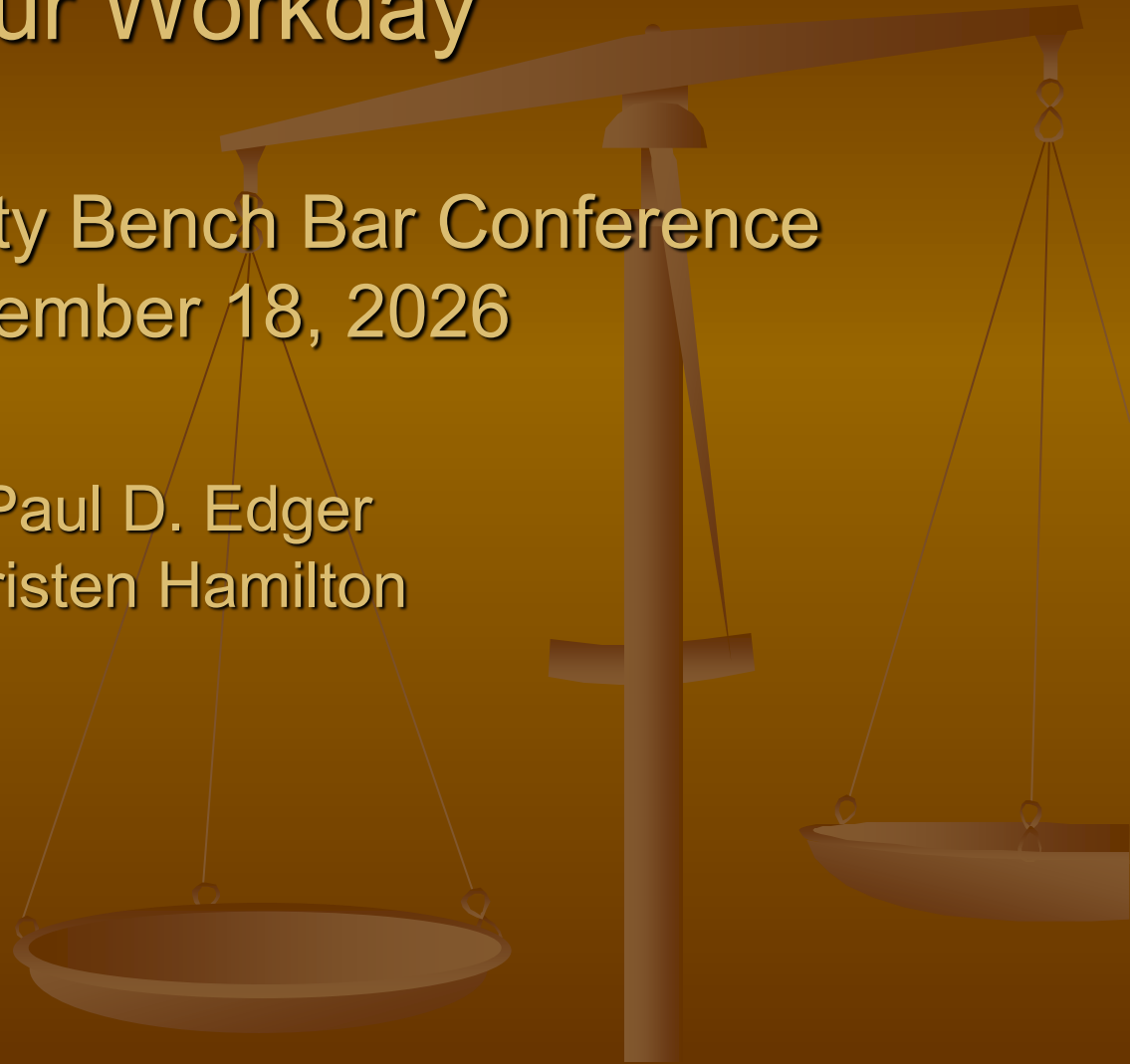


Work Smarter, Not Harder: Using Technology & AI To Maximize Your Workday

Franklin County Bench Bar Conference
September 18, 2026

Paul D. Edger
Kristen Hamilton





Disclaimer

Any statements or opinions made during this presentation are those of the presenters **ONLY**. Those statements, comments, or assertions are not a reflection of any policy or specific thoughts of the Attorney General, the Office of the Attorney General, or any employee.

