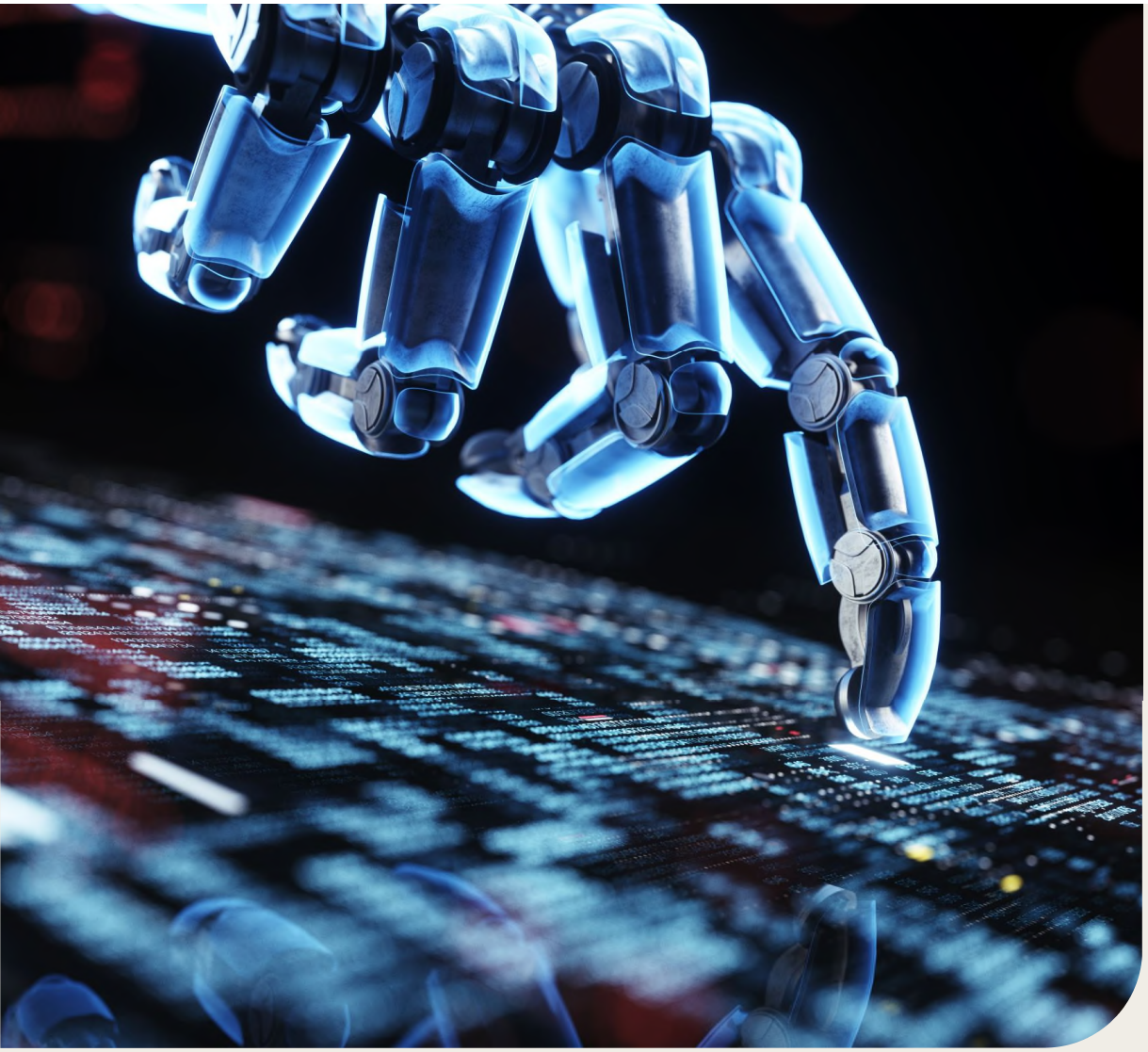
Legal Technology Dos and Don'ts

Bill Ramsey, Womble, Bond





- Evolution of Technology in the Practice of Law
- Emergence of AI
- AI Use and Trends for Lawyers
- Privacy and Cybersecurity
- Trial Tech and E-discovery
- Fun and Useful Gadgets



EVOLUTION OF TECHNOLOGY IN THE PRACTICE OF LAW

Old School Tools in Law



Typewriters in Law

Typewriters were essential for drafting legal documents and formal correspondence in traditional law firms. Created content with in person or recorded dictation.

GONE NOW!



Physical Filing Systems

Physical filing systems organized case files and important legal documents before digital storage. Used a lot of physical space. All trials used paper exhibits.

ALMOST GONE NOW!



Landline Communication

Landline phones were the primary mode for client communication and coordination in law offices. No email communications, maybe voicemail

GONE NOW!

A new model for law firms



Everything is computerized

Centralize matters, files, calendars, billing and knowledge so teams can work securely from anywhere.

CONNECTED

One source of truth



AI-ASSISTED RESEARCH & DRAFTING

Accelerate research, summarize records and create first drafts—with lawyer review and authoritative-source checks.

AUGMENTED

Faster first pass



SECURE CLIENT COLLABORATION

Use protected portals, e-signatures, e-filing and access controls to move work without email-chain friction.

PROTECTED

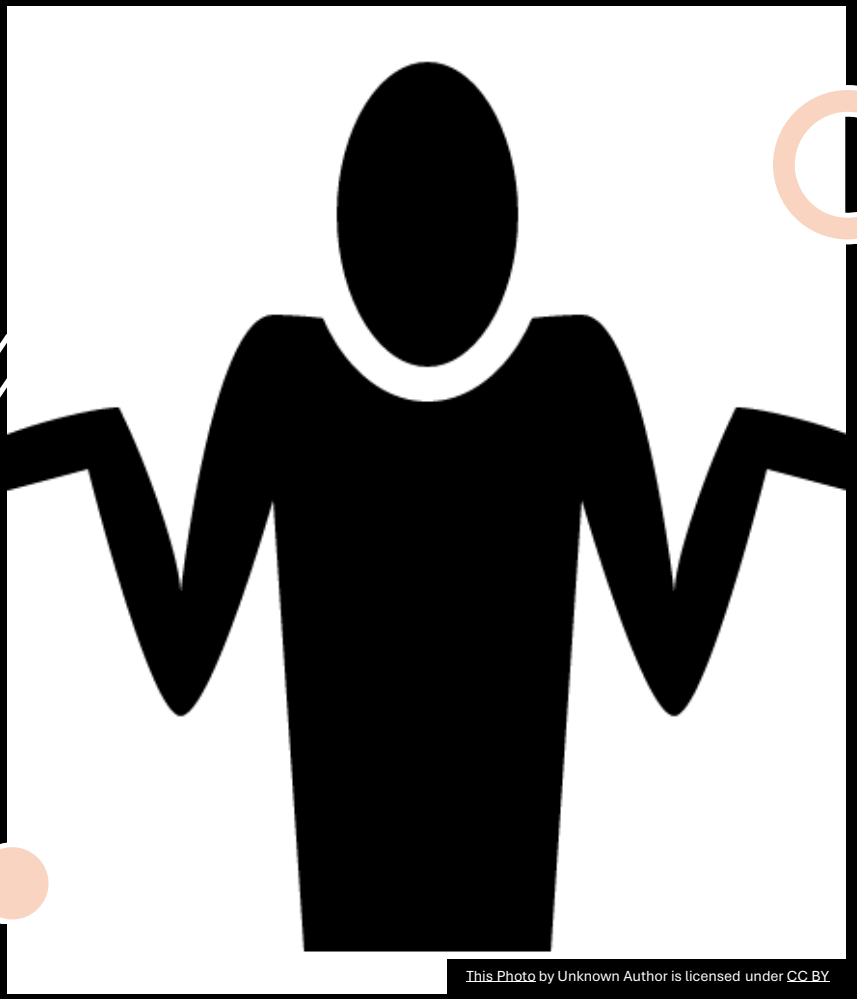
Digital by default

The modern office is a connected system: cloud infrastructure, AI assistance and security work together.

Source: American Bar Association legal technology trends, 2025

How did we get here?

