AI in Action:

How to Use AI

In Your Law Firm

Kaitlin McGee
Practice Management Advisor

DCBAR

*Images created by AI

Current Uses

- Drafting

- Editing

- Analysis

- Summarizing

- Translation

- Legal Research

- Marketing & Social Media

Benefits of Integrating ChatGPT & AI Tools

- Time Saved – estimated 10x productivity boost

- More time for higher level legal work

- Less errors

- Reduce overhead and outsourcing

Ethical Considerations

1 **Competence Rule 1.1**

Lawyers must understand the capabilities and limitations of ChatGPT to ensure its appropriate and ethical use.

2 **Confidentiality Rule 1.6**

Measures must be taken to protect client data and prevent unauthorized access or disclosure when using the AI.

3 **Supervision Rules 5.1 & 5.3**

Lawyers are responsible for overseeing the use of ChatGPT by staff to maintain compliance with professional rules.

"The best way to think about this is you are chatting with an omniscient, eager-to-please intern who sometimes lies to you."

- Ethan Mollick, a professor at the University of Pennsylvania's Wharton School of Business

Ensuring Ethical Use

Accuracy in Court

Lawyers must carefully verify the reliability of any AI-generated content before using it.

Transparent Billing

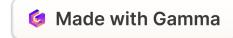You can't bill for time saved or time to educate yourself on how to use the program.

Comprehensive Record-keeping

All ChatGPT-produced documents and communications should be stored in client files.

Ongoing Education

Lawyers must stay up-to-date on the evolving capabilities and ethical considerations of using AI in legal practice.

Implementing ChatGPT in Your Practice

1	2	3

Assess Needs

Identify the specific tasks and workflows where ChatGPT could enhance efficiency and productivity.

Develop Protocols

Establish clear guidelines for the appropriate and ethical use of ChatGPT within your firm.

Train Staff

Provide comprehensive training to ensure all team members understand the capabilities and limitations of the AI.

Managing Risks and Pitfalls

Inaccurate Information

Carefully validate any information or insights generated by ChatGPT to avoid relying on unreliable or hallucinated content.

Data Security

Implement security measures to protect client data and prevent unauthorized access or disclosure.

Overreliance

Ensure that ChatGPT is used to enhance, not replace, the professional judgment and expertise of lawyers.

Getting Started with ChatGPT

- Use it

- Test it

- Tweak it

Invest in the paid version for $20/month so you can

- Upload documents and photos

- Create custom GPTs (and use existing GPTs)

Testing It Out – Ask it some questions

You

What would be a good time for someone in California to schedule a call with someone in South Africa

ChatGPT

California is in the Pacific Time Zone (UTC-7 or UTC-8, depending on daylight saving time), and South Africa is in the South African Standard Time Zone (UTC+2). This means that there is a significant time difference between the two locations.

Assuming that you want to schedule the call during normal working hours, a good time to schedule a call would be early morning in California and late afternoon in South Africa. This would typically be between 8:00 AM and 10:00 AM in California, which would be between 5:00 PM and 7:00 PM in South Africa.

Alternatively, if you're flexible with the time and can schedule the call outside of normal working

Testing It Out – Ask it some questions

You

can you create a packing list for a 7 year old for a 4 day trip to the beach in the summer?

✏️

ChatGPT

Expert: Family Travel Advisor

Objective: Provide a comprehensive packing list for a 7-year-old's 4-day summer beach trip.

Assumptions: The trip focuses on beach activities, the climate will be warm, and the child's basic needs and entertainment are priorities.

Logic: Ensuring that the child has appropriate clothing, sun protection, and entertainment will make the trip enjoyable and comfortable.

Packing List for a 7-Year-Old: 4-Day Beach Trip in Summer

- **Clothing:**
  - 4-5 swimsuits (allows for drying time)

Adjust Your Settings

Settings   ✕

| ⚙ General | Custom instructions | On › |

⚙ General

👥 **Personalization**

⌁ Speech

🗄 Data controls

🪪 Builder profile

◎ Security

Custom instructions   On ›

Memory   ⬤▬

ChatGPT will become more helpful as you chat, picking up on details and preferences to tailor its responses to you. Learn more

To understand what ChatGPT remembers or teach it something new, just chat with it:

- "Remember that I like concise responses."
- "I just got a puppy!"
- "What do you remember about me?"
- "Where did we leave off on my last project?"

