

# UpLevel Ops AI Thought Leadership Bundle

**UpLevel Ops**

Take Legal to the Next Level



Take Legal to the Next Level

## Hello, World: An Introduction to AI in Legal Ops

Hello, World!

This innocuous phrase is a nostalgic callback to the early days of programming. But today, the cutting edge of computer technology is dominated by the power and potential of Generative Artificial Intelligence (GAI). At UpLevel Ops, we refuse to sit idly by and watch the world change around us. We are actively exploring how GAI can be harnessed to make legal operations more efficient and effective.

While GAI presents exciting opportunities, it's also a double-edged sword. On the one hand, it promises to revolutionize the way we do business – facilitating quick summarization, lightning-fast research, and detailed analysis. On the other hand, some industry professionals worry that it could spell the end of traditional legal practices.

At UpLevel Ops, we're not afraid to address these challenges head-on. We've assembled a collection of thought-provoking pieces on GAI and AI in general, led by our very own Brandi Pack, Legal Ops Analyst and AI Specialist. We aim to provide you with the most up-to-date insights on this powerful and sometimes controversial technology. Through these articles, we hope to address the questions and concerns of professionals in the legal tech industry.

We firmly believe that the people behind the systems make all the difference. So while GAI may be new and unfamiliar, it is ultimately a tool that can be wielded for good. We encourage everyone – even the hesitant – to confront this technology with optimism and enthusiasm. With the right team and the right mindset, we believe it's a journey worth taking. Let's explore the possibilities together and take legal operations to the next level.

All the best,

Stephanie Corey

UpLevel Ops CEO/Founder

## Table of Contents

The Artificial Intelligence Glossary from <i>LegalTech News</i>	Page 1
Demystifying AI for Legal Operations	Page 4
The Dawn of Advanced Conversational AI in the Legal Tech Landscape	Page 6
Welcoming AI into your Legal Ops Team: <i>Etiquette and Advice for a Successful Transition</i>	Page 8
Learning from the Past: <i>Why Dismissing Generative AI is a Risky Proposition for the Legal Industry</i>	Page 10
A Roadmap for Legal Professionals: <i>Navigating the Complex Path to Generative AI Adoption</i>	Page 12
Breaking Boundaries in Legal Tech : <i>The Game-Changing Potential of Generative AI</i>	Page 14

## The Artificial Intelligence Glossary

A guide to the key terms you need to know and understand when discussing AI

***From LegalTech News, May 2, 2023***

Artificial intelligence is dominating conversations across all industries, including legal. To help legal professionals navigate this fast-evolving space, below, we define many of the key terms and concepts relating to AI. This glossary will be continually updated as new developments emerge.

**Algorithm:** In AI, a set of instructions or programming that tells a computer what to do in order to allow the machine to learn to operate on its own to solve a specific problem or perform a specific task.

**Artificial Intelligence (AI):** The branch of computer science focused on the theory, development and design of computer systems that have the ability to mimic human intelligence and thought or perform tasks that normally require human intelligence.

**Bard:** A chatbot tool released by Google in February 2023, based on the LaMDA large language model.

**Chatbot:** A computer program that “converses” with its user. Rule- or flow-based chatbots deliver pre-written answers in response to questions and cannot deviate from this content. AI-based chatbots are more dynamic, can pull from larger databases of information, and can learn more over time. These are built on top of conversational AI.

**ChatGPT:** A commercially available chatbot from Open AI, based on the GPT-3.5 large language model, also known as text-davinci-003, that was released on November 30, 2022.

**Continuous Active Learning (CAL):** An application of AI in which the system learns to correct itself—without the need for ongoing human supervision—because it has learned to discern between varying degrees of responsive and non-responsive documents or concepts via supervised learning. In e-discovery, TAR 2.0 is an example of continuous-active-learning.

**Conversational AI:** Technologies that use large volumes of data, machine learning and natural language processing to allow users to “talk to” the technology, by imitating human interaction through recognizing text and speech inputs. Conversational AI serves as the synthetic “brain” behind some chatbots.

