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WHITE PAPER

A Practical Guide to GenAI Solutions for Legal Teams





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Navigating Legal GenAI Solutions

Generative AI (GenAI) is rapidly transforming how businesses operate, becoming an essential tool for enhancing efficiency and innovation. By 2025, GenAI is expected to significantly influence 70% of text and data-driven tasks, a dramatic increase from just 10% in 2023.¹ Yet, organizations across all sectors struggle with similar questions – where to start, how to start, what use cases it applies to, and what solutions they should get. The landscape is diverse and becoming more complex as new solutions emerge and innovation happens. This guide provides some practical guidelines to help you plan your next steps.

By 2025, GenAI is expected to significantly influence 70% of text and data-driven tasks

We aim to help you stay ahead of the curve, by sharing valuable insights from our AI experience, conversations with analysts, experts, our customers, and the collective wisdom of our strategic partners.

One of the key areas of focus when considering GenAI is what type of solution is right for your needs. In this Guide, we cover three models.

¹Gartner, Beyond ChatGPT: The Future of Generative AI for Enterprises, 2023 <https://www.gartner.com/en/articles/beyond-chatgpt-the-future-of-generative-ai-for-enterprises>

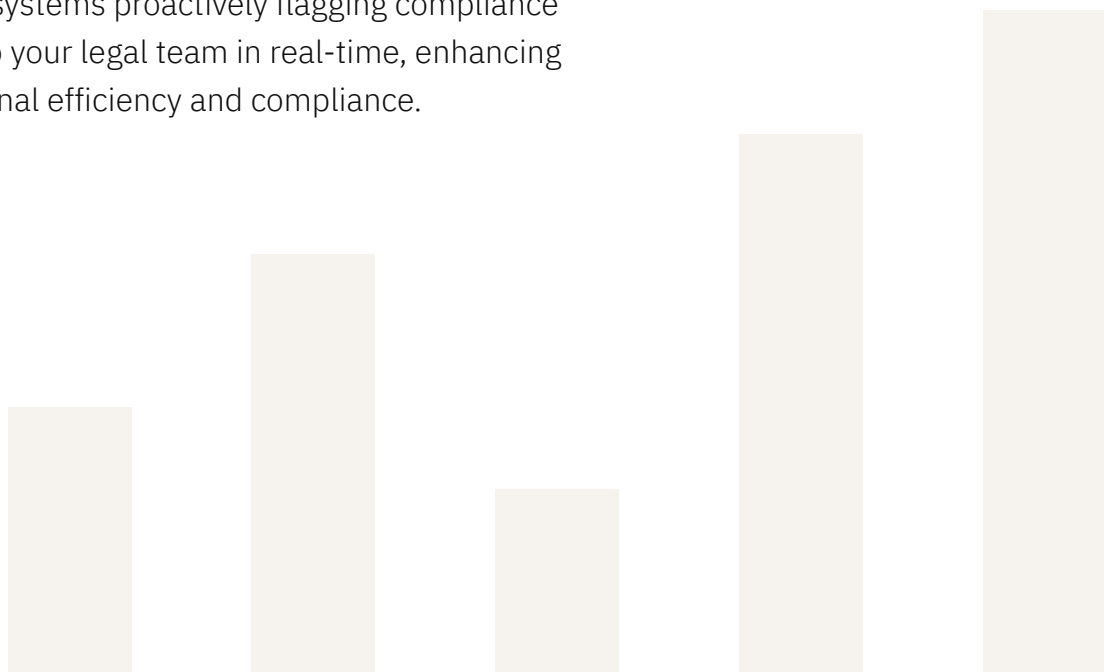
Three GenAI Models to Consider Implementing

GenAI Features: A practical first step to leverage GenAI is by utilizing the AI-enhanced features already integrated into your existing legal software, including contract lifecycle management (CLM) systems, legal research databases, and eDiscovery tools. These enhancements make it easier to begin realizing the benefits of GenAI in your daily operations.

