

LawOS: REBOOTING THE LEGAL INDUSTRY WITH AI



WSBC

WESTERN STATES BAR
CONFERENCE

2025





LEGAL INDUSTRY TRANSFORMATION

FERTILE GROUNDS FOR DISRUPTION

Law Thick World

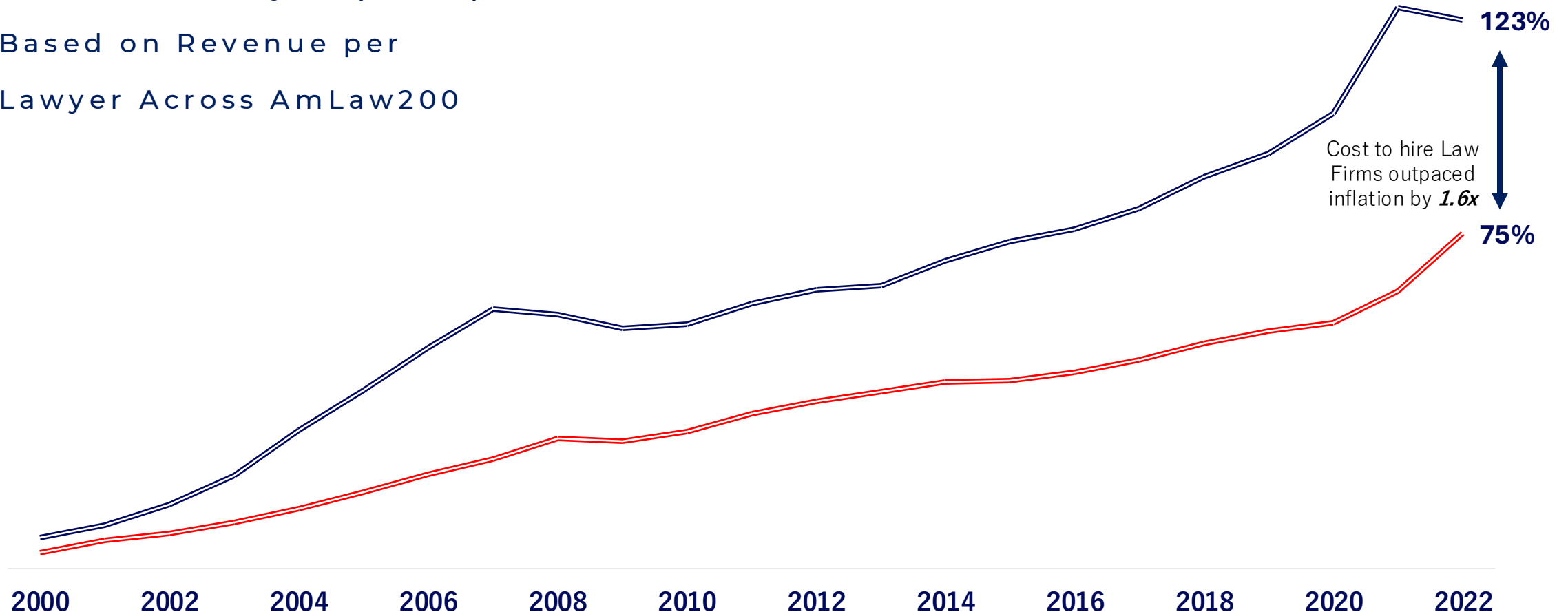
“We live in a law thick world. To secure a benefit or avoid a loss in this world, we often find that we must somehow use the law. This is as true for global corporations as it is for ordinary individuals...”

- Noel Semple in *Legal Services Regulations at the Crossroads*

COST OF HIRING A LAWYER

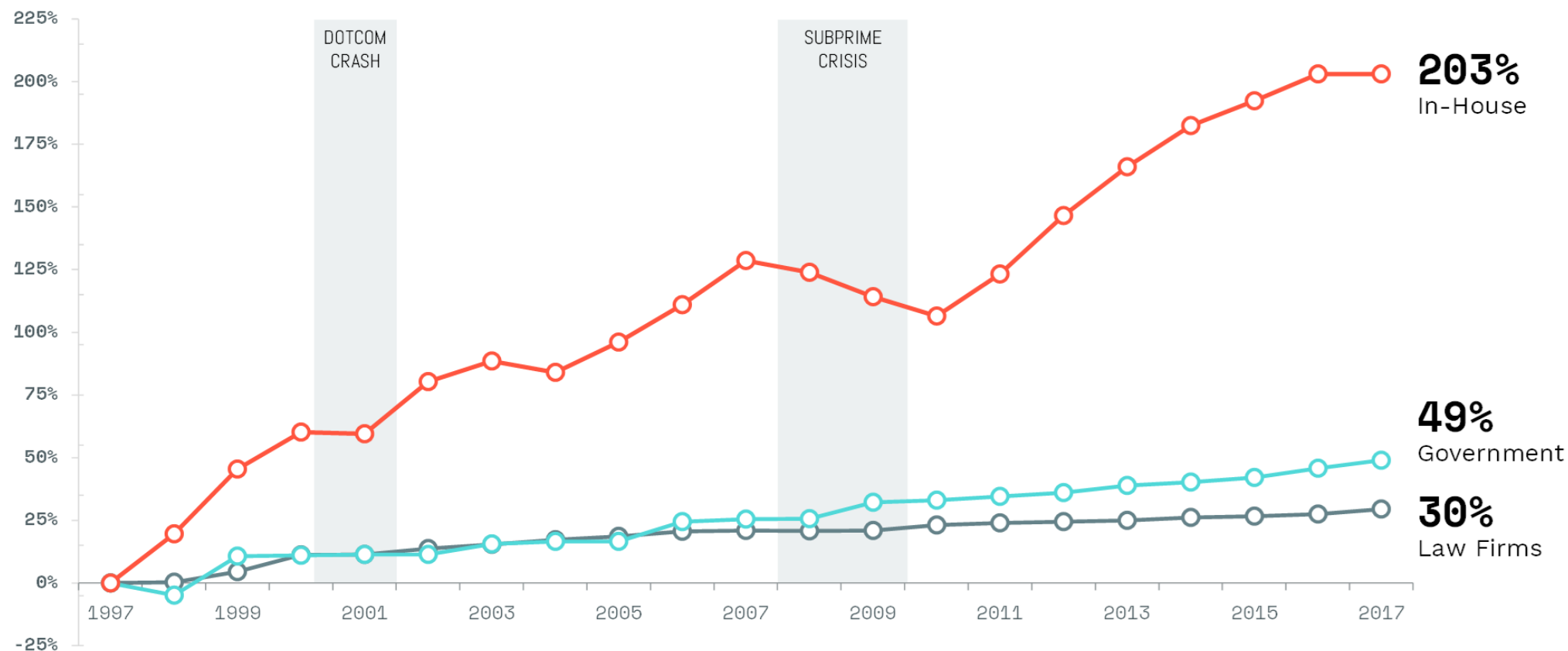
\$1.0M Average Cost of
Outside Lawyer (2022)

Based on Revenue per
Lawyer Across AmLaw200



The number of **in-house lawyers** has tripled

% CHANGE IN NUMBER OF EMPLOYED LAWYERS BY PRACTICE SETTING, 1997 – 2017



Credit: Bill Henderson on Legal Evolution PBC / Data Source: Bureau of Labor Statistics