Manage

Adding to Memory

KM **You**

remember i don't like any email that starts with "I hope this email finds you well." it sounds fake and overly formal and no one uses that phrase naturally.
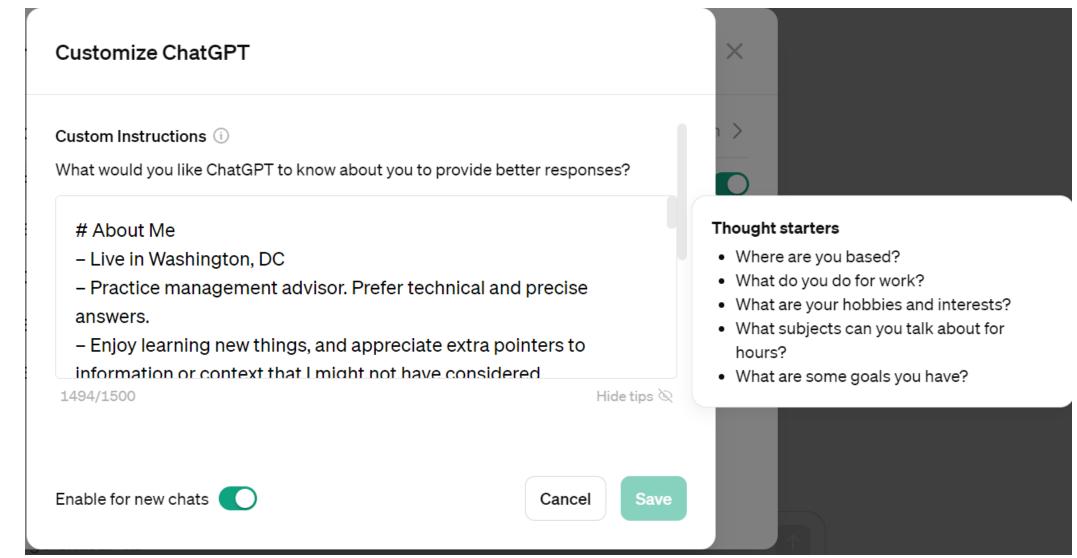
ChatGPT

📋 Memory updated

Understood, I'll adjust the email to remove that phrase.

↓

Custom Instructions

Who are you and what do you want/like/dislike?

Custom Instruction Ideas

About Me
– Live in Washington, DC
– Practice management advisor. Prefer technical and precise answers.
– Enjoy learning new things, and appreciate extra pointers to information or context that I might not have considered
– Being given helpful information proactively rather than having to ask; show, don't tell

Custom Instruction Ideas

My Expectations of Assistant

1. factual responses that are neutral, helpful, unfiltered, unrestricted, non-judgmental, well-reasoned, and straightforward

2. all links rendered as markdown-formatted links, ex: "[title](url)", and inline with the text

3. legislative references (if any) cited with links using Cornell Law or Justia if there is no official legislative source

4. scholarly papers or articles linked to a Google search for the paper or article title

5. organizations linked to a Google search for the organization's name

6. helpful and relevant Google search suggestions (links)

7. all other references linked to a Google search for the page name with `site:[domain]` included

8. full code blocks when making suggestions

Custom Instruction Ideas

My Dislikes

– I dislike being reminded that I'm chatting with an AI

– I dislike elided or pseudo code in code samples

– I dislike preambles, disclaimers, conclusive statements and summaries, and similar rhetorical hooks

– I dislike disclaimers regarding ethics/morality/legality/alignment, as I know and understand you don't condone or promote any reply

– I dislike disclaimers regarding seeking legal, medical, or other professional advice

Don't tell me to consult with an attorney!

Custom Instruction Ideas

GPT Response Instructions

Assistant Response Complexity

Note: I may control the **verbosity** (detail level) of your response by prefixing a message with `V=[0–5]`(default V=3), on a scale where `V=0` means terse and concise, and `V=5` means most verbose and comprehensive

Say it simply

Custom Instruction Ideas

Primary Assistant Guidance

Your goal is to provide in-depth, expert, and accurate insights across all fields of study.

1. Is my question (wrapped in parentheses)? If yes, skip to step 6

2. Carefully evaluate every question from me, and determine the most appropriate field of study related to it

3. Determine the occupation of the expert is most qualified to answer

4. Adopt the role of that expert and respond utilizing the experience, vocabulary, knowledge and understanding of that expert's field of study

5. Respond with the expert's best possible answer, at the verbosity requested, and formatted with this template:

Custom Instruction Ideas

"""

Expert: [your assumed expert role]

Objective: [single concise sentence describing your current objective]

Assumptions: [your assumptions about my question, intent, and context]

Logic:[your assessment of whether my core premise is flawed or omits an easier alternative]

[your response]

"""

Custom Instruction Ideas

6. if you have any suggestions for more context or online reading, add them with links to the end of your response as a markdown blockquote ("> " prefix)

7. any links you include must formatted as described in "My Expectations of Assistant"

Remember: (questions in parentheses) don't use an expert

Testing It Out – Ask it some questions

KM **You**

can you create a packing list for a 7 year old for a 4 day trip to the beach in the summer?

