AI and Emerging Technology Can Increase Law Practice Efficiencies

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All lawyers should periodically explore new products and technology, including those that use artificial intelligence. Many tools will pay for themselves by opening up time for more billable work.

Did you know that it is possible to increase billable hours while spending less time in the office? To get started, you can start by mapping out your daily nonbillable and billable tasks. The next step is to determine the technology and artificial intelligence (AI) tools that you can use to automate or decrease the amount of time spent on nonbillable tasks.

It can be that easy if you keep an open mind, examine the various tools mentioned here, and work through the following questions: How much time do I or my staff spend on this task? What is the total amount of time on this task in an entire year? Will the use of technology allow me to spend less time on nonbillable tasks and more on billable tasks?

Dictation and Transcription

You probably already have experience with simple dictation tools. If you open your smartphone and send a text message or create a note, you've likely seen the microphone icon that allows you to dictate your voice message so that it appears as text. The same feature is available in word-processing documents. If you're more comfortable or faster speaking than writing, consider using these tools that are already integrated into the technology you use.

Transcription Tools. Transcription tools in word-processing documents and meeting applications are relatively new and inexpensive features that can significantly increase efficiency when transcribing audio files. The days of recording an audio file on a physical dictation machine, providing the tape or electronic file to an assistant for transcription, and reviewing the finished product for accuracy are gone. If you have a Microsoft 365 subscription and log in to Word Online, you can upload an audio file and Microsoft will transcribe the text in a document (this feature is aptly named Transcribe in Word). If more than one person spoke in the meeting that is recorded in the audio file, each person can be named in the document. There also are stand-alone applications, such as Otter.ai, that can join meetings and provide live transcription and notes.

Meeting and Appointment Scheduling

Instead of emailing or calling clients to schedule meetings and appointments, you can email a link that allows clients

to choose a time on your calendar when both parties are available. Clients will have access only to the availability times that you have set and not to other meetings or appointments on your calendar. You can also set the maximum duration that clients can schedule, such as 15 minutes or 30 minutes. Once the client schedules the meeting or appointment, both parties will receive an email confirmation, and the time will be reserved on your calendar (clients can also add the meeting or appointment time to their calendar). Clients can schedule meetings and appointments without downloading any additional software.

The software for these features is likely already included in your Microsoft 365 subscription or can be easily purchased. Microsoft Bookings and Calendly are two popular options, and numerous training videos, available on YouTube, explain how to quickly set up and start using the software. After you have set up Microsoft Bookings or Calendly, you can include a link in all emails that allows someone to book directly. Or you can share the scheduling link on an as-needed basis.

Case Management Software

Take a moment and think about the many software systems or programs you use to run your law practice. Having separate programs for checking conflicts, tracking deadlines, storing documents, communicating with clients, and recording time and sending bills is one of the most common sources of inefficiency.

With case management software, you can streamline your law-practice workflow into a single program. Many case management services offer integrations with other applications, such as online accounting, email, customer relationship management, and document-retrieval software. This enables users to sync data between different systems, automate data entry, and save valuable time by eliminating the need for manual data entry into multiple systems.

In the past, case management software typically had high upfront costs and expensive maintenance contracts and lacked training resources. An overwhelming majority of software providers now use monthly and yearly subscription-based pricing models, provide training and video guides, and do not charge monthly maintenance fees.

Now, lawyers can purchase case management software on a monthly contract basis of $60-$120 per user, per month (the fees decline if a yearly subscription is purchased up front). Many offer free trials and make their sales team available to answer questions about things such as the software, one-time data migration fees if switching case management software, data security, and how data can be downloaded at termination of the agreement.

Artificial Intelligence: ChatGPT

If you missed "ChatGPT Artificial Intelligence: Will It Replace Lawyers and Legal Staff?" (Wis. Law. Feb. 2023), read it now. As explained in that article, ChatGPT is a language-processing AI model developed by OpenAI. ChatGPT can generate human-like text and can be used for various natural-language-processing tasks, including language translation, summarizing, and answering questions.

Since I wrote the article that appeared in the February issue, version 4.0 of ChatGPT launched, and, among other accomplishments, it passed the Uniform Bar Exam with a score in the top 10%. Microsoft has heavily invested in OpenAI and previewed forthcoming product improvements (discussed below) during a launch event in mid-March. However, not everyone has embraced the technology, and some universities and organizations, and even one nation, have banned its use. Nonetheless, the technology will continue to advance and eventually be integrated into the everyday legal technology used to power law firms.

Before using ChatGPT or similar tools, it is crucial to understand the ethical and confidential implications. When used correctly, ChatGPT and other tools can significantly streamline content generation and editing, such as providing content suggestions for social media posts, summarizing and explaining long text, editing and suggesting improvements for text, and even creating content. However, users should remove any

confidential information before placing the text into ChatGPT or a similar tool.

Microsoft Copilot

Microsoft caught the attention of users, industry experts, and competitors with a launch event in mid-March titled, "The Future of Work with AI." The launch event (available as a video on YouTube) showcased Copilot, the latest AI-powered creation by Microsoft. Expected to be released in the coming months, Copilot leverages the power of Microsoft applications and generative AI to greatly improve users' productivity.

Some examples provided in the launch video were the ability to ask Copilot to:

• Take a Word document and convert it into a PowerPoint presentation (and vice versa);

• Highlight a series of Excel data and explain what type of graphs or calculations you would like to receive;

• Provide a summary of a portion of the meeting you missed in Teams or key action items and follow-up tasks after the meeting concludes;

• Create, edit, and summarize text in Microsoft Word; and

• Comb through emails in Outlook to provide a summary and even draft responses to emails or schedule meetings.

Microsoft has promised that it will present additional advancements in AI at future events. Regardless of the type of feature, current or yet to be announced, review data security and confidentiality provisions before use.

Process of Continuous Improvement

The process of continuous improvement involves analyzing the steps necessary to complete a task and examining those steps to determine whether improvements can be made. For example, onboarding a new client could be streamlined by providing a link for the client to schedule a meeting or complete a questionnaire. Another example of an improvement is using an application to transcribe a meeting versus listening to the entire meeting and transcribing the text. The process doesn't end by making one or two improvements; as the name suggests, all tasks should be regularly reviewed to determine whether more improvements can be made.

Two books that provide great insight into this subject are *The Goal: A Process of Ongoing Improvement*, by Eliyahu M. Goldratt and Jeff Cox, and *The Lean Law Firm: Run Your Firm Like the World's Most Efficient and Profitable Businesses*, by Larry Port and Dave Maxfield. The authors explain the lean theory behind continuous improvement and provide stories of characters who used continuous improvement to make their businesses more profitable. Reading either of these books could change the way you manage your law practice and the time you spend on nonbillable tasks. Plus, you will learn in greater detail about the tools and strategies needed to make your law firm more profitable.

Conclusion

Lawyers cannot afford to ignore the rapid advancements in AI technology. Sooner or later, these tools will be integrated into the applications lawyers use, and many clients and judges will use them, too. While AI can appear daunting, there are numerous training resources available, including tutorials, guides, and articles, and Practice411 is available for confidential and complimentary consultations. Waiting too long to embrace AI could result in falling behind the competition, so it is essential to start learning and incorporating these new technologies into your practice now. **WL**

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