The Challenge

Expanding Work Loads

75%

General Counsels that expect workloads to outpace budgets

A need to make team's more effective & efficient

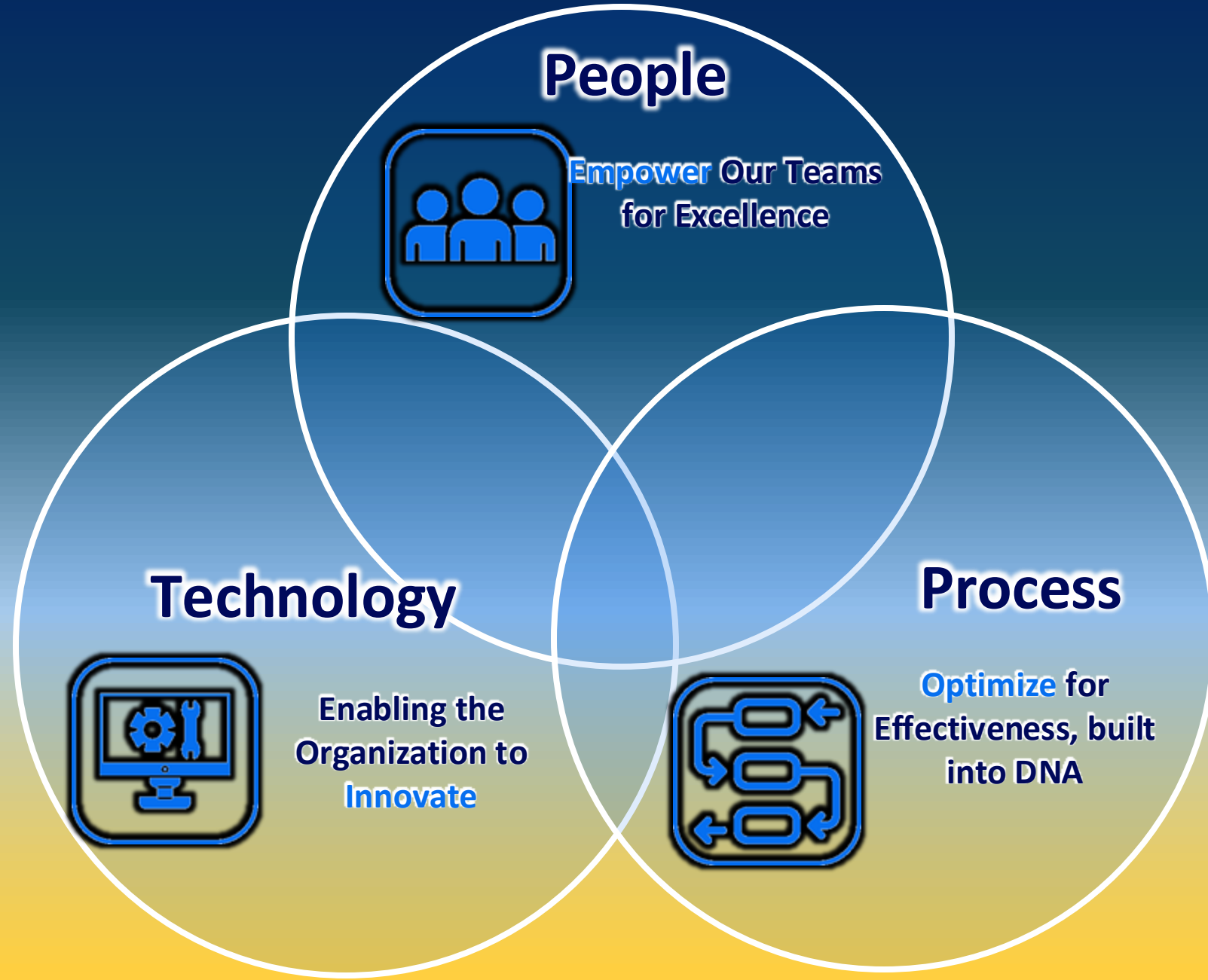
Growing Cost of External Advice

1.6x

Pace that cost of hiring external counsel has exceeded Inflation

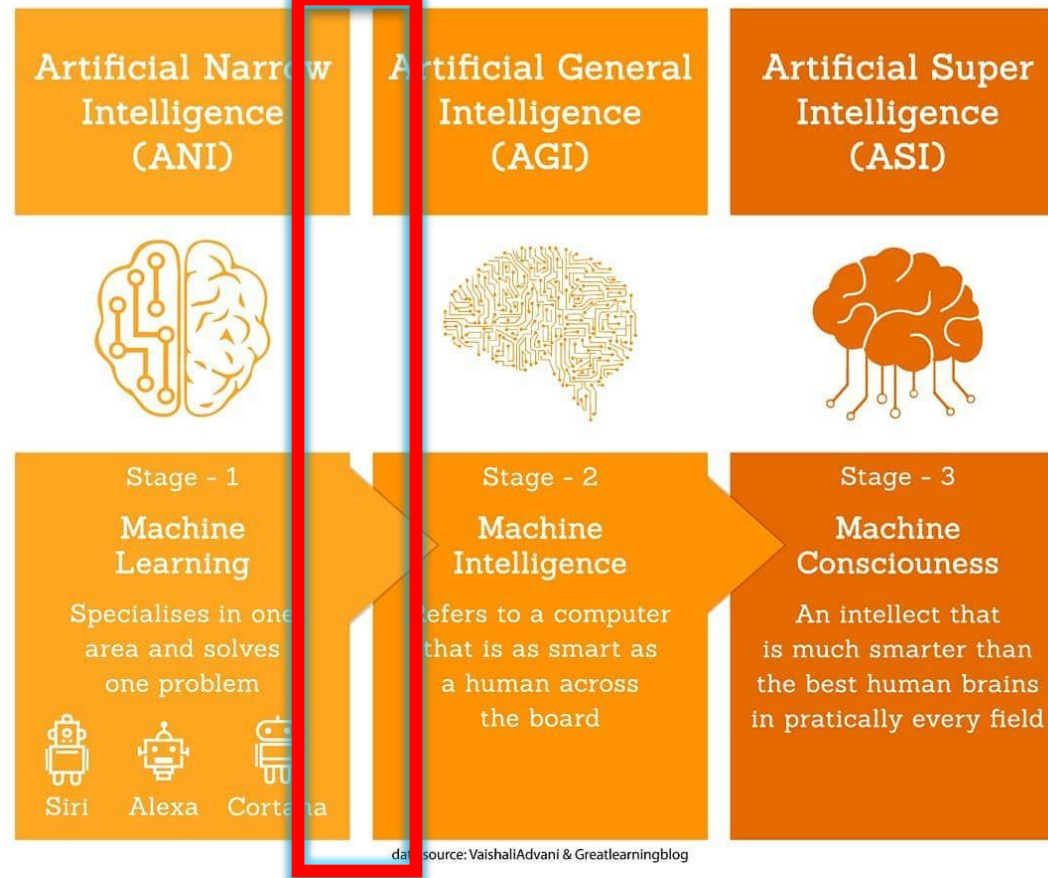
A need to effectively invest in outcomes

The Solution



3 TYPES OF ARTIFICIAL INTELLIGENCE

@agrassoblog



data source: Vaishali Advani & Greatlearningblog



Ethan Mollick [in](#)

2mo



If AI development stopped this week we would have 5-10 years of absorbing the impact of current models on education, culture, healthcare, and business.

But this week has also suggested that development is not stopping.



1,205 · 117 Comments



Like



Comment



I am afraid of AI.

PERCENT WHO AGREE

51%



I don't really understand AI.

PERCENT WHO AGREE

Global average ▾

50%







**As Clients Adopt AI,
Slow Service is a
Bottleneck...**

**Slow Service = No
Service**

Large Language Models (LLM)

The technology has finally caught up with the words.

“

Language is the central
tool of our trade.



Gen AI

John Roberts

Chief Justice, United States Supreme Court

AI that can **read** text and images

AI that can **summarize** text and images

AI that can **annotate** text and images

AI that can **analyze** text and images

AI that can **translate** text and images

AI that can **categorize** text and images

AI that can **synthesize** text and images

AI that can **interpret** text and images

2023

GPT-4

OpenAI ChatGPT

- ChatGPT was being released as a “research preview”
- ChatGPT has “no source of truth”
- ChatGPT therefore “sometimes writes plausible-sounding but incorrect or nonsensical answers”
- ChatGPT “is sensitive to tweaks to the input phrasing”
- ChatGPT has issues that “arise from biases in the training data”
- ChatGPT tends to “guess what the user intended” rather than “ask clarifying questions”
- ChatGPT “will sometimes respond to harmful instructions or exhibit biased behavior”



Sam Altman 
@sama · [Follow](#)

ChatGPT is incredibly limited, but good enough at some things to create a misleading impression of greatness.

it's a mistake to be relying on it for anything important right now. it's a preview of progress; we have lots of work to do on robustness and truthfulness.

6:11 PM · Dec 10, 2022



RAG – Retrieval Augmented Generation

- ChatGPT therefore “sometimes writes plausible-sounding but incorrect or nonsensical answers”

Prompt Engineering

Query

Hallucinations

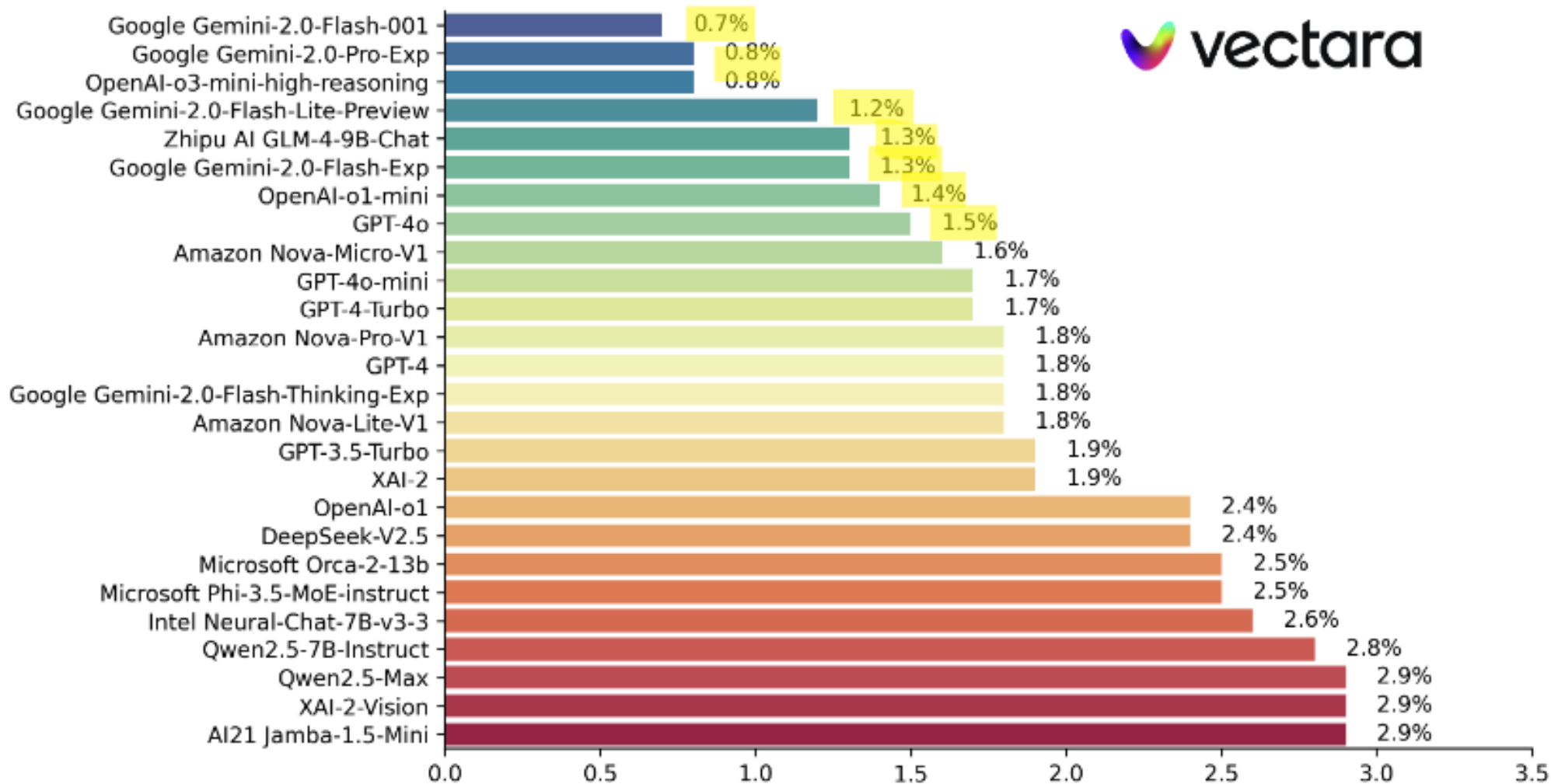


Open
LLM

Response

Last updated on February 11th, 2025

Hallucination Rates for Top 25 LLMs



Last updated on February 11th, 2025

SONY PICTURES TELEVISION

	A	N	O	T	H	E	R				
	F	E	A	T	H	E	R			N	
	Y	O		R			A				

PHRASE



#abc7eyewitness

Large Language Models (LLM)

Huge “foundation models” are turbo-charging AI progress

They can have abilities their creators did not foresee



OpenAI



Google



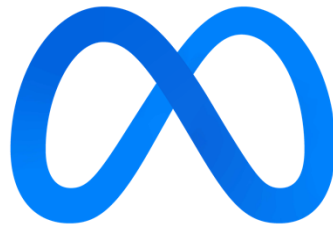
Mistral AI



Anthropic



Microsoft



Meta



Bloomberg



Amazon

2022



casetext



OpenAI



Ford

Legal + Policy

Ops

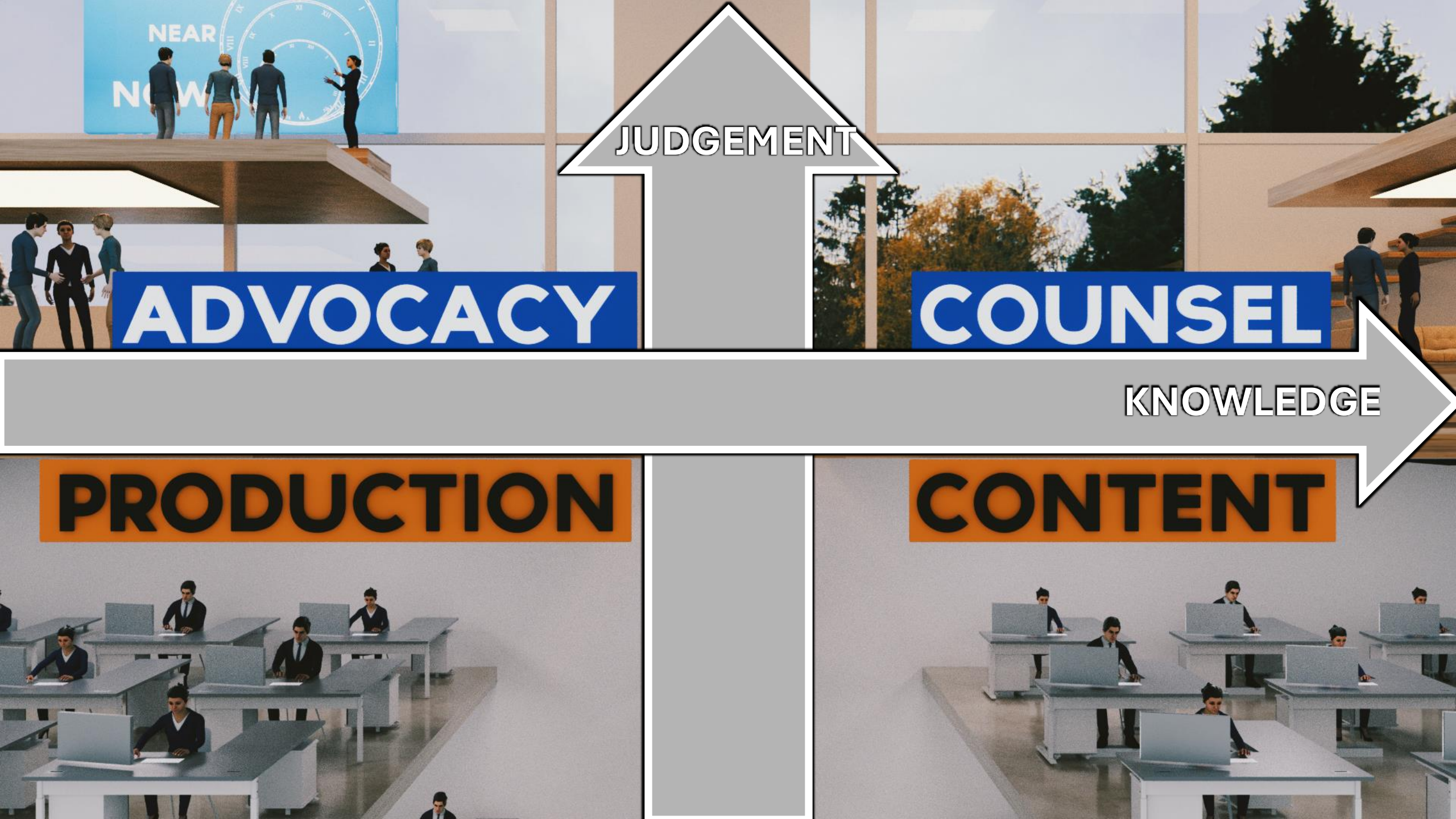
Sourcing Use Cases

50+

Ford Legal Ops+ sourced 50+ Casetext CoCounsel Use Cases from Billing Data and Internal Process Mapping & Qualitative Discussions

