

Modern tools, better practice: Tech in law firm management

After exploring why plaintiff firms should embrace AI, we now turn to how automation can streamline workflows from initial claim through discovery and beyond.

By Danny Abir

In Part 1 of “Reconfiguring law firm management with automation and emerging tech,” (*Daily Journal*, Aug. 13), the discussion covered why plaintiff firms should embrace emerging technologies like artificial intelligence to boost productivity and adapt to shifting power structures. This article now focuses on how AI and automation tools can streamline workflow from the initial claim through discovery and beyond.

There are several steps lawyers take before even setting foot in a courtroom to litigate a claim. Some professionals gravitate toward research and discovery, while others do their best work while arguing before a judge and jury.

Legal tech and AI tools are available to assist lawyers through all phases of a case and manage tedious tasks, which can speed up review processes and analysis. No lawyer should rely on them solely without proper review, but let’s explore the benefits of some of the leading tools by their practical applications.

Streamline demand letters

Demand letters are central to plaintiff practice in California, yet the mere mention of them causes eyes to roll because drafting them is so time intensive. Tools such as EvenUp and DemandsAI(r) have emerged to ease this responsibility. These AI-powered platforms can generate settlement-ready demand letters almost instantly by:

- **Parsing medical records and other evidence**
 - **Calculating damages**, including pain and suffering, lost earnings and future care needs
 - **Organizing facts and citations** for maximum persuasive effect
 - **Flagging missing records or prior injuries**
 - **Estimating case value** based on real-world outcomes and California-specific trends
- EvenUp sets itself apart by combining AI with human expert re-

view, ensuring demand letters are both fast and fact-rich. Its “Case Companion” feature quickly extracts and organizes key facts from medical files, saving paralegals and attorneys hours of tedious work.

One mid-sized California plaintiff firm reported that EvenUp reduced demand letter preparation time from six hours to under one hour per case. The firm also noted a 20% increase in settlement values due to more comprehensive, data-driven demands. A smaller firm using DemandsAI(r) saw a 50% reduction in time spent on initial demands, allowing attorneys to focus more on client strategy.

Modernizing discovery and document management

Discovery is widely regarded as one of the most demanding phases of litigation. Even attorneys who find satisfaction in discovery will acknowledge that it can consume significant time, effort and resources. AI tools are now transforming this process by streamlining document management and analysis.

The Microsoft Word plugin ClearBrief allows users to conduct contextual searches and automatically extracts dates from transcripts before generating tables of authorities and deposition exhibits. The system uses artificial intelligence to find



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inadmissible evidence and provide reusable content which speeds up the drafting process.

Through its AI capabilities, Adobe Acrobat Pro enhances the PDF workflow by performing faster redaction and optical character recognition (OCR) and clause recognition, which improves efficiency and security.

Legal research and document analysis

Modern legal research platforms use AI to search case law, statutes and regulations with unprecedented speed and accuracy. For example:

- **Casetext CoCounsel:** Finds relevant authorities and drafts memos, deposition outlines and medical chronologies—often in under 15 minutes for tasks that once took hours

- **Lexis+ AI (Protégé):** Integrates your firm’s documents with Lexis’s library to create tailored legal drafts and summarize large case files

- **Westlaw Precision + CoCounsel:** Excels at jurisdictional surveys, detects mischaracterizations in briefs and supports multi-jurisdiction research

AI document analysis tools sift through voluminous records, flag inconsistencies and extract key facts – helping you find the “needle in the haystack” and ensuring no critical detail is missed.

Innovations in jury selection and trial preparation

Trial preparation, long considered an art, is also being transformed by AI. While the term “revolutionary” should be used sparingly, this is one of those situations where the word is completely appropriate. Jury Simulator creates AI-generated jurors based on local demographics and psychographics – their values, in-

terests, opinions, attitudes and lifestyles. This is incredibly insightful when conceptualizing a jury of your peers. These “Persona Bots” offer perspective on case theories, witness credibility and argument effectiveness, offering insights at a fraction of the cost and time of traditional focus groups. While nothing replaces in-person mock trials, these tools are incredibly insightful; further, it can save five figures in preparatory costs.

During trial, these tools can adapt to reflect the seated jury’s profile, acting as a “shadow jury” to help assess case presentation in real time. ClearBrief’s hyperlinked courtesy copies are a valuable resource, generating documents that meet evolving court filing requirements and ensuring judges can navigate key evidence effortlessly.

Enhancing client intake

Managing increasing caseloads without sacrificing client service is a constant challenge. AI-powered intake solutions, such as Smith.ai, helps by offering an around-the-clock virtual receptionist that can qualify leads and book consultations.

One plaintiff firm integrated Smith.ai and saw a 25% increase in qualified leads and a 15% boost in case conversion rates. Predictive analytics helped attorneys prioritize cases with the highest settlement potential, improving profitability.

Everyday efficiencies

A tool does not need to exist as a single platform. Many programs you already use – like Word and Outlook – now include machine learning features that streamline writing, scheduling and email drafting. Word, for example, has always checked for spelling but is now automatically doing so and highlighting grammar issues and repeated words. This will

prevent embarrassing mistakes before judges, opposing counsel or even clients.

The new versions of Microsoft programs deliver Copilot as a feature, but users find its customization options less flexible compared to the platforms mentioned above. The platform serves as an introduction to this developing domain, so experiment with it to determine its useful features and limitations.

These built-in tools add up to significant time savings and help maintain professional standards. But make sure that your communication retains your authentic voice. If you are spending more time re-writing anything – from an email to a legal brief – assume your audience can tell the difference between you and a simulation.

Mastering prompt engineering for legal practice

If AI is here to stay and society – let alone, law firms – will be relying on it, then prompt engineering should be a prerequisite for any user. Prompt engineering is the practice of crafting specific and effective instructions, known as prompts, to guide generative AI models in producing desired outputs. It involves understanding how these models interpret language and then structuring prompts to elicit accurate, relevant and high-quality responses.

Essentially, it’s about bridging the gap between human intent and machine understanding to achieve optimal results from AI systems. This extends beyond basic prompting; effective prompt engineering requires knowledge of AI and machine learning, strong critical thinking and communication skills, and sometimes even programming and development abilities.

If and when you decide to use certain platforms, ask for demos

that are accessible to your entire firm – in-person and virtually. This will ensure optimal outputs.

Taking CTRL instead of playing catch-up

California plaintiff firms don’t just practice law – they manage risk, invest in people and bet on outcomes that can take years to realize. Work must be accomplished, quality must remain high, and margins are constantly squeezed by rising litigation costs.

AI now automates written discovery, generates objections with a click and allows clients to respond to interrogatories and requests for admission via secure portals. While this does not mean attorneys should assume complete accuracy, its capabilities reduce attorney workload and empowers clients to participate more actively in their cases.

Firms adopting AI report faster workflows, higher settlement values and reduced burnout. Those who resist risk falling behind competitors who leverage technology for better, faster and more cost-effective representation.

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