Let’s take a look at history



This Photo by Unknown Author is licensed under CC BY

Legal Technology Through the Years

1980's: WordPerfect era

1990: Microsoft Office

1990: LexisNexis 100,000 searches

1992: AOL for Windows



1995: O.J. Simpson Trial



1996: Trial Director & Sanction

1996: TimeSlips

Legal Technology Through the Years

2000:
Y2K Scare



2003:
Zubulake v.
UBS Warburg

2005:
E-Discovery
FRCP
Changes

2007:
Apple iPhone

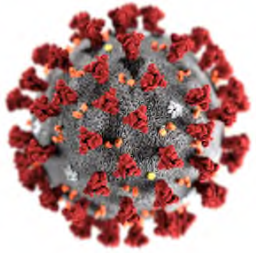


2010:
iPad

2012:
ABA
Technical
Competence

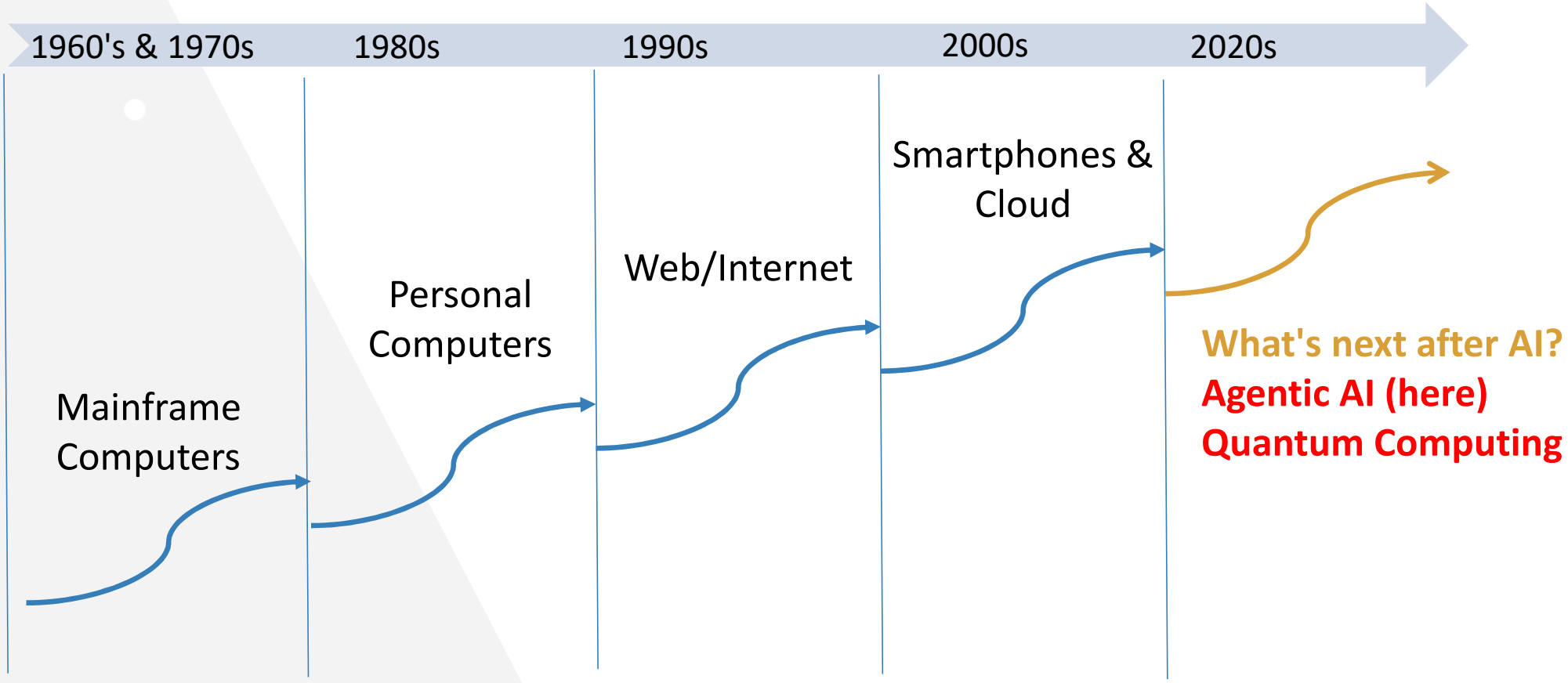
2016:
Panama
Papers
Scandal

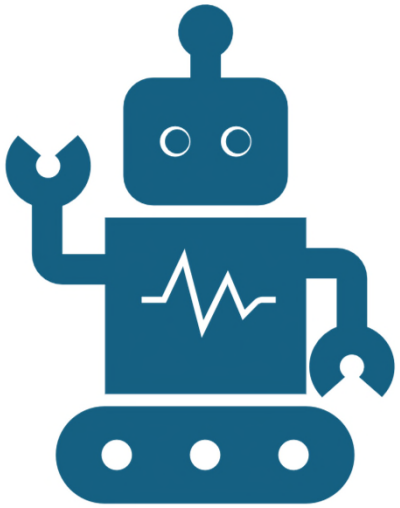
2020:
Covid-19
Pandemic



Artificial
Intelligence
Tools

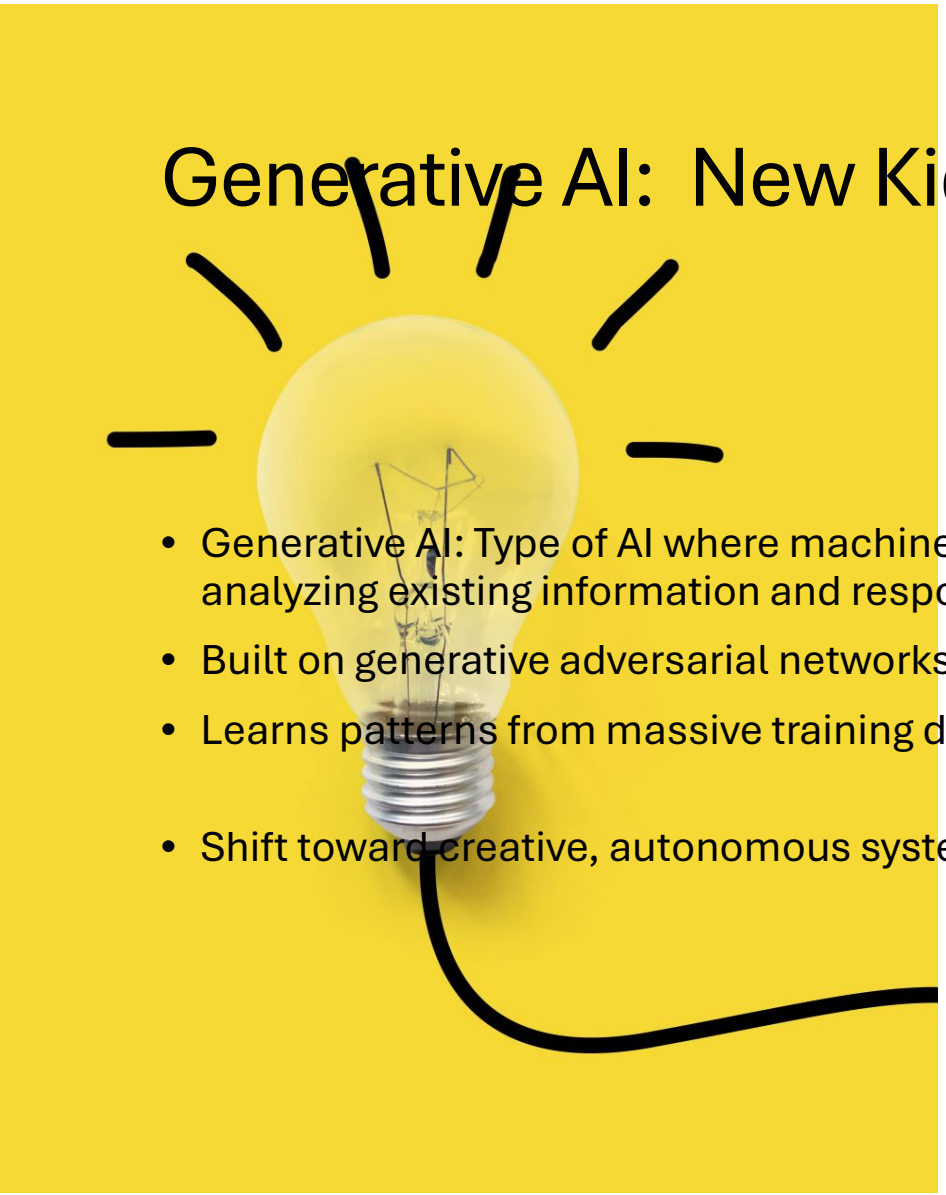
Tech Life Cycles 1970-Current





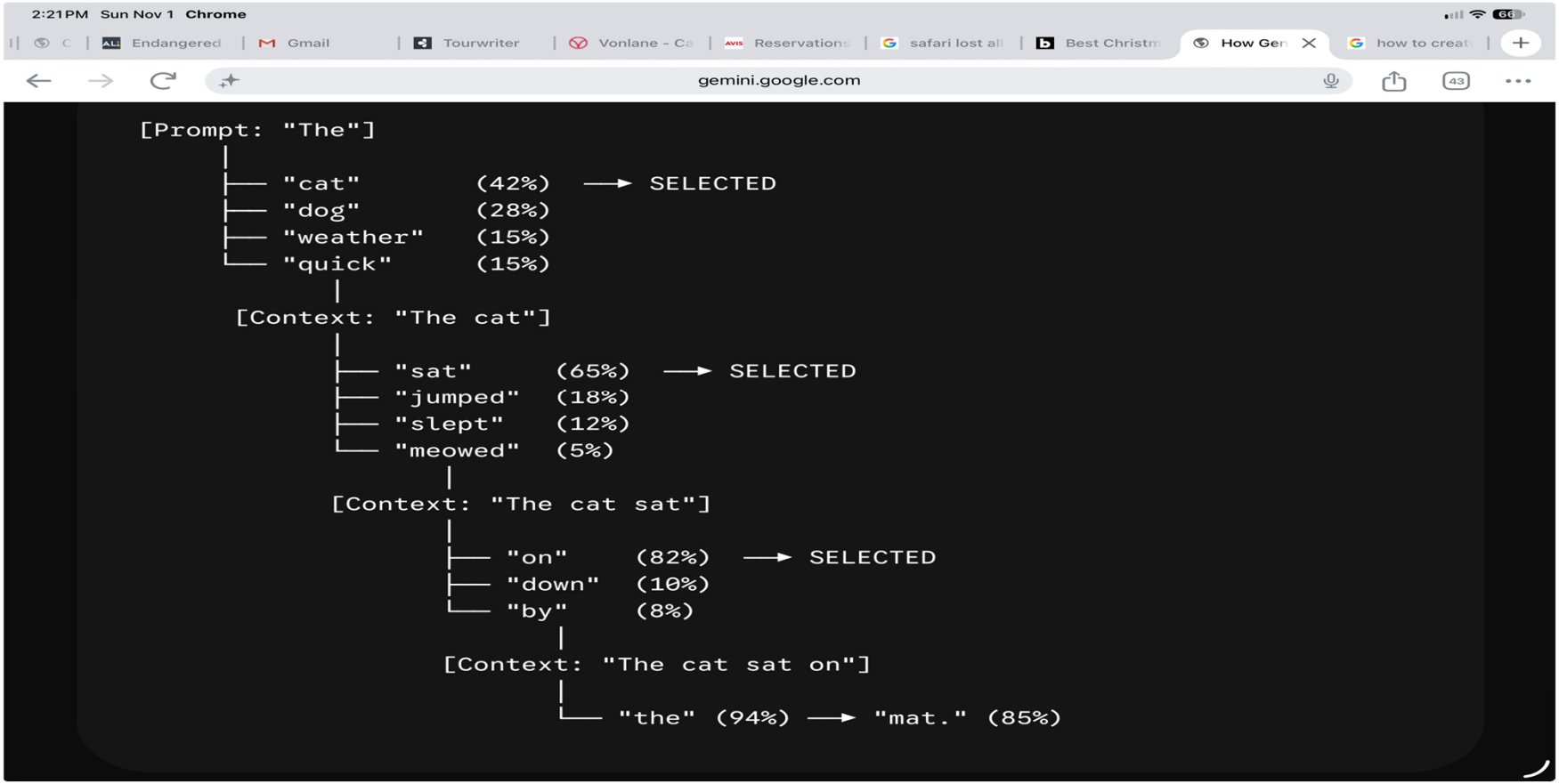
AI – The New Disrupter

Generative AI: New Kid on the Block



- Generative AI: Type of AI where machine creates new, original? content rather than just analyzing existing information and responding to user inputs.
- Built on generative adversarial networks (GAN) to create new content
- Learns patterns from massive training data
- Shift toward creative, autonomous systems