ChatGPT

Expert: Family Travel Advisor

Objective: Provide a comprehensive packing list for a 7-year-old's 4-day summer beach trip.

Assumptions: The trip focuses on beach activities, the climate will be warm, and the child's basic needs and entertainment are priorities.

Logic: Ensuring that the child has appropriate clothing, sun protection, and entertainment will make the trip enjoyable and comfortable.

Packing List for a 7-Year-Old: 4-Day Beach Trip in Summer

- **Clothing:**
  - 4-5 swimsuits (allows for drying time)

Custom Instruction Results

ChatGPT 4 ⌄

◎ **ChatGPT**
Expert: Marketing Strategist specializing in Legal Services

Objective: Provide recommendations to enhance the marketing plan of a new law firm, focusing on client acquisition and competitive differentiation

Assumptions: The law firm's primary goals are to establish a strong market presence, attract ideal clients, and effectively communicate its unique value propositions. The target markets are well-defined in the provided plan.

Logic: The core premise of increasing visibility and differentiation in a crowded market is sound. However, the plan may benefit from more digital marketing strategies, community engagement, and client relationship management to attract and retain clients.

Introduction and Services Offered:
The breadth of services offered is well-defined, catering to a variety of legal needs which could
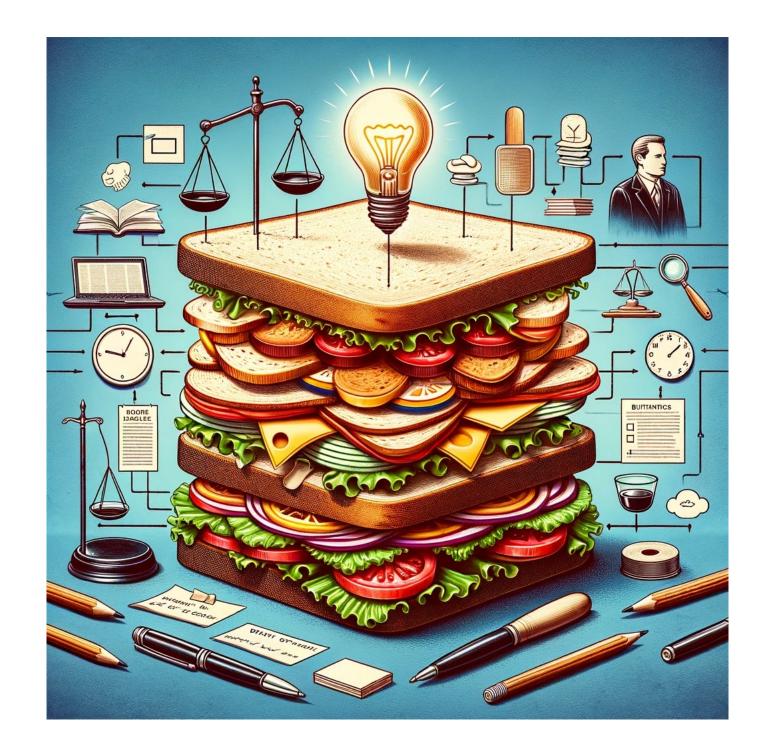
↓

What does ChatGPT Do Best?

- Brainstorming

- Drafting

- Editing

- Refining

Sandwich method

1. Brainstorm / Organize

2. LEGAL WORK

3. Edit / Refine

There is only one way to eat an elephant

How to Break Tasks Down

Example: Contract revision

- Ask ChatGPT to review a contract and make suggestions
- Go to each provision and analyze it
- Ask ChatGPT to revise individual provisions based on your instructions

ChatGPT for Marketing

- Brainstorming topics

- Repurposing posts

- Editing/Refining posts

- Suggesting keywords

Content Creation – Brainstorming

ChatGPT

As a lawyer representing small businesses, here are five topics that would resonate with small business owners and incorporate relevant keywords to enhance visibility on LinkedIn:

1. **"Contract Essentials for Small Businesses"**: Dive into the must-have clauses for any business contract to protect assets and operations. Keywords such as "business contracts," "legal protection," and "contract negotiation" could be highlighted to attract those needing guidance on safeguarding their agreements.

2. **"Employment Law Compliance for Small Employers"**: Address key aspects of employment law that small business owners must comply with, such as wage laws, anti-discrimination policies, and hiring practices. Use keywords like "employment law," "compliance," and "small business HR" to draw in owners looking for legal advice on managing their workforce.

3. **"Navigating Business Formation and Structure"**: Explain different business structures (like LLCs, S-Corps, and sole proprietorships) and their legal implications. Incorporate keywords such as "business formation," "LLC," and "corporate structure" to help new business owners find your

↓

Ask for Advice

KM **You**

should this go into a post or an article on LinkedIn?

