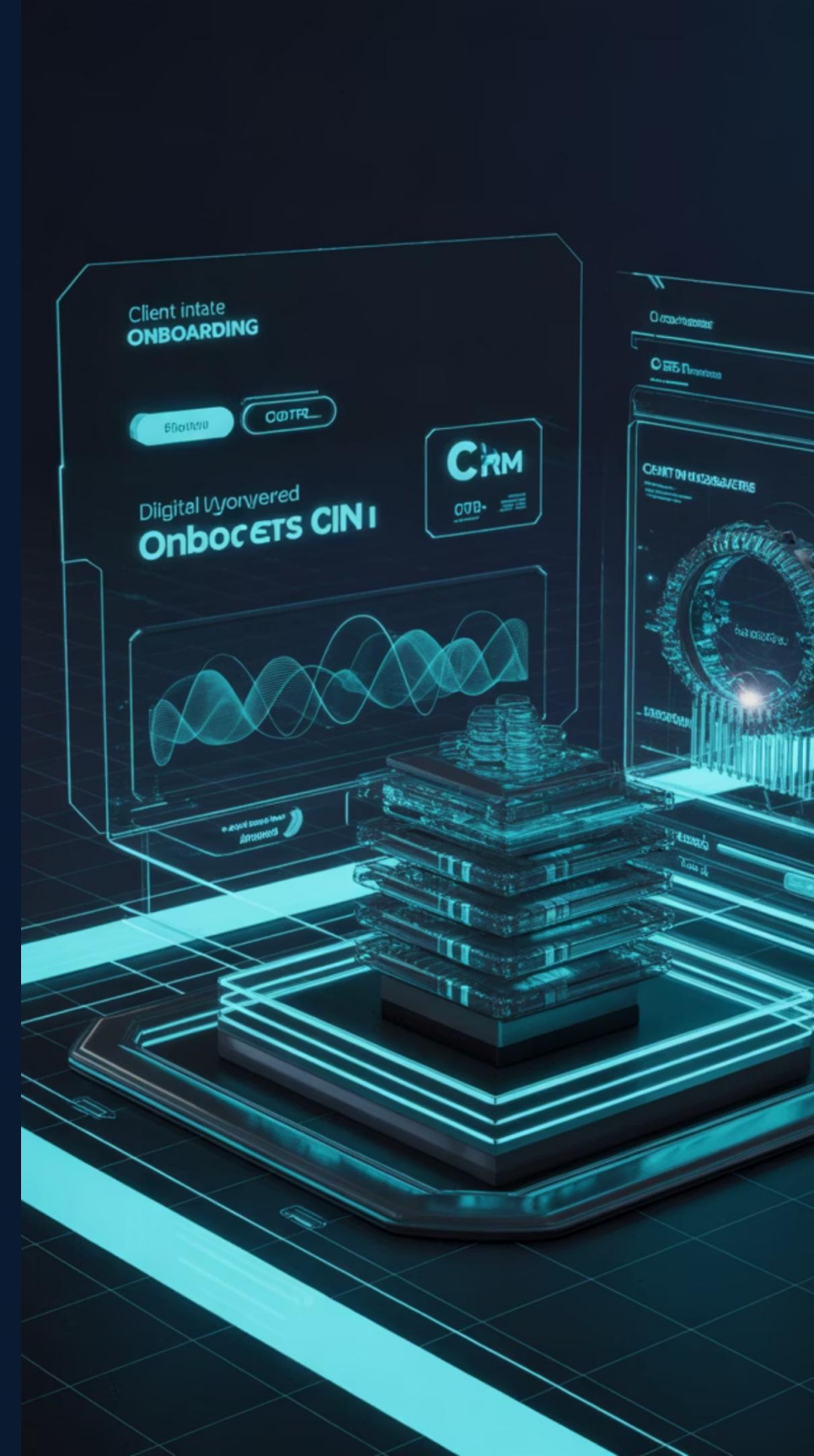
### Client Information Gathering

- AI-powered intake forms adapt questions by matter type.
- AI intake tools (Clio or Filevine/) capture client details and automatically populate matter records.