HOW LLMs WORK



AI USE AND TRENDS FOR LAWYERS



There Are Many Use Cases
Here are a Few

Automated Document/E-mail Creation	Contract Drafting and Review	Legal Research	Case Prediction
Due Diligence and Compliance	Discovery	Litigation Strategy	Trial Presentation

But First!!!

ABA Formal Opinion 512

Mississippi Ethics Op. No. 267

ABA FORMAL OPINION 512

Competence	Confidentiality issues	Communication
• Understand capabilities and limitations	• Rule 1.6 • Understand the tool you are using	• Disclosure of use of Gen AI • Tell your client you are using AI • Warn client about AI usage

ABA FORMAL OPINION 512

Candor

- Rules 3.1, 3.3 and 8.4(c)
- Hallucinations
- Some courts require disclosure

Supervisory Responsibility

- Rules 5.1 and 5.3
- Establish policies and know how your folks are using

Fees

- Should inform your client? yes
- How do you charge for using?

Legal Research Applications

- Westlaw Edge and Co-Counsel
- Lexis+
- Vincent AI
- Harvey AI



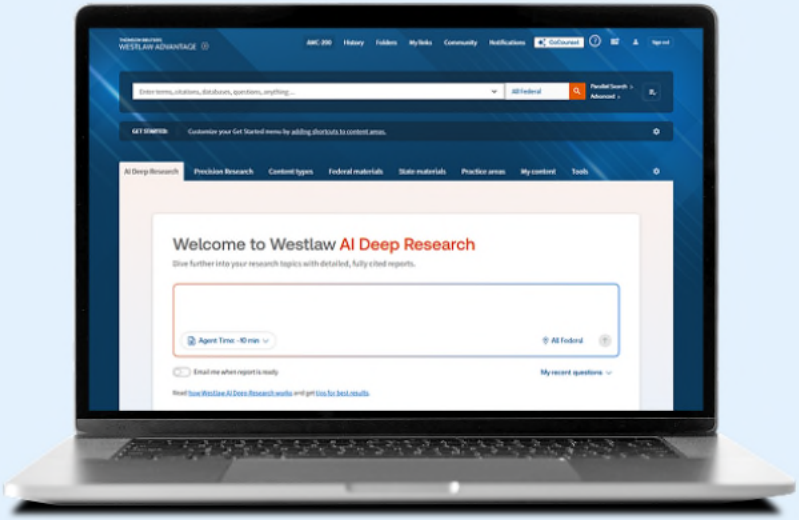
AI legal research

Fast-track your legal research with Westlaw Advantage

Gain deep insights and move seamlessly from research to strategy with the combined power of agentic AI and trusted, industry-leading content

Request free trial

View pricing



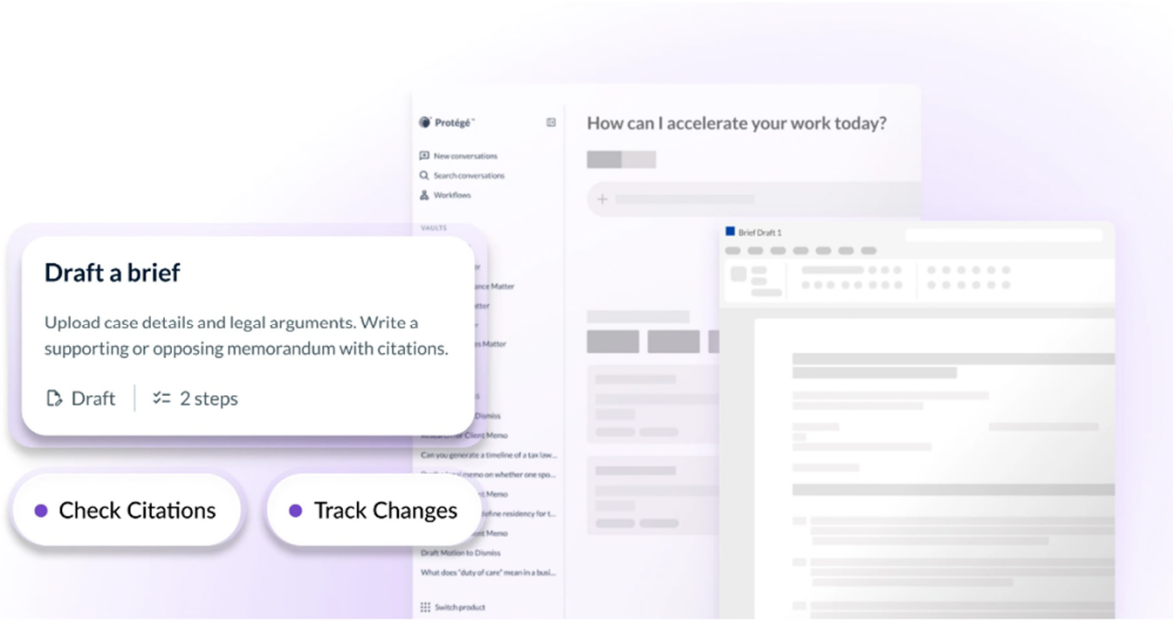
Achieve thorough, accurate results with powerful legal research tools

LexisNexis Protégé™

Turn trusted intelligence into confident work

Request a trial →

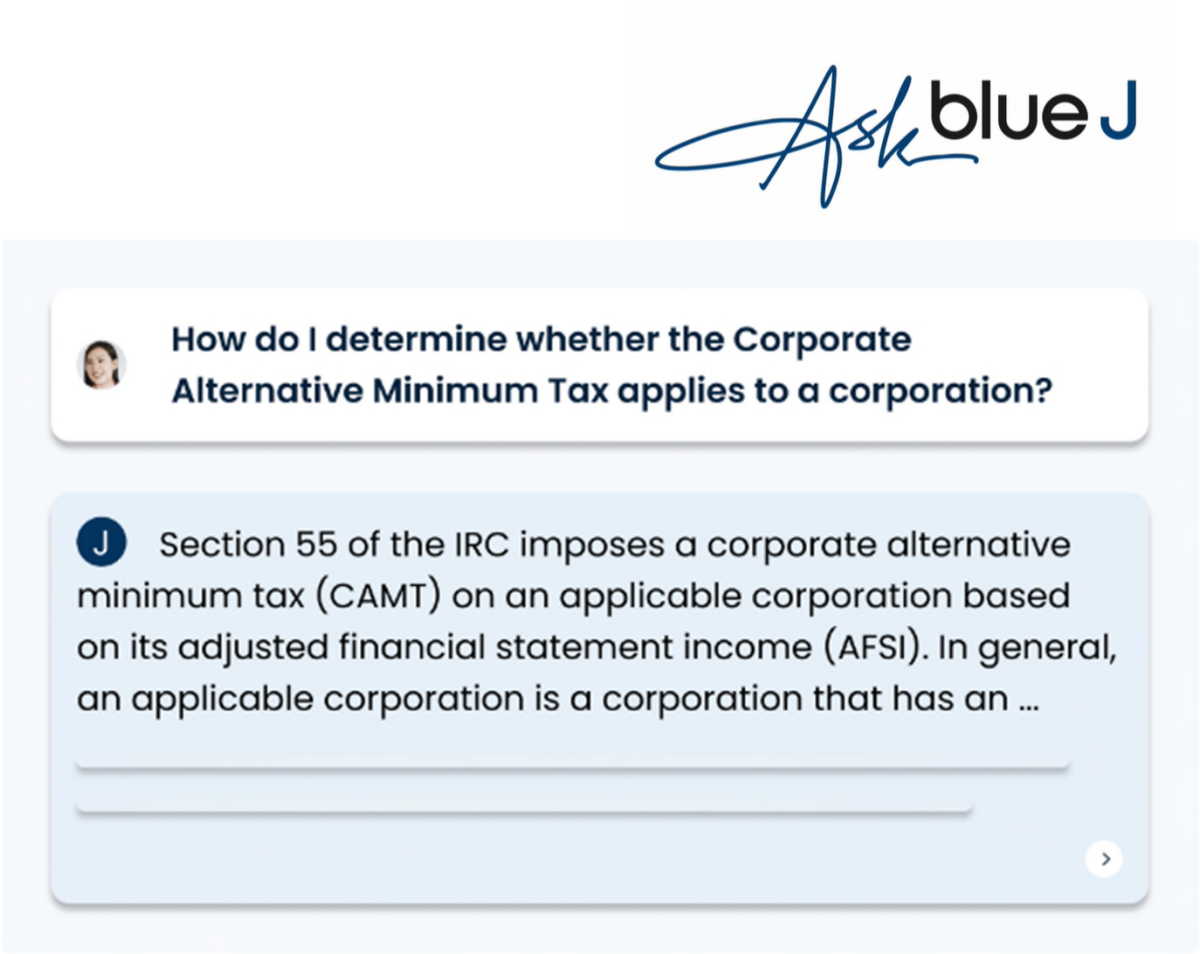
Explore the latest →



LexisNexis Protégé™ is the trusted AI assistant that powers legal work and business intelligence across LexisNexis solutions. It helps professionals deliver work with confidence—backed by exclusive LexisNexis sources and organizational knowledge.