**Deep Learning:** A type of machine learning that utilizes neural networks to mimic the human brain, using three or more layers of training to enable the AI cluster data and make predictions.

**Foundational Model:** A large AI model trained on massive quantities of unlabeled data, usually through self-supervised learning, that can be used to accurately perform a wide range of tasks with minimal fine-tuning. Such tasks include: natural language processing, image classification, question answering and more.

**Garbage In, Garbage Out:** An expression meaning that an AI system is only as good as the data on which it is trained. If an AI system is trained on inaccurate, biased or outdated data, its outputs will reflect those shortcomings.

**Generative AI:** A category of AI systems, including large language models, that can independently create unique, novel content, in the form of text, images, audio and more, based on the data they have previously been trained on. Unlike traditional AI systems, generative AI algorithms go beyond recognizing patterns and making predictions. Some advanced generative AI systems are not limited to their training datasets, and can learn to respond to questions or prompts containing information on which they were not previously trained. This is defined as zero-shot learning.

**GPT:** Generative Pre-trained Transformer; the prefix to various generations of large language models from the company OpenAI. For example, GPT-3 is the third generation of GPT models. GPT-1 was released in June 2018. GPT-2 was released in February 2019. GPT-3 was released in June 2020. GPT-3.5 was released in March 2022, with underlying models rolled out over the year, and tex-davinci-003 receiving significant attention in late 2022. GPT-4 was released on March 14, 2023.

**Graphics Processing Unit (GPU):** A type of efficient processor that is used to render graphics on a computer screen. GPUs are critical in the training of AI systems and large language models that require significant processing power.

**Hallucination:** An instance where an AI system, when asked a question or prompt, provides a false, fictitious, yet convincing answer that it's confident is correct.

**LaMDA:** Language Model for Dialogue Applications, a large language model released by Google in May 2021.

**Large Language Model (LLM):** A type of deep learning algorithm or machine learning model that can perform a variety of natural language processing tasks. These include: reading, summarizing, translating, classifying, predicting and generating text words or sentences, answering questions or responding to prompts in a conversational manner and translating text from one language to another. It performs these tasks based on knowledge gained from massive datasets and supervised and reinforcement learning. LLMs are one kind of foundational model.

**LLaMA:** Large Language Model Meta AI, a large language model released by Meta in February 2023.

**Machine Learning:** A broad branch of AI concerned with "teaching" AI systems to perform tasks, understand concepts or solve problems in a way that imitates intelligent human behavior, gradually becoming more accurate as it is trained on more data.

**Model:** An AI tool or algorithm based on a defined dataset that makes decisions a human expert would make given the same information, but without human interference in the decision-making process. GPT-3, for example, is an AI model.

**Multimodal AI:** An AI system that is capable of processing multiple types of data, such as images, video or sound, in addition to text, in order to generate output.

**Natural Language Processing (NLP):** A branch of AI and computer science that refers to the ability of computers or software to understand and read written and spoken language in the form of text and voice data, including intent and sentiment.

**Neural Network:** A means of machine learning that mimics the human brain, and includes the ability for multiple layers of training to occur simultaneously. Neural networks are made up of millions of processing nodes and are central to deep learning.

**Parameters:** Bits of knowledge or variables, which can be thought of as connections between concepts, that an AI model learns throughout its training process. Parameters are adjusted during training to achieve desired outputs from specific inputs. Generally speaking, the more parameters, the greater AI's ability to understand and connect complex concepts together. Therefore, the more parameters, the more advanced the AI model.

**Prompt:** The instruction given to an AI model or machine learning algorithm in order to generate a specific output.

**Prompt Engineering:** Identifying and using the right prompts to produce the most useful or desirable outcomes from an AI tool.

**Reinforcement Learning:** A machine learning technique used to train an AI model in which the AI system interactively learns by trial and error, incorporating feedback from its own actions and outputs.

**Robotic Process Automation (RPA):** A form of business process automation, also known as software robotics, that allows humans to use intelligent automation technology to define a set of instructions for the performance of high-volume, repetitive human tasks quickly and without error. While RPA technology shares similarities with AI and is often included in the same discussions, it is not a form of AI.