### CRM Data Enrichment

- AI tools can enrich client records with data from LinkedIn, the CRO, and public sources.

**Key Tools:** Microsoft Copilot for M365, Clio, Filevine, ActionStep



# Practical Applications: Knowledge Management

## Turning Institutional Knowledge Into Competitive Advantage

### Internal Research Library

- Notion AI/Copilot: Natural language search across your firm's notes and research files.
- Example: Locate past personal injury matters with strong liability arguments.

### Template & Precedent Management

- ContractPodAI: Manages a living library of templates and clauses.
- Automatically recommends the latest approved templates for drafting.

### Know-How Capture

- Teams + Copilot: Records internal training; creates searchable transcripts.

### Client Matter Intelligence

- Harvey AI: Analyses closed matters to identify successful strategies.
- Example: Insights on effective arguments for constructive dismissal cases.

**Key Tools:** Notion AI, Microsoft Copilot for M365, ContractPodAI, OtterPilot, Harvey





# Practical Applications: Time Recording & Billing

## Effortless Time Capture with AI

- **Automatic Tracking:** AI tools such as TIQ Time capture time from documents, emails, and calls to prevent lost billable hours.
- **Narrative Generation:** TIQ Time drafts time entry descriptions (e.g., "Email to opposing counsel re: discovery deadline extension").
- **Write-Off Reduction:** Aderant Expert flags entries likely to be written off based on historical data.
- **Fee Estimate Accuracy:** Harvey analyses past matters to support more accurate fee estimates.
- **Invoice Optimisation:** Luminance reviews invoices for clarity, compliance.

❏ **Impact:** Firms using AI time tracking report a 12-18% increase in captured billable hours.

**Key Tools:** TIQ Time, Aderant Expert, Harvey, Luminance



# Practical Applications: Compliance & Risk Management

## Proactive Risk Identification & Management

Risk Area	AI Application	Tools
Deadline Management	Automatic deadline extraction from court orders/contracts.	Clio, Filevine, Harvey
Regulatory Compliance	Summarising updates to Irish and EU regulations for faster review.	Lexis+ AI, Westlaw Edge AI
Client Communication Audit	Review client advice and suggest missing caveats or risk warnings.	Grammarly Business, Microsoft Copilot
Conflict Checking	Enhanced conflict searches across current and past client/matter records.	Clio, Filevine
Document Retention	AI-assisted document tagging and retention workflows aligned with firm policies.	ContractPodAI, Luminance
Privilege Protection	Highlighting communications that may contain privileged material.	Harvey, Luminance

**Key Tools:** Clio, Filevine, Harvey, Lexis+ AI, Westlaw Edge AI, Grammarly Business, Microsoft Copilot for M365, ContractPodAI, Luminance



# Practical Applications: E-Discovery & Litigation Support

## AI-Powered Discovery & Trial Preparation

### Document Review at Scale

- AI (Luminance, Kira) reviews thousands of docs (relevance, privilege)
- Example: 50,000 emails reviewed in 3 days (95%+ accuracy)

### Hearing & Trial Preparation

- AI (Harvey) summarises cases, creates examination outlines
- AI (CoCounsel) retrieves relevant precedents and drafts supporting references.

### Evidence Organization

- AI (RelativityOne) creates chronologies, timelines, witness summaries
- Teams + Copilot transcribes meetings, hearings, and interviews with searchable, time-stamped transcripts.

### Trial Strategy Analysis

- AI (Lexis+ AI) reviews past rulings to highlight patterns in judicial reasoning.
- Highlights arguments commonly associated with favourable past outcomes.

**Key Tools:** Luminance, Kira Systems, Harvey, Casetext CoCounsel, OtterPilot, Lexis+ AI, RelativityOne



# Practical Applications: Training & Professional Development

## Accelerating Solicitor Development With AI



### Personalised Learning

Notion AI: Creates tailored learning materials by practice area and experience.

Junior solicitors get immediate, non-interruptive guidance.



### Knowledge Retention

Teams + Copilot: Records training sessions for later review.