THOUGHT FOR THE DAY (or at least this session):

Do not live in the fear of what the future may hold.
Live in the anticipation of the new opportunities that
lie ahead.

- Anonymous

It looks like you're trying to
reconsider my legacy.

Would you like help?

Yes

No



<https://nymag.com/vindicated/2016/10/clip-py-didnt-just-annoy-you-he-changed-the-world.html>

As We Begin: A Quick Survey

- Do you use AI tools in your practice?
 - If so:
 - How frequently?
 - For what purpose(s)?
 - Which tool(s)?
 - Why those tools?
 - If not, why not?
 - Why the hesitation?
 - What's stopping you?

As of this date, AI so far IS NOT:

A replacement for human judgment or understanding
Infallible and/or perfect

A database of primary source authorities and accurate
information particularly where law is concerned

Something to be exclusively relied upon

The end of all mankind (at least today)

A Few Introductory Observations

- We have been here before and generative, adaptive AI is not new:

Spell check

Spotify/Apple Music

Word Prediction

Scheduling and Reminders

Social Media algorithms

GPS

Siri and Alexa

Scanners (OCR)

PDF document summary

Apple/Android Watch

Overview of Some Common Consumer Platforms

- **Apple Intelligence (Siri)**
 - The personal intelligence system that integrates generative AI models into the core of operating systems for Apple products.
- **ChatGPT**
 - An AI chatbot developed by OpenAI that uses natural language processing to generate human-like conversational dialogue.
- **Claude**
 - An AI chatbot and family of large language models (LLMs) developed by the research firm Anthropic.
- **Copilot (Microsoft)**
 - An AI-powered assistant designed to boost productivity in the Microsoft universe by providing contextual assistance, automating repetitive tasks, and analyzing data using LLMs.
- **Gemini (Google)**
 - A family of multimodal generative AI models and associated software integrated into various Google products and services.

Overview of Some Law-Focused AI Platforms and Resources

- **Decisis**
 - Leverages “cutting-edge” search engine technology and AI to power search capabilities and offer features in partnership with corporate sibling LexisNexis' Lexis+ AI.
- **Lexis/Nexis: Lexis+ AI (Harvey)**
 - A generative AI solution for legal professionals, integrating powerful language models with extensive content to facilitate research, analysis and drafting.
- **Clio: Manage AI**
 - A suite of AI features integrated within the Clio legal practice management platform, designed specifically to automate tasks and provide insights for legal professionals.
- **Asure: Luna AI**
 - An AI agent integrated into Asure's Human Capital Management (HCM) software, designed to automate and simplify complex payroll and human resources (HR) tasks.
- **USI Affinity**
 - Leverages AI tools to understand legal client needs better, offer specialized coverage (e.g., malpractice), and improve service delivery for PBA and other legal organizations.

For Practitioners...

- Specific Uses of AI in Work
 - Legal Research
 - Discovery/Document Review
 - Drafting
 - Case Building
 - Contract Drafting/Review*
 - Case summary
 - Article Summary
 - Firm Creation & Modernizations
 - Trial assistance (direct/cross exams, closings)
 - Case Management

Another AI Use: Discovery/Document Review

- Summarize Large Sets of Documents (e.g., including depositions)
- Code Documents for Responsiveness & “hotness”
- Suggest Documents for Potential Privilege/Confidential Tagging
- Generate Timelines of eDiscovery Documents

Example: Finding Needles in a Haystack

Upload

Search...

You: How much money are paid for each license agreement?

