

## Best Practices to Get the Most Out of AI

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In the rush to adopt AI, lawyers must distinguish hype from substance to determine optimal implementation strategies. Before deployment, law firms should make informed choices about AI utilization across their organizations. These considerations range from assessing readiness and addressing ethical concerns to selecting platforms that complement existing workflows and implementing effective training protocols. With greater understanding of these considerations, legal professionals can take a more methodical approach to their AI journey.

### Assessing Your Firm's AI Readiness

A foundational step before deploying AI is assessing your firm's readiness to adopt AI-powered tools that meet current needs. This process requires a thorough evaluation of current workflows and pain points that can be alleviated by more efficient approaches to daily work.

For most firms, the administrative aspects of legal work represent a prime opportunity for efficiencies. AI tools are designed to relieve these administrative burdens so that attorneys can focus on substantive client matters where their attention is most needed and valued.

Assessing firm readiness can also uncover other high-value implementation opportunities where the greatest return can be gained from an AI investment. For example, generative AI tools can significantly decrease the amount of time spent on routine and repetitive tasks such as document review, contract analysis, regulatory compliance monitoring, and legal research, creating significant time and cost-savings for attorneys and their clients.



Courtesy photos

**Katie Nadro of Levenfeld Pearlstein, left, and James Le of Stretto, right.**

### Ethical Considerations and Compliance

When implementing AI capabilities, it's critical to keep ethical considerations and compliance top of mind. Licensing issues and data protection are among the most important considerations for the AI tool that the firm deploys. Law firms should ensure that they have rights to use data sets embedded in their AI tools. In doing so, they must obtain any required consents and provide required disclosures to all potential end-users.

Law firms are custodians of their clients' confidential information and are ethically required to use appropriate safeguards to protect that information. In negotiating contracts with AI providers, firms should require that confidential information is protected from inadvertent disclosure through AI outputs or prompts. To ensure transparency with clients, legal professionals should carefully consider whether and

when clients should receive notice of the firm's use of AI and its measures to secure privileged and confidential information.

Attorneys are aware of the risks AI presents: according to a recent Thomson Reuters study, 68% of respondents cited data security concerns as a barrier to AI adoption, while 62% pointed to privacy and confidentiality issues. Assuaging those concerns through rigorous vetting of an AI tool's privacy and security measures can smooth the path toward faster adoption by attorneys.

### Selecting and Integrating an AI Platform

When it comes to selecting an AI platform, a myriad of choices can make the process seem overwhelming. Law firms can navigate this decision by matching capabilities to their needs, which may vary depending on the firm size and specialty. Large AI providers may not have the ideal solution tailored for every firm's needs. For firms that practice in a niche or specialized area, a platform geared specifically to their practice area may be beneficial.

To minimize friction in adopting a new AI tool, law firms should consider platforms that can integrate with existing technology infrastructure. Attorneys may balk at learning multiple new tools, so integrating them into existing tools can ease implementation pressure and allow for faster adoption.

Employee training and adoption planning are critical. Attorneys must be properly trained on the safe and effective use of AI before it can be leveraged effectively. When implementing training programs, law firms should address the significant cultural resistance to AI adoption, as a global survey conducted by Slack revealed that nearly half of all professionals report discomfort in acknowledging their use of AI tools. Effective training must cover both technical skills and strategies for overcoming barriers to ensure successful integration of AI into workflows. Managing change, leading by example, and establishing protocols are key steps in this process.

### Putting AI Applications into Practice

Law firms should anticipate potential challenges and opportunities when selecting and implementing an AI platform. Effective prompt engineering is critical for an AI platform to be successfully applied for legal

contexts. Several techniques have proven valuable for legal applications as noted in a recent Genie AI white paper, including role-based priming (instructing the AI to assume the perspective of a specific legal professional), goal-oriented priming, and chain-of-thought prompting for complex legal reasoning. Mastering these approaches enables firms to extract significantly more relevant and precise responses from their AI systems.

While many service providers are developing new solutions to minimize hallucinations and improve output accuracy, attorneys must be vigilant against using incorrect outputs. Firms should create internal AI usage policies to ensure a human validates all outputs used in legal work.

In deploying AI across various use cases, law firms should consider applying appropriate guard rails to ensure a successful outcome for each specific function. Administrative use cases, such as email management, timekeeping and creating templates, have different considerations and implementation needs than "legal" use cases, such as drafting legal documents, performing due diligence or conducting legal research.

### Measuring Success and Evolving Your Approach

Ultimately, the success of an AI platform can be measured based on the firm's goals. To gain measurable insights into a return on investment, law firms should work with their providers to define key metrics and benchmarks at the time of implementation. As new technological advancements seemingly become available every week, professionals can build upon their AI capabilities to reach their goals of greater efficiency and client service.

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