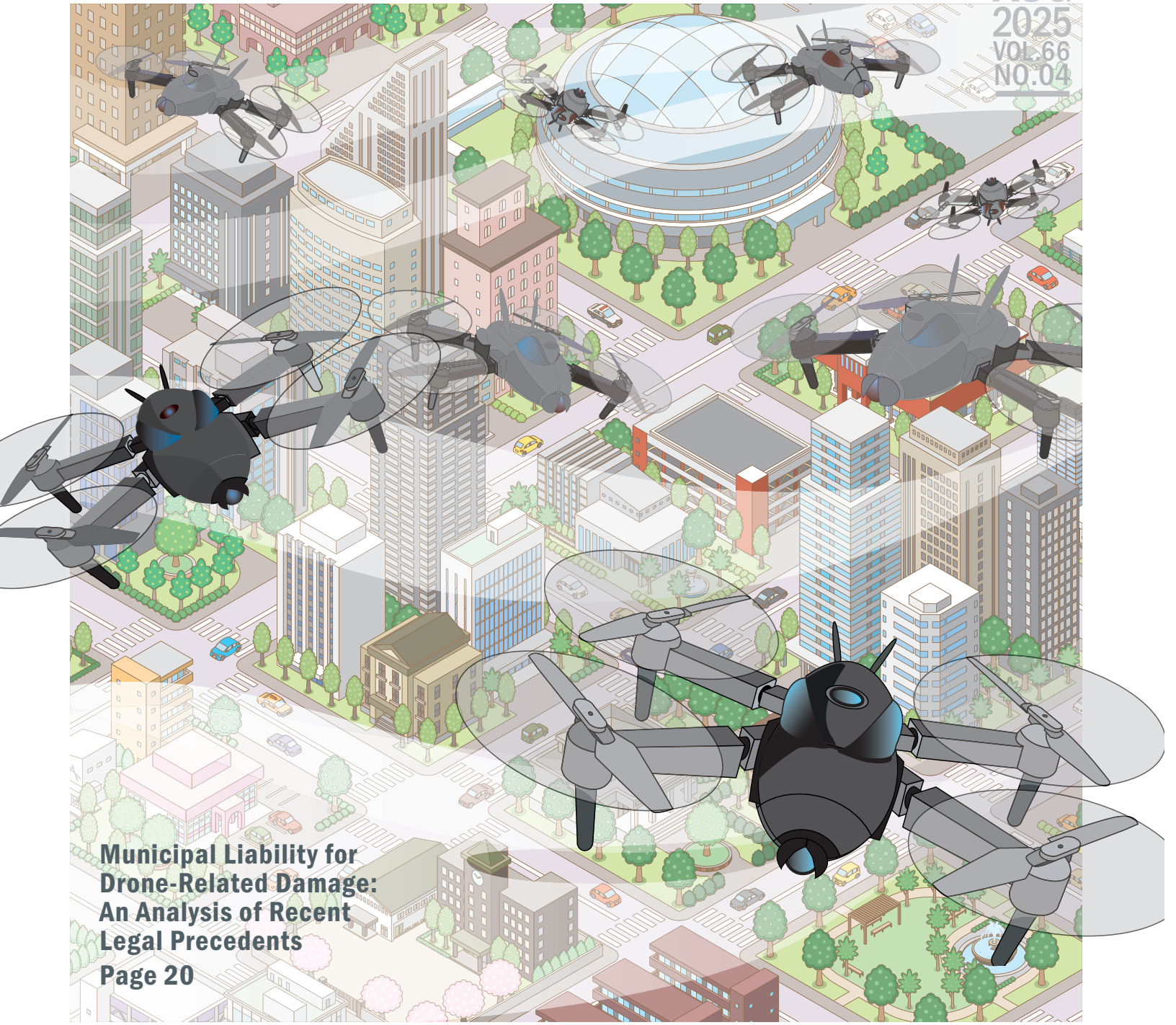
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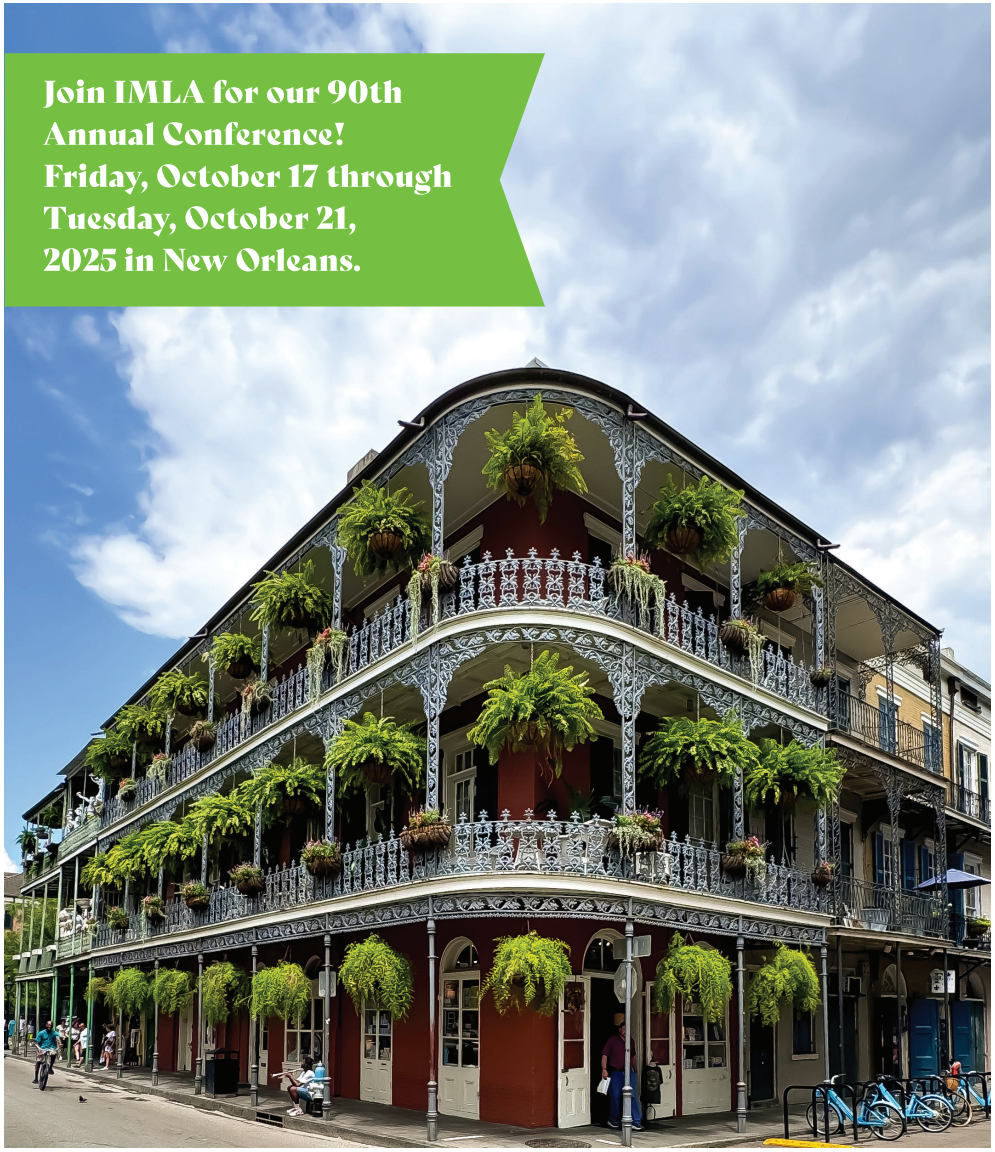
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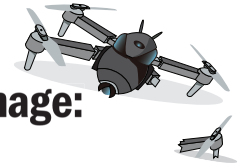