**Self-Supervised Learning:** A form of machine learning in which a model is input with unstructured data and automatically generates data labels; essentially, the model trains itself to differentiate between different parts of the input. Also known as predictive or pretext learning.

**Semi-Supervised Learning:** A form of machine learning in which some of the input data is labeled. Semi-supervised learning is a mix of supervised and unsupervised learning.

**Supervised Learning:** A form of machine learning in which a model is taught how to identify a certain concept or topic—for example, a specific type of document—via a person manually correcting the machine during the training process. In e-discovery, TAR 1.0 is an example of supervised learning.

**Token:** In natural language processing, a sequence of characters that form a semantic unit or certain role in a written language. The process of breaking a stream of language into meaningful elements such as words or sentences is called tokenization.

**Unsupervised Learning:** A form of machine learning in which a model employs deep learning techniques to detect patterns in data without explicit training on labeled data.

**Zero-Shot Learning:** The ability for an AI system to learn how to respond to questions or prompts, create new content or classify data on which it was not previously trained.

## Demystifying AI for Legal Operations

**By Brandi Pack, Legal Ops Analyst & AI Specialist**

When it comes to the legal field, artificial intelligence (AI) has begun to have a significant impact. But before you start to picture an army of robot lawyers taking over courtrooms across the globe, don't worry: Fear of the Robot revolution is unfounded.

Instead, consider AI a powerful tool that can streamline and enhance legal operations. In this way, AI is changing the game for legal teams who want to stay ahead of the curve.

AI technologies use machine learning algorithms to analyze and make sense of large data sets, allowing AI tools to automate routine tasks, make predictions, and derive insights from patterns that might be hard for humans to detect.

Before an AI system is ready for use, it must be appropriately trained. The first step in training is to collect and prepare relevant data and select a suitable training model or combination of models. Different models serve different purposes and are best suited to particular data types or tasks.

Programmers use a range of models to train AI systems. Some categories include:

**Supervised learning models** are often deployed when labeled training data is available. These models learn by identifying patterns in the training data and using these patterns to predict outcomes for new data.

**Unsupervised learning models** work with unlabeled data to find underlying patterns or structures. These models analyze and simplify data points and effectively identify unusual or unexpected patterns in the data.

**Reinforcement learning models** aim to learn through trial and error. In this type of learning, a goal is provided to the AI system, and it tries out different actions to achieve it. The system gets feedback on which steps lead to positive outcomes and which do not. The system can then use this feedback to improve its performance moving forward.

**Deep neural networks** are effective tools for various tasks, including image/video analysis, natural language processing, and more. These models typically use multiple processing layers to extract high-level features from input data. This robust neural network structure mimics how learning occurs in the human brain.

**Transformers** are neural network architectures that have become increasingly popular in natural language processing. They use self-attention mechanisms to understand the context and relationships between words in a text, and this can improve performance on machine translation, question-answering, and text summarization.

AI systems are making a significant impact by using natural language processing (NLP), language prediction, and deep neural networks. NLP and language prediction work together to allow AI systems to "understand" language in a way that closely resembles how humans process it. These functions are particularly beneficial to the legal industry, which often requires the analysis of large volumes of documents containing complex language.

Neural networks are a significant component of many AI systems, enabling them to learn and improve over

**“Consider AI a powerful tool that can streamline and enhance legal operations. In this way, AI is changing the game for legal teams who want to stay ahead of the curve.”**

time. By analyzing large data sets, neural networks can "learn" to find patterns and relationships and predict outcomes based on experience. It might not sound like the most exciting stuff, but trust us- for the legal field, it's enormous.

