

The Dawn of Advanced Conversational AI in the Legal Tech Landscape

By Brandi Pack, Legal Ops Analyst & AI Specialist

Over the past decade, there have been tremendous strides in AI, with advancements in its power and the range of applications across industries. The field of Legal Tech has significantly benefitted from these developments, with many software products now integrating AI for tasks such as automating contract management, document review, and eDiscovery research.

While many legal professionals have taken advantage of these technological improvements, the progress has been incremental, and developments have typically been limited to the backend of software products. As a result, the true impact of AI has remained largely hidden from view, with some users feeling apprehensive about its complexity or its potential.

However, the general AI landscape has changed with the emergence of conversational AI-enabled by neural networks and large language model (LLM) technology. Conversational AI refers to technology that enables computers to engage in conversation with humans naturally and informally. It often uses natural language processing capabilities to understand user input, analyze the context, and generate appropriate responses. Recent advancements in this area have enabled unprecedented human interactions with AI on the front end of software products in a way that will indeed be groundbreaking.

The most well-known of these systems, ChatGPT, has quickly gained notoriety, having taken the world by storm since its release in late 2022. The popularity of OpenAI's application is evident in its record-setting user base growth, with 100 million users accumulated in just over two months, and the platform now averages more than 13 million unique users each day. Amazingly, OpenAI has achieved these impressive statistics without using their most advanced technology. Rumors have circulated about the anticipated release of AI with even greater capabilities, generating much excitement about future advancements.

Some consider advancements in this field risky due to observed challenges with ChatGPT. This includes system "hallucinations" (fabrications of language that don't align with the facts), potential AI bias, and the risk of conversations going off the rails during long chat sessions. Microsoft has been in a very public struggle to fine-tune their OpenAI-powered chat assistant Sydney, which was exhibiting unpredictable and even occasionally disturbing behavior. It will be necessary for companies using this newer, more powerful technology to demonstrate that they have safeguards in place to mitigate these concerns.

Although it has only recently been announced, legal tech pioneer Casetext has used a more advanced OpenAI technology not available to the public for some time to develop an AI CoCounsel assistant, affectionately referred to as "CoCo." Because of the natural language interface, interacting with CoCo feels like working virtually with a knowledgeable human assistant. Current applications for CoCo are wide-ranging and include legal research, litigation preparation, content generation, document management, and some contract management. Casetext has utilized AI with its powerful "AllSearch" capabilities in its previous product offering. This technology is highly effective at understanding legalese and employs a variety of approaches to extract relevant information from vast amounts of legal documents.

“AI is helping to break down barriers when it comes to legal services. This is leading to the democratization of the field and making it easier for a wider range of people access affordable and quality legal advice.”

*~ Stephanie Corey,
CEO/Founder, UpLevel Ops*

For example, by using techniques such as sentence splitting to isolate individual pieces of information combined with LLM technology, the tool can better understand and interpret content, providing users with more accurate search results. Combining the abilities of AI Search and AI CoCounsel creates an assistant with unprecedented speed and accuracy when performing a huge variety of legal tasks.

Although the computing power required to run a system like CoCo may limit the technology's widespread use, it can potentially level the legal playing field by enabling smaller firms and non-profits to compete more effectively with larger organizations. In addition, the ability to communicate complex legal topics in natural language opens up the possibility that more legal work can be done independently, without reliance upon expensive firms.

UpLevel Ops CEO and Co-founder Stephanie Corey has long been talking about inevitable changes in terms of ease of access to legal services and sees AI as an accelerator.

"By automating many routine tasks and providing easy access to information, AI is helping to break down barriers when it comes to legal services," Corey said. "This is leading to the democratization of the field and making it easier for a wider range of people access affordable and quality legal advice."

The power and ease of natural language interaction between humans and machines have given way to a new field of expertise, prompt engineering. Experts in this field will design effective prompts to create successful and productive communications between users and AI systems. Prompt engineering is employed at different levels of system interaction. AI developers use it in various ways, including enhancing system capabilities, creating guardrails, and front-loading other hidden instructions on how the AI should interact with its users. End users can employ similar techniques and tricks to get the system to work for them optimally. Prompt engineering plays an important role in shaping the user experience and ensuring that AI systems perform as intended by providing guidance and structure for these interactions.

Although conversational AI systems do automate some routine tasks, the need for prompt engineering will remain. Users must develop a certain base level of expertise to drive AI systems effectively and capitalize on their capabilities. Becoming proficient in prompt engineering will be a critical skill for those looking to maximize the potential of conversational AI. Many, if not most, law firms will likely have at least one prompt engineer on staff when this technology becomes more widely available.

Considering the potential implications of advancements in this area, it's difficult not to be awestruck at how it could disrupt the legal field and beyond. Conversational AI represents a fundamental shift that could be as transformative as the advent of computers or the internet. As technology evolves, we can expect to see even more innovative AI-driven solutions in the legal space.

[This piece originally ran in LegalTech News, March 1, 2023](#)

About UpLevel Ops

UpLevel Ops leads the evolution of the legal operations practice and takes legal to the Next Level.

We are trusted advisors providing practical guidance, mentorship, and coaching that goes beyond consulting. With our custom, high-end service – born of extensive corporate in-house experience – we partner with clients to craft actionable solutions. We create a roadmap to success that empowers teams with best practices, tools, and workflows tailored to their unique business objectives.

For more information about UpLevel Ops, please email us at info@UpLevelOps.com or you can discover more at UpLevelOps.com.