Reference

Hide

No.	Document Name	Page Number	Relevance	Content
1	PatentLicenses-1	15	High	extend to claims of infringement that result solely from a third party product or service in and of itself or in combination with products and services other than the Licensed Products. 5. Consideration 5.1.1. In consideration for the licenses, covenants not to assert, and releases granted herein, [REDACTED] shall pay to [REDACTED] and [REDACTED] an aggregate fee ("Paid-Up Fee") totaling Eight Million United States Dollars (\$8,000,000 US). Except as provided for in Sections 7 and 11, this Paid-Up Fee shall be non-refundable under all circumstances including, but not limited to, a termination of this Agreement or a finding of invalidity or unenforceability of any of the [REDACTED] Patents, [REDACTED] Patents, or any patents in the [REDACTED] Portfolio or [REDACTED] Portfolio. The foregoing payment shall be the aggregate, total compensation paid by [REDACTED] and [REDACTED] for the rights, covenants and releases granted in this Agreement, and no additional payment will be made to either of [REDACTED] by [REDACTED] or any of its Affiliates for the rights, covenants and releases granted hereunder. Any allocation of the payment
2	PatentLicenses-4	16	Medium	4.2 As of the Effective Date and for the Term, [REDACTED] on behalf of itself and its Affiliates, further covenants not to directly or indirectly seek, initiate, or pursue any legal remedy against Licensee and/or Licensee Customers that is based on any claim for infringement of the Licensed Patents by [REDACTED] Products. 5. Consideration 5.1 In consideration for the rights, license, covenant, and release
3	PatentLicenses-3	4	Medium	CONFIDENTIAL [REDACTED] extent to which, and subject to the conditions under which [REDACTED] has the right to release and forever discharge, claims of infringement of the [REDACTED] Patents, other than for infringement of Excluded Rights, arising out of any acts of manufacture, sale, use, offer for sale or import of Licensed Product prior to the Effective Date. 5. Consideration

Regenerate

liabilities and rights of action of any kind and nature, at law, in equity or otherwise, known and unknown, suspected and unsuspected, disclosed and undisclosed, accrued, actual, latent or otherwise, in any jurisdiction in the world which [REDACTED] may have relating to any infringement or alleged infringement of any of the [REDACTED] Patents (whether direct, contributory or by inducement, and whether or not willful), to the extent such claim, demand, liability or right of action arises from (a) the manufacture, sale, use, offer for sale, import, lease, transfer, provision, performance or disposal of Licensed Products by or for Licensee prior to the Effective Date or (b) the combining of third party products or services with Licensed Products or using such combination but only to the extent when such third party products and services are combined or used with Licensed Products prior to the Effective Date. For sake of clarity, such rights being granted in this Section 4.4 do not extend to claims of infringement that result solely from a third party product or service in and of itself or in combination with products and services other than the Licensed Products.

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Example: Summarize 500+ Page Depositions

Upload

Search...

Name ↑

Option

Sample Depo Transcript Red...

Q

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100%

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Q

Relating specifically to the topic of things that -- I'll call it things that may interfere with someone walking. And by that I mean balance issues, dizziness, that kind of stuff. Were you experiencing -- or had you experienced any of those in, say, the week before the accident occurred?

A

No.

Q

And as of the day of the accident, were you experiencing any of those kinds of symptoms?

A

No.

Q

Before this accident happened, had you ever -- in, say, the last couple of years before this accident happened, had you ever tripped and fallen similar to the fall you had in the parking lot?

A

No.

Q

Just thought I'd ask. Are you still doing okay? Do you need to stretch, or are we cool to keep going?

A

I'm good. I just sat down. Thanks.

Q

Just so we're both on the same page, I'll check in with you periodically. But please don't hesitate to speak up if you need to stretch, you know, any of that kind of stuff. Okay?

A

Okay.

Q

All right. So let's kind of continue with the

AI: Welcome to meet AnytimeAI -Your Private AI Counsel!