Having a general feel for the legal tech landscape and how AI is playing out in the field is vital. Here is a quick primer on where things currently stand. AI tools available in legal tech fall primarily into the following categories:

1. **Document and contract analysis:** AI tools in this category help automate the review and analysis of large volumes of documents and contracts, saving firms time and minimizing errors.
2. **Legal research:** AI-powered search tools identify relevant cases and statutes, extract key insights, and make legal research more efficient.
3. **E-discovery:** AI tools in this category assist the discovery process, automating document review and speeding up evidence analysis.
4. **Process automation:** These AI tools automate routine tasks in the legal field, allowing firms to focus on higher-value work, such as CLM, Workflow, and eBilling.
5. **Litigation analytics:** AI can be used to analyze data and predict the outcome of cases, suggesting the best course of action to take based on historical data.

While some AI tools are standalone, most are embedded within other technology products, and upgrades to existing legal tech tools increasingly include AI capabilities. Many legal technology tools are designed to be stackable and integrate with existing systems your legal department may already use. Taking advantage of system integrations helps with process automation and data flow.

Law firms that decide not to adopt AI technology likely face risk moving forward and may fall behind in efficiency and productivity, since AI technologies can automate many routine and repetitive tasks. Firms that choose to adopt will be able to deliver quicker and more accurate outcomes for their clients. Ultimately, firms that don't embrace AI technology may see a decline in revenue and market share as this is a rapidly evolving industry with the potential to change the legal game.

Although AI tools are already proving transformative, one intriguing factor is that we've barely scratched the surface of what's possible. There's tremendous potential for AI to revolutionize the field in the years to come. Predictive analytics tools will advance further, allowing legal firms to anticipate and manage risk more efficiently by analyzing previous cases and trends. Additionally, AI-powered tools will become even better at generating legal documents, negotiating contracts, and streamlining processes. While the AI tools of today are groundbreaking, the ones of tomorrow promise to be even more game-changing.

Potentially the most transformative change on the horizon is the advancement of front-end conversational AI systems. These systems, such as the technology behind ChatGPT, generate excitement in many fields but are particularly well suited to address challenges in legal operations. The ability to streamline processes and facilitate meaningful interactions will likely reshape the legal tech industry in a big way. The only question left is how and when this change will take place.

[This piece originally ran in LegalTech News, February 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](mailto:info@UpLevelOps.com) or you can discover more at [UpLevelOps.com](https://UpLevelOps.com).





## 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](mailto:info@UpLevelOps.com) or you can discover more at [UpLevelOps.com](https://UpLevelOps.com).



## Welcoming AI into your Legal Ops Team Etiquette and Advice for a Successful Transition

**By Brandi Pack, Legal Ops Analyst & AI Specialist**

The legal tech industry is experiencing a before-and-after moment when it comes to the adoption of generative AI technology. Every day brings a slew of new announcements as companies scramble to integrate this transformative technology into their product offerings. Given the speed at which AI technology is evolving, some AI-driven products currently on the market may soon be seen as outdated or legacy systems.

Generative AI tools are groundbreaking due to their versatile capabilities, allowing them to transcend traditional product category boundaries within the legal tech landscape. Because of this, we will likely see a decline in siloed tools as organizations take advantage of the efficiencies and increased capabilities offered by more general, multipurpose tools. This trend is driving the rise of AI legal assistants, which are likely to become indispensable legal resources.

Over the past three months, many new legal AI assistants have emerged, including Harvey, CoCo (AI CoCounsel), Leah, and SALI. As this technology continues to evolve, we can expect to see an accelerated proliferation of AI assistants, with broad capabilities and also fine-tuned to automate specific, time-consuming processes.

While AI legal assistants can support various tasks, many of the most valuable applications fall to Legal Operations. AI legal assistants can help with countless legal ops functions, such as acting as a "front door" to legal services, facilitating document management and search, and automating the generation of contracts and general correspondence.

Although the benefits of incorporating this powerful technology into your organization are compelling, it's essential to be aware of and consider potential challenges or pitfalls that may arise. Companies will need to consider how to bring their new AI assistant on board in a way that does not cause friction within the current team. An effective change management strategy will go a long way to ensure the AI team member is being used effectively and transparently. Here are a few AI etiquette suggestions that can help smooth the transition.