Use Cases Evaluated Based on Prioritization Matrix

In collaboration with Casetext, Ford Legal Ops+ evaluated each of these Use Cases based on the Highest Return on Investment and Lowest Implementation Complexity



JUDGEMENT

ADVOCACY

COUNSEL

KNOWLEDGE

PRODUCTION

CONTENT

**Legal
Professionals
are performing
tasks that aren't
their highest
and best use**



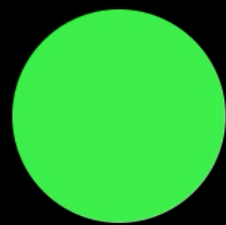
**Technology
enhances our
legal
professionals**



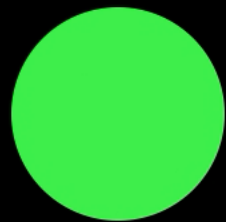
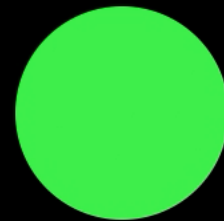
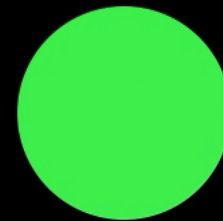
TASKS



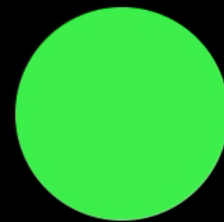
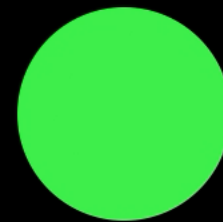
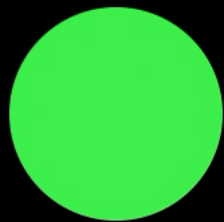
Deposition
Summaries



Contract Revision

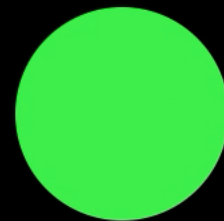
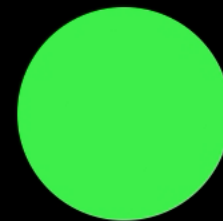


Legal Research



EPLACE

Identify Conflicts
and Risks





The top tasks we've identified with highest ROI

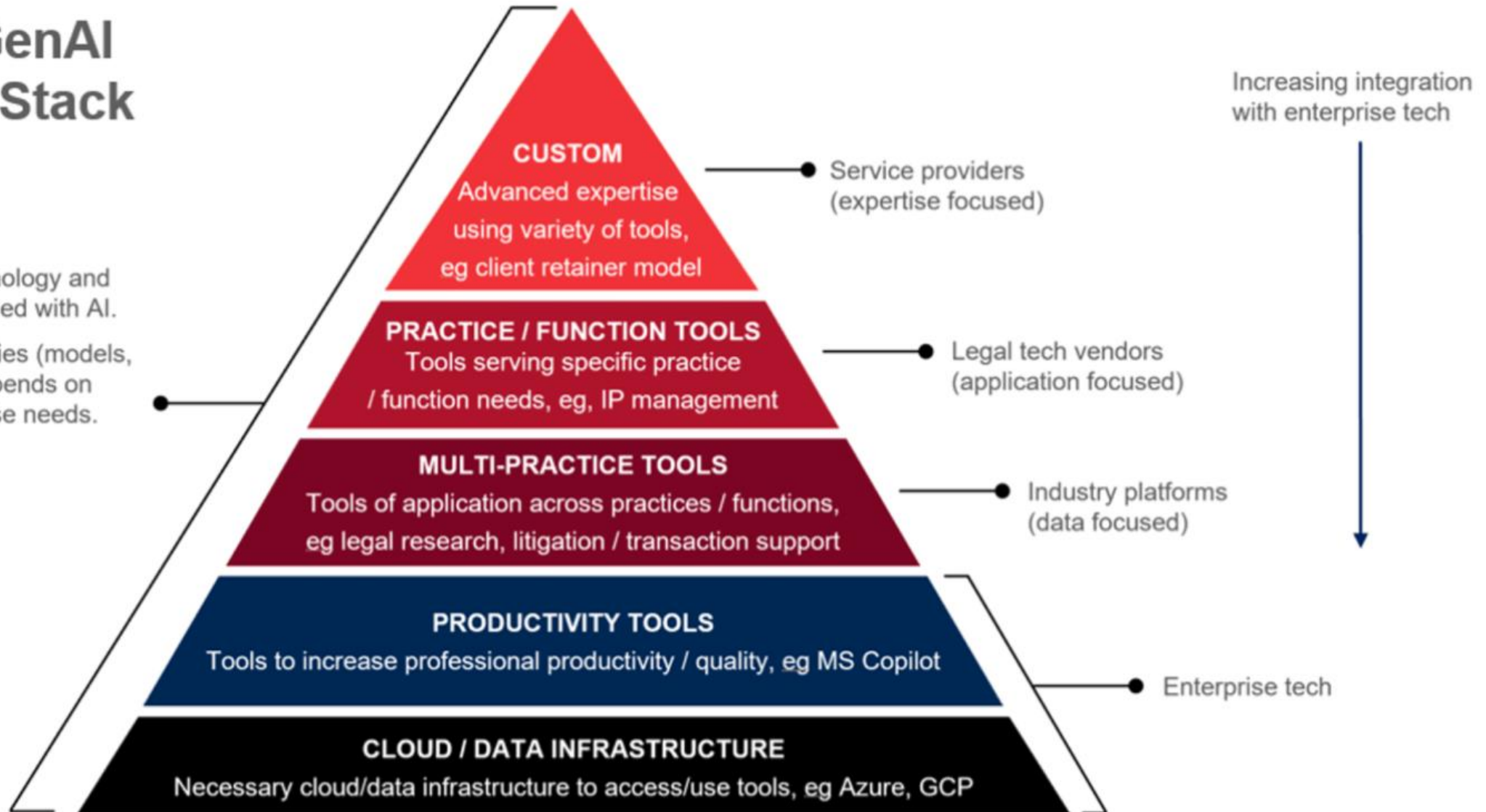
1. **Summarizing Documents** ↑
2. **Legal Research** ↑
3. **Reviewing/Analyzing Documents** ↑
4. **Drafting Documents** ↑
5. **Comparing Info Against Reference Materials** ↑

**WHAT REPETITIVE TASKS
ARE YOU BURDENED WITH
THAT DON'T UTILIZE
YOUR SKILL AND EXPERIENCE**

Example GenAI Capability Stack

Each layer of the technology and commercial stack infused with AI.

Right stack of capabilities (models, tools and partners) depends on specific client / use case needs.



Productivity Tools + Use Cases



CUSTOM

Advanced expertise
using variety of tools,
eg client retainer model

PRACTICE / FUNCTION TOOLS

Tools serving specific practice
/ function needs, eg, IP management

MULTI-PRACTICE TOOLS

Tools of application across practices / functions,
eg legal research, litigation / transaction support

PRODUCTIVITY TOOLS

Tools to increase professional productivity / quality, eg MS Copilot

CLOUD / DATA INFRASTRUCTURE

Company Productivity Tools

Follow Company Policies on Information Sharing

Office Suite
Tools



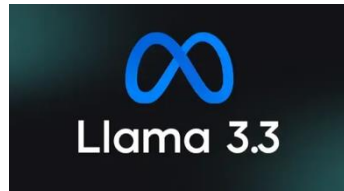
Microsoft
CoPilot



Google
Gemini



Enterprise
Content
Creation
(Chatbots)



Project
Management
+ Workflow



Public Productivity Tools

Should NOT Use Company Non-public Information

Public
Content
Creation
(Chatbots)



ChatGPT



Anthropic



Online
Search



Image and
Presentation



Adobe Firefly

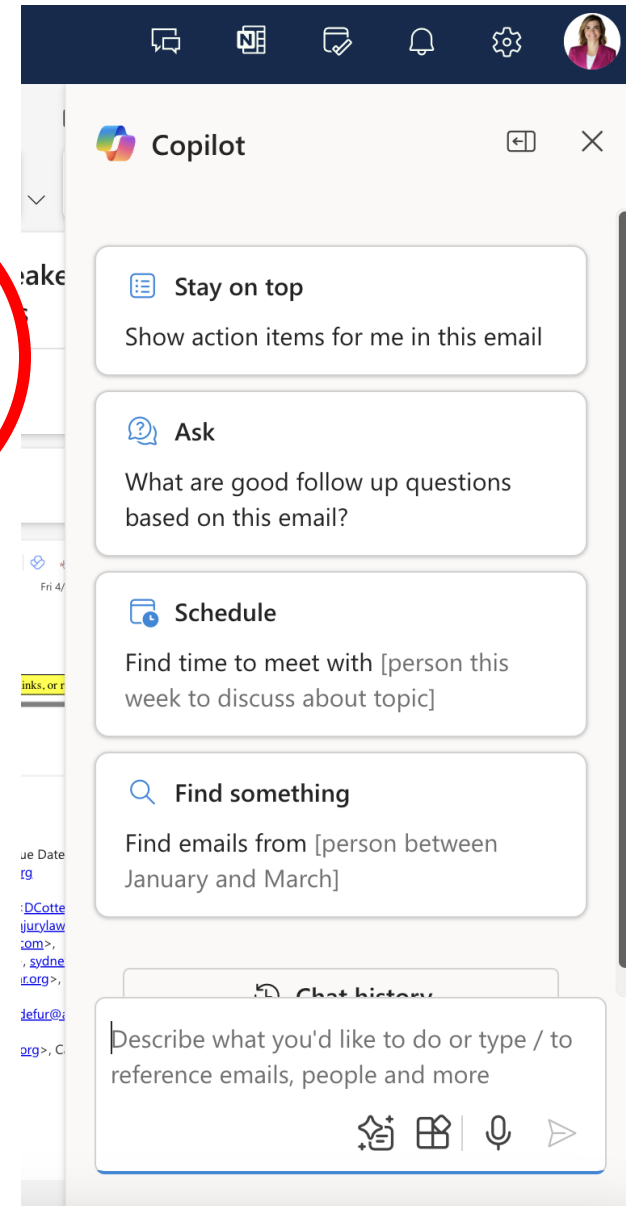
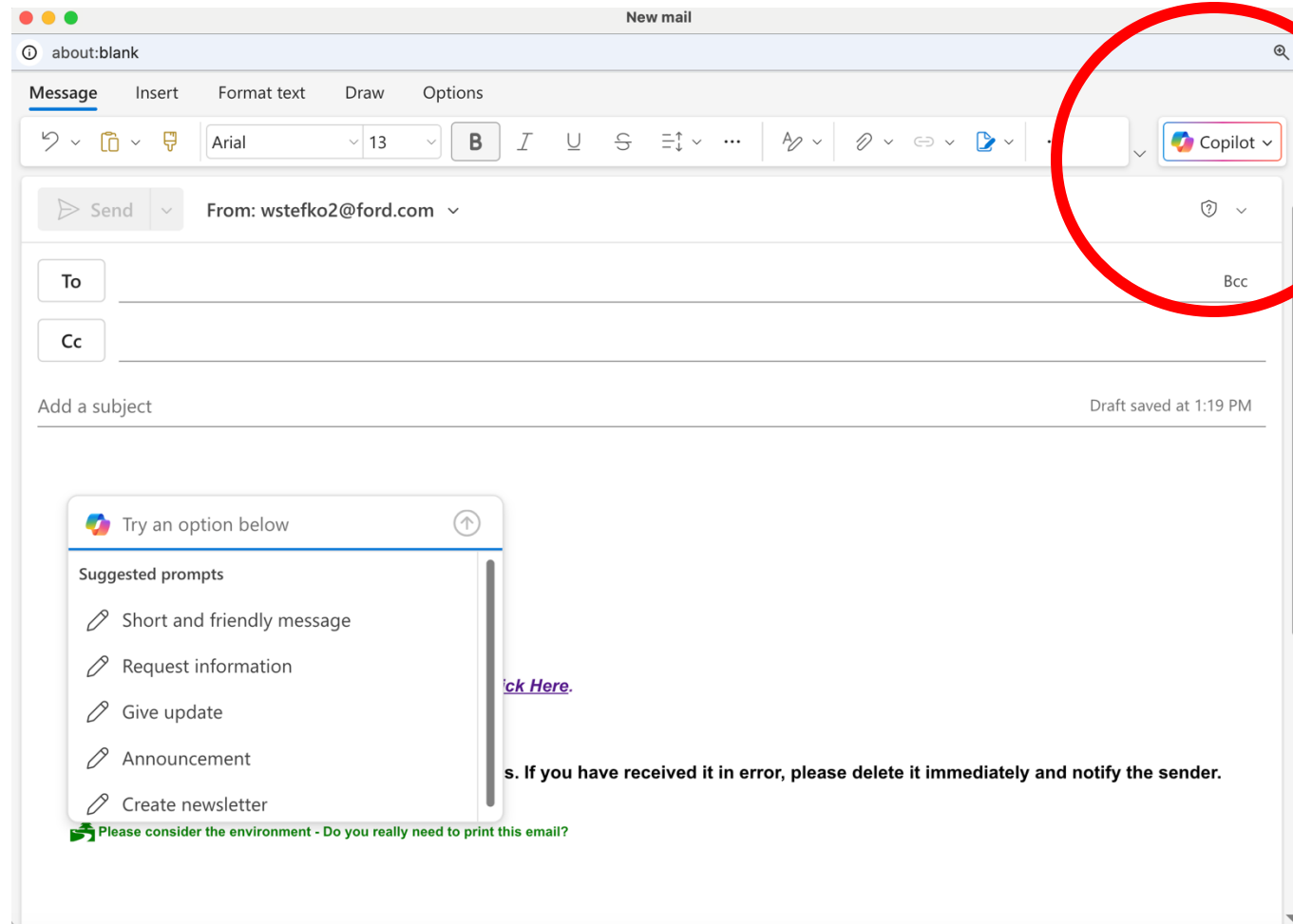


