

# Using AI Responsibly: 3 Compelling Use Cases for Your Law Firm

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# About AllRize

AllRize is a complete, AI-powered practice management solution for law firms seeking to streamline internal operations, improve client experience, and accelerate revenue growth.

Learn more at [allrize.ai](https://allrize.ai).

Built on Microsoft Dynamics 365, AllRize seamlessly integrates marketing, CRM, matter management, document management, and accounting.

AllRize can be deployed as a complete system, or one module at a time and easily integrate with your existing tools.

Powered by Microsoft's Copilot AI technology, it enables firms to deploy AI responsibly – when and where it's needed.

## Agenda for this Webinar

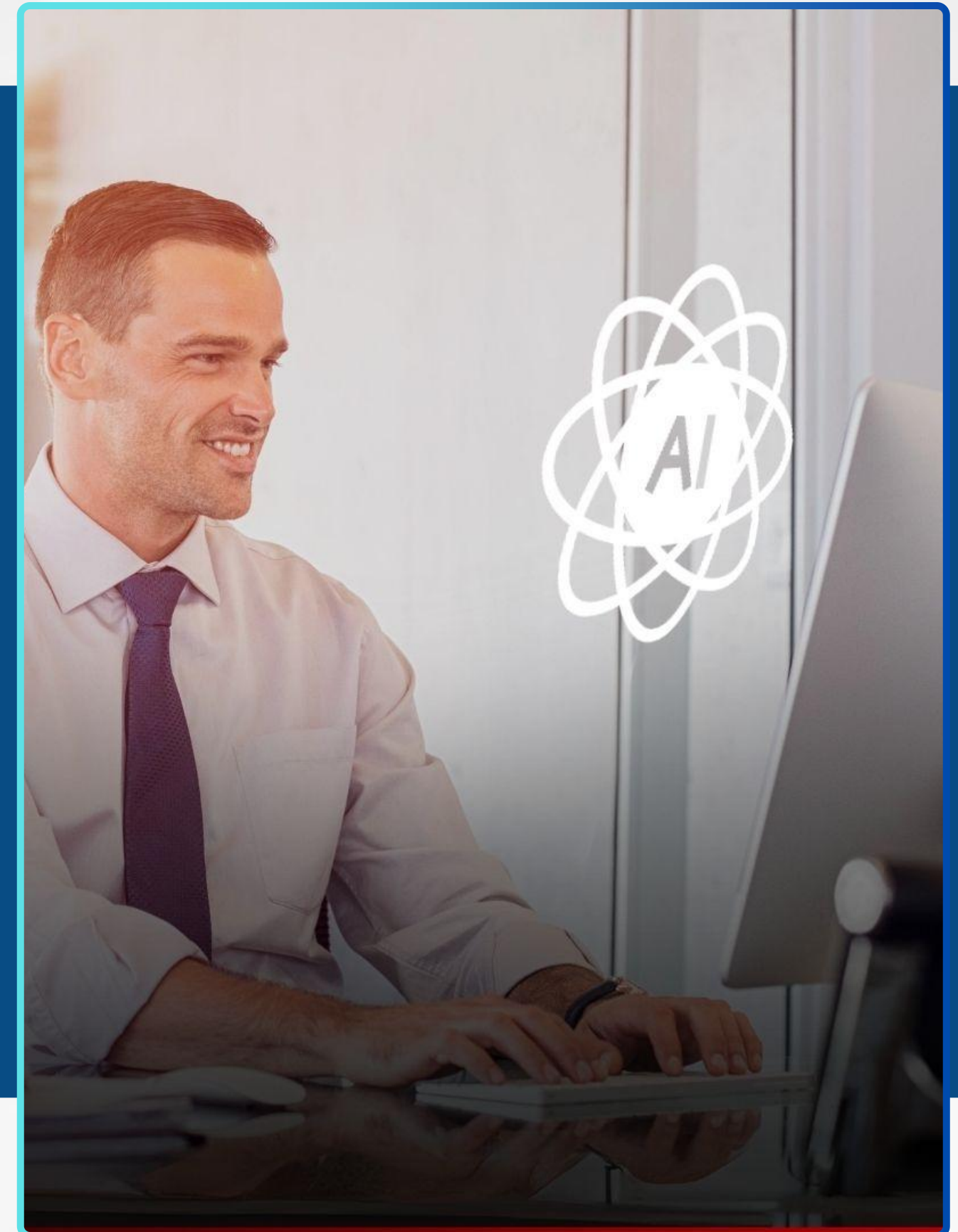
# AI is Changing Everything

A close look at 3 use cases and the value AI delivers

- **Tactical – Document Sorting**
  - AI can automate organization of key documents
- **Strategic – Client Intake**
  - AI can improve the efficiency and effectiveness of your client Intake process
- **Visionary – Business Analysis**
  - AI can provide insight into the performance and growth potential of your firm

We want your feedback!

- We'll ask polling questions after each use case and share the results in real-time



# Confronting a new reality

- The legal industry is being rapidly impacted by advancements in AI
- The changes enabled by AI will be significant and permanent
- To stay relevant and competitive, every law firm must embrace AI

**But where should you begin?**



# AI is Changing Everything

Charting the best path forward

Begin by creating policies that ensure the responsible use of AI

Integrate AI to support and optimize your internal workflows and processes

Leverage a configurable AI engine like Microsoft Copilot to customize tasks

Adopt a “go slow” approach, starting with specific use cases

# Tactical Use Case – Document Sorting

## Problem

Document dump in early phases of a case can take hours just to sort through what you have.

## Solution

Use AI to automate organization, locate documents, and get summaries instantly.

Name	Modified	Doc Type	Tags
Client Share	Yesterday at 11:57 AM		
001031-Jack Lewis Monday, 01 January 0...	Yesterday at 11:59 AM	Email	
Follow-Up on Investigation Pr...	Yesterday at 11:59 AM	Email	
Intake Form.docx	November 19, 2024	Intake Form	paralegal check, Important