1. It's essential to **treat your new AI assistant as a distinct member of the team** rather than simply a tool or resource. Transparency is key so content generated solely by the AI assistant should be clearly labeled as such. Additionally, store any content created by the AI assistant in a location that is easy for your team to identify and access.
2. To get the most out of your AI system, **designate one or two legal operations team members to undergo training to become proficient at user-level prompt engineering**. Poor prompt engineering can dramatically reduce the quality of the work your AI assistant will perform. In addition to becoming acquainted with successful prompt engineering techniques, relevant team members should receive training on their AI assistant's strengths and weaknesses, so they are not relying on it to do tasks it was not intended to perform. This will reduce the risks associated with system "hallucinations" and eliminate performance errors.

**Companies will need to consider how to bring their new AI assistant on board in a way that does not cause friction within the current team.**

3. Use a platform such as Slack or Teams to **create a communication channel dedicated to AI requests**. It is vital to make the benefits of your new AI team member equally available to the whole team so that one member is not getting exclusive access. This could lead to resentment and unequal workloads for team members.
4. As you settle in with your AI legal assistant and discover how it can enable the team, make sure you **document and store your most successful prompts** to build your own custom prompt engineering library. Being able to quickly cut and paste prompts you know will be effective can save time and drive efficiencies.

As the legal tech industry increasingly adopts generative AI technology, organizations must take the time to carefully consider the implications for their unique operations and plan accordingly. While AI legal assistants can drastically improve efficiency, those who move forward strategically will benefit by having the most functional teams. By engaging in effective change management, being transparent with your team, and taking care of the technical details, your organization can reap the full benefits of this transformative technology.

*[This piece originally ran in LegalTech News, April 3, 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](mailto:info@UpLevelOps.com) or you can discover more at [UpLevelOps.com](https://UpLevelOps.com).



## Learning from the Past:

### Why Dismissing Generative AI is a Risky Proposition for the Legal Industry

**By Brandi Pack, Legal Ops Analyst & AI Specialist**

Generative AI is one of the most disruptive technologies to come along for quite some time, and initial reactions have varied widely. Many have welcomed this new development with great enthusiasm while others have expressed caution, warning of job losses in the legal field as routine tasks become automated. Some pundits have raised substantial concerns regarding data privacy, security, provenance, and integrity.

Some downplay the impact of generative AI altogether, predicting that its adoption won't bring about as much change as some claim. As attitudes continue to evolve, legal professionals and industry experts must stay educated and informed, considering the implications for those who adopt generative AI and those who choose not to.

While reflecting before moving forward with transformative technology is prudent, we should not allow resistance to change to exert undue influence on such a decision. Legal professionals, who are often slow to adopt new technologies, may be tempted to sit this one out. However, I argue that this is likely a mistake for most legal professionals, given the implications of generative AI on the legal field.

There are many historic examples of a minority contingent resisting disruptive technology, only to eventually be shown to have been on the wrong side of history. For instance, there were some vocal skeptics of the first automobiles. In 1899, the New York Times ran an article warning that "[T]he automobile would not be suitable for city traffic and that horses would remain the primary mode of transportation." In addition, Life magazine published an editorial in 1902 stating that automobiles were dangerous and would be just a passing fad. They could not envision a society that would abandon horses for such loud, dirty, and dangerous machines.

There are many recent examples of bad takes on technology, such as early skepticism around the Internet. In 1994, prominent technology leader Bill Gates did not see the Internet as the game-changing development that it turned out to be. Similarly, economist Paul Krugman declared in 1998 that it wouldn't have any more impact than a fax machine. Although both men are respected experts in their industries, they completely missed the clues that the Internet would fundamentally alter the way we live and work.

It is interesting that Bill Gates now views generative AI as one of the only technologies that has strikes him as truly revolutionary. In a recent article, Gates writes that he believes generative AI will redefine entire industries and provide a competitive edge for businesses that use it well. Given the parallels that exist between the early days of the Internet and the current state of generative AI, his statements seem particularly noteworthy. By examining the follow parallels, we can see that generative AI is poised to make a significant impact.