AI generates summaries and key takeaways.



### Skills Practice & Feedback

AI (Cognitiv+) simulates client scenarios (interviewing, advice).

Grammarly Business: Instant feedback on drafting quality/tone.



### Competency Assessment

AI (Definely) reviews work samples to assess research, drafting, and communication skills.

Highlights areas where solicitors may benefit from additional support.



### Research Training

Lexis+ AI / Westlaw Edge AI: Interactive guidance for efficient research.

New solicitors become productive researchers significantly faster with AI support.

# How to Prompt Effectively





# Why Prompt Quality Matters

## Better Prompts = Better Results

- AI responds to the instructions you give it — vague prompts produce vague answers.
- Clear direction leads to more accurate, reliable, and legally-sound outputs.
- Adding context (facts, goals, audience) dramatically improves quality.
- Structured prompts reduce errors and cut down on rewriting or re-drafting.
- Good prompting helps AI support your work — not replace judgment.

## The Bottom Line

- Strong prompts save time and improve consistency across your practice & work



# The RTCF Framework for Legal Prompts

## A Simple System for Consistently Better AI Prompting Results



### R = ROLE

Define who the AI should be: "Experienced Irish solicitor specialising in employment law..."



### T = TASK

State what you need: "Draft a settlement agreement for a constructive dismissal claim..."



### C = CONTEXT

Provide background: "The employee has 8 years' service, claims bullying by line manager, willing to settle for €35,000..."



### F = FORMAT

Describe how you want the output: "Use standard settlement agreement structure, include confidentiality clause, highlight areas needing client-specific customisation..."

📄 **Example Application:** "You are an experienced Irish solicitor [R]. Draft a cease and desist letter [T] regarding trademark infringement, for my Dublin-based craft brewery client, whose logo is being used by a competitor without permission [C]. Use professional but firm tone, cite relevant Irish and EU trademark law, and format as a formal letter ready to send [F]."



# Understanding AI Prompts: The Foundation of Success

Prompt Quality → AI Output Quality

Same tool, dramatically different results.

Poor Prompts = Poor Results

Great Prompts = Transformative Results

Weak Prompt	Strong Prompt
"Review this contract"	"You are an experienced Irish commercial property solicitor [R]. Review this commercial lease for a Dublin retail client [T]. Identify any unusual or unfavourable clauses, excessive maintenance or repair obligations, clauses that may raise issues under Irish law, and any gaps in common retail protections [C]. Present the findings in priority order with clause references [F]."
<b>Result:</b> Generic overview, misses key issues.	<b>Result:</b> Targeted, actionable analysis for the client.

The Difference: Specificity, Context, Format, Clear Expectations.

# Advanced Prompting: Chain of Thought & Iteration

## Two Techniques for Complex Legal Tasks

### Iterative Prompt Refinement

Start broad, then refine based on initial output.

- 1. Initial Prompt:** "Draft a letter of claim for personal injury from a workplace accident"
- 2. Refinement:** "Revise to include specific medical evidence from attached report and emphasise employer's breach of Safety, Health and Welfare at Work Act 2005"
- 3. Further Refinement:** "Strengthen the causation section and add a schedule of special damages"

**Result:** Higher quality output than a single, complex prompt.





# What Does An AI Roadmap Look Like?



# Implementation Roadmap: Month-by-Month Plan

## Realistic Timeline for Irish SME Law Firms (3-6 Solicitors)

Phase	Timeline	Activities	Expected Outcomes
Assessment & Planning	Month 1	• Audit current workflows • Identify top pain points • Research GDPR-compliant tools • Develop an AI strategy & roadmap	Clear priorities and tool shortlist
Pilot Implementation	Months 2-3	• Start with one department • Choose 1-2 tools (e.g., Copilot + Teams Transcription) • Train 2-3 "champions" • Document processes	Early wins demonstrate value
Expansion	Months 4-5	• Roll out to all fee earners • Add specialised tools (Luminance, Harvey or similar) • Integrate with existing systems • Refine based on feedback	Firm-wide adoption and efficiency gains
Optimisation	Month 6+	• Measure ROI and time savings • Advanced training on prompts • Explore additional use cases • Continuous improvement	Sustainable competitive advantage