Vertical GenAI: As adoption of GenAI increases, the demand for sophisticated, industry-specific solutions becomes more critical. Vertical GenAI, trained on legal data, documents, and legal frameworks, offers precise support for tasks such as contract analysis, legal research, drafting, and compliance reviews, making it indispensable for advanced legal operations.

System Integration: Looking forward, GenAI presents the exciting potential to seamlessly integrate legal services across your organization. Envision a future where legal contract reviews are intelligently automated within your sales, CRM, and HR systems proactively flagging compliance issues to your legal team in real-time, enhancing operational efficiency and compliance.

You may discover you need a combination of all three to fulfill your goals.



01 AI in Existing Applications

GenAI-Boosted Features

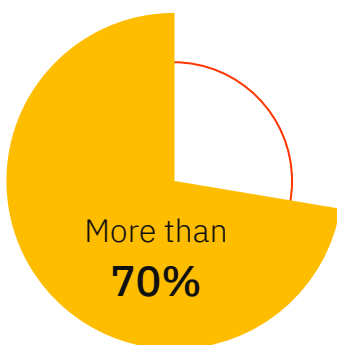
One of the most accessible and practical approaches for legal teams is to make use of the GenAI-boosted features and capabilities within the products they use every day. In this chapter, we'll explore the value of GenAI features where you already work.

GenAI Where You Work

One of the key benefits of this approach is that it's straightforward for the business and users. It's low risk but is a significant first step into utilizing the technology. This approach allows you to leverage the power of GenAI while maintaining the familiarity of your existing products and applications.

Projections from Gartner indicate that by 2026, over 70% of independent software vendors (ISVs) will have incorporated generative AI capabilities into their enterprise applications— a remarkable surge from the current figure of less than 1%, as of July 2023. Adding

GenAI capabilities to existing technology or applications require a thoughtful approach by vendors and a balance of innovation with the practicalities of the systems.



Projections from Gartner indicate that by 2026, over 70% of independent software vendors (ISVs) will have incorporated generative AI capabilities into their enterprise applications.²

² Gartner, How to Choose an Approach for Deploying Generative AI, 2023



Key Considerations

- 01 Discuss with your vendors if GenAI is already available in their application. If it is already available, how do you get access? Then, assess how it aligns with your use cases and identify where you and your team see value.
- 02 GenAI features should blend smoothly with the application and workflow. However, in some cases, GenAI will transform features and eliminate steps or the task itself, changing the workflow. In these scenarios, you'll want to get insight into the new operation.
- 03 Next, ask your vendor about the AI roadmap. This is an opportunity to get more insight into what your vendor has planned.
- 04 Continuously learning and using GenAI tools are important to truly understand and realize their value.

As an example, ContractPodAi's CLM is AIpowered, with features that remove steps and tasks once considered standard. Take Leah One Drop: by simply dragging and dropping a contract, Leah analyzes the document, automatically extracts key data, compares it to existing contracts in the repository, creates a record, and stores it – all in one seamless process.

Real-World Applications

A recent study by ContractPodAi (2024) found that a staggering 39% of legal professionals cite contract review and analysis as their top use case for GenAI. This statistic dispels the myth that lawyers are skeptical of GenAI; and many in the legal sector are [embracing GenAI as a transformative tool](#).

From AI-powered negotiations, discovery through deep analysis to legal advice, incorporating GenAI delivers groundbreaking innovations. These tools not only enhance efficiency, reduce errors, and minimize risk, but also provide real-time insights into past negotiations – an invaluable capability previously unimaginable without the speed and accuracy of GenAI.

Challenges and Consideration

While GenAI in your existing applications offer numerous advantages, it is not without its challenges.

Key considerations include:

- Ensuring data privacy and security, especially in sensitive domains.
- Balancing the automation capabilities of GenAI with the need for human oversight.
- Addressing complexities with legacy systems.