- **Increasing Usage.** Though the first Internet browser was released in 1990, it took a few years for user adoption to pick up. It wasn't until 1998 that the number of users surpassed 100 million, and from then on, the adoption rate skyrocketed. Today, more than 5 billion people use the Internet. By contrast, the growth of ChatGPT is even more rapid: After acquiring more than a million users in just one week following its launch, the service amassed more than 100 million users by January 2023. This is a truly unprecedented rate of growth for a new product.

In a recent article, [Bill] Gates writes that he believes generative AI will redefine entire industries and provide a competitive edge for businesses that use it well.

- **Business Investment.** In the early days of the Internet, the rapid development of search engines, browsers, and e-commerce platforms spurred its explosive growth. Similarly, generative AI is seeing industry power-players Microsoft and Google - as well as hundreds of startup companies - integrating the technology into their products and services. The demand for generative AI is so high that server chip manufacturers are struggling to keep up, with some of the biggest companies in the world currently experiencing wait times of a month or more to rent the hardware they need. These are all signs that generative AI is poised for an extended period of exponential growth.
- **Cultural Impact.** In the early 2000s, social media platforms like Friendster, MySpace, and Facebook precipitated a cultural shift, making the Internet a central part of people's lives. Today, we see a similar trend with AI assistants such as ChatGPT, Sidney, and Bard. These tools are capturing the public's imagination and transforming the way we carry out basic tasks.

The legal field should take note that generative AI is poised to be a massively disruptive technology. A recent Goldman Sachs report highlights the industry's vulnerability to change, due in large part to the overlap between common legal tasks and the strengths of generative AI. While some may be worried by these predictions, it's important to remember that AI systems don't operate on their own. To remain competitive, legal professionals need to educate themselves on generative AI and leverage it as early as possible.

It is also important for legal tech vendors who want to remain relevant to get on board. While it may not be surprising to see some established vendors downplaying the significance of generative AI in favor of older AI technology, their claims don't necessarily hold up to scrutiny. Experiencing a generative AI product demo makes it clear that the technology represents not only an advancement in capabilities, but also a significant leap forward in terms of ease of use and flexibility. For example, generative AI doesn't require the extensive training or meta data mapping that can make other product implementations long and arduous. It also reduces the risk of costly mistakes during set-up, making it a more forgiving and adaptable technology overall.

For those users who have not yet explored generative AI, it can be difficult to appreciate just how transformative it can be. For instance, detailed legal research or document comparison tasks, which could previously take days or weeks, can now be completed with stunning precision in just minutes. This is just one example in the legal tech field how generative AI is reshaping the landscape as we know it.

Those who have had the opportunity to work with one of the AI legal assistants currently available can attest to their transformative impact. Demonstrations with leading vendors consistently leave users awestruck, as they quickly realize they have access to a truly revolutionary technology. Generative AI not only improves the speed and quality of legal work, but it can also make the process more enjoyable and engaging for professionals. As these systems become more commonplace, law firms that don't adopt generative AI will risk falling behind their competition.

***This piece originally ran in LegalTech News, May 9, 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](mailto:info@UpLevelOps.com) or you can discover more at [UpLevelOps.com](https://UpLevelOps.com).



## A Roadmap for Legal Professionals: Navigating the Complex Path to Generative AI Adoption

**By Brandi Pack, Legal Ops Analyst & AI Specialist**

For legal professionals, caution and conservatism are often vital in fulfilling their job responsibilities. Discretion and thoroughness are required to protect clients' best interests. So it's no wonder that many in the legal field are hesitant to adopt new, untested technologies. Even with potential benefits on the horizon, the risk of using tools that haven't been fully vetted can be enough to slow down innovation.

The promise of generative AI presents a unique challenge for those in legal operations. While this technology undoubtedly has the potential to improve efficiencies and create strategic advantages, it's not an easy decision. Being overly cautious could mean falling behind the competition and missing out on opportunities, but moving too quickly may expose the company to unnecessary risk. In particular, concerns around privacy and security can make organizations hesitant to move toward adoption.