**Key Success Factor:** Start small, prove value, then scale

# Where Outside Expertise Makes the Difference

**A successful AI integration strategy hinges on both internal commitment and external expertise.**

## Why It Matters

- Most firms don't know where AI will add the most value
  - Ad-hoc adoption wastes time and creates risk
  - Real gains come from redesigning workflows, not just testing tools
  - A structured approach pays back faster
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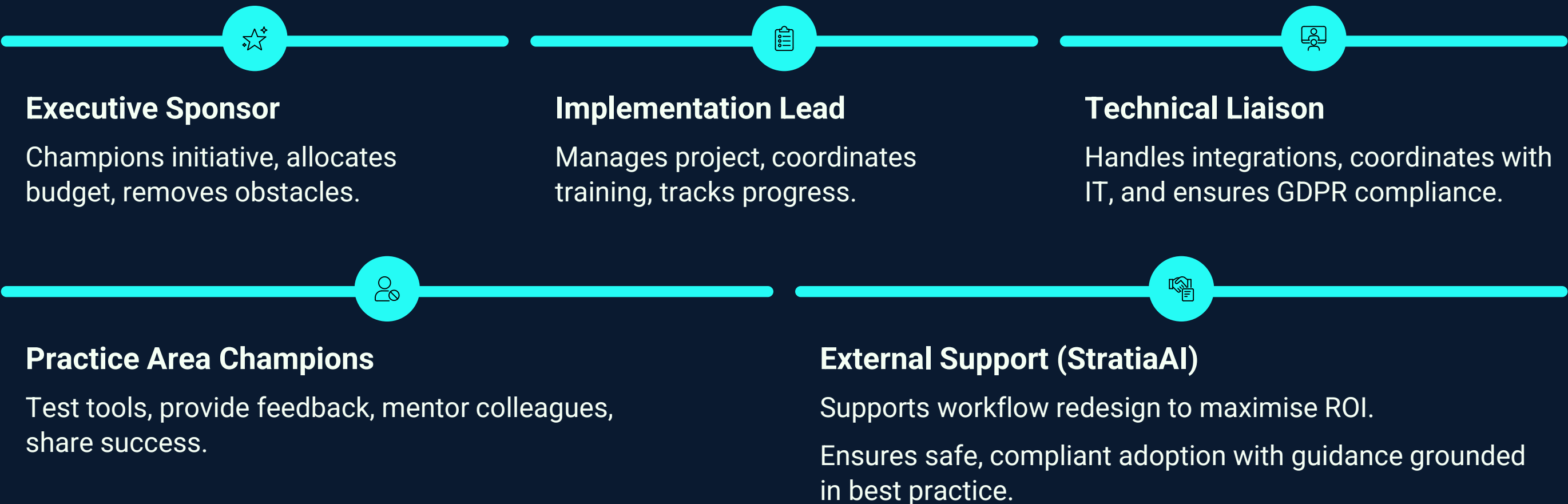
## What Expert Guidance Delivers

- Identification of the highest-impact opportunities for your firm
- Workflow mapping to find hidden efficiency gains
- Compliant, GDPR-safe tool recommendations that fit how you work
- Team training to use AI confidently from day one
- Managed rollout so it doesn't disrupt client work



# Building Your AI Implementation Team

## Roles for Successful AI Adoption



## Time Commitment:

Leads: 2-4 hours/week (implementation); 30 minutes/week (ongoing)

# Curious about where AI fits in your practice? Let's have a conversation

Paul Byrne - StratiaAI



StratiaAI

# Appendix



# TABLE 1 — Core Legal AI Tools (High Trust / Enterprise Grade)

A successful AI integration strategy hinges on both internal commitment and external expertise.