Investigation notes.docx	November 19, 2024	Letter	
Jack Lewis_001031 agent.agent	Yesterday at 12:06 PM		
Log files.txt	February 11	Estate Will	
Notes.pdf	November 19, 2024	Not Categorized	Court Docket

- Document Types and Other Attributes Set Automatically based on Intelligence
- Documents organized and sorted based on the content of the document

- Auto-create a standard set of traditional folders based on Practice Areas
- Documents filed in the appropriate folders based on the content of each document.

Document ID	Client	Name	Modified	Doc Type	Tags
		Client Share	Yesterday at 12:04 PM		
		Drafts	Yesterday at 12:04 PM		
		Emails	Yesterday at 12:05 PM		
		Intake	Yesterday at 12:05 PM		
		Letters	Yesterday at 12:04 PM		

# Document Sorting: Responsible AI Considerations

- If you are using prompts to assist, you should have a policy in place - prompts may be discoverable in litigation
- Duty to provide competent representation - double check
- Duty to supervise - know what all staff is doing





# Strategic Use Case – Client Intake

## Problem

- Law firms often use manual processes to sort, vet, and track client leads.
- A high-value prospective client inquiry could get lost or delayed in the process.

## Solution

- Use AI to consolidate, automate, and prioritize lead conversion strategy.

Prioritized with AI

Try to search in your own words

Name	Case Type	Case Sub Type	Predictive Score	Case Grading
Alex Hartley	Business Law	Antitrust	98	Grade A
Yasmine Lewis	Family Law	Paternity	95	Grade A
Xenia Clark	Intellectual Property	Copyright Litigation	94	Grade A
William Adams	Immigration Law	Family Reunification	86	Grade A
Vanessa Hill	Business Law	Antitrust	82	Grade A
Ulysses Wright	Employment Law	Benefits Disputes	77	Grade A
Teresa Green	Real Estate	Title Disputes	75	Grade A
Steven Young	Personal Injury	Nursing Home Abuse	68	Grade B
Rebecca Scott	Criminal Defense	Juvenile Crimes	60	Grade B
Quentin Bell	Family Law	Guardianship	60	Grade B
Penelope Ward	Intellectual Property	Patent Litigation	55	Grade B
Oliver Hughes	Immigration Law	Asylum	49	Grade C
Natalie Edwards	Business Law	Intellectual Property	45	Grade C
Michael Collins	Employment Law	Retaliation	35	Grade C
Laura Mitchell	Real Estate	Zoning Issues	35	Grade C
Kevin Bennett	Personal Injury	Product Liability	25	Grade C
Julia Sanders	Criminal Defense	White Collar Crimes	10	Grade C