By integrating GenAI features into CLM systems, new levels of automation can be achieved, spanning from contract creation to compliance monitoring. This integration allows CLM systems to automate various stages of contract management, streamlining the entire process. For instance, features like automated redlining, powered by GenAI, not only save time but also increase the accuracy and consistency of legal documents, reducing the risk of errors and ensuring adherence to predefined standards.

The Path Forward

As we move forward, adding GenAI to existing products and applications will become a norm rather than an exception. This approach offers a pragmatic and effective pathway for organizations to harness the power of AI, enhancing their products and services while staying aligned with their current technological ecosystems.

Examples of GenAI Services in a Contract Management System

Create Records	<ul style="list-style-type: none">• Automatically detects and analyzes the contract files and produces document records.• Captures details automatically, to decrease the need for manual entry to save time and reduce errors.
Compliance & Review	<ul style="list-style-type: none">• Reviews contracts, including third-party paper, to assess and score the business risk in these critical documents.• Reviews the non-compliant text and suggests redlines based on best practices, playbooks, and prior negotiations.
Collaborate & Negotiate	<ul style="list-style-type: none">• Get to signature faster by using insights from prior negotiations, playbooks, and best practices to inform negotiations.• Library of pre-built AI prompts designed for better contract negotiations.
Manage & Search	<ul style="list-style-type: none">• Automatically identifies and tracks all obligations and associated risks.• Analyzes all contracts in the repository and answers detailed questions about any agreement.
Summarize	<ul style="list-style-type: none">• Summarizes contracts and supports faster, more informed decision-making revealing key themes of the agreement.
Translate	<ul style="list-style-type: none">• Translates an entire contract or clause and extracts in multiple languages.

02

The Value of Vertical GenAI Solutions for Legal

Unleashing the Power of GenAI in Legal

Vertical Generative AI

In the evolving world of GenAI specialized vertical solutions (tailored to specific domains) will revolutionize how professionals work. This chapter delves into the transformative impact of vertical-specific GenAI for legal. While horizontal GenAI offers broad applicability and flexibility across various tasks, vertical-specific AI delivers enhanced performance and greater precision in targeted areas, by leveraging tailored expertise and specialized training data. By 2027, over half of the generative AI models used by enterprises will be domain-specific (industry or business function), up from 1% today.³

The Rise of Vertical AI Solutions

GenAI vertical solutions are bespoke tools that cater to a specific vertical or domain. In fields like legal, GenAI is more than a tool, it's a partner in decision-making and task execution.

Take, for example, Leah Legal, a vertical GenAI solution for legal teams. Leah delivers out-of-the-box applications for contract analysis, document drafting, discovery, legal guidance, and more. Leah's ability to analyze documents, suggest edits, and even draft contracts based on legal precedents and organizational policies exemplifies the impact of domain-specific GenAI.

Understanding Nuances

The effectiveness of a GenAI lies in its understanding of the domain it serves. In the context of legal, this means the AI is trained to understand complex legal language and documents, interpret laws, and compliance. Legal GenAI is trained to understand the subtleties of legal terminology and the intricacies of legal frameworks. It is an invaluable asset for legal professionals who navigate these complexities daily.

By 2027, over half of the generative AI models used by enterprises will be domain-specific (industry or business function), up from 1% today.³

³ 2024 Tech Provider Top Trends: Vertical Generative AI Models. Gartner. 2024

Competitive Advantage

Adopting GenAI like Leah is about enhancing productivity, gaining a competitive edge, and setting the pace and narrative within your organization. As the legal sector becomes increasingly tech-driven, law firms and legal departments leveraging GenAI to position themselves at the forefront of innovation. This early adoption is crucial, especially in a landscape where technological agility often dictates market leadership.



“The collaboration with ContractPodAi is poised to drive significant advancements in the way our legal solutions and services are executed, enhancing efficiency, productivity, accuracy, and innovation for our clients on a global scale. Our alliance with ContractPodAi demonstrates our deep understanding of the vital role that GenAI technology plays in our clients’ current and future legal work, reaffirming our dedication to staying at the forefront of technological innovation in the legal sector.