Tool	GDPR Risk (1–5)	Data Residency Transparency (1–5)	Training Controls (1–5)	Security Standards (1–5)	Enterprise Features (1–5)	Suitability (1–5)	Notes
Harvey	5	4	5	4	5	5	Enterprise only. SOC2. No training on customer data.
Luminance	5	4	5	5	5	5	ISO27001 and SOC2. Strong compliance.
Kira Systems	5	4	5	5	5	5	Established due diligence platform.
ContractPodAI	5	4	5	5	5	5	ISO27001. Strong enterprise controls.
Casetext CoCounsel	5	4	5	5	5	5	SOC2. No training on user inputs.
Lexis+ AI	5	4	5	5	5	5	Enterprise legal research AI.
Westlaw Edge AI	5	4	5	5	5	5	High trust compliance posture.
Microsoft Copilot for M365	5	5	5	5	5	5	Best in class for GDPR and privacy.
Teams + Copilot	5	5	5	5	5	5	Full enterprise governance.
Microsoft Bookings	4	4	4	5	5	5	Inherits Microsoft 365 enterprise controls.

Note: it is important to carry out your own due diligence on any tools you're considering using or use an expert to do this work for you.



TABLE 2 – Mid-Tier Tools (Appropriate With Conditions / Enterprise Plan Required)

Tool	GDPR Risk (1–5)	Data Residency Transparency (1–5)	Training Controls (1–5)	Security Standards (1–5)	Enterprise Features (1–5)	Suitability (1–5)	Notes
Juro	4	4	4	4	4	4	SOC2. Suitable for contract workflows.
eBrevia	4	4	4	4	4	4	Enterprise contract analysis.
Definely	4	3	4	4	4	4	Good drafting privacy controls.
Henchman	4	3	4	4	4	4	Precedent management tool.
Clio	4	4	4	4	4	4	GDPR compliant. EU data region available.
Filevine	4	3	4	4	4	4	Uses SCCs for EU compliance.
ActionStep	4	3	4	4	4	4	Cloud case management.
Grammarly Business	4	4	4	4	4	4	SOC2. Suitable for drafting.
TIQ Time	4	4	4	4	4	4	Good compliance.
Notion AI	3	3	3	4	3	3	Enterprise required for sensitive data.
Spellbook	3	3	3	3	3	3	Uses OpenAI backend. Enterprise only.
ZeroTime	3	3	3	3	3	3	Enterprise subscription recommended.
Trint	3	3	3	3	3	3	Use enterprise tier with DPA.
Vatis Tech / Sally	4	5	4	4	3	4	Not suitable for sensitive or privileged matters.

Note: it is important to carry out your own due diligence on any tools you're considering using or use an expert to do this work for you.

# TABLE 1 — Core Legal AI Tools (High Trust / Enterprise Grade)

Tool	GDPR Risk (1–5)	Data Residency Transparency (1–5)	Training Controls (1–5)	Security Standards (1–5)	Enterprise Features (1–5)	Suitability (1–5)	Notes
Calendly	3	2	3	3	3	3	Admin tool. Avoid sensitive details.
OtterPilot	2	1	1	2	1	1	Not appropriate for privileged client meetings.
Vatis Tech / Sally	4	5	4	4	3	4	Not suitable for sensitive or privileged matters.
Gamma	2	2	2	2	2	2	Not appropriate for confidential content.
Canva AI	2	2	2	2	2	2	Consumer-grade. Not appropriate.
Jasper	3	2	2	2	2	2	Marketing tool only. Not for client work.
SurferSEO	2	1	1	2	1	1	SEO tool. Do not use with any client data.

**Note:** it is important to carry out your own due diligence on any tools you're considering using or use an expert to do this work for you.



# Practical Applications: Administration & Practice Management

## Meeting Notes & Actions



Vatis Tech/Sally transcribe meetings & generate action items.  
Solicitors can focus on the conversation.

## Document Automation



ContractPodAI/Juro automate standard document creation (NDAs, agreements) .  
Reduces routine drafting time by 60-70%.

## Email Management



Microsoft Copilot drafts responses and prioritises urgent client emails.

## Calendar & Tasks



Calendly/MS Bookings handle meeting coordination.  
Clio/Filevine/CourtAlert automatically track deadlines.