PRODUCTIVITY TOOLS

Tools to increase professional productivity / quality, eg MS Copilot

Non-Exhaustive List – Examples Only

Microsoft CoPilot



Microsoft CoPilot



Home

Copilot

Pages

Create

OneDrive

Apps

Work

Web

New chat

🛡️

📄

⋮

🗨️

Copilot

Agents

Visual Creator

Prompt Coach

Get calendar info

When's my next meeting with **Bernardes, Rodrigo (R. L.)** ?

Understand the main points

List key points from **Agentic AI Braindump.docx**

Boost your knowledge

Help me learn about [topic]

Analyze visuals

Describe what's in this image: [upload file or insert link here]

Visualize your data

Create a stacked bar chart showing the energy consumption breakdown, by source, for the top 5 energy consuming countries

Graph the data quickly

Create a pie chart showing the market share of smartphones in the United States

🔍 Your organization has turned off **web search**. Copilot responses won't include the latest data from the web.

Message Copilot

+

 Add content

🗨️

Click to add title

Click to add subtitle

Click to add notes

Copilot

✕

Hello Stefko,!

Here are some ideas to get you started.

Create a presentation from [file]

Create a presentation about [the benefits of meditating every day]

What are the dates or deadlines in this presentation?

Show key slides in this deck

Extract text from this image [add an image]

🕒 Chat history

Generate ten slides for me on Generative AI. Here is your outline: Slide One

+

🌐

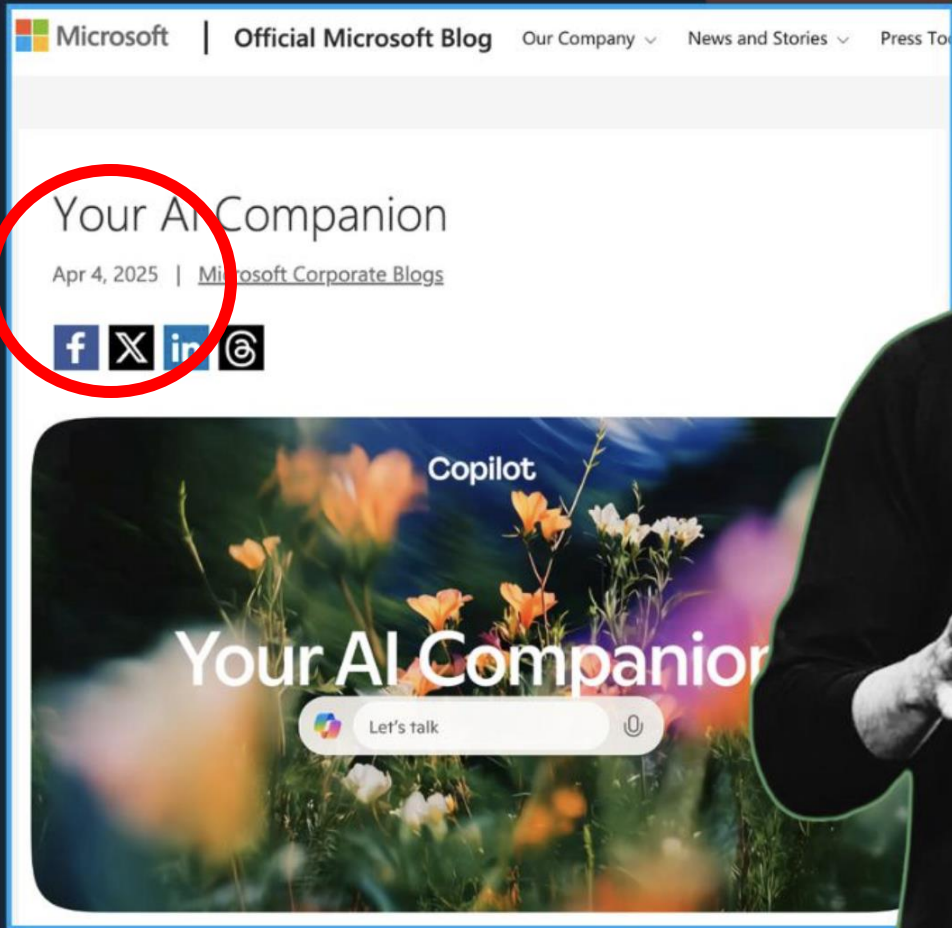
🎤

➡️

Microsoft CoPilot



Microsoft Ramps Up Copilot



Conor Grennan • Following

Chief AI Architect, NYU Stern School of Business | NY Times and #1 Int'l best...
5h • 🌐

BREAKING: Minutes ago, **Microsoft** dropped some huge Copilot announcements: Agents! Personalization! Podcast-y stuff! Can Copilot be your true copilot? Check this out:

Mustafa Suleyman, CEO of **Microsoft** AI announced that for Microsoft's 50th birthday, Copilot was getting personal.

This has been his personal mission since he came over from founding Inflection and DeepMind. And today felt like a big step - we'll see how it all looks live, so just hang on, but the news is promising:

Company Productivity Tools

Follow Company Policies on Information Sharing

Office Suite
Tools



Microsoft
CoPilot



Google
Gemini



Grammarly, Inc.
Software company :

Enterprise
Content
Creation
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ChatGPT
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+ Workflow



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perplexity



Bing



Google

Image and
Presentation



Midjourney



Adobe Firefly

beautiful.ai

PRODUCTIVITY TOOLS

Tools to increase professional productivity / quality, eg MS Copilot

Non-Exhaustive List – Examples Only

Google NotebookLM

* Notebook guide

Help me create



FAQ



Study Guide



Table of Contents



Timeline



Briefing Doc

Summary

These documents are excerpts from legal briefs filed in court cases regarding Social Security Disability benefits, where claimants appeal the denial of their benefits. They demonstrate the legal argumentation involved in such cases, focusing on the ALJ's (Administrative Law Judge) assessment of the claimant's disability based on their medical evidence, their testimony regarding their functional limitations, and how the ALJ's conclusions are challenged by claimants in their appeal. The court, in turn, evaluates the ALJ's reasoning and determination of whether their conclusion is supported by substantial evidence.

Audio Overview



Click to load the conversation.

Load

Suggested questions



How do the rulings in these cases apply to the specific evidence presented for each case?



What are the overarching legal principles governing the determination of disability benefits?



How do the ALJ's decisions in these cases exemplify the challenges of navigating social security law?

PRODUCTIVITY TOOLS

Tools to increase professional productivity / quality, eg MS Copilot

What is the standard for assessing whether the ALJ properly evaluated the claimant's testimony regarding symptoms?

Standard for Evaluating Claimant Testimony Regarding Symptoms

When evaluating a claimant's testimony about their symptoms, the ALJ must follow a two-step process.

Step One:

- The ALJ must determine whether there is objective medical evidence to support the claimant's complaints. 1 2 3 4 ...
- At this stage, the claimant is not required to prove that their impairment could reasonably be expected to cause the full severity of the symptoms alleged. 5
- The claimant simply needs to show that the impairment could reasonably be expected to cause some degree of the symptom. 5 9
- **The ALJ cannot reject the claimant's subjective complaints solely because there's a lack of medical evidence fully corroborating the alleged severity of the pain.** 10 11 12 13 14

Step Two:

- If the claimant demonstrates objective medical evidence supporting their symptoms and there is no evidence of malingering, the ALJ can only reject the claimant's testimony about the severity of the symptoms if the ALJ provides "specific, clear, and convincing reasons" for doing so. 6 7 8 9 ...
- The ALJ must identify what specific testimony is not credible and explain what evidence contradicts the claimant's complaints. 24 25 26 27 ...
- **The ALJ's decision must be detailed enough to allow a court to determine that the ALJ rejected the claimant's testimony for valid reasons and didn't arbitrarily discredit their testimony.** 12 24 30 34 ...
- The ALJ should consider the following factors when evaluating the claimant's testimony: 17 26 39 40
 - Daily activities
 - The location, duration, frequency, and intensity of the claimant's symptoms
 - Precipitating and aggravating factors
 - Side effects
 - Other relevant factors

PRODUCTIVITY TOOLS

Tools to increase professional productivity / quality, eg MS Copilot

which decision talks about how a plaintiff's ability to live on their own for three months in a van showed he was not disabled

Plaintiff Living in a Van for Three Months

Source ¹ discusses how a plaintiff's stay in San Francisco for three months was used by the ALJ to discount the opinions of medical experts who found the plaintiff to have marked limitations in social functioning and concentration, persistence, and pace. The ALJ viewed the three month period as a successful venture, demonstrating the plaintiff's self-sufficiency. ¹

However, the source goes on to state that this was not a rational interpretation of the record. The plaintiff was living in a van, working part-time, and returned to San Diego because living in a van in San Francisco's climate was not sustainable. ¹

The source argues that the evidence actually supports the medical experts' opinions, showing that the plaintiff's move was impulsive and poorly planned, highlighting his difficulties in maintaining concentration, persistence, and pace. ¹

Furthermore, the source criticizes the ALJ's decision to selectively focus on this single three-month period, arguing that it cannot be considered substantial evidence to support the ALJ's RFC finding. It points to case law that states that ALJs cannot selectively pick isolated instances of improvement as a basis for concluding that a claimant is not disabled. ^{1 2}



Save to note

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Tools to increase professional productivity / quality, eg MS Copilot

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Office Suite
Tools



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CoPilot



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Non-Exhaustive List – Examples Only



Anthropic's Claude


AG Last year, this was my quote in the performance review for my courtroom deputy: "Trina continues to get even better as a courtroom deputy. She continues to be dependable and very hard-working, but in the last year she has demonstrated notable growth in addressing issues proactively. I really enjoy working with her." Please draft a similar quote for this year's review. She has continued to perform at a high level and I appreciate her work.