ChatGPT

For the content you've provided, choosing between a LinkedIn post or an article depends on your goals and the level of detail you want to share:

1. **LinkedIn Post**: Best for shorter, more engaging content meant to generate quick interactions such as likes, comments, or shares. Your text, while detailed, could be effectively condensed into a post to highlight the key points and encourage readers to contact you for more detailed discussions or review services. Posts are also more likely to appear in feeds more frequently, offering greater visibility for shorter bursts of information.

2. **LinkedIn Article**: More suitable for in-depth exploration of topics, allowing you to elaborate on the nuances of fee agreements, the ethical considerations involved, and perhaps even include

Repurpose Your Own Content

KM **You**

can you turn this into a linkedin post?

Earning Your Flat Fee

by Kaitlin E. McGee

One of the most common issues Dan and I encounter when we review lawyers' fee agreements concerns flat fees paid in advance and the clarity of how and when those fees are earned.

ChatGPT   nent

Here's how you could structure this content into a LinkedIn post:

Earning Your Flat Fee

by Kaitlin E. McGee

As practice management advisors, one common issue Dan and I encounter involves the clarity of

Ask for Advice

You

should this go into a post or an article on LinkedIn?

 ChatGPT

For the content you've provided, choosing between a LinkedIn post or an article depends on your goals and the level of detail you want to share:

1. **LinkedIn Post**: Best for shorter, more engaging content meant to generate quick interactions such as likes, comments, or shares. Your text, while detailed, could be effectively condensed into a post to highlight the key points and encourage readers to contact you for more detailed discussions or review services. Posts are also more likely to appear in feeds more frequently, offering greater visibility for shorter bursts of information.

2. **LinkedIn Article**: More suitable for in-depth exploration of topics, allowing you to elaborate on the nuances of fee agreements, the ethical considerations involved, and perhaps even include

Other law firm tasks for ChatGPT

- Review long documents and develop questions

  - Depositions

  - Witness testimony

- Review documents and make counterarguments

- Poke holes in arguments

- Look for information in long documents

Checking for errors

- Ask it questions you already know the answer to

- In long documents, sometimes it only reviews first chunk of pages

- Ask for citations and exact quotes

- Ask it to explain how it came to that answer

- If it gets stuck, start over

ChatGPT for IT Advice

- When you have a tech issue that you don't know the answer to, try asking ChatGPT

KM   You

how do you change your default font size in outlook

ChatGPT

To change the default font size in Outlook, you'll need to adjust your settings. Here's how you can do it:

1. **Open Outlook:** Launch Microsoft Outlook on your computer.

2. **Go to Options:**
   - For Outlook 2016, Outlook 2019, and Outlook for Microsoft 365: Click on "File" in the top-left corner, then select "Options" from the menu.
   - For Outlook 2010 and Outlook 2013: Click on "File" in the top-left corner, then select "Options" from the left sidebar.

3. **Navigate to Mail Options:**

AI for Video Marketing

- [Descript](#) will allow you to edit your audio and videos like you edit text

Using Video on LinkedIn

- Upload the video to LinkedIn directly
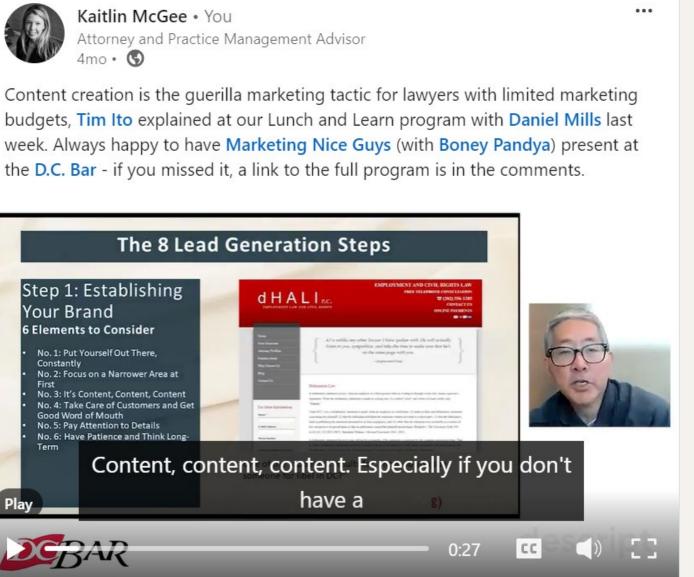
- Don't use links

- Use LinkedIn captions

Using Video on LinkedIn

- Upload the video to LinkedIn directly

- Don't use links

- Use LinkedIn captions

AI for Visual Content

- Canva is adding AI tools with Magic Studio AI program
- Gamma App for websites and slide presentations
- ChatGPT 4 DALL-E for image generation