With so much uncertainty, a growing divide is emerging between the smaller group of enthusiastic early adopters and the rest of the legal community. The early adopters, who are already reaping the benefits of generative AI, typically fall into a few categories: law firms involved in heavy litigation, firms managing significant trademark or patent portfolios, and large corporate legal departments. For these organizations, the potential benefits of generative AI seem to outweigh any perceived risks, leading them to move forward more quickly.

For in-house legal teams at small- to medium-size companies, the decision to adopt generative AI is not always as clear.

While these organizations may see the importance of leveraging generative AI in their operations, they often struggle to determine the best approach. Concerns about cost, resources, and risk can all contribute to hesitation. To move forward, these organizations must carefully assess their needs and create a strategic roadmap for adoption.

The ideal timeline for adopting generative AI will differ depending on the product category. Generative AI capabilities and functionality are already developed and readily available, meaning adoption can happen relatively quickly. For others, however, development is evolving more slowly, necessitating a more patient approach.

There are a few areas in legal operations where generative AI is already making a major impact, such as document and contract analysis, legal research, and eDiscovery. With vendors already providing significant jumps in capability, organizations can reap the benefits of this technology today without worrying that they have moved too quickly. Legal professionals should not hesitate to move forward in these areas.

Regarding contract management, eBilling, and process automation, vendor transitions to generative AI will likely happen slower. These more complex systems require additional development time to fully build generative AI functionality. Most vendors have started incorporating minor enhancements and will gradually expand from there. As such, it will likely take years for organizations to see the technology's full impact in these product categories.

If your organization already uses a system in a product category that has not matured, check with your vendor to learn more about their development timeline for generative AI incorporation. More importantly, if your organization wants to implement something new, it is advisable to avoid systems only utilizing older AI

**With so much uncertainty, a growing divide is emerging between the smaller group of enthusiastic early adopters and the rest of the legal community.**

technologies. Since generative AI will likely simplify the software implementation process significantly, a wait-and-see approach makes sense to understand what more fully developed options from vendors will look like. Once these more complex legal tools are fully built out they will be an even more significant game changer for the legal profession.

Ultimately, legal organizations should adopt a strategic and targeted approach to generative AI. For product categories that are developing at more rapidly, it makes sense to move quickly to stay ahead of the curve. However, a wait-and-see approach could be prudent for products that are still evolving.

***This piece originally ran in the ACC Observer Newsletter, June 22, 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](mailto:info@UpLevelOps.com) or you can discover more at [UpLevelOps.com](https://UpLevelOps.com).



## Breaking Boundaries in Legal Tech: The Game-Changing Potential of Generative AI

**By Brandi Pack, Legal Ops Analyst & AI Specialist, and Sumi Trombley, Senior Advisor**

Despite an outpouring of media coverage for generative artificial intelligence (AI), some may still wonder whether reality will actually measure up to all the hype. Sure, this is a clear technological advancement, but haven't we been here before?

Many wary legal professionals remember how the initial excitement around previous AI introductions led to disillusionment—especially in the Contract Lifecycle Management space. Promises of productivity from the technology were limited to simple, easily templated, and logic-based tasks, such as document review or markup. Legal professionals at companies with a variety of agreements, risk portfolios, or limited leverage to use their own templates were left wondering how this early form of AI was going to vastly improve their lives, as promised.

The early versions of AI often struggled with complex tasks such as bespoke markups of nondisclosure agreements (NDAs) or nuanced reviews of master services agreements (MSAs). Instead, the AI captured data sets through the use of metadata, applied pre-configured playbooks, and required complex product implementations - which often required legal professionals to learn an entirely new "language" related to software implementations.

These challenges caused lingering skepticism among legal professionals—and rightly so. But new generative AI models are poised to address the cases that were previously unattainable. These models are less software dependent and more intuitive, allowing legal professionals to use their research skills instead of learning about metadata and data mapping. This innovation has the potential to let legal professionals spend their time advising on a company's risk appetite with informed data, allowing them to be strategic advisors.