Here's a performance review quote that builds on last year's feedback while highlighting Trina's continued excellence:

"Trina remains an exceptional courtroom deputy who consistently sets a high bar for excellence. Her proactive approach to managing courtroom operations has become a real strength, and she continues to demonstrate remarkable attention to detail and sound judgment. Her reliability and strong work ethic make her an invaluable member of our team, and I continue to deeply appreciate our working relationship."



AG Thanks, but it sounds too similar. I'm concerned she may look at the quotes back to back and think I just phoned it in. Could you update the wording to have the same intention but stated a bit differently?

 Edit

Here's a fresh take that conveys your appreciation while using different language:

"As a courtroom deputy, Trina exemplifies what it means to be a true professional. She anticipates needs before they arise, manages complex situations with remarkable composure, and consistently delivers outstanding work. Her contributions to our courtroom operations have been invaluable, and her dedication to excellence makes her a pleasure to work with each day."

This version maintains the positive sentiment while using entirely different phrasing and highlighting specific qualities that weren't mentioned in the previous year's review. Would you like me to try another variation?



What are some analogies I could use to describe an attorney who has overstated the importance of a case to their legal issue?

Let me offer some fitting analogies for an attorney exaggerating a case's significance:

1. Like a fisherman turning a minnow into a whale story - what started as a small catch grows bigger with each telling
2. Similar to a meteorologist treating every cloudy day like an incoming hurricane - raising unnecessary alarms when routine weather is expected
3. Like someone claiming they've found a revolutionary new recipe when they've just added an extra pinch of salt to an existing dish
4. Comparable to treating a paper cut as if it requires emergency surgery
5. Like calling a puddle the Pacific Ocean - technically they're both bodies of water, but the scale comparison is absurd

Would you like me to elaborate on any of these or explore other analogies that might better fit your specific context?

Copy Retry



Claude can make mistakes. Please double-check responses.

PRODUCTIVITY TOOLS

Tools to increase professional productivity / quality, eg MS Copilot

**Stein Verdict
Form**

PDF ⓘ

AG I am attaching a draft special verdict form. Give me three alternatives for the questions in the verdict form that make it more easy to understand to a non-lawyer

I'll help you create more user-friendly versions of the special interrogatories that would be easier for jurors to understand.



Alternative Jury Verdict Form Versions

Click to open document

I've created three different versions of the verdict form, each taking a different approach to making the questions more accessible to non-lawyers:

1. Version 1 uses plain language and focuses on making each question as clear as possible while maintaining the legal meaning.
2. Version 2 takes a Q&A format approach, with more context and clearer answer choices. This version might be especially helpful for jurors who prefer having more explanation.
3. Version 3 uses a timeline approach, organizing questions based on when things happened in the case, which might help jurors connect the questions to the evidence they heard.

Key improvements across all versions include:

- Removing legal jargon
- Using shorter sentences
- Adding context where helpful
- Making the yes/no choices clearer
- Using more natural language
- Organizing related questions together

modify any of these versions or would you prefer a different

Copy ⌂ Retry ⌄ ⌄

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AG Please provide a one paragraph explanation of the tax concept of FDII, or foreign-derived intangible income. The paragraph should be at the level of an eighth grade reader.



Foreign-derived intangible income, or FDII, is a special tax rule for U.S. companies that sell products or services to customers in other countries. It's designed to encourage American businesses to sell more things overseas. Basically, if a U.S. company makes money from selling to foreign customers, they might pay less taxes on that money. This applies to things like selling software, patents, or providing services to people in other countries. The government created this rule to help U.S. companies compete better with businesses from other countries and to keep jobs and business activities in the United States.

Copy Retry



Claude can make mistakes. Please double-check responses.

PRODUCTIVITY TOOLS

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Thanks. I think I need it to be slightly more sophisticated in language. Could you provide the explanation at a 12th grade reading level?



Certainly. Here's an explanation of FDII at a 12th grade reading level:

Foreign-derived intangible income (FDII) is a provision in U.S. tax law designed to incentivize domestic corporations to export goods and services related to intangible assets. Introduced as part of the 2017 Tax Cuts and Jobs Act, FDII offers a reduced tax rate on income that U.S. companies earn from foreign sales and services, particularly those associated with intellectual property like patents, trademarks, and copyrights. The policy aims to encourage multinational corporations to maintain their intellectual property and production within the United States while expanding their global market presence. By providing this tax benefit, the government seeks to enhance the competitiveness of U.S. companies in the international marketplace and discourage the offshoring of valuable intangible assets and related economic activities.

Copy Retry



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Claude can make mistakes. Please double-check responses.

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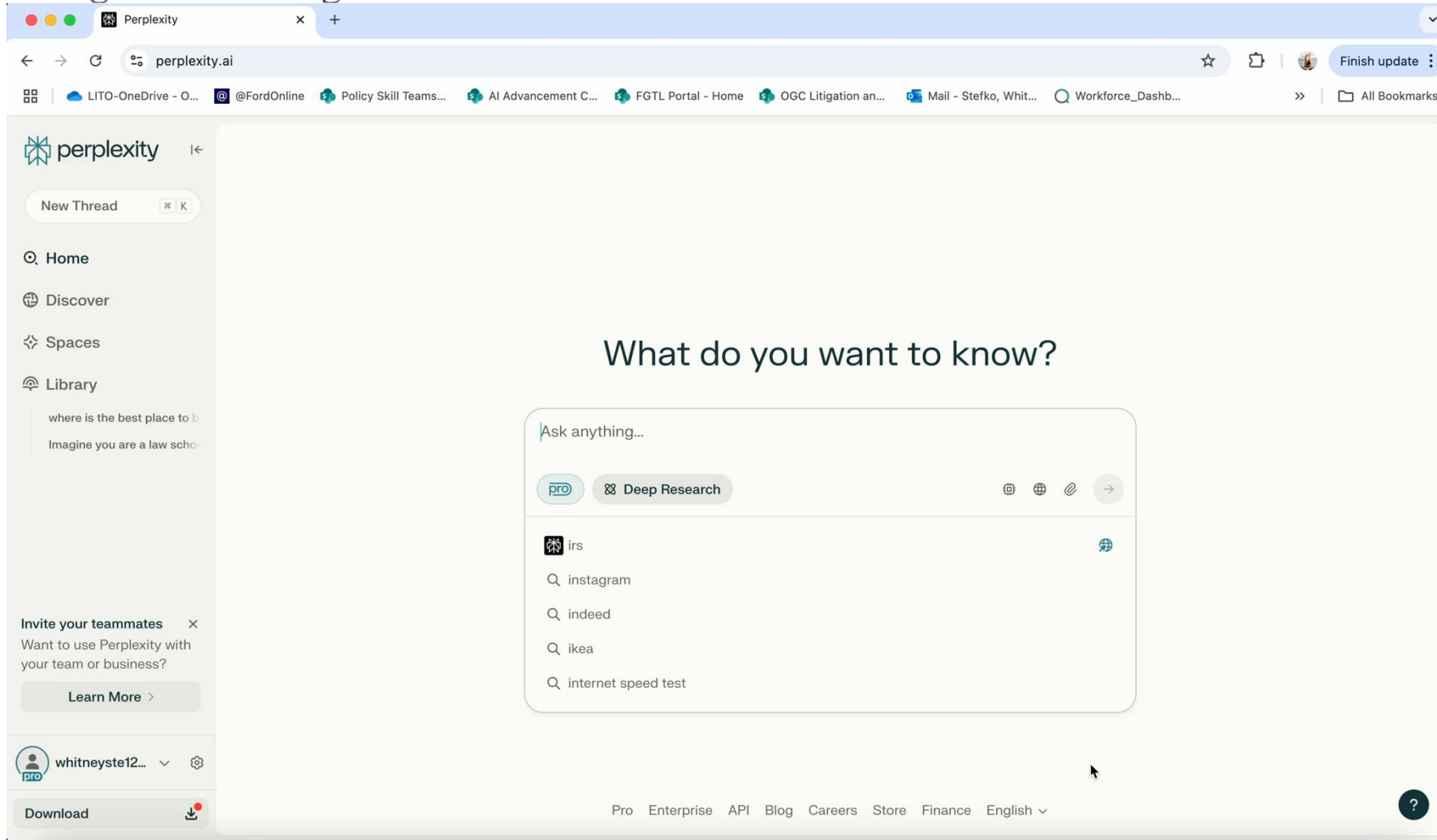
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Tools to increase professional productivity / quality, eg MS Copilot

Non-Exhaustive List – Examples Only



perplexity.ai



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Tools to increase professional productivity / quality, eg MS Copilot

Other Use Cases

1. Summarizing Documents

Office Suite Tool - review a repository of lease contracts and summarize all expiration dates in a table
Online Search - summarize recent privacy law changes in specific jurisdiction

2. Legal Research

Online Search - search for recent IP infringements
Content Creation Tool - generate sample motion or legal paper in relevant jurisdiction with relevant case law included
* Extra care using Productivity Tools in subject matters specific areas

3. Reviewing/Analyzing Documents

Content Generation Tool - Review/analyze evidentiary materials for key documents
Office Suite Tool - Review/analyze judicial rules/order

4. Drafting Documents

Office Suite Tool - Draft outline for case argument based on evidence, emails, and repository documents
Image and Presentation - Use Outline and draft entire presentation

5. Comparing Info Against Reference Materials

Task better suited for a custom solution.

PRODUCTIVITY TOOLS

Tools to increase professional productivity / quality, eg MS Copilot

Multi-Practice Tools + Use Cases



CUSTOM TOOLS

Advanced expertise using variety of tools, eg client retainer model

PRACTICE / FUNCTION TOOLS

Tools serving specific practice / function needs, eg, IP management

MULTI-PRACTICE TOOLS

Tools of application across practices / functions, eg legal research, litigation / transaction support

PRODUCTIVITY TOOLS

Tools to increase professional productivity / quality, eg MS Copilot

CLOUD / DATA INFRASTRUCTURE

Multi-Practice Tools

Legal
Research

Lexis+ AI[®]

Harvey

WESTLAW PRECISION

v|lex

Legal
Assistants

Thomson Reuters™ CoCounsel

Discover Vincent AI

LAWDROID

LEGORA

Matter/Case
Management/
Document Management

Clio

MITRATECH

NetApp

iManage

eBilling/
Time Tracking

brightflag

LEGAL
DECODER
LEGAL SPEND ANALYSIS

MULTI-PRACTICE TOOLS

Tools of application across practices / functions,
eg legal research, litigation / transaction support

Non-Exhaustive List – Examples Only

Enter terms, citations, databases, questions, anything ...

9th Circuit



Search Tips >
Advanced >



GET STARTED:

Cases

Statutes

Practical Law

Secondary Sources

Regulations



Precision Research

Content types

Federal materials

State materials

Practice areas

My content

Tools



Cases

Trial Court Orders

Statutes & Court Rules

Secondary Sources

Specialty areas

Artificial Intelligence Legal Materials & News

Civil Rights Legal Materials & News

COVID-19 Legal Materials & News

Business Law Center

Company Investigator

Court Wire Alerts Archive

Practical Law

Regulations

Administrative Decisions & Guidance

Arbitration Materials

Directories

Dockets

General Counsel Resources

Intellectual Property

International Materials

Briefs

Expert Materials

Forms

Jury Verdicts & Settlements

Litigation Analytics

Legislative History

News

Profiler

Key Numbers 

Proposed & Adopted Regulations

Proposed & Enacted Legislation

Trial Court Documents

Trial Transcripts & Oral Arguments

Sample Agreements

Public Records

Key Features

MULTI-PRACTICE TOOLS

Tools of application across practices / functions,
eg legal research, litigation / transaction support

Overruled in Part — See which parts of overruled cases are invalid and which are still good law.