Final Summary:

- The witness is questioned about a fall she had in a hotel parking lot during a deposition. [24][8]
- The witness describes the circumstances of the fall, including the location and time of day. [19][16]
- The witness mentions previous medical conditions and procedures, including a work-related injury and a spinal cord stimulator implant. [27][62]
- The attorney asks about any limitations or symptoms the witness experienced before the fall, as well as any medication she was taking. [34][31]
- The witness describes the injuries she sustained in the fall and the subsequent swelling and pain she experienced. [23][35]
- The witness went back to the scene of the fall to investigate what caused it and confirms that cracked pavement was the cause. [100][19]
- The witness suffered injuries to her shoulders, knees, and low back as a result of the fall. [23][63]

For Practitioners: Legal Research in More Detail

- Conduct Case Law Research
- Summarize Statutes and Regulations
- Compare Case Law or Statutes Across Jurisdictions
- Generate Legal Arguments (beware...)
- Predict Case Outcomes and Evaluate Case Strength
- Judge “shopping” and predictions

Example: Auto-generate Legal Memos

Task: Legal Research Demo 01

Search...



Considering the Buyer's substantial investment, the uniqueness of the Property, and the fact that damages may not adequately compensate the Buyer for the failed transaction, the Court may find specific performance appropriate in this case. The equities favor the Buyer, who acted in good faith and fulfilled their obligations under the purchase agreement.

On the other hand, the Seller's attempt to evict the Buyers may face challenges if the Court determines that specific performance is the appropriate remedy. The Seller's actions in seeking eviction after the tax lien clearance and the Buyer's reliance on the purchase agreement may be viewed unfavorably by the Court.

Conclusion: Given the circumstances where the IRS tax lien has been cleared, the Buyer's substantial investment, and the equities involved, the Court may have the power to grant specific performance in this real property transaction. The Buyer's request for specific performance appears to align with equitable principles, and the Seller's attempt to evict the Buyers may face obstacles if specific performance is deemed appropriate by the Court.

Source

Hide

Jurisdiction

☒ Case Law ☐ Statutes ☐ Regulations

Ask this source: ☐

Start Date

End Date

Set Case Fact

Regenerate

Type a message...

Use "Shift + Enter" for new line

The problem which confronted the district court was that the most desirable solution—a sale of MKI to a third person, with damages to Leasco—was not possible. Leasco had tried to sell MKI but had been unsuccessful. Consequently, the court was compelled either to award damages, which would have burdened Leasco with a company it did not want (and could not handle), or to grant specific performance. We believe that the court reached the fair result. Taussig's repudiation of the contract after leading Leasco to forego a sale to Berger was the prime reason Leasco was unable to dispose of MKI. The increase in the Leasco loan guarantee, a direct result of the agreement, also made disposal of MKI more difficult. When a buyer's conduct makes it difficult if not impossible for a seller to dispose of the property elsewhere, specific performance is proper relief. See *E. Errett Smith, Inc. v. Gibson Art Co.*, 15 Misc.2d 504, 181 N.Y.S.2d 707 (Sup. Ct., N.Y.Co., 1958).

Under the totality of the circumstances here,⁷ the district court did not abuse its discretion in granting specific performance. See *Gary v. Dane*, 411 F.2d 711, 713 (D.C. Cir. 1969).

LIMITED DISCOVERY

Ask this source: ☒

Regenerate

e a message...

Use "Shift + Enter" for new line

AI as a convenience in law firm modernization

- Signature creation for a new “professional” signature
- Updating/creating your headshot
- Creating your website
- Creating an elevator speech for your business
- Logo/watermark creation

Marketing ourselves





BENEFITS OF AI

- AI offers potential benefits for improving the wellbeing of legal professionals:
 - Work/Life Balance
 - Task automation
 - Mental Health Support Resources
 - AI-powered stress management tools
 - Assistance in Daily Life
 - THESE ARE NOT ONLY ABLE TO BE USED FOR WORK
 - Task management and assistance in daily life

What about non-legal life?