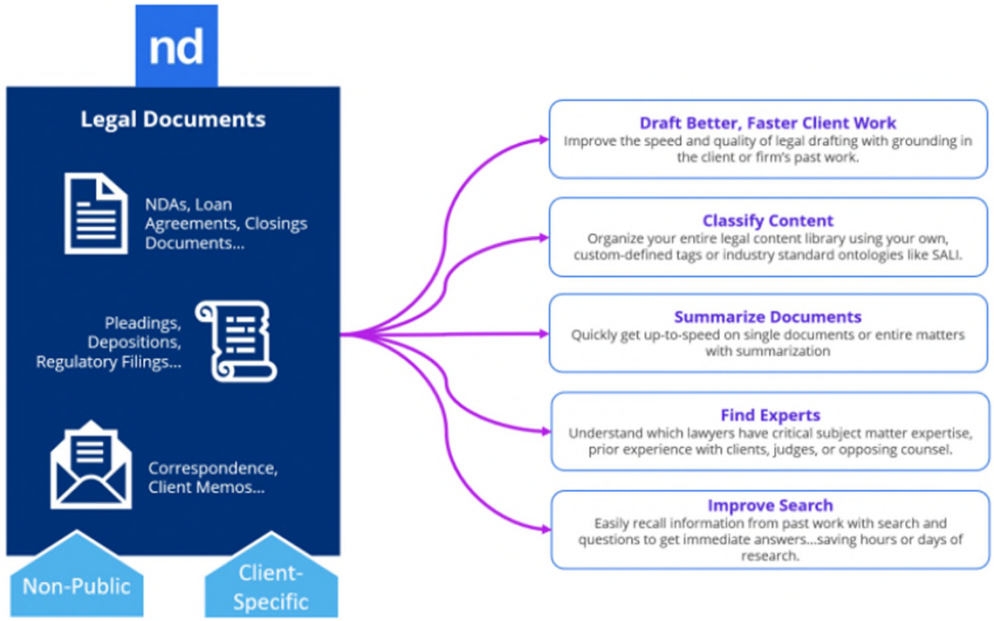
AskblueJ

- Generative AI for tax research
- Trained on massive tax content library
- Data updated daily
- Results supported by relevant sources
- Bluej.com/ask



Net Documents ndMAX

- Generative AI capability embedded in NetDocs
- Organize automations by group
- Generate new content based on internal precedents
- Compare third-party contracts against firm's clause & best practices
- Instantly summarize documents
- Natural language query of documents
- Netdocuments.com/ndmax



Top Generative AI Chatbot Engines

- ChatGPT
- Gemini
- Claude AI (Anthropic)
- Copilot
- Perplexity
- Grok (xAi)

Most Popular AI Legal Tools

- Harvey AI
- Copilot
- CoCounsel (Thompson)
- Lexis AI (with Protégé)
- Claude CoWork (Anthropic)
- Gemini (Google) Notebook LM
- Spellbook

Bankruptcy-Specific AI tools

- Counsel Pro AI
- Best Case
- Next Chapter
- Callidus
- Relaw.ai
- Clio Duo
- Claude/ChatGPT

Problems with Generative AI

Hallucinations: Generative AI can confidently produce plausible but false information, similar to how a dream might feel real.

Lack of Common Sense: Models don't possess true intelligence or common sense; they rely on statistical probabilities from their training data.

Nuanced Understanding: They struggle with subtle human language elements like humor, sarcasm, and irony.

Inability to Distinguish Fact from Fiction: Generative AI cannot easily verify the accuracy of information or distinguish between truth and falsehood.

But these problems are being continuously dealt with

AI Dos and Don’ts

Do	Don’t
Avoid AI “Slop”	Just Copy and Paste

AI Dos and Don’ts

Do	Don’t
Use “Enterprise” Version	Use AI Version That Trains On & Keeps Data

AI Dos and Don’ts

Do	Don’t
Remove Private, Sensitive Data From Prompts	Just Be Lazy and include Personal and Privileged Info

AI Dos and Don’ts

Do	Don’t
“Play Around” With AI – Experiment	Be Afraid Of Using AI

AI Dos and Don’ts

Do	Don’t
Correct	Accept
And	The First
Redirect	Response
All the time	You Get

AI Dos and Don’ts

Do	Don’t
Try Using Voice Mode And Dictate	Use The Keyboard All the Time (Especially on Your phone)

AI Use Tips for Lawyers

- Do not use consumer model
- Warn clients about use
- Try Dictating Prompts
- Double-Check Translations
- Try using on Phone
- Take an AI certification course

AGENTIC AI

Agentic AI is an advanced form of artificial intelligence that focuses on autonomous systems capable of reasoning, planning, and executing complex, multi-step tasks with minimal to no human intervention.

The term "agentic" refers to the system's agency—its ability to act independently and proactively to achieve a specific, pre-determined goal.

HOW AGENTIC AI WORKS



Goal Decomposition – Breaks a complex legal task into manageable sub-tasks automatically



Autonomous Reasoning – Evaluates information, identifies gaps, and decides next steps without prompting



Tool Integration – Accesses legal databases, document management systems, and research platforms



Iterative Refinement – Reviews its own output, cross-checks citations, and improves results before delivery

AGENTIC AI FOR LAWYERS

Agentic AI refers to AI systems that can autonomously plan, reason, and execute multi-step tasks to achieve a goal — without continuous human guidance.

Unlike traditional AI tools that respond to a single prompt, agentic systems can break complex problems into sub-tasks, use external tools, and adapt their approach based on intermediate results.

For lawyers, this means AI that can independently research case law, draft documents, review contracts, and flag risks — acting more like a junior associate than a search engine.

Agentic AI Dangers

- Loss of Control
- Runaway Decisions
- Major Security Risk
- No Transparency
- Failure
- Capable of Generating New Agents

Bankruptcy.ai Agentic tool

Stage 1 — Intake

62% READY

Debtor · Maricopa County, AZ · Chapter 7

- Contact and household details captured (household of 3)
- Credit-counseling certificate on file
- Prior filings check clear — no case in 8 years
- Spouse income figures for the 6-month lookback
- Vehicle payoff statement
- Wage garnishment reported — starts in 19 days

Stage 2 — Document collection

84% READY

Debtor · Pierce County, WA · Chapter 13

- 6 months of pay stubs received and labeled
- 2 years of tax returns matched to the file
- Mortgage statement and arrears figure logged
- Two bank statements missing (Feb, Mar)
- Business profit-and-loss for side income
- Transfer of a titled vehicle 11 months ago — needs review

Stage 3 — Analysis & schedules

93% READY

Debtor · Pima County, AZ · Chapter 7

- Means test run against state median for household of 2
- Exemptions applied to homestead, vehicle, and retirement
- Creditor matrix built from credit report and mail
- Household goods valuation confirmation from client
- Homestead equity within $4,100 of the cap — attorney review requested