Rows: 52

Lead score ⓘ

94 Grade A ↗ Improving

- ▲ Date of incident is <6 months ago ⓘ
- ▲ Practice Area is Relevant ⓘ
- ▲ Referral ⓘ
- ▼ Date of dispute is past statute of limitations ⓘ
- ▼ Client is seeking pro bono representation ⓘ

# Client Intake – Responsible AI Considerations

Who has access to client info?



How is client info stored and deleted?



Which incoming communications are considered 'prospective clients'?

# Visionary Use Case – Business Analysis

## Problem

Many law firms lack tools to assess performance, identify gaps, and execute plans to scale.

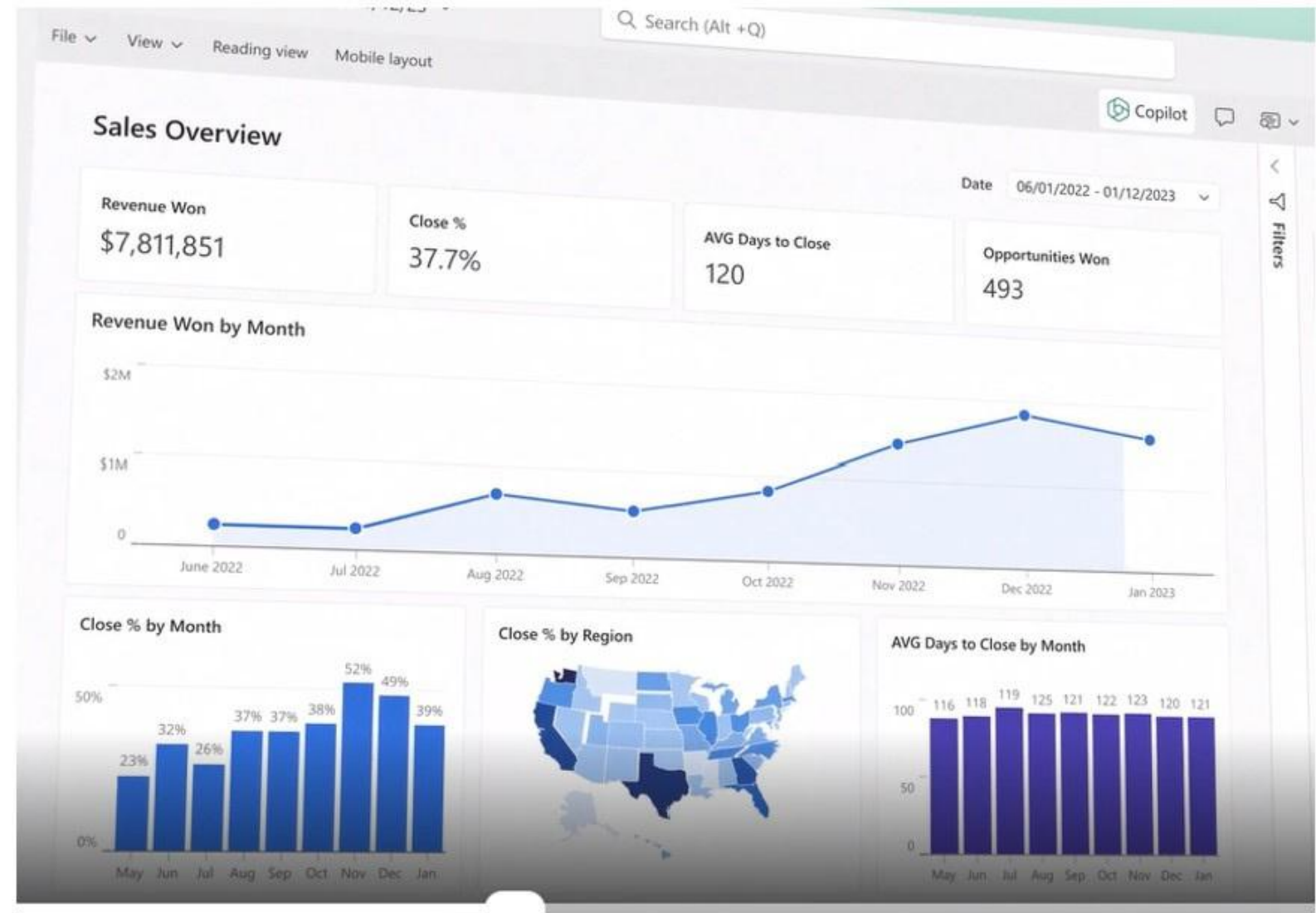
## Solution

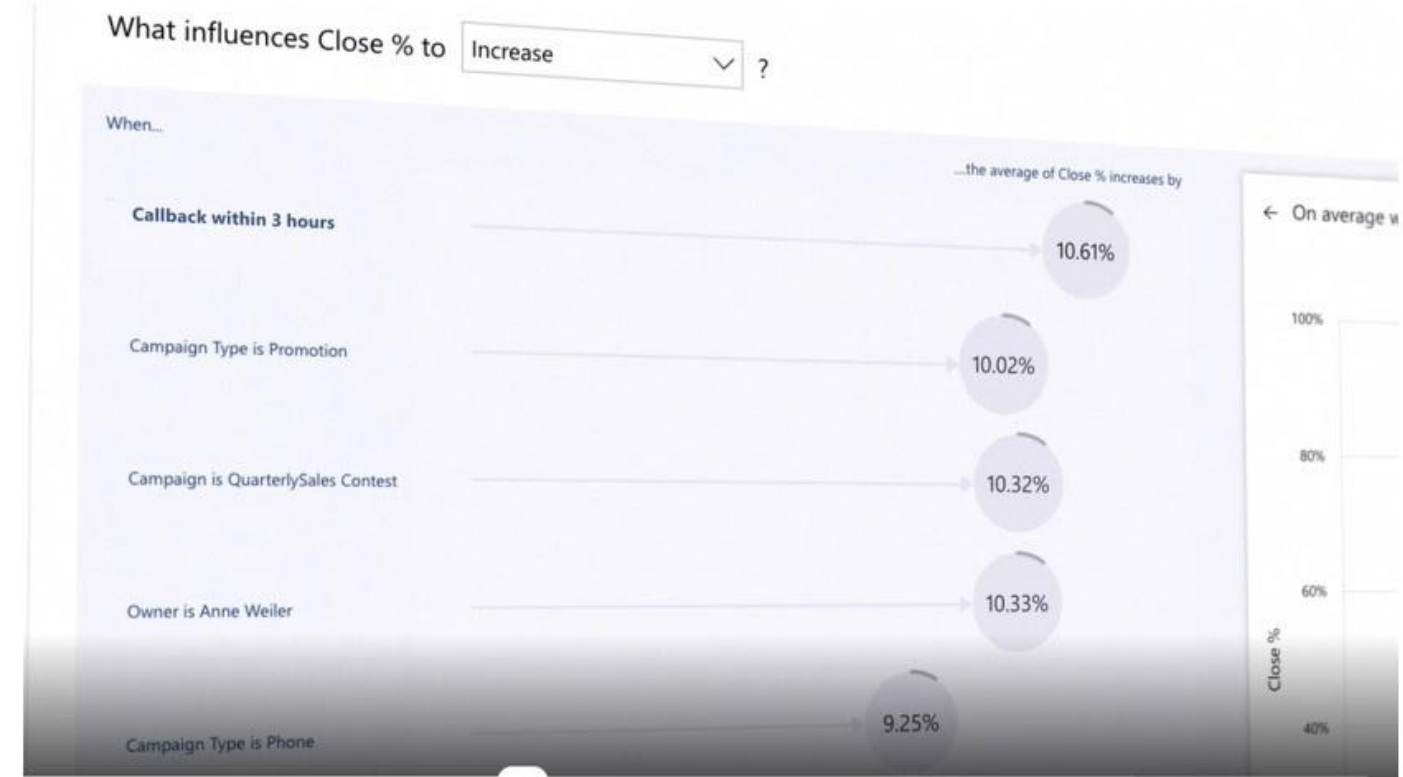
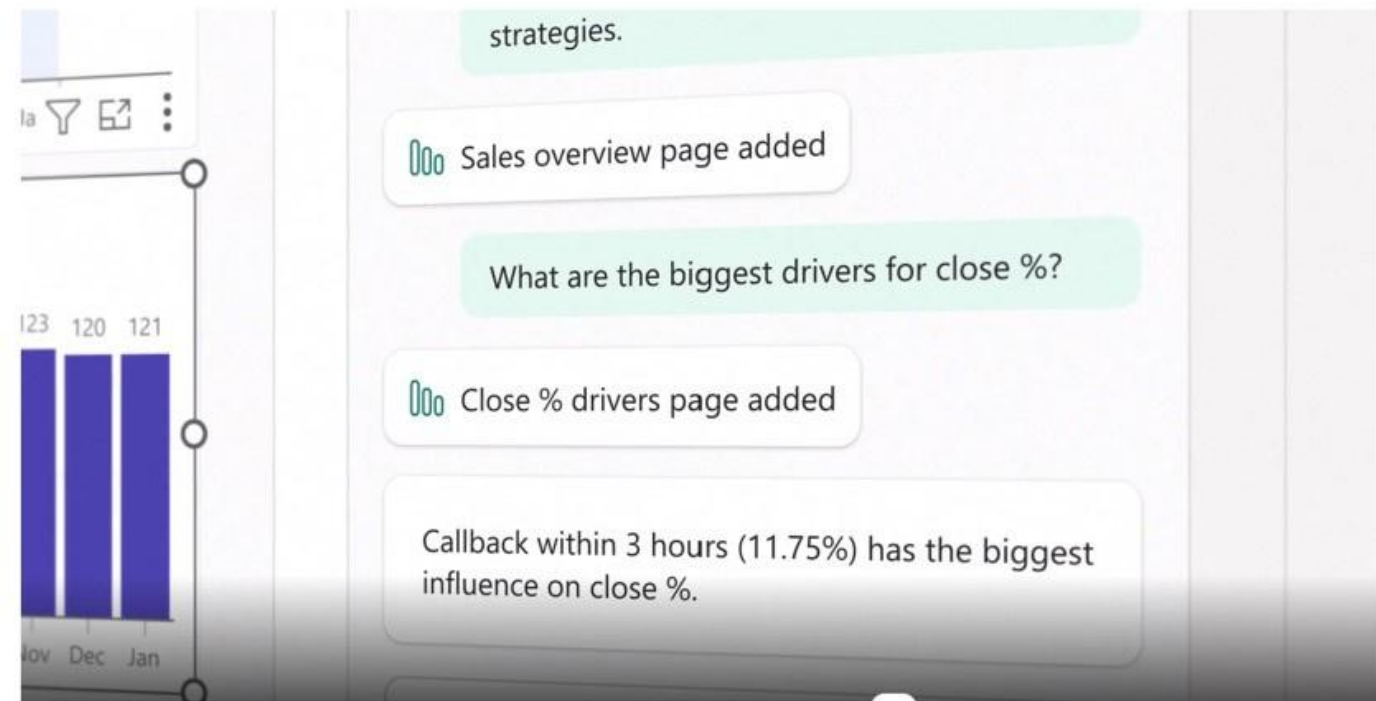
Use AI to analyze all aspects of firm performance to optimize and accelerate business growth.

Help me build a sales report summarizing our key metrics and trends

📄 Sales overview page added

What are the biggest drivers





# Business Analysis – Responsible AI Considerations

- Bias – recommending to not take cases from a particular demographic or neighborhood
- Hallucinations – AI is not yet perfect



# Summary

- AI is here to stay – and its potential value to your firm is significant
- Success starts with implementing responsible use policies
- AllRize with Copilot AI empowers your firm to achieve your AI objectives



# Q&A



# THANK YOU!

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