- Is there something that I am doing repeatedly or that is cumbersome or burdensome, that can be done faster, more consistently?
 - ORGANIZATION - Receipts, travel information, warranties, household records, medical records
 - REMINDERS - oil changes, birthdays, subscriptions, deadlines, household maintenance
 - ASSIST - Meal planning, grocery lists, drafting emails, comparing for decisions
 - **ACTING WITH APPROVAL - e-signatures**
 - ACTING AUTONOMOUSLY - home routines (lights, roombas), maps to/from work & rerouting

But beware potential pitfalls...

- The "Efficiency Paradox" (greater efficiencies themselves can lead to AI-induced stresses)
- Data privacy and security (wellness programs often collect sensitive and/or confidential data)
- **Ethical considerations** (see, e.g., Rule 1.1 (Competence); Rule 1.6 (Confidentiality); and duty of care, duty to supervise - more broadly.
- **Supervision** (See Rules 5.1 and 5.3)
- **Reasonableness of Fees** (See Rule 1.5)
- **Liability and/or accountability concerns**: determining who may be liable for an error in an AI-driven recommendation (e.g., the AI developer, the client, or the legal professional using the tool) may present complex issues.



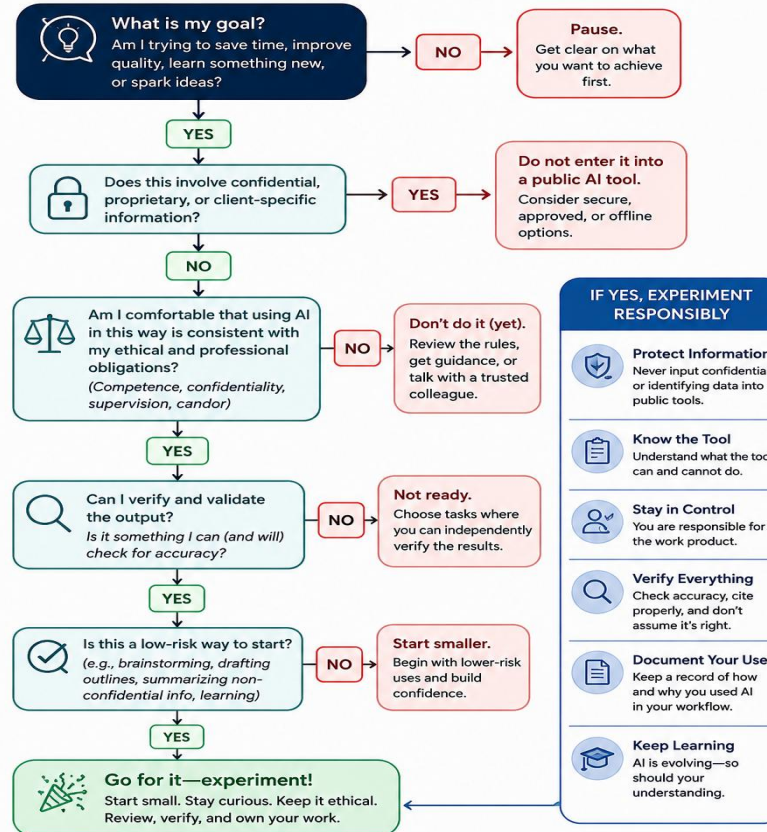
ARE YOU READY TO DIVE IN?

USING and EXPERIMENTING WITH AI RESPONSIBLY

This Chart made with LLM - AI Accelerated Flow Chart Manager

SHOULD I EXPERIMENT WITH AI?