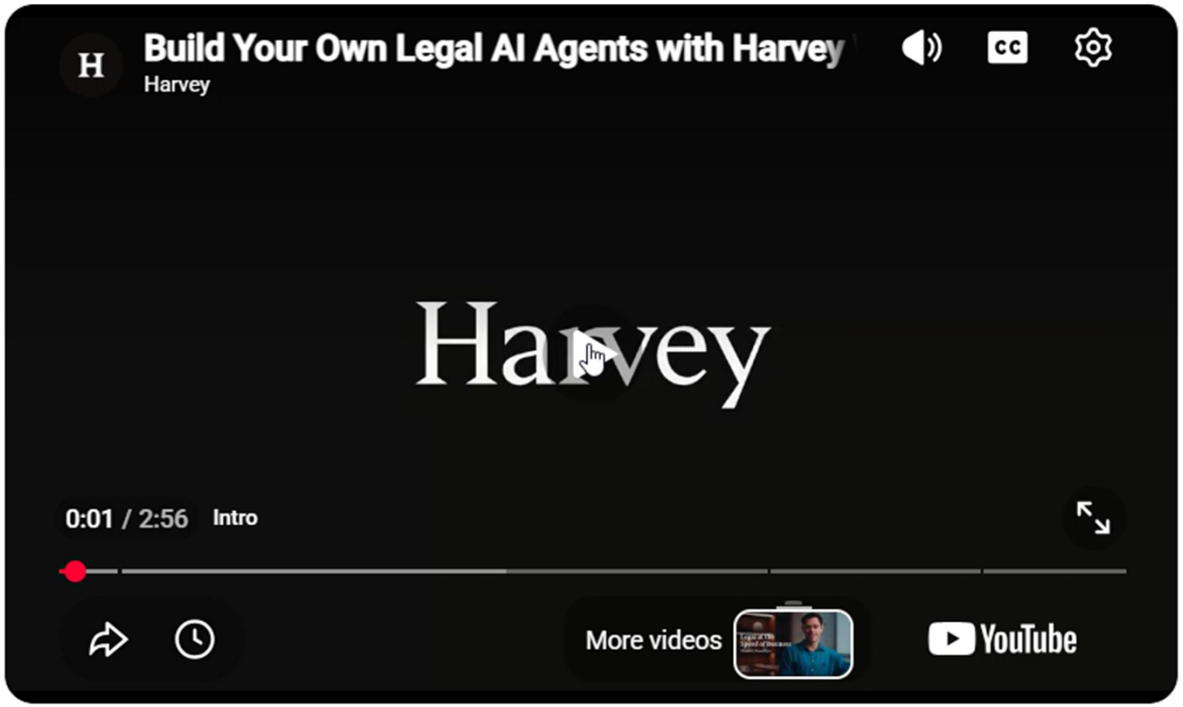
Stage 4 — Petition & trustee delivery

100% READY

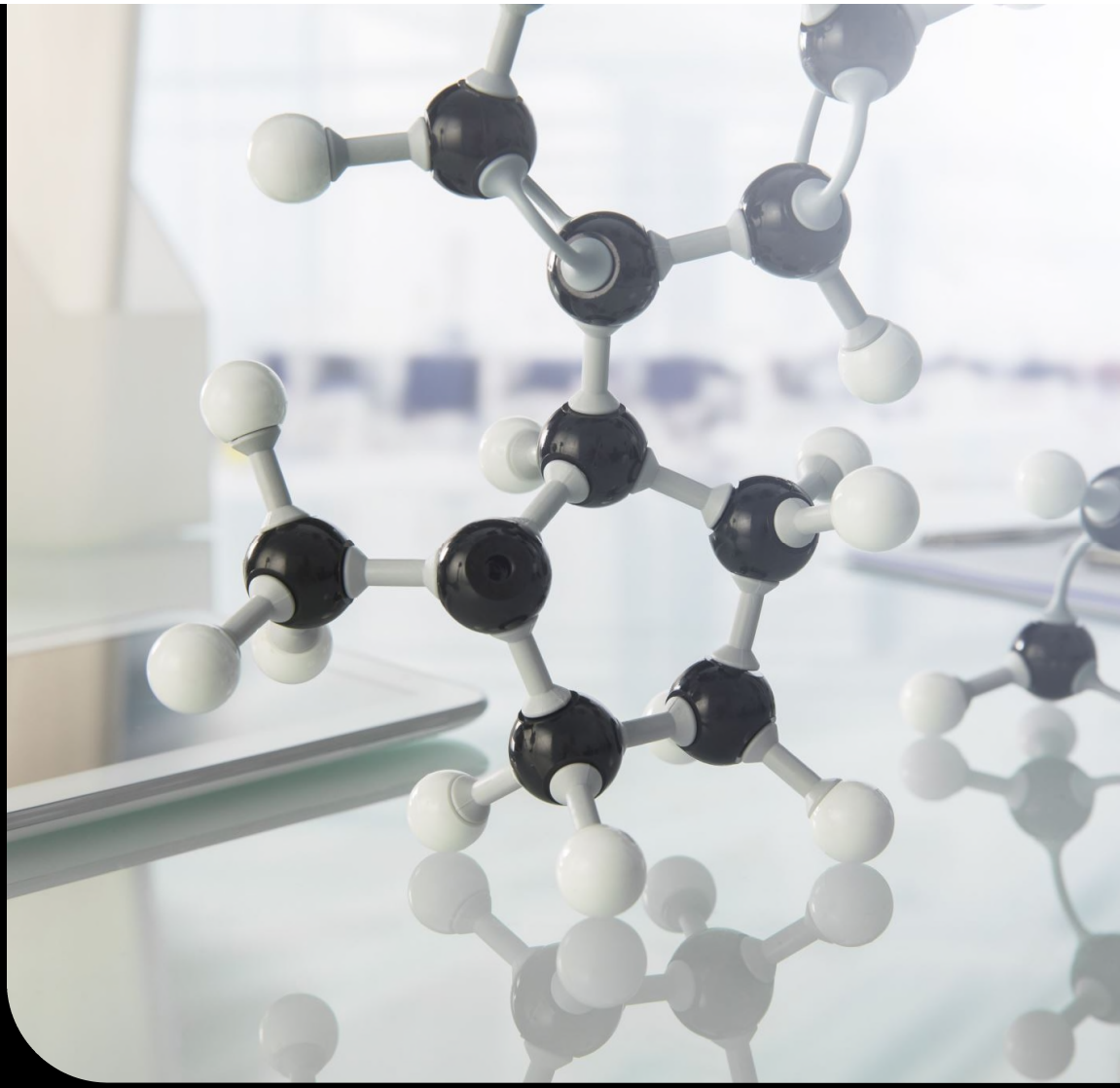
Debtor · King County, WA · Chapter 13

- Schedules exported to petition software without manual re-entry
- Signature pages executed and filed to the case folder
- Trustee packet assembled and delivered
- 341 meeting date calendared with client reminders

Example of how agents are built



Specialized agentic al



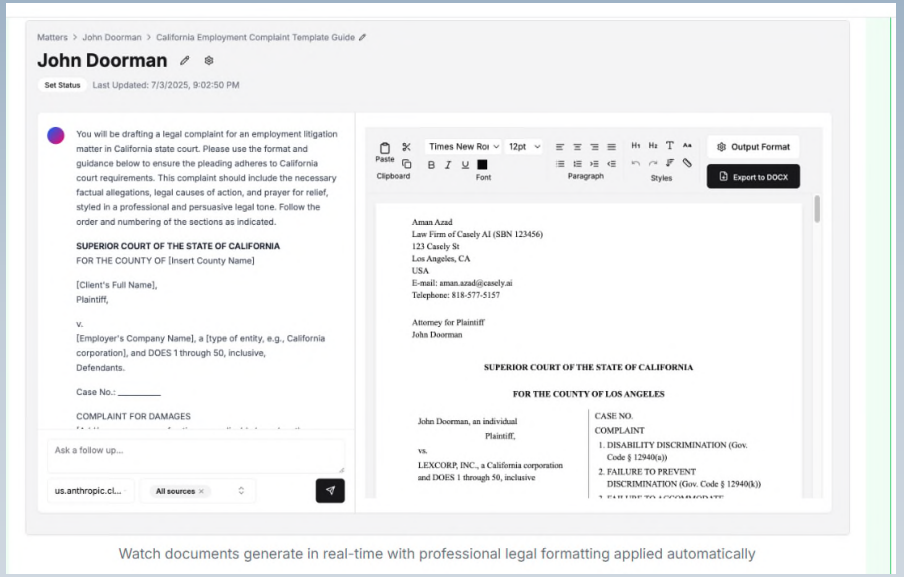
One Example of Agentic AI for a specialized pratice

Casely

AI TOOL DESIGNED SOLELY FOR DUI CASES

Features of Casely

- Jurisdiction-specific template variations
- Court-approved formatting and structure
- Pre-written compliant clauses and language
- Regular updates for law changes
- Dui-specific document types
- Professional pleading paper formatting
- Automated citation and reference formatting
- Can create custom templates
- No Data Training Concerns: Documents stay private and secure



Watch documents generate in real-time with professional legal formatting applied automatically

Casely

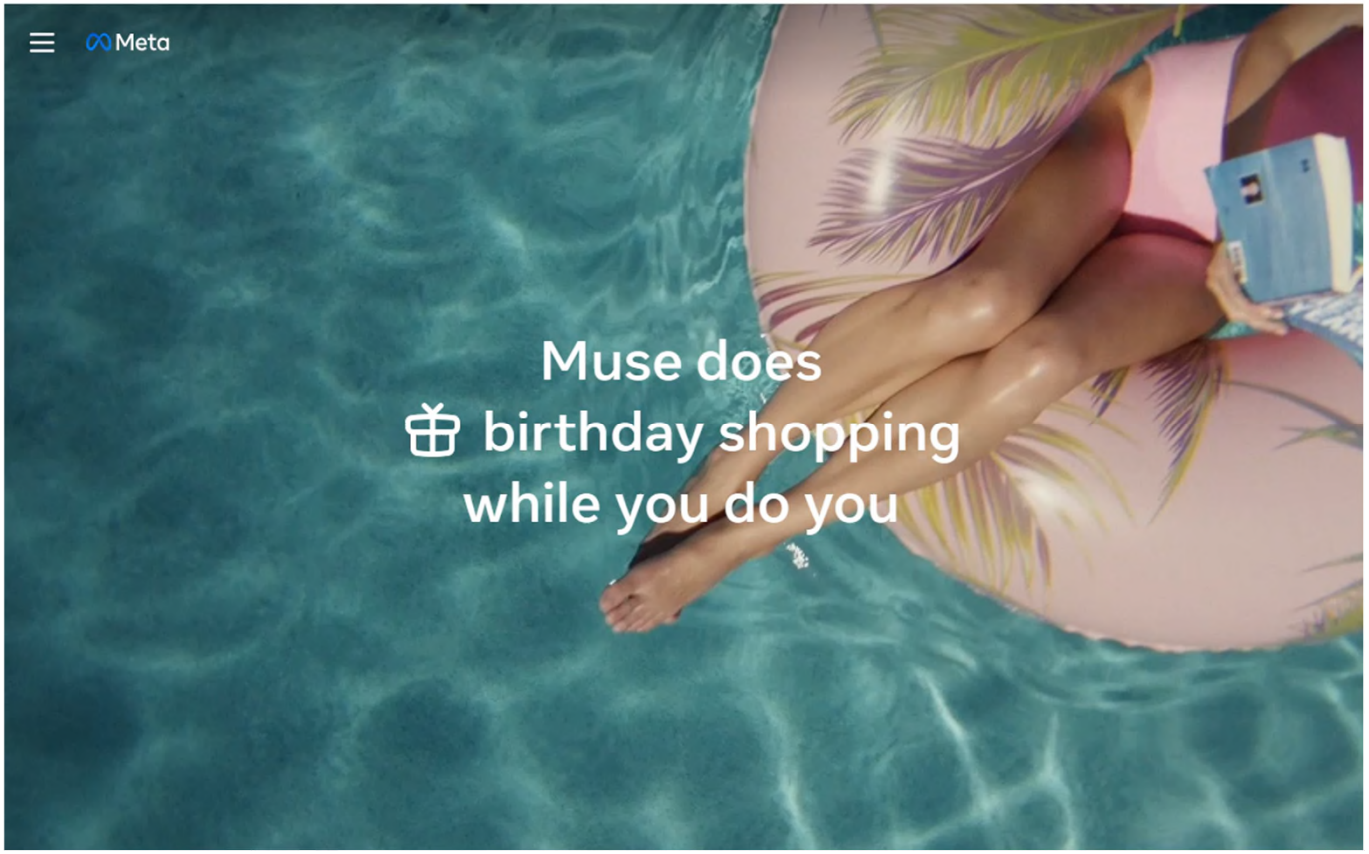
PERSONAL AI AGENTS

- Muse
- Dots
- Instinct
- Claude Duet
- Gemini Spark
- Grok Bot

What are Personal AI Agents?