**Key Tools:** Vatis Tech / Sally, ContractPodAI, Juro, Microsoft Copilot for M365, Clio, Filevine



# Practical Applications: Fee Earners - Client Advice & Correspondence

## Enhancing Client Communications With AI

- **Email Drafting:** Microsoft Copilot for M365 drafts emails in your style, using case details.
- **Client-Friendly Explanations:** ChatGPT Enterprise or Notion AI simplifies complex legal concepts for client documents.
- **Update Letters & Reports:** AI automatically generates progress updates from case management systems (Clio or Filevine).
- **Meeting Preparation:** Harvey AI quickly creates client meeting briefs with status, deadlines, and discussion points.
- **Follow-Up Efficiency:** Vatis Tech captures action items and Copilot auto-generates follow-up emails.

**Key Tools:** Microsoft Copilot for M365, Notion AI, Harvey, Vatis Tech, Clio, Filevine



# Prompt Engineering: Before & After Examples

## Real Scenarios Showing Prompt Improvement Impact

Scenario	Weak Prompt	Strong Prompt (RTCF)	Outcome Improvement
Legal Research	"Find cases about negligence"	R: Litigation solicitor T: Find Irish High/Supreme Court cases (10 yrs) C: Professional negligence vs. solicitors (missed limitation) F: Summarize (citation, facts, reasoning, outcome)	80% more relevant, immediately usable
Client Email	"Write an email to my client"	R: Family law solicitor T: Draft email to client C: Mediation failed; proceed to court (client anxious about cost/time) F: Reassuring/realistic tone, outline next steps, estimate timeline/fees	Professional, empathetic, actionable; minimal editing
Document Review	"Check this contract"	R: Corporate commercial solicitor T: Review shareholder agreement C: Minority investor (€200k) concerned re: exit/decision rights F: Identify problematic clauses, suggest amendments, highlight missing standard protections	Comprehensive, client-focused analysis



# Advanced Prompting: Chain of Thought & Iteration

## Two Techniques for Complex Legal Tasks

### Chain of Thought Prompting

Ask AI to "show your reasoning step-by-step" for complex analysis.

Example:

1

"Analyse whether my client has a valid constructive dismissal claim. Show your reasoning step-by-step: (1) Identify the alleged breaches of contract; (2) Assess whether each breach is sufficiently serious; (3) Evaluate whether my client's resignation was in response to the breaches; (4) Consider any delays or affirmation; (5) Conclude on the overall strength of the claim with reasons."

**Result:** More thorough, logical analysis, mirroring expert solicitor thought.



# Measuring Success: Key Metrics to Track

## What to Measure (Before, During, and After Implementation)

<p><b>Time Efficiency</b></p> <ul style="list-style-type: none"><li>• Hours spent on legal research per matter</li><li>• Contract review time</li><li>• Email response time</li><li>• Document drafting time</li></ul> <p><b>Impact: 40-60% reduction</b></p>	<p><b>Financial Impact</b></p> <ul style="list-style-type: none"><li>• Billable hours captured (reduced write-offs)</li><li>• Cost per matter</li><li>• Tool ROI (savings vs. subscription costs)</li></ul> <p><b>Impact: 15-25% improvement</b></p>	<p><b>Quality Indicators</b></p> <ul style="list-style-type: none"><li>• Client satisfaction scores</li><li>• Error rates in documents</li><li>• Missed deadlines</li><li>• Reduced drafting errors and fewer rewrites</li></ul> <p><b>Impact: 20-30% improvement</b></p>
<p><b>Adoption Metrics</b></p> <ul style="list-style-type: none"><li>• % of solicitors using AI tools daily</li><li>• User adoption by AI tool</li><li>• Training completion rates</li></ul> <p><b>Impact: 80%+ usage target</b></p>	<p><b>Business Development</b></p> <ul style="list-style-type: none"><li>• Response time to new inquiries</li><li>• Pitch/proposal completion time</li><li>• Marketing content publishing frequency</li></ul> <p><b>Impact: 2-3x increase</b></p>	

**Tracking Method:** Monthly dashboard shared with all team members to maintain momentum