– Robin Snasdell, Senior Managing Director, Morae

Benefits of GenAI for Legal teams and individual productivity:



Enhance Efficiency



Gain a competitive advantage



Set the pace for innovation

Comparison Between Horizontal and Vertical GenAI Models

Horizontal GenAI	Vertical GenAI
<p>Brand applicability: Can be applied across various industries and use cases</p> <p>Scalability: Can be deployed across different business units with varying needs</p> <p>Cross-domain expertise: Developed and trained using data across multiple verticals and domains</p> <p>Tailoring required: Necessitates prompt engineering and fine-tuning to get optimal results</p> <p>Hallucinations: Lower accuracy and higher risk of hallucinations because of breadth of training data</p>	<p>Industry focus: Built to meet needs and challenges of specific domains</p> <p>Deep domain knowledge: Uses industry expertise to address specific requirements and use cases</p> <p>Better price/performance: Lower costs to run since models are smaller requiring less resources</p> <p>Faster deployment: Reduces the need for prompt engineering and fine-tuning since already optimized</p> <p>Accuracy: Higher accuracy and reduced hallucinations because of more relevant focused training data</p>

Examples of Vertical GenAI Services in Legal

Draft Documents	<ul style="list-style-type: none">• Summarizes regulatory updates for current industry legalities.• Drafts contracts and memos tailored to corporate legal needs.• Creates customized documents to match corporate legal requirements.• Ensures ongoing compliance within the corporate legal framework.
Extract Data	<ul style="list-style-type: none">• Precise extraction of valuable data from legal documents.• Extract essential details like clauses, dates, and involved parties.• Eliminates the need for manual data extraction, saving valuable time and effort in the legal process.• Efficiently analyze and utilize the extracted information.
Discovery	<ul style="list-style-type: none">• In-depth analysis and insights across various legal documents relevant to corporate law, including M&A, Contracts, and Policies.• Comprehensively examines each line and clause across documents. Answers detailed queries for refined analysis with rationale and citations.
Redline Documents	<ul style="list-style-type: none">• Provides redlining recommendations.• Provides risk and remediation analysis reports.
Create Playbooks	<ul style="list-style-type: none">• Automates customized playbook creation from existing documents.• Elevates playbook management.
Litigation	<ul style="list-style-type: none">• Processes large volumes of litigation claims.• Makes swift decisions, aligns responses with precedents, and enhances defense or action efficiency.
Mergers & Acquisition	<ul style="list-style-type: none">• Streamlines M&A workflows by optimizing, planning, & accelerating financial analysis.• Provides actionable recommendations.• Proactively identifies risks, saves time, and gives a comprehensive view of obligations.

03

Integrating Legal Into the Fabric of Your Organization

The Future

GenAI will power where legal needs to be – in the business process, in the contract, and in the conversation.

Picture this: a scenario where sensitive communications undergo compliance checks with little manual intervention. Or an always-ready legal chatbot to answer your employees' queries – helping elevate overall legal compliance.

Beyond Legal: Into the Enterprise Ecosystem

Legal is a service that touches every aspect of an organization – buying, selling, hiring, leasing, litigation, M&A, compliance, and more. Legal is part of every business interaction.

The future is weaving legal services into the right workflow at the right time using GenAI. For instance, GenAI in Human Resource (HR) systems provide intelligent talent management, employee contracts, and compliance. GenAI in CRM supports contract negotiations, obligation tracking, and other systems to improve performance, drive compliance, and reduce legal risk.

The Future of Integrated Legal AI Solutions

Integrated GenAI solutions represent a significant leap towards a more interconnected and intelligent legal-business environment. By integrating AI services into existing solutions across various functions, organizations can unlock new levels of efficiency, insight, and innovation. Not to mention elevating the foundation of legal across the enterprise and reducing risk. As we move forward, the ability to seamlessly integrate AI into diverse business ecosystems will be a competitive advantage and a necessity for staying relevant in an increasingly AI-driven world.