- Assistants that act for you across email, calendar, your browser and files, and keep working in the background. And some have access to credit card accounts and bank accounts
- **For lawyers:** an agent that can read your inbox can see client confidences. Use enterprise plans, give it as few permissions as possible, and check anything before it sends.

Muse Personal AI Agent



Trial Tech and E-Discovery

Trial Presentation Dos and Don’ts

Do	Don’t
Get evidence organized well in advance	Wait Until The Last Minute

Trial Presentation Dos and Don’ts

Do	Don’t
Practice Using the Tech Ahead of Time	Assume It will “Just Work”

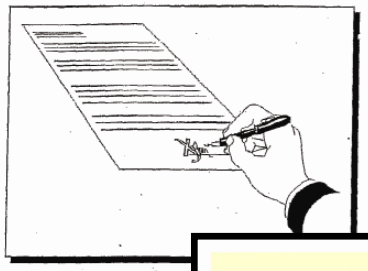
Trial Presentation Dos and Don’ts

Do	Don’t
Place all Videos, Pictures, Etc. On your local computer	Try To use Material from the Cloud

Trial Presentation Dos and Don’ts

Do	Don’t
Use “call outs” When displaying Documents	Just show The Whole Document on The Screen

Fee Agreement



This agreement made on the date of DEC

between the Melbourne MillsLaw Office, refer

Marcia LeuAnne Hughes , re

WITNESSETH: That client empl

client's injuries, actual or potential, resulting f

known as fen-phen, Redux, and Pondimin. Attorney accepts the employment. It is anticipated that attorney will file a class action law suit on behalf of client and others similarly situated against the manufacturers of those drugs. Attorney's fees shall be set by the court, but shall not be more than 30% of client's net recovery. Expenses, if any, will be paid up front by Attorney and repaid off the top before calculation of fee. Client will pay for

M000460

This agreement made on the date of DEC '97,

between the Melbourne MillsLaw Office, referred to as Attorney, and

Marcia LeuAnne Hughes, referred to as Client,

similarly situated against the manufacturers of those drugs. Attorney's fees shall be set by the court, but shall not be more than 30% of client's net recovery. Expenses, if any, will be

ELECTRONIC PRESENTATION ADVANTAGES



- Expedites trial proceedings
- Appeals to different learning styles
- Flow of information controlled

AI-POWERED COURTROOM PRESENTATIONS



- **Call up exhibits** instantly or by voice
- **Auto-annotate** documents
- **Flag contradictions** in witness testimony in real time
- **Generate 3D visuals** and animations on the fly

IMMERSIVE VISUALS AND 3D RECREATIONS



3D laser scanning



Drone footage



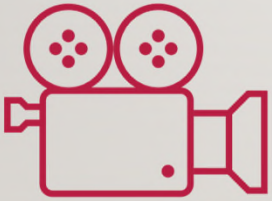
3D-printed scale models



Animated timelines

Used to explain complex forensic, medical and corporate data to jurors

HYBRID AND REMOTE PROCEEDINGS



- **Platforms:** Zoom, Webex and local tools such as LA Court Connect
- **Hybrid depositions**
- **Virtual witness testimony**
- **Remote mock-trial research**
- All now routine practice

DEEPFAKES IN EVIDENCE



- **Fakes are already in court:** a California judge dismissed Mendones v. Cushman & Wakefield (2025) over AI-generated witness videos
- **Verify before you offer:** get original files, metadata and chain of custody
- **Expect the deepfake defense:** opponents may call real evidence fake, so corroborate it
- **No AI-specific rule yet:** proposed FRE 707 and 901(c) remain under study
- **Ethics:** never offer evidence you know or reasonably believe is false (Rules 3.3, 3.4)

Elmo TT-12G Visual Presenter

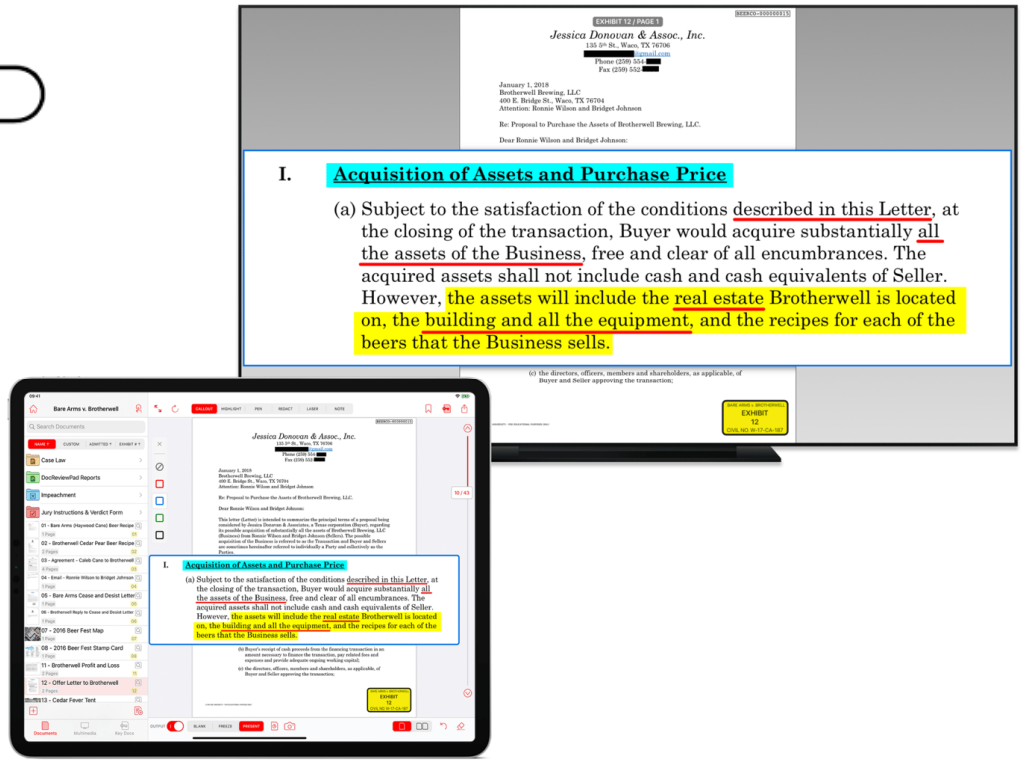
- Ultra compact
- 192K zoom in 4K
- 6 lbs
- Digital document camera
- HDMI input/output
- Connect to laptop
- Use for court / mediations
- $1,065
- www.elmousa.com



Trial Presentation Software

TRIALPAD

- www.litsoftware.com
- Available from App Store
- iPad or Mac
- Several apps come with bundle (transcripts, doc review, timeline, exhibits
- 7-Day Free Trial



TRIAL PRESENTATION PLATFORMS

OnCue	TrialDirector	Sanction

What these platforms do best

Transcript syncing	Video-clip editing	Exhibit control
Deposition video synced to the transcript	Clips cut and queued for playback quickly	Zoom, highlight and call out exhibits live

LINEAR PRESENTATION TOOLS

- PowerPoint (Windows)
- Keynote (Apple)
- Prezi (Cloud)



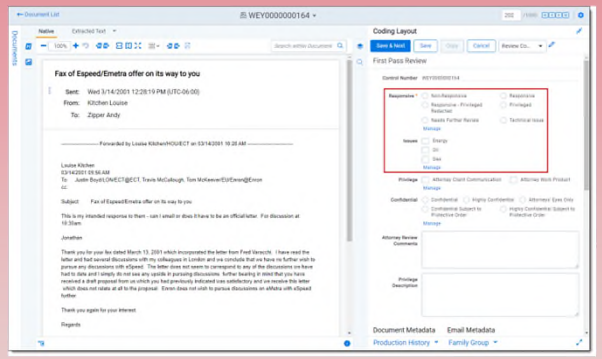
E-Discovery

LATEST TRENDS IN EDISCOVERY TECHNOLOGY

- **Generative AI review** scores documents from a plain-language description of the issues
- **AI included in platform pricing** at Relativity and Everlaw
- **AI agents** that plan and run multi-step review tasks
- **Review platforms connected** to CoCounsel, Harvey and Microsoft Copilot
- **Chat and mobile data** now part of most matters
- **Courts defining standards** for validating AI-assisted review

AI-POWERED REVIEW PLATFORMS

- **RelativityOne:** aiR for Review and aiR for Privilege now standard
- **Everlaw:** free AI Assistant; links to CoCounsel, Harvey and Copilot
- **DISCO:** Auto Review and agentic Advanced Research
- **Reveal:** reviewed evidence flows into CoCounsel Legal



Relativity

FROM KEYWORD SEARCH TO AI AGENTS

Keyword search	TAR 1.0	TAR 2.0	Generative AI	AI agents
Exact terms and Boolean logic; still the first cull in about 40% of matters	Attorneys code a seed set; a model predicts relevance	Model retrains as reviewers code; today's default	Lawyers describe the issues in plain language; an AI model scores each document	Plan, run and check multi-step review tasks, then hand off for attorney sign-off

Source: Agentic eDiscovery, "What is agentic eDiscovery? A 2026 taxonomy" (Apr 2026).