Graphical View of History

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- Identify potential issues with the opponent's cited authority and quotations
- See relevant authority contrary to the positions in the opponent's filing
- Get analysis of your own work to anticipate attacks or spot weaknesses

Analyze an opponent's work



Quick Check Judicial

- See analysis of the issues and citations in the briefs filed by both parties to a matter
- Review the most relevant authority for the legal issues that neither party cited
- Discover issues with the citations and quotations relied upon by the parties

Quick Check Judicial

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Quick Check Judicial

Get analysis of the citations and quotations from both sides of a matter and see relevant authority cited by neither party.

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Choose file

or drag a Microsoft Word or PDF file here

Assign documents

Party 1 name

Max characters 25

Movant

1. + Webloyalty MFCC.pdf
2. + Webloyalty MFCC Reply.pdf
3. Drag and drop or press enter to assign selected file to Party 1

Party 2 name

Max characters 25

Opponent

1. + Webloyalty MFCC Opposition.pdf
2. Drag and drop or press enter to assign selected file to Party 2
3. Drag and drop or press enter to assign selected file to Party 2

Report name

Movant v Opponent

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Jurisdiction +

Date +

Previously Viewed +

Documents in folders +

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Omitted by both

Omitted by Movant

Omitted by Opponent

Cases relevant to both sides (8)

☐ ☐ ☐☐ Select all items 0 items selected☐ 1. Park v. Webloyalty.com, Inc.

United States District Court, S.D. California. • March 15, 2019 • Not Reported in Fed. Supp. • 2019 WL 1227062

Case details

Trial level outcome: Motion denied

This case was recommended for the following headings.

Movant: Webloyalty MFCC.pdf

- ☐ III. PROPOSED CLASSES
- ☐ 2. Plaintiff's Claims Present Common Questions of Law and Fact
- ☐ 1. Common Issues Predominate

Movant: Webloyalty MFCC Reply.pdf

- ☐ D. The Statute of Limitations Does Not Raise Individualized Issues

Opponent: Webloyalty MFCC Opposition.pdf

- ☐ 1. The EFTA Authorization Claim Presents Individualized Issues
- ☐ 3. The UCL Claim Presents Individualized Issues
- ☐ 4. The Statute of Limitations Raises Additional Individualized Issues As to All Claims
- B. In the Alternative, Any Class Must Exclude People Who Gave Releases Or Received Full Refunds

☐ 2. Bazarganfard v. Club 360 LLC

United States District Court, C.D. California. • July 28, 2023 • 344 F.R.D. 411 • 2023 WL 6304694

Case details

Motion type: Motion to certify class

🕒 Last 2 years

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Content type

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Trial Court Orders 0

Statutes 11

Regulations 1

Secondary Sources 1

Administrative Decisions &
Guidance 0

All cited authority 108

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Clear

Cases (95)

Unverified citations (3)



1 - 50 >

☐ Select all items 0 items selected

Sort: Severity of treatment ▾



1. Satterwhite v. City of Greenville, Tex.

United States Court of Appeals, Fifth Circuit. • August 23, 1978 • 578 F.2d 987 • 17 Fair Empl.Prac.Cas. (BNA) 1451

Cited by Movant: Document 2

- ▼ Certiorari Granted, Judgment Vacated by *Satterwhite v. City of Greenville, Tex.* U.S.Tex. March 24, 1980
- ...Minda SATTERWHITE, etc., petitioner, v. CITY OF GREENVILLE, TEXAS U.S.,1980 Supreme Court of the United States Minda SATTERWHITE, etc., petitioner,v. CITY OF GREENVILLE, TEXAS No. 78- 1008 March 24, 1980 Facts and opinion, D.C., 395 F.Supp. 698 549 F.2d 347 557 F.2d 414 **578 F.2d 987** On petition for writ of certiorari to the United States Court of Appeals for the Fifth Circuit. The petition for a writ of certiorari granted. Judgment vacated and case remanded to the United States Court of Appeals for the Fifth Circuit for further consideration in light of...

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tment: Most recent Distinguished (1) All (7)

Unverified citations

Below are items from your document that appear to be citations but cannot be verified. The citations may contain potential errors, cite documents that are not available, or match multiple documents on Westlaw.

Movant

Document 2: Webloyalty MFCC Reply.pdf

1. recommendation adopted, 2015 U.S. Dist. LEXIS 72347 (D. Mass. June 4, 2015)
2. Webloyalty relies on Western and So. Life Ins. Co. v. Countrywide Fin. Corp., No. 11-MDL-02265, 2012 U.S. Dist. LEXIS 60776, *19 (C.D. Cal. Mar. 9, 2012)

Opponent

Document 1: Webloyalty MFCC Opposition.pdf

1. 571 U.S. 1071

Close

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E, etc., petitioner, v. CITY OF GREENVILLE, TEXAS U.S.,1980 Supreme Court of the United States, 454 U.S. 100, 100 S.Ct. 1345, 69 L.Ed.2d 343 (1982) (SATTERWHITE, etc., petitioner,v. CITY OF GREENVILLE, TEXAS No. 78- 1008 March 24, 1980 Facts and opinion

☰ Cited authority

“ Quotation analysis

Select report ▾



36

7

43

□ 3.

Quotation from the analyzed document

Differences

...Seventh Claim challenges Webloyalty's practice of continuing to collect membership fees from consumers who enrolled in a Webloyalty program through a data pass method after the enactment of ROSCA. California Business and Professions Code § 17200 prohibits businesses from engaging in



“any unlawful, unfair or fraudulent business act **of** practice.”

Business practices violate section 17200 if they are unlawful, unfair, or fraudulent. *Cal Tech Comms. Inc. v. L.A. Cellular Tel. Co.*, 553, 560 (1998). Plaintiff has alleged violations of the unlawful...

Under Washington law, a contract requires material assent to its essential terms in order to be binding. Although it is clear that an electronic “signature” can be legally sufficient under Washington state law, see Wash. Rev.Code § 19.34.010(2), Washington courts have not decided whether or under...



§ 17200. Unfair competition; prohibite...

CA BUS & PROF § 17200 • West's Annotated California Codes • Business and Professions Code

As used in this chapter, unfair competition shall mean and include



any unlawful, unfair or fraudulent business act **or** practice

and unfair, deceptive, untrue or misleading advertising and any act prohibited by Chapter 1 (commencing with Section 17500) of Part 3 of Division 7 of the Business and Professions Code.

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Enter terms, citations, databases, questions, anything ...

GET STARTED:

Cases

Statutes

AI-Assisted Research

Precision Research

Content types

Federal materials

Cases

Trial Court Orders

Statutes & Court Rules

Secondary Sources

Specialty areas

Arti
Nev

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Sample Agreements

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Filters

(Showing 1 to 2 of 2)

Select	Name ↑↓	Created by	Date added ↓	Files ↑↓	Status
<input type="radio"/>	Stein v Farmers	Allison Goddard	12/10/24, 12:01 PM	10	Complete
<input type="radio"/>	AHG Social Security Orders	Allison Goddard	11/25/24, 4:51 PM	37	Complete

Page 1 of 1

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25



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Allison – 2:52 PM

Please create a timeline of the events in this trial based on these transcripts. The timeline should include citations to the transcript that refer to a specific event.

Database selected:  **Stein v Farmers**



↕ Search a Database



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September 9, 2018: Barbara and Stuart Stein were involved in a car accident in Colorado Springs, Colorado, when an uninsured motorist struck their vehicle from behind. [1](#)

August 15, 2018 - February 15, 2019: The Steins had an active automobile insurance policy with Farmers Insurance Company of Arizona ("FICA") that included \$250,000 uninsured motorist bodily injury coverage per person. [2](#) With two vehicles covered, the Steins had a \$500,000 policy limit. [3](#)

May 22, 2019: Steve Wayant, a claims adjuster at FICA, gave the Steins \$175,000 each, totaling \$350,000. [4](#) [5](#) The letter accompanying the payment stated that FICA would not request reimbursement even if the final award was less than \$350,000. [6](#)

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Steins filed a lawsuit against FICA. [7](#) [8](#)

Please create a timeline of the events in this trial based on these transcripts. The timeline should include citations to the transcript that refer to a specific event.

Database selected:  Stein v Farmers



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September 9, 2018: Barbara and Stuart Stein were involved in a car accident in Colorado Springs, Colorado, when an uninsured motorist struck their vehicle from behind. [1](#)

August 15, 2018 - February 15, 2019: The Steins had an active automobile insurance policy with Farmers Insurance Company of Arizona ("FICA") that included \$250,000 uninsured motorist bodily injury coverage per person. [2](#) With two vehicles covered, the Steins had a \$500,000 policy limit. [3](#)

May 22, 2019: Steve Wayant, a claims adjuster at FICA, gave the Steins \$175,000 each, totaling \$350,000. [4](#) [5](#) The letter accompanying the payment stated that FICA would not request reimbursement even if the final award was less than \$350,000. [6](#)

February 28, 2019: The Steins filed a lawsuit against FICA. [7](#) [8](#)

July 31, 2020: Mrs. Stein's deposition was taken. [9](#)

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September 2020: An independent medical evaluation was conducted in the Stein claim. [11](#)

December 15, 2020: Mr. Kammeraad completed an evaluation of the Stein claim. [12](#)



40



Page Width



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1 Q. OKAY. SO STEVE WAYANT OFFERS THIS MONEY -- DOESN'T
2 OFFER IT. HE GIVES THEM \$175,000 EACH, \$350,000, IN EARLY MAY
3 OF 2019, TRUE?

4 A. IT WAS AN UNDISPUTED AMOUNT. HE CALLED IT AN ADVANCE
5 AND HE SAID IT IS SPECIFICALLY NOT AN UNDISPUTED AMOUNT, BUT I
6 KNEW HE FELT THAT FARMERS OWED AT LEAST THAT MUCH, YES.

7 Q. IN YOUR DEPOSITION, SIR, YOU TESTIFIED -- I AM NOT GOING
8 TO READ YOUR ACTUAL QUESTION, BUT I WILL. I JUST WANT TO
9 REFRESH YOUR RECOLLECTION.

10 MR. WAYANT SAID, HERE IS \$175,000, EACH OF YOU, AND YOU
11 DON'T HAVE TO PAY IT BACK.

12 ISN'T THAT TRUE, SIR?

13 A. I DON'T BELIEVE HE ASKED FOR THE MONEY BACK.

14 Q. I AM SORRY. SO YOU AGREE WITH ME, SIR?

15 A. IN SUM, YES.

16 Q. AND HE SAID, HEY, THE PURPOSE OF THIS IS TO HELP YOU
17 WITH YOUR MEDICAL BILLS.

18 ISN'T THAT TRUE?

19 A. I SAW THAT IN HIS LETTER.

20 Q. AND HIS LETTER --

21 MR. HOLLINS: CAN WE BRING THAT UP? WE WILL GET HIS
22 LETTER UP HERE IN A SECOND. IT IS A MAY 22 LETTER. DO WE
23 HAVE IT?

24 WE ARE GOING TO MOVE ON WHILE WE FIND IT. WE

25 HAVE -- THERE WE GO. NO. LETTER. IT IS PAGE 124. I DON'T

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Summarizing Documents Using CoCounsel- L330 Task Optimization (Reviewing, Summarizing and Drafting Documents)

Using our prioritization matrix in conjunction with quantitative & qualitative data review we identified an opportunity with low complexity and high ROI within the L330 task code.



Litigation Code Definitions

Uniform Task-Based Management System

L330 Depositions.

All work concerning depositions, including determining the deponents and the timing and sequence of depositions, preparing deposition notices and subpoenas, communicating with opposing or other party's counsel on scheduling and logistics, planning for and preparing to take the depositions, discussing deposition strategy, preparing witnesses, reviewing documents for deposition preparation, attending depositions, and drafting any deposition summaries.