Elevate Legal

Transform your business operations by integrating GenAI into your existing systems and workflows. For example, enhance your business users' experience by replacing cumbersome intake forms with an intuitive chat interface simplifying legal requests and improving users satisfaction. Similarly, boost your sales and compliance efficiency by adding legal GenAI directly into your CRM system. GenAI can automatically review interactions and transactions for compliance issues, significantly speeding up the sales process while ensuring adherence to legal standards.

04

Ethical Considerations

Emphasizing Ethical and Responsible Use of GenAI

The deployment of GenAI solutions, particularly in sensitive domains like legal, necessitates a strong emphasis on ethical and responsible usage. It is imperative for organizations to adhere to ethical guidelines and frameworks while utilizing these advanced AI tools. This approach ensures that the outcomes derived from GenAI are not only beneficial for the business but also considerate of the broader implications on stakeholders and the ecosystem.

Partnering with companies that specialize in AI and have deep domain expertise is crucial. These companies bring a daily focus to GenAI and extensive domain knowledge to ensure that solutions are tailored to the unique needs and challenges of the industry. This allows customers to concentrate on their core business while leveraging advanced AI capabilities, confident that the technology is being developed and applied by experts who understand the domain. This partnership is particularly beneficial in complex fields like legal, where the specific knowledge and application of AI can make a substantial difference in operational efficiency and strategic decision-making.

It is imperative for organizations to adhere to ethical guidelines and frameworks while utilizing these advanced AI tools.



The Philosophy of Not Reinventing the Wheel

When deploying GenAI solutions it's essential to embrace the principle of not reinventing the wheel unnecessarily. This means leveraging existing frameworks and methodologies, such as precedent-based and rule-based negotiation recommendations, to enhance decision-making processes. By integrating these established practices with AI's advanced analytical capabilities, organizations can optimize their operations and unlock new levels of efficiency without discarding proven methods. This approach ensures you get the most out of your GenAI investment while minimizing disruption to your current workflows, allowing you to harness the power of both the wisdom of established practices and the innovation of AI.

Fine Tuning and Governance

Using GenAI technology ethically and responsibly is a cornerstone of successful implementation. This involves fine-tuning custom models for specific tasks and use cases, such as redlining, drafting, and discovery, and governing them within structured frameworks. Governance ensures that the AI's decisions and recommendations align with the organization's ethical standards and legal requirements.

Performance through Precedents and Insights

GenAI solutions excel by providing comprehensive and detailed insights into the entire ecosystem of systems of records. This deep understanding, fueled by AI's capacity to process vast amounts of data, drives efficiency and performance. By analyzing historical data and extracting relevant insights, AI tools can make informed recommendations, enhancing decision-making processes across the organization.

Harnessing GenAI with Responsibility and Insight

As we look towards the future, the role of GenAI solutions in professional domains is set to grow exponentially. For sectors like legal, AI offers not just productivity enhancements but also a new paradigm in how work is conducted. Embracing these solutions is more than an operational decision; it is a strategic move towards staying relevant and competitive in an increasingly AI-driven world.

The successful deployment of GenAI solutions hinges on a balanced approach that values ethical considerations, leverages existing methodologies, and gains from the insights offered by AI. By partnering with GenAI firms, organizations can navigate these complexities effectively, ensuring that their use of AI not only enhances their operations but also aligns with broader ethical and societal standards.



By embracing GenAI, organizations are not just adopting a new technology; they are participating in a paradigm shift that redefines how business is conducted.

With careful consideration and strategic implementation, GenAI can unlock unprecedented levels of efficiency, innovation, and success.