ARTIFICIAL INTELLIGENCE IS CHANGING EDISCOVERY

- **Data now goes well beyond email**
  - 43% of practitioners see chat app data in most cases; 38% see phone data
  - Disappearing messages must be preserved once litigation is likely
- **AI does more than review**
  - Drafts privilege calls, summaries, timelines and deposition outlines
- **Defensibility is the open question**
  - Expect rulings on validating, sampling and disclosing AI review
- **Lawyers stay accountable**
  - Verify AI output before it shapes a production



E-Discovery Dos and Don’ts

Do	Don’t
Send a Legal Hold As Soon As Litigation Is Likely	Wait Until The Data Is Already Gone

E-Discovery Dos and Don’ts

Do	Don’t
Spot-Check AI Review Results	Rely on Search Terms Alone

E-Discovery Dos and Don’ts

Do	Don’t
Collect Texts, Slack and Teams Chats	Assume Email Is the Only Evidence

E-Discovery Dos and Don’ts

Do	Don’t
Get a 502(d) Clawback Order Early	Produce Without A Privilege Review

Privacy and Cybersecurity

Cyber Threats

Data Growth

System Vulnerabilities

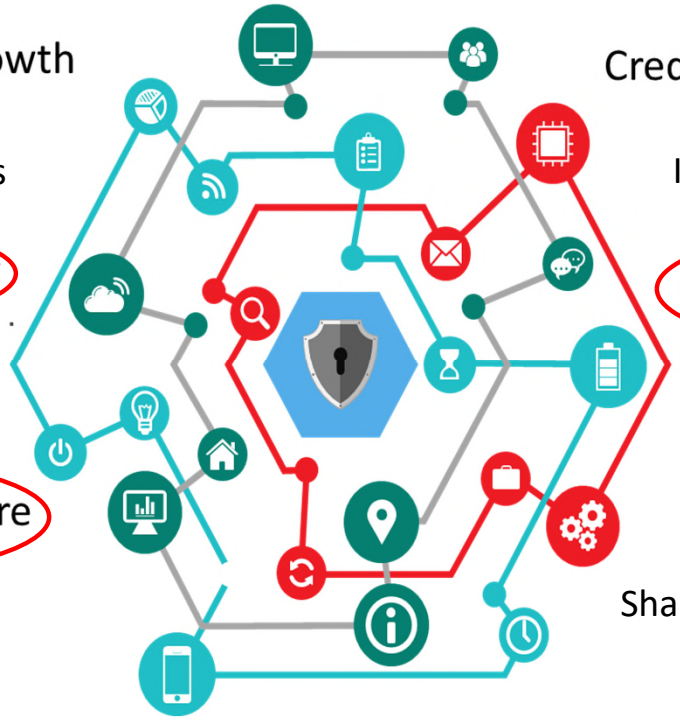
Email/Spearphishing

Malicious Insiders

Advanced Threats

Ransomware/Malware

Third Party Exposure



Credential Theft/Password Re-use

Identity Management

Intellectual Property Theft

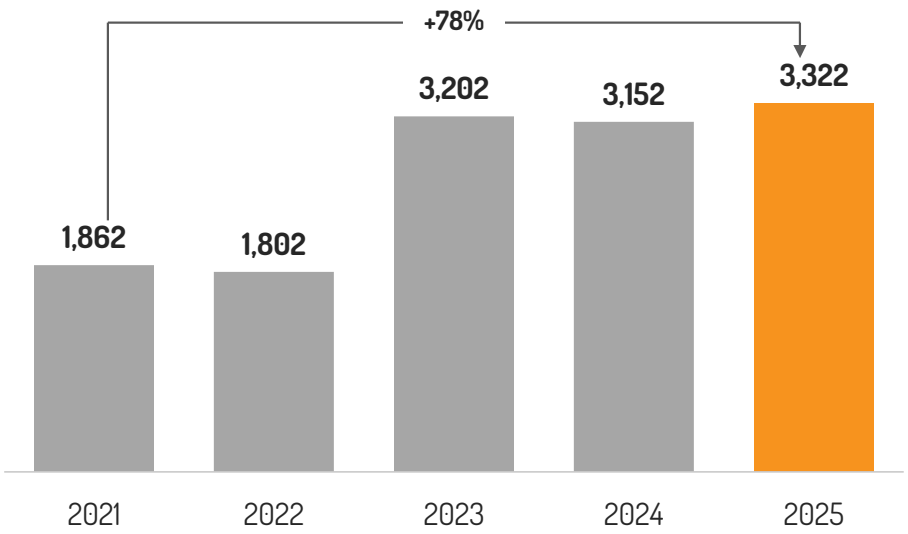
Insecure API/Interfaces

Denial of Service

Shared Technology Vulnerabilities

Data Loss Trends

U.S. data compromises per year



- **3,322** U.S. data compromises in 2025, a record high[1]
- **48%** of breaches involved a third party, up from 30% a year earlier[2]
- **Ransomware** appeared in 48% of breaches[2]
- **Professional services**, which includes law firms, was the third most-breached industry with 478 compromises[1]

1. Identity Theft Resource Center, 2025 Annual Data Breach Report (Jan 2026). 2. Verizon, 2026 Data Breach Investigations Report.

Cybersecurity Do's and Don'ts for Lawyers

DO

- ✓ **Turn on multi-factor authentication** for email, cloud and practice software
- ✓ **Encrypt** laptops, phones and client files sent outside the firm
- ✓ **Confirm wire instructions by phone** using a number you already have
- ✓ **Install updates promptly** on every device and app
- ✓ **Vet vendors' security** before sharing client data
- ✓ **Keep an incident response plan** and know when to notify clients

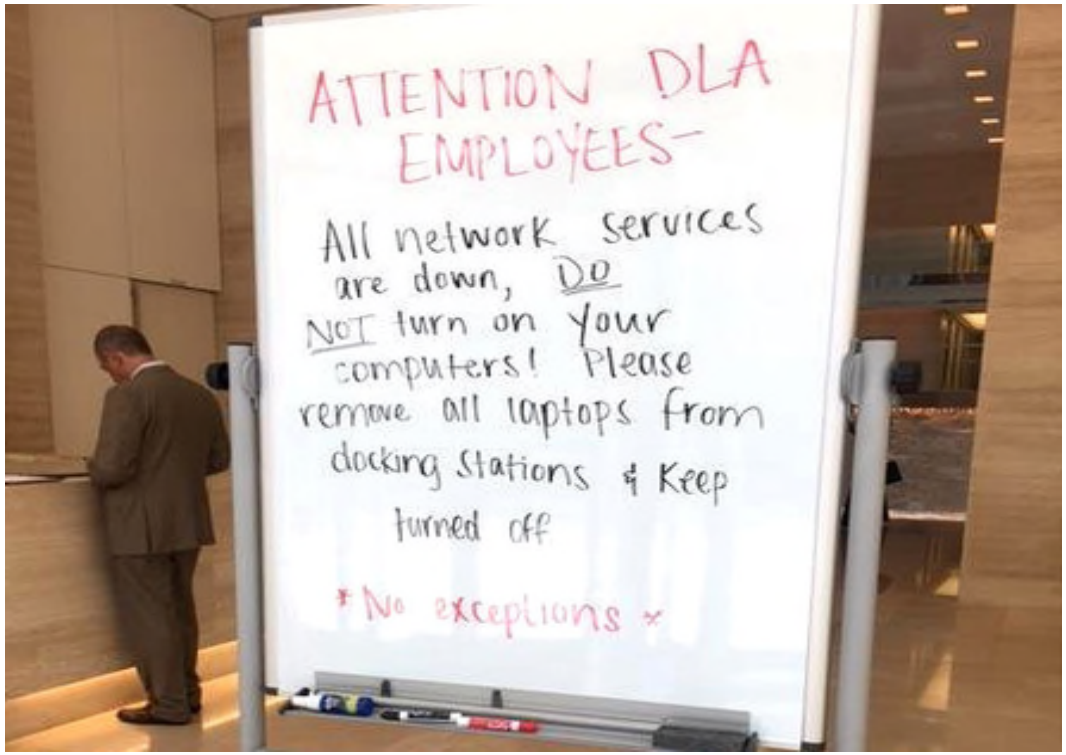
DON'T

- ✗ **Reuse passwords** across accounts; use a password manager
- ✗ **Use public Wi-Fi** for client work without a VPN
- ✗ **Open unexpected links or attachments,** even from known senders
- ✗ **Put client data in personal email** or unapproved AI tools
- ✗ **Leave devices unlocked** or unattended in public

ABA Model Rule 1.6(c) requires reasonable efforts to protect client information; ABA Formal Opinions 477R (2017) and 483 (2018) cover securing communications and breach notice.

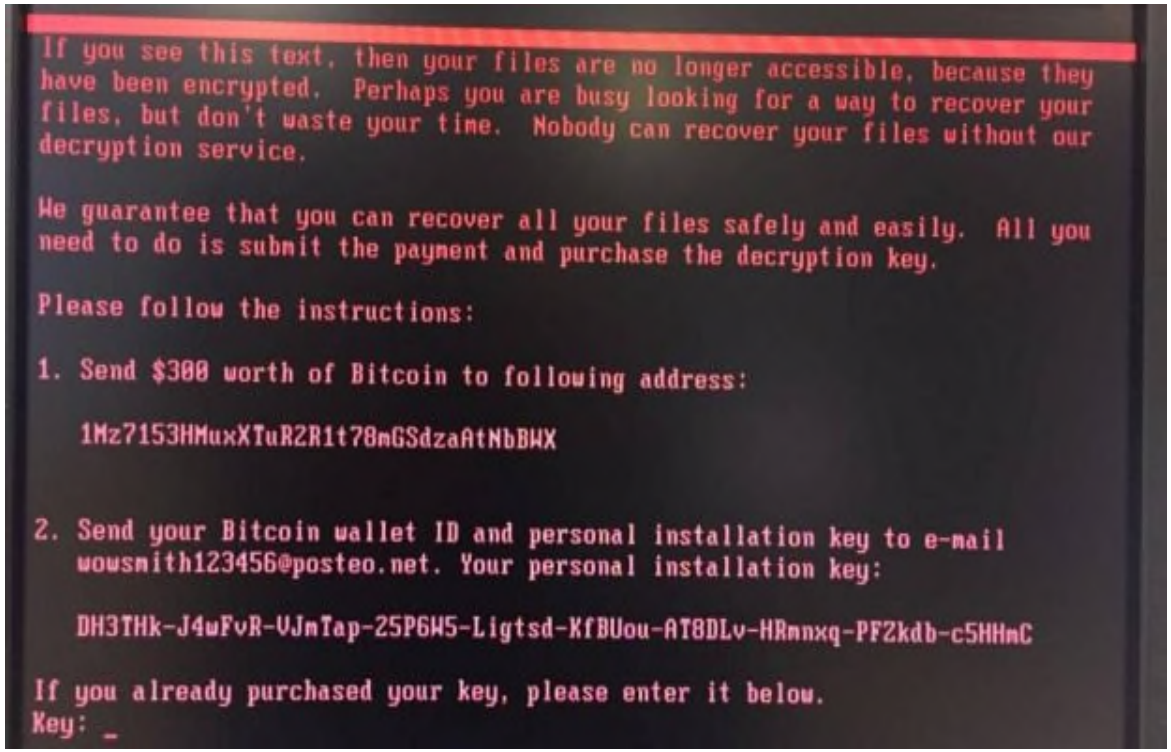
Ransomware Attacks Against Attorneys

DLA Piper (June, 2017):