A Quick Decision Flowchart for Lawyers & Judges



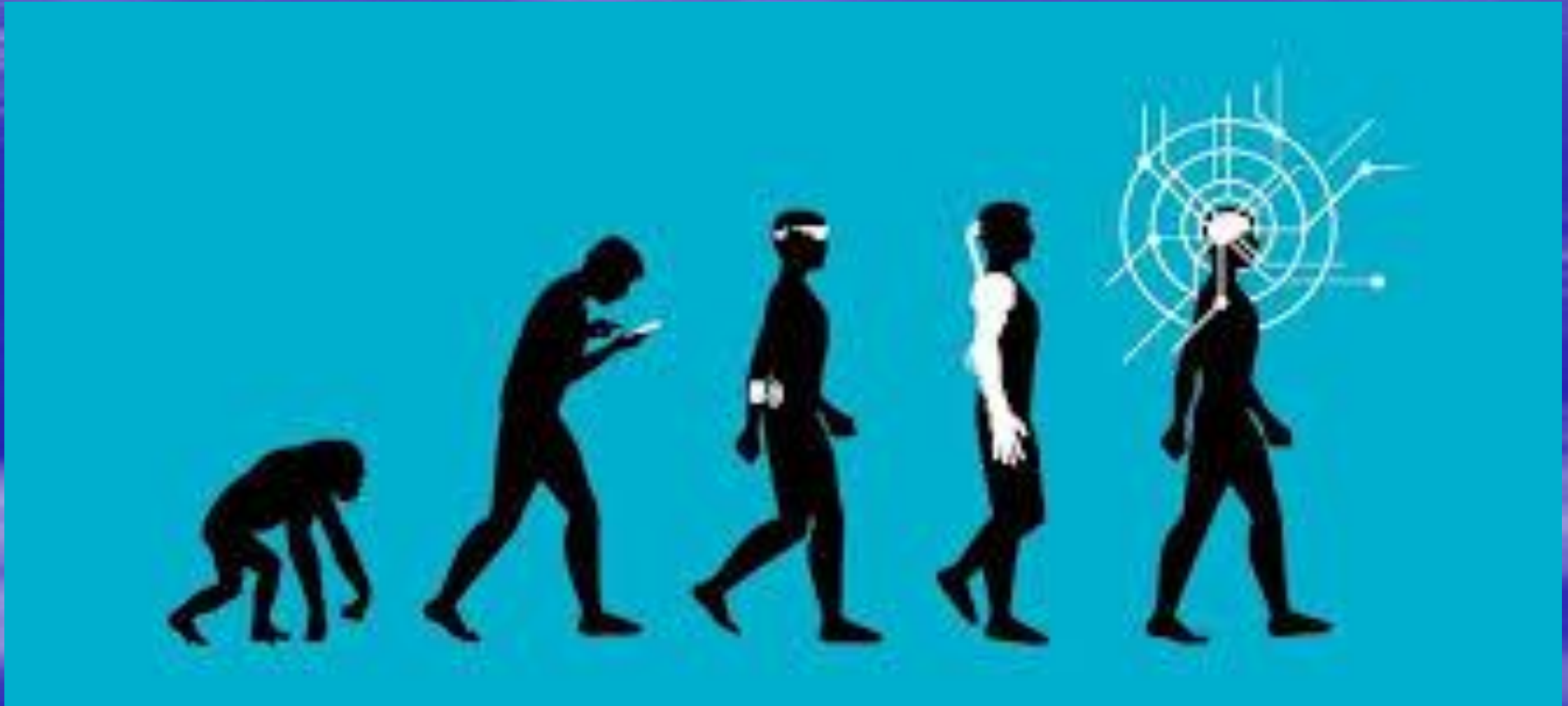
REMEMBER:

- AI is a tool, not a replacement for professional judgment.
- Start simple, stay ethical, and keep humans at the center.
- Curiosity today = confidence tomorrow.



*Experiment.
Learn.
Elevate your practice.*

The practice of law isn't going away. It is evolving.



AI will not replace lawyers but
lawyers who use AI will
replace lawyers that don't.

The practice of law isn't going
away. It is evolving.