05

Embracing the Future with Generative AI Solutions

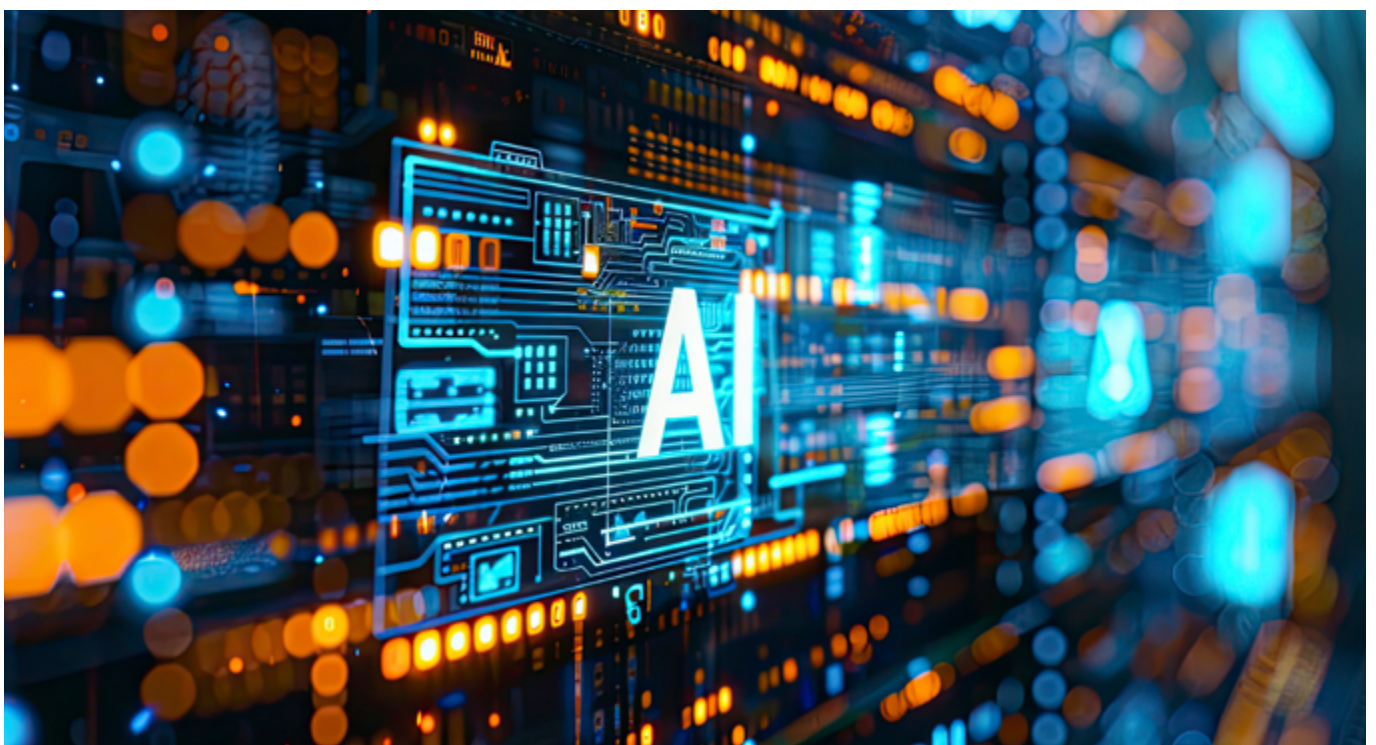
AI-Driven Transformation

It's clear that the journey into AI-driven transformation is both exciting and complex. From adding GenAI into existing products to leveraging features within existing solutions to the future of integrated AI solutions, the possibilities are vast and varied.

The future of business operations and strategy is intertwined with the

advancements in AI. Companies that can effectively integrate GenAI solutions will find themselves at the forefront of innovation, efficiency, and competitive advantage. However, this journey requires thoughtful consideration, strategic planning, and a commitment to ethical and responsible AI use.

If you want to know how GenAI can help drive your business and legal efficiency, [talk to our experts.](#)



Steps to Choosing GenAI Solution

Here is a checklist for organizations considering GenAI solutions:

01 Identify Specific Needs and Goals

- Determine which use cases and projects could benefit from GenAI.
- Set clear objectives for what you want to achieve with GenAI.