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Legal Invoice Review – Legal Decoder

UBS and UnitedLex Collaboration Awarded 2025 ACC Value Champions for Excellence in Legal Innovation



Tech-enabled partnership with Legal Decoder focused on legal spend optimization drove 25% cost reduction while surfacing long-term efficiency gains

Mar 13, 2025, 9:00 AM ET

NEW YORK, March 13, 2025 (GLOBE NEWSWIRE) -- [UnitedLex](#), a tech-enabled legal and professional services company, has been honored by the Association of Corporate Counsel as a [2025 Value Champion](#) alongside UBS, a global financial services company, supported by technology from Legal Decoder. This prestigious recognition honors organizations that demonstrate creative and value-based legal management skills, driving both internal efficiencies and industry-wide transformation. The award recipients were honored for their innovative project, ***“UBS and Credit Suisse Outside Counsel Management Integration: AI-Powered Optimization with UnitedLex and Legal Decoder.”***

“At the heart of this project was the close collaboration between the UBS Outside Counsel Management team, the UBS in-house legal team, and UnitedLex, to turn analytic insights into meaningful action,” said John Burke, Managing Director, Outside Counsel Management, UBS. “This was a truly collective effort, requiring precision, professionalism, and objectivity from all stakeholders. We delivered a level of success that speaks to the strength of our partnership and the value of a data-driven approach.”

By integrating data-driven decision-making into UBS’s legal operations, this project strengthened a foundation for sustainable legal cost management, establishing a roadmap for ongoing spend analysis, monitoring, and strategic decision making.

Other Use Cases

1. Summarizing Documents

Legal Assistant - Summarizing large evidentiary materials with legal analysis

Document Management - Summarize key legal repositories

2. Legal Research

Legal Research - research judicial statistics by jurisdiction

Legal Assistant - take research and have assistant generate memo of research as it relates to key documents

3. Reviewing/Analyzing Documents

eBilling - evaluate key task codes being billed to by volume, cost and skill level

Matter/Document Management - review key case claims relative to evidence and develop strategy

4. Drafting Documents

Legal Assistant - draft preliminary memo or motion based on specific legal research and uploaded files

Legal Assistant - draft privacy policy incorporating relevant new statutes and regulations


5. Comparing Info Against Reference Materials

Legal Assistant - Compare Contract to Standard Terms and Conditions and identify deviations, impact on negotiations, and proposed redlines

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Practice / Function + Use Cases



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PRACTICE / FUNCTION TOOLS
Tools serving specific practice
/ function needs, eg, IP management

MULTI-PRACTICE TOOLS
Tools of application across practices / functions,
eg legal research, litigation / transaction support

PRODUCTIVITY TOOLS
Tools to increase professional productivity / quality, eg MS Copilot

CLOUD / DATA INFRASTRUCTURE

Practice / Function Tools

TOOLS



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Commercial & Transactions



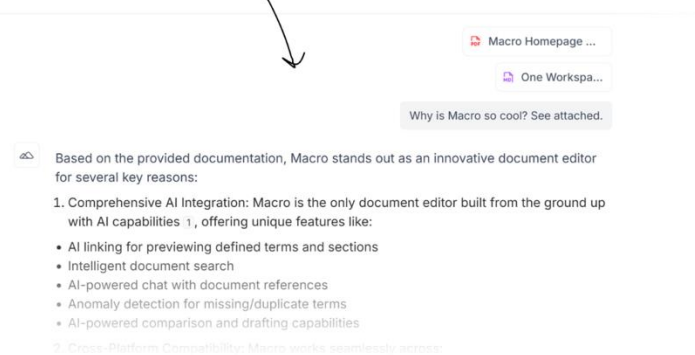
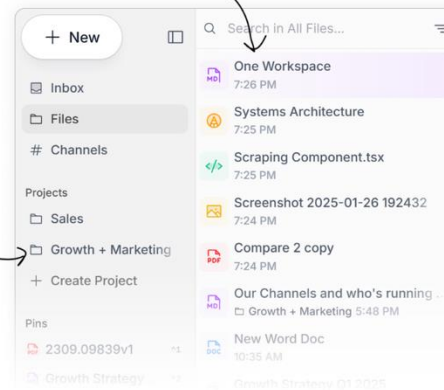
One AI Workspace

Chat and collaborate with AI. Edit **pdfs**, **docs**, **notes**, **code** and **diagrams** in one place.

Built-in editors for **code**, **docs**, **notes** and **pdf...**

AI chat with
and edit files

Organize
with Projects



PRACTICE / FUNCTION TOOL
Tools serving specific practice
/ function needs, eg, IP management

Custom Tools + Use Cases

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/ function needs, eg, IP management

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Tools of application across practices / functions,
eg legal research, litigation / transaction support

PRODUCTIVITY TOOLS

Tools to increase professional productivity / quality, eg MS Copilot

CLOUD / DATA INFRASTRUCTURE



26 March 2025

Baker McKenzie Awarded Best Use of AI at 2025 Legalweek Leaders in Tech Awards

Leading global law firm Baker McKenzie has been awarded Best Use of Artificial Intelligence in the Law.com 2025 Legalweek Leaders in Tech Awards. This recognition highlights the innovative partnership between the Firm's cybersecurity and applied AI (BakerML) practices, which has revolutionized how Baker McKenzie's lawyers respond to global cybersecurity incidents.

Brian Hengesbaugh, chair of data and cybersecurity at Baker McKenzie, noted, "As global cyber threats grow in scale, speed and sophistication, clients need legal partners who can match pace. This recognition reflects the power of combining deep cybersecurity legal expertise with advanced AI, enabling faster and more confident decision-making. Our collaboration has been a game-changer for us helping our global clients navigate the increasingly complex regulatory landscape, and we're proud to be at the forefront of transforming how legal support is delivered in these high-stakes moments."

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NEWS **ALERT**

Media Contact:

Michael Clark

American Arbitration Association

+1.212.716.3978

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AAA-ICDR® Launches New AAAi Panelist Search* to Enhance Panelist Selection with AI Technology

NEW YORK (October 10, 2024)—The American Arbitration Association® (AAA®) and its international division, the International Centre for Dispute Resolution® (ICDR®), today announced the internal beta launch of AAAi Panelist Search, a new generative artificial intelligence (GenAI)-powered panelist selection tool. AAAi Panelist Search is designed to mine the comprehensive AAA-ICDR Roster to identify the most suitable matches for arbitration and mediation cases. Case managers will use this tool to supplement their traditional roster searches, aiming to build a list of arbitrators or mediators tailored to the specific parameters of each case.

“In March, we initiated a beta test with a select group of case managers to compare AAAi Panelist Search to their panelist selections,” said Cindy Rumney, AAA vice president of panel resources and development. “By the end of summer, most of the beta team were incorporating it into their list creation process. AAAi Panelist Search effectively identifies the best fits for each case, aligning closely with the selections made by our experienced case managers.”

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Introducing ClauseBuilder® AI (Beta) and API Innovations: Streamlining Arbitration and Mediation Clause-drafting with Generative AI



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Posted on: Tue, 12/03/2024



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By Caitlin Saint-Jean

The AAA® has launched ClauseBuilder AI (Beta), a generative AI (GenAI) tool designed to simplify drafting arbitration and mediation clauses while introducing new efficiencies through application programming interfaces (APIs). The tool leverages natural language processing to enable users to create alternative dispute resolution (ADR) clauses aligned with AAA standards, offering precision and customization. Additionally, the new APIs streamline case administration by facilitating seamless data exchange, filing, and tracking for users managing multiple cases. Below, AAA leaders provide insights into these developments: Chief Information and Innovation Officer Diana Didia emphasizes collaboration with the legal team for clause accuracy and the strategic use of APIs; Software Development & Operations Vice President Yogesh Chaudhari highlights the intuitive design of the tool; and President and CEO Bridget McCormack discusses the AAA's mission to enhance dispute resolution through accessible and innovative technology.

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Lori Cohen, left, and Gerard Buitrago, right, with Greenberg Traurig. Courtesy photos

NEWS

'Not Going Away': A Star Greenberg Traurig Litigator Lost Her Voice. AI Brought It Back

Lori Cohen achieved an impressive 58 defense verdicts before suddenly and inexplicably losing her voice. Now, with the help of her long-time trial technologist and friend Gerard Buitrago, she's harnessing the power of AI to get back in the courtroom.

January 24, 2024 at 07:47 PM

🕒 14 minute read

Artificial Intelligence



Stephanie Wilkins ➔

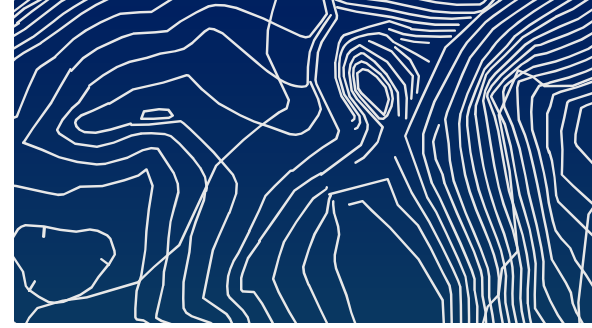
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Arizona Supreme Court taps AI avatars to make the judicial system more publicly accessible

Arizona highest court has created a pair of AI-generated avatars to deliver news of all rulings issued by the justices

By SEJAL GOVINDARAO Associated Press
March 17, 2025, 9:06 PM



PHOENIX -- Arizona's highest court has created a pair of AI-generated avatars to deliver news of every ruling issued by the justices, marking what is believed to be the first example in the U.S. of a state court system tapping [artificial intelligence](#) to build more human-like characters to connect with the public.

A court in Florida uses an animated chatbot to help visitors navigate its website, but the Arizona Supreme Court is charting new territory with the creation of Victoria and Daniel. Made of pixels, the two avatars have a different job in that they serve as the face of the court just as a spokesperson made of flesh and blood would.

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Chaz Deluca

Jan 23, 2024

Introducing the Legal Case Brief Assistant - A Tool for Law Students



Hello everyone,

I'm excited to share a tool I've developed called the "Legal Case Brief Assistant". This AI assistant is designed to aid us in the process of briefing legal cases, a task that can sometimes be time-consuming and complex.

URL: [Legal Case Brief Assistant](#) ➞

Instructions:

1. **Search for the Case on LexisNexis:** Find the legal case you're interested in.
2. **Download the Case Document:** Choose 'Microsoft Word' format for the download.
3. **Select and Deselect Appropriate Options:** Opt for 'Full documents' and deselect options like 'Shepard's Signal™ Indicator', 'Headnotes', 'Core Terms', etc.
4. **Complete the Download:** Save the file to your computer.
5. **Use Legal Case Brief Assistant:** Upload the downloaded Word document to the platform.

Please note, it's imperative to read the cases thoroughly. This tool is meant to assist in briefing but not replace the comprehensive understanding that comes from reading and analyzing cases ourselves.

Feel free to try it out and share your thoughts or observations. Looking forward to hearing your feedback!

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Use Cases for GenAI in Legal

Introduction

Generative AI is both replacing and supplementing traditional tasks performed by paralegals and lawyers across law firms of all sizes.