Ransomware Attacks Against Attorneys

DLA Piper (June, 2017):



Ransomware Attacks Against Attorneys

DLA Piper (June 27, 2017):

- Firm infected by Petya malware.

- Entire 3,600 lawyers + support staff in 40 countries on digital lockdown.

- Lockdown wasn't fully remediated for weeks.
  - 1 day without phones
  - 6 days without email
  - 2 weeks without complete access to older email and documents

- Total direct and indirect costs to firm estimated to be millions of dollars.

TECH GADGETS AND TOYS



PHONES PHONES PHONES



iPhone 18 Pro

- A20 Pro chip, 2nm
- 48MP main camera with variable aperture
- Smaller Dynamic Island
- Up to 36 hours of video playback
- 50% charge in 15 minutes
- Up to 2TB, from $1,199
- Not a lot that is new
- Apple Intelligence imporving



Samsung S26

- Larger 6.3" 120Hz display
- Snapdragon 8 Elite Gen 5 chip
- 50MP main camera, 3x zoom
- Bigger 4,300mAh battery
- 256GB base, from $899
- Galaxy AI live translation
- Not much improved over S25



iPhone Duo

- Apple's first foldable iPhone
- 5.4" outside, 7.6" unfolded
- Thinnest iPhone ever
- Same A20 Pro chip as 18 Pro
- Touch ID replaces Face ID
- No telephoto camera
- $1,999 to $3,199
- Now competing with Samsung and others





PERSONAL COMPUTERs

Computers that run AI locally

- ASUS ProArt P14 and P16
- Dell XPS 16
- HP’s OmniBook Ultra and OmniBook X 14.
- Lenovo Yoga Pro 9n
- Microsoft Surface Laptop Ultra
- **All use NVIDIA RTX Spark and are expensive**



Apple computers than can run AI locally (Most new ones can)

- **M6 Mac mini ($899)**
- **Macbook Pro M5**
- **M6 is here**
- **Very fast, amazing computers**



Apple MacBook Neo 13-Inch (2025, M4)

- Low starting price ($699)
- Good starter computer
- Should spend some money and add storage
- 16 hours battery life
- Uses iPhone class processor
- Dell, Asus, and others released competitors



Competing Dell

- Low starting price ($699)
- Good starter computer
- Should spend some money and add storage
- 16 hours battery life
- Uses iPhone class processor
- Dell, Asus, and others released competitors



NOTE-TAKING OPTIONS



Remarkable Paper Pure

- Latest from Remarkable
- Syncs with apps over wi-fi
- Handwriting recognition
- Notes are searchable
- From $399
- Similar stuff from Boox, Kindle Scribe, iPad mini



Rocketbook

- Write, erase, reuse
- 8.5 X 11
- Works with Rocketbook app
- Connect to various apps
- Take picture an load into app
- Handwriting recognition
- Notebooks are about $40
- App is free



Nuwa Pen



- Actual ink pen
- Equipped with 3 cameras
- Capture what you write
- On real paper
- Saves it app
- Searchable
- Interact with the app's built-in large language

Plaud Note + Plaud NotePin

- Records meetings
- Transcribes and summarizes
- Records all meetings and summarizes
- Powered by ChatGPT
- $159
- Plaud.ai





And there are many more

- Limitless Pendant
- Bee-AI wearable
- Pocket
- Comulytic
- Otter.ai
- Zoom, Teams, Meet



Bee AI-wearable (now owned by Amazon)



- Listens to conversations
- All day
- Summarizes
- Makes transcripts
- Provides “insights”
- Behavior coaching
- Integrates with
  - Calender
  - Email
- Amazon added Plaud-like device

Meeting Recorder Rules

- Always ask permission
- Check your state’s law: some require consent of all parties
- Be careful about using with privileged information
- Know where recordings and transcripts are stored
- Assume recordings can be discoverable
- Review AI summaries before relying on them

OTHER STUFF



Ray Ban/Meta
Smart Glasses
Gen 3

- Looks like Wayfarer
- 3K Ultra video (optional)
- Up to 8 hours of battery life, 48 additional hours with fully charged case.
- Prescription-ready
- 12 MP ultra-wide camera for HD photos and video
- Open-ear speakers and custom 5-mic array
- 32GB flash storage
- $379



Meta’s Ray-Ban Display Glasses

- Glasses with a display
- Wristband to control the glasses with hand gestures
- Glasses include a small display in its right lens
- $800
- Lots of competitors:
  - Xreal One Pro
  - Halliday AI Glasses
  - RayNeo Air XR Glasses

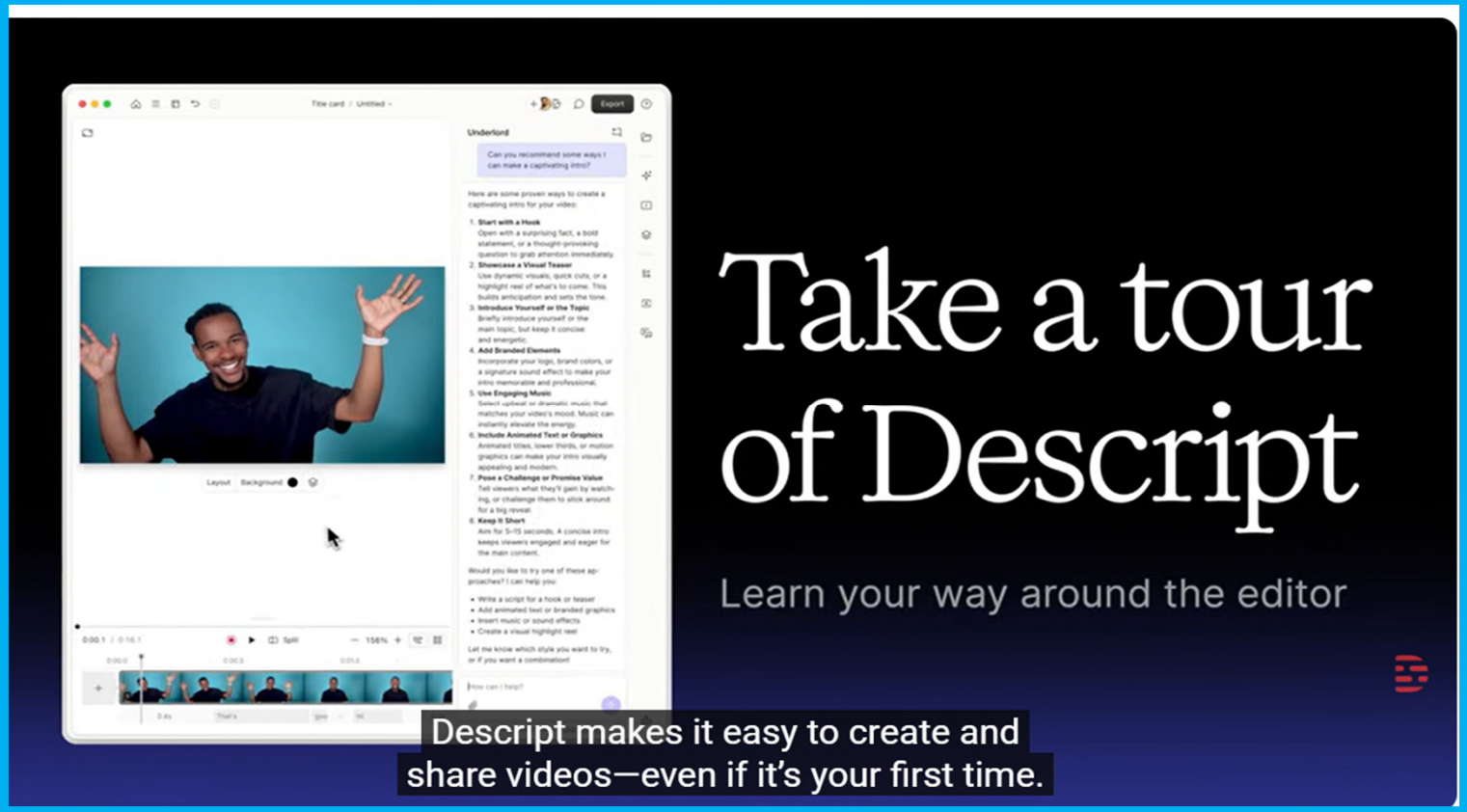


ANKER LAPTOP POWER BANK



- 165 Watts
- Can power laptop
- Built in USB cables
- Built-in display
- $120
- Awesome

Descript
descript.com



Use Riverside for interviews and podcasts (Riverside.com)

You can also make videos using an AI Avitar





THE END

THANK YOU FOR PUTTING UP WITH ME!