02 Evaluate Different GenAI Approaches

- Talk to your existing vendors about their roadmap.
- Start, test, and learn. Then repeat.
- Assess the compatibility of these solutions with your existing technology stack.

03 Focus on Vertical-Specific Solutions

- For specialized fields like legal, look for GenAI solutions tailored for legal.
- Ensure the solution can be configured (longer-term) to understand the nuances and complexities of your organization.
- Discuss the future roadmap and how they plan to support you as GenAI technology moves fast and you want to ensure you have the right partners.

04 Ethical and Responsible AI Use

- Choose solutions prioritizing data privacy, security, and ethical AI practices.
- Ensure compliance with regulatory standards and industry best practices.

05 Integration and Compatibility

- Assess the ease of integration with your current systems.
- Ensure the solution can scale and evolve with your organization.

06 Vendor Expertise and Support

- Partner with vendors who have a proven track record in AI/GenAI.
 - Look for ongoing support and training to maximize the benefits of the AI solution
-

07 Monitor Performance and Adaptability

- Regularly evaluate the performance of the AI solution.
 - Be prepared to adapt and fine-tune the solution as your business and the AI landscape evolve.
-

08 Cost-Benefit Analysis

- Weigh the costs of implementation against the potential ROI.
 - Consider both short-term and long-term financial impacts.
-

09 Stakeholder Engagement

- Involve key stakeholders in the decision-making process—Legal, IT, and Security Team.
 - Ensure employees are trained and comfortable with the new technology.
-

10 Futureproofing

- Choose adaptable solutions and vendors that can grow with emerging AI trends.
 - Stay informed about advancements in AI to ensure your solutions remain relevant.
-

Important Definitions and Distinctions

Generative AI (GenAI): GenAI enables users to generate new media such as text, images, videos, sounds, code, 3D designs, and other media. Using existing online documents and artifacts, it “learns” and is trained. Furthermore, innovative applications extend beyond mere text generation, incorporating multimodal capabilities that enable AI systems to analyze audio, video, and image data relevant to legal cases.

Horizontal GenAI: Also known as general-purpose AI or foundation models, refers to artificial intelligence systems that are designed to perform a wide range of tasks across multiple domains, rather than being specialized for a specific application or industry. These AI models are trained on vast amounts of diverse data, enabling them to develop broad capabilities and knowledge that can be adapted and applied to various use cases.

Vertical GenAI: Vertical GenAI solutions are designed to cater to the unique requirements and challenges of specific industries, business functions, or tasks. These tailored models offer enhanced performance and efficiency compared to general-purpose models, as they are built with a focused set of use cases in mind. By leveraging industry-specific expertise and training data, vertical GenAI models can deliver more accurate and relevant results, reducing the need for extensive prompt engineering.

GenAI in CLM: GenAI in CLM involves using GenAI with existing systems or applications. This approach seamlessly incorporates AI capabilities into workflows, enhancing specific functionalities or processes without requiring users to interact separately with the GenAI system.

Integrated CLM: Integrated GenAI refers to the incorporation of GenAI across multiple systems or platforms within an organization. This approach aims to create a cohesive and interconnected AI environment, allowing for seamless collaboration and data exchange between different AI-enabled tools and applications.

Custom GenAI Models: Custom GenAI Models are meticulously crafted by organizations to suit their specific needs and data, thereby maximizing accuracy and adaptability. Challenges like high maintenance costs and technological evolution pose significant hurdles.

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As an authorized ContractPodAi partner, Morae routinely helps our law firm and corporate legal department clients leverage LeAh from ContractPodAi for legal AI assistance, legal intake and contract management. Clients benefit from working with Morae based on our industry expertise and deep implementation knowledge to help them achieve their digital transformation objectives.



Changing
Legal
Together

Morae Global Corporation is trusted worldwide by leading law firms, legal departments, and compliance functions for the delivery of award-winning solutions for digital transformation and legal transformation.

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