As AI adoption is relatively new, clients and legal professionals have shown varied responses to its use in law:

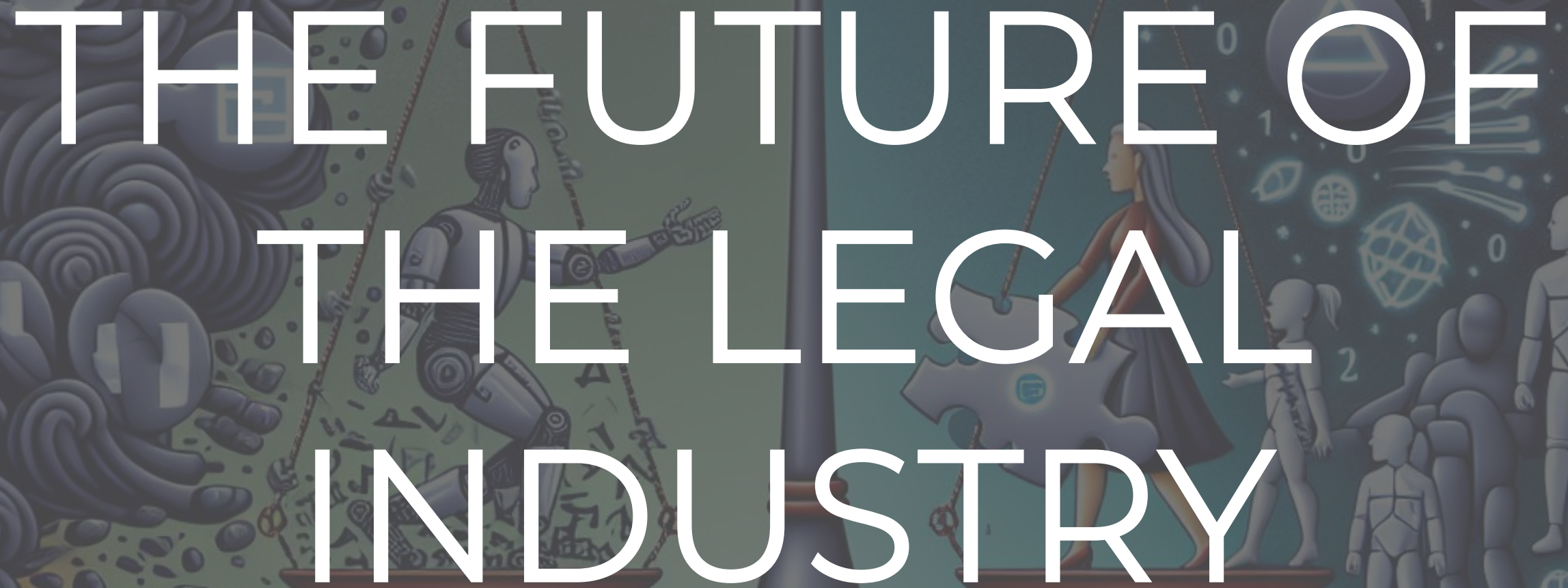
- Some clients explicitly prohibit AI use, while others actively require it.
- Attorneys and paralegals range from enthusiastic adopters to skeptical observers.
- Several firms are developing proprietary AI tools and training programs.

Clients and attorneys continue to explore, question, and adapt to these technological changes.

RAILS Working Group 1 developed the below resources on use cases for AI in legal to assist attorneys in communicating the opportunities for AI with clients or colleagues. We hope this resource fulfills a need in the ecosystem.

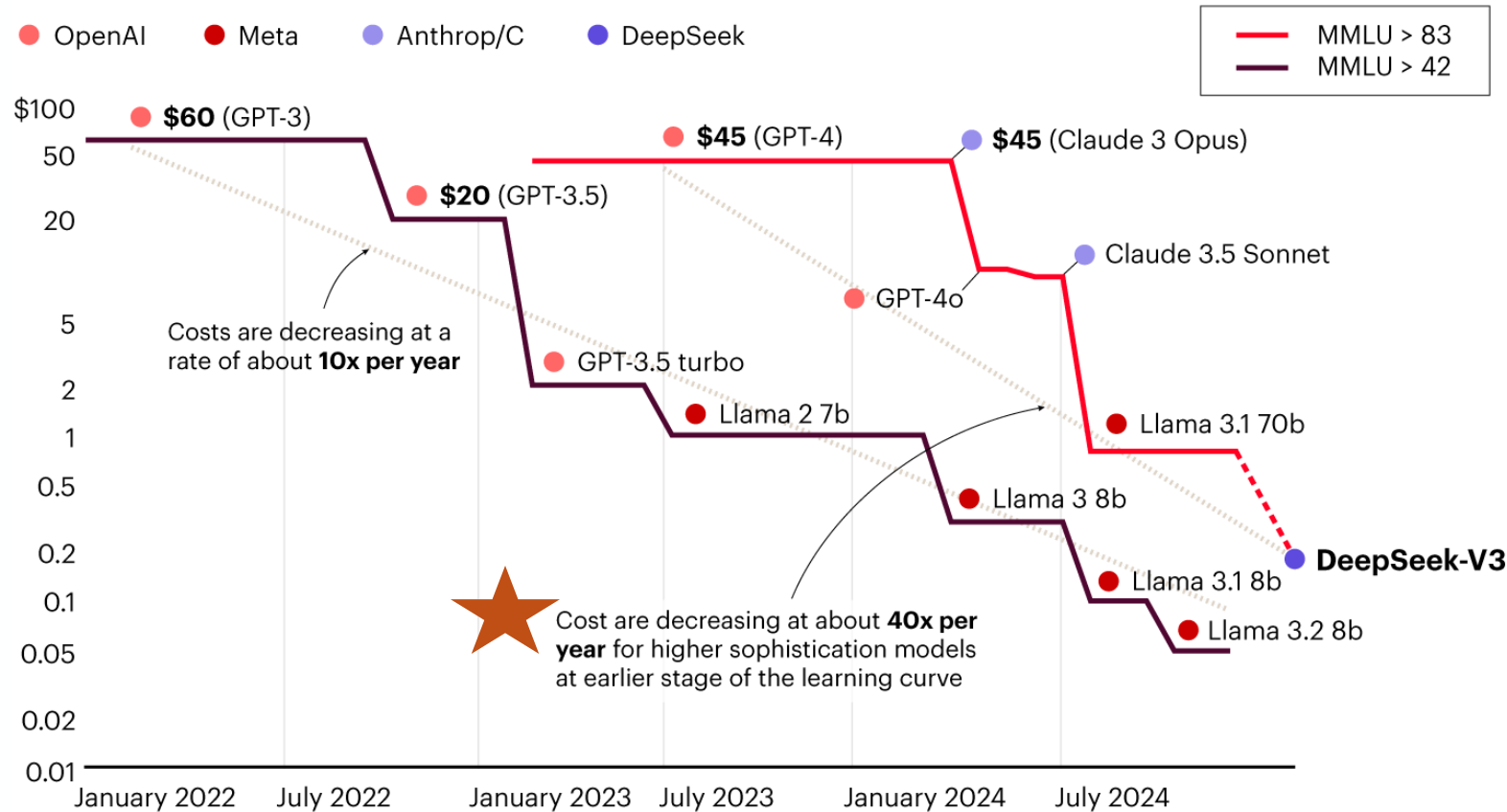
[Read the Use Cases](#)

THE FUTURE OF THE LEGAL INDUSTRY



Cost of Intelligence is Dropping Rapidly

Cost of the cheapest LLM per million tokens by MMLU (in US dollars, log scale)



Source: Bain & Company (2025)

- The **cost of human intelligence is a blocker** and a limiter for the scope of legal work being done
- As the cost of intelligence decreases legal teams can **look at work from a different perspective**



Steven Lerner • 2nd
Senior Reporter at Law360
6h • 🌐

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A look at [#legaltech](#) funding by month.

February 2022: \$73.3 million

February 2023: \$67.2 million

February 2024: \$47.9 million

February 2025: \$983.2 million

One of these things is not like the other.



Joe Borstein and 16 others

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AI will **Replace** Legal Tasks

Goldman Sachs | Economics Research

26 March 2023 | 9:05PM EDT

Global Economics Analyst

The Potentially Large Effects of Artificial Intelligence on Economic Growth (Briggs/Kodnani)

44% of legal work
can be automated
by Artificial
Intelligence

AI will **Create** More Legal Tasks





AI & FUTURE TECHNOLOGIES

Agentic AI in legal: What it is and why it may appear in law firms soon

Zach Warren Manager for Enterprise Content for Technology & Innovation / Thomson Reuters Institute

9 Dec 2024 · 7 minute read





Nicola Shaver · 1st

Driving the Future of Law at Legaltech Hub | Legal AI, Legal Inno...

2w · 🌐

...

So many people have expressed concern about AI's impact on lawyer training.

"If young lawyers don't do things manually (the way they've always been done), how will they learn?"

This is the exact same objection that has been lodged every time new technology is introduced.

- ⚠️ **Email?** How will lawyers learn to write proper legal letters?
- ⚠️ **eDiscovery systems?** How will lawyers learn how to perform document review and identify relevant evidence?
- ⚠️ **Online research systems?** How will lawyers learn to perform their own caselaw research?
- ⚠️ **Document automation?** How will lawyers learn to write contracts?

In exactly *none* of these scenarios has automation ultimately impeded legal training.

This time, there is another consideration: **we have available to us the single best learning tool that has ever existed.**

The very AI systems that naysayers fear will upend the training of young lawyers will in fact become the delivery systems for that training in the future.

Even now, for those so inclined, these systems are outstanding teachers and trainers. Upload any complex document into an AI system and ask questions to make sense of it. You can already use AI to build training programs to learn a new language or to develop self-guided lessons on endless subject matters.

In the future, built out properly, organizations will be able to upload checklists and process maps and offer an interface wherein junior associates can ask and learn how to do things - with not just answers but relevant learning materials pushed to them.

None of this will happen organically, though. Just as professional development teams had to create training programs before, so they will have to design and build training programs that are coded into AI systems, allowing for just-in-time learning that is accessible but also oriented towards appropriate skills development depending on the practice area and seniority of the user.

Flailing our arms and worrying about a loss of skills won't get us anywhere, and neither will ignoring the fact that AI is going to change the way we learn.

Professional development teams should be pausing now to determine how best to upgrade learning programs given the inevitable adoption of AI by everyone in their organization. If we don't consciously develop those new systems for learning, then learning won't happen. But that will be our fault, not the AI's.

[#artificialintelligence](#) [#AI](#) [#law](#) [#legal](#) [#legalskills](#)

THE NEED FOR EDUCATION



Lawyers Getting Tripped Up By Generative AI Such As ChatGPT But Who Really Is To Blame, Asks AI Ethics And AI Law

Lance Eliot Contributor ⓘ

Dr. Lance B. Eliot is a world-renowned expert on Artificial Intelligence (AI) and Machine Learning...

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May 29, 2023, 08:00am EDT



New York law fake ChatGPT

By Sara Merken

June 26, 2023 4:28 AM EDT · Updated



The Rise of AI: Why Legal Professionals Must Adapt or Risk Being Left Behind

Artificial Intelligence has already taken over many jobs that were previously handled manually. This technology's continuous development challenges more professions and will even disrupt high-skill areas such as the legal industry.



BY **ROLAND POLZIN** • JAN 11, 2023

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Opinions expressed by Entrepreneur contributors are their own.

Could It Be Unethical Not to Use AI?

At its 2019 annual meeting the ABA adopted Resolution No. 112 urging courts and lawyers to address the emerging ethical and legal issues...

By **Amy Endicott and Omar Haroun** | January 07, 2021



Shutterstock image

At its 2019 annual meeting the ABA adopted Resolution No. 112 urging courts and lawyers to address the emerging ethical and legal issues relating to the usage of artificial intelligence (AI) in the practice of law including: bias, explainability and transparency of automated decisions made by AI; ethical and beneficial usage of AI; and controls and oversight of AI and the vendors that provide AI.

TABLE 11.1. New jobs for lawyers

the legal knowledge engineer
the legal technologist
the legal hybrid
the legal process analyst
the legal project manager
the ODR practitioner
the legal management consultant
the legal risk manager

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NEW SKILLS FOR LEGAL PROFESSIONALS IN THE AGE OF AI



- Basic Tech Competency
- Agility – Growth Mindset
- Technology Evolution
- Behind the Blackbox
- Hands on Workshops
- Use Case Discussions
- Patience
- Personal Use Cases

Legal Professionals are the key...



Ethan Mollick  • Following

Associate Professor at The Wharton School. Author of Co-Intelligence

13h • 

Big firms like Amazon and Microsoft shipping LLMs need to recognize that IT is not always the center of AI use in companies - the key to productivity is often workers and subject matter experts using chatbots who experiment & share what they learn. This is where we saw the gains in our experiments at Procter and Gamble and at BCG.

Making key features and products only accessible to IT functions and expecting them to build centralized solutions means that the tools are not in the hands of the people who will figure out the best use cases. There is a role for IT, obviously, but it is not always the traditional one in plays in technology adoption.



Gerald Glover III, Esq. and 1,263 others

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THANK
YOU