To understand the full potential impact of generative AI, it's important to know what it is and why it stands apart from previous AI offerings. Generative AI refers to large language model systems that are trained on massive data sets—essentially giving them access to collective human wisdom. This information allows generative AI models to create new data from scratch, based on observations from their training data sets.

One key advantage of generative AI is its ability to make human-like decisions. Unlike some earlier AI advancements that required specific metadata mapping, generative AI can both create new data and derive insights on its own.

For example, imagine you've received a second round markup of a master services agreement (MSA) and have had strategic conversations with your business partners about key terms. You could "ask" your AI assistant to "prepare a conservative markup of this MSA to reflect a 5% increase in pricing over a period of time and adjust limitations of liability thresholds, accordingly, using limited redlining."

Creating a markup with limited redlining isn't easy—it's an art - but the AI assistant would be able to cull through its accessible data set, including your company's transactional history, to understand what a "conservative" markup entails. The AI assistant would also flag places in the agreement where redlining is needed and apply the art of limited redlining.

**Unlike some earlier AI advancements that required specific metadata mapping, generative AI can both create new data and derive insights on its own.**

While you would still review the markup, you'd be spared from time-consuming wordsmithing, allowing you to focus on strategizing with your business partners and working on other projects. This flexibility demonstrates the potential for generative AI to be applied to a wide range of tasks and scenarios in the legal tech field.

The legal tech landscape appears to be shifting rapidly in terms of the current use of generative AI technology. Some vendors with early access to GPT4 (the most powerful large language model available to the public) are already able to offer general AI legal assistants with expansive capabilities. These assistants can review contracts for policy compliance, extract contract data, and summarize documents.

Meanwhile, other vendors have taken a targeted approach, adding generative AI functionality to a portion of their offerings to capture basic use cases. These companies often have plans to expand capabilities over time.

As this trend towards broadening functionality continues, the legal tech landscape will start to see the realization of the highly sought after—but ever elusive—enterprise legal management (ELM) tool with best-of-breed capabilities. AI legal assistants could be leveraged to manage multiple systems all at once, blurring traditional product categories and creating new opportunities for efficiency and productivity.

As generative AI develops, it could lead to the deployment of "universal tools" or ELM that could have vast implications for the legal tech field. These tools are created by allowing AI agents to interface with one another, with a managing AI agent directing the activities of subordinate agents. This technology enables the managing agent to drive multiple software programs, streamlining the process for legal professionals and providing broader functionality through just a single interface.

One intriguing near-term possibility for generative AI in legal tech is the potential use as "independent agents," which are AI programs that can act and collaborate in human-like ways with minimal instruction. Recent research, including a [2023 Stanford study](#), suggests that generative AI can extrapolate from its current data set to act in ways that don't necessarily mimic history, but use it to inform future actions. This capacity could allow the AI assistant to play a larger role in problem solving and addressing challenges.

The implications of using generative AI as independent agents are especially promising for contracting within legal departments who face resource constraints. CEOs are increasingly asking their general counsels and legal departments to perform at a strategic level, but legal departments are often burdened with routine tasks that limit innovation and strategy. By viewing AI as a "capable resource," legal departments can leverage AI agents to negotiate and finalize ordinary course contracts autonomously. This frees up legal professionals to work on strategic tasks, sometimes aided by potential novel solutions suggested by the AI assistant.

It's important to note that this doesn't mean legal professionals will be replaced entirely: Clients are still human, with unique needs and risk profiles that may be irrational or dependent on unique circumstances that remain unpredictable either by another human or AI. Human legal professionals are needed for strategy, but generative AI has the potential to revolutionize the field by allowing legal professionals to work more efficiently and elevate the human legal professionals' practice of law. Some legal tech vendors are already working to achieve this vision, and as generative AI matures, its transformative potential will continue to push boundaries.

***This piece originally ran in [Corporate Counsel on Law.com](#), June 21, 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](mailto:info@UpLevelOps.com) or you can discover more at [UpLevelOps.com](https://UpLevelOps.com).