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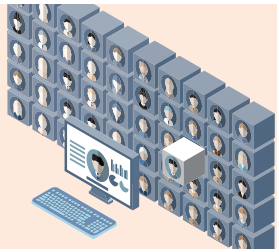
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PRACTICE TIPS

How to Successfully Integrate Gen AI

Contributed by
Dr. Gleb Tsipursky

Integrating generative artificial intelligence (Gen AI) into law firms presents a transformative opportunity to enhance efficiency, accuracy, and client service. However, this integration must be approached thoughtfully, adhering to ethical guidelines and being mindful of potential risks.

In July 2024, the American Bar Association (ABA) issued Formal Opinion 512, providing its first formal guidance on using Gen AI in legal practice.[1] This guidance emphasized that lawyers must fully consider their ethical obligations to ensure Gen AI tools are used responsibly and in a manner that upholds the integrity of the legal profession.

The ABA's Formal Opinion 512 highlighted several key Model Rules that lawyers must heed when integrating Gen AI into their practice:

1. Competence (Model Rule 1.1) Lawyers must provide competent legal representation, which involves having the requisite legal knowledge, skill, and thorough preparation. When using Gen AI tools, this means understanding both the benefits and risks of the technology. A lawyer must possess sufficient technical competence to evaluate whether a particular Gen AI tool is suitable for the task at hand and ensure it is used effectively. This includes verifying the accuracy of Gen AI outputs, given that errors or fabricated citations—commonly referred to as "hallucinations"—can result in serious professional consequences.

2. Confidentiality (Model Rule 1.6) Gen AI systems often require inputting sensitive client information, which raises concerns about maintaining confidentiality. Model Rule 1.6 underscores a lawyer's duty to safeguard all client-related information, regardless of its source. The rule emphasizes that attorneys must ensure the security of any data shared with Gen AI tools and, if there is a lack of protection that risks unauthorized disclosure, must not use such tools without the client's informed consent.

3. Communication (Model Rule 1.4) Effective communication with clients is central to ethical legal practice. Under Model Rule 1.4, lawyers have a fiduciary obligation to inform clients about important developments and to "reasonably consult" with them about the means used to achieve their objectives. In the context of Gen AI, this might mean evaluating whether using the Gen AI tool materially impacts the achievement of client objectives and, if so, informing the client.

4. Fees (Model Rule 1.5) Lawyers must ensure their fees and expenses are reasonable. This extends to the use of Gen AI. If, for example, a lawyer uses a Gen AI tool to draft a document in significantly less time than it would take manually, the lawyer can charge for the time spent reviewing and finalizing the document, but, unless the client approves, not for the time spent learning how to operate the tool. However, with appropriate disclosure to the client, the lawyer can, for example, charge a higher fee for more efficient work done using Gen AI, compared to the same work done without using Gen AI: in other words, clients get a higher ROI. The key is to keep the client informed and get the client's approval if you plan to change your fees due to Gen AI.

Formal Opinion 512 went beyond merely restating ethical rules. It encouraged lawyers to approach Gen AI with a blend of caution and innovation, recognizing the potential for technology to enhance efficiency and service delivery while safeguarding professional standards.

The eleven months since the ABA issued Formal Opinion 512 have witnessed a remarkable transformation in how the legal profession approaches Gen AI. According to a report from Thomson Reuters, 26% of legal organizations are now actively using Gen AI, up from 14% in 2024.[2] This near doubling of Gen AI adoption reflects a fundamental shift in attitude. In 2024, hesitancy was the predominant reaction (35%), but in 2025, excitement (27%) and hopefulness (28%) have taken the lead, while hesitancy has dropped to 24%. Many states have formed AI task forces, with at least 33 states forming AI committees or task forces in 2024, signaling widespread regulatory attention to Gen AI's impact on legal practice.[3]

Successful integration of Gen AI depends on thoughtful implementation, including the following:

- Technical training to familiarize employees with the capabilities and limitations of specific Gen AI tools, including how to interpret AI-generated outputs, refine prompts for improved results, detect errors in the system's responses, and maintain the security of sensitive information.
- Ethical training to highlight confidentiality, bias, and the necessity of human oversight.
- Policy Guidelines that include protocols for accuracy and data use, to ensure consistency in how Gen AI is used, to maintain accountability, and to minimize risk.
- Integration training to demonstrate how Gen AI fits into existing workflows, clarifying how it complements traditional legal practices and enhances productivity.
- Ongoing education is also critical as Gen AI tools evolve. A commitment to continuous learning ensures that the workforce remains competent and confident in effectively leveraging Gen AI.

Reflecting on the year since Formal Opinion 512, the legal profession stands at a transformative inflection point. The rapid evolution from skepticism to strategic adoption demonstrates that Gen AI has moved beyond experimental curiosity to become an essential tool for competitive legal practice. This transformation brings both opportunity and responsibility.

By combining thorough assessments, robust security measures, comprehensive training, and clear policies, law firms can integrate Gen AI to maximize its benefits while mitigating potential risks. These foundational steps pave the way for a responsible and effective adoption of this transformative technology. **ML**

Gen AI has moved beyond experimental curiosity to become an essential tool for competitive legal practice

Dr. Gleb Tsipursky was named "Office Whisperer" by The New York Times for helping law firm leaders overcome frustrations with Generative AI. He serves as the CEO of the future-of-work consultancy Disaster Avoidance Experts. Dr. Gleb has written seven best-selling books, including ChatGPT for Leaders and Content Creators: Unlocking the Potential of Generative AI.

Endnotes:

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