



THE LEGAL AI PLAYBOOK

How Law Firms Can Evaluate, Justify, and Deploy AI with Confidence

*A working guide for attorneys, paralegals,
legal administrators, and litigation support teams*



WHAT'S INSIDE

- ✓ A shared glossary of AI terms for legal professionals
- ✓ A use-case spectrum showing where AI helps and where human judgment leads
- ✓ An opportunity scorecard for choosing your first use case
- ✓ An AI use policy builder, vendor due diligence checklist, and starter prompt library
- ✓ A role-based training and rollout checklist



EVALUATE



GOVERN



VET



PROMPT



TRAIN

The information provided in this guide is for informational purposes only and should not be construed as legal advice for attorneys or clients.



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INTRODUCTION

Why Law Firms Need an AI Playbook Now

A 200-page deposition transcript lands in the case file on a Tuesday, due for a summary by Friday. The firm approved an AI tool for this exact task months ago. Running the transcript through it takes minutes, but the real work lies in deciding how much to trust the output and what needs to be verified before it goes anywhere near a filing.

Right now, that decision gets made a little differently depending on who's at their desk that day, because most firms haven't formally documented how it should get made at all.

This playbook gives firms a framework for making that decision and the tools to document it consistently, rather than from scratch every time. Score a use case with the opportunity scorecard, set the guardrails with the policy builder and vendor checklist, then put it to work with the prompt library. It is a working resource for attorneys, paralegals, legal administrators, and litigation support teams who need a practical way to decide where AI belongs, how to manage the risk that comes with it, and how to build a consistent, firm-wide approach to AI adoption.

Each section ahead is something you can put to work right away. Scan it, score a candidate use case against it, and apply what's relevant to your firm.

Legal GenAI usage nearly doubled from 14% in 2024 to 26% in 2025, while 48% of law firm professionals still lacked formal GenAI policies. This is the gap most firms are navigating right now.¹

HOW TO USE THIS PLAYBOOK

SCAN

Read through the tools below and note which ones map to a real question your firm is facing right now.



SCORE

Run your first candidate use case through the Opportunity Scorecard before you pilot anything.



APPLY

Fill in the policy builder, mark up the vendor checklist, and pull straight from the prompt library while you're mid-task.



¹ Thomson Reuters. "2025 Generative AI in Professional Services Report." 2025.

TOOL 1

AI Terms for Legal Professionals

Vendors, clients, and colleagues will use these terms loosely. A shared, plain-English vocabulary makes it possible to evaluate tools and have the policy conversation without getting stuck on definitions.

TERM	WHAT IT MEANS	WHY IT MATTERS
AI (Artificial Intelligence)	Technology that performs tasks normally requiring human judgment, such as recognizing patterns or generating text.	It's the umbrella term. Most legal tech marketing uses it loosely, so knowing what's actually inside the box matters when vetting a tool.
Generative AI (GenAI)	A type of AI that creates new text, summaries, or drafts from a prompt, rather than only sorting or retrieving existing information.	Most legal drafting and summarization tools use GenAI. While it can accelerate routine work, its outputs require human review due to the risk of hallucinations.
Large Language Model (LLM)	The technology behind most GenAI tools, trained on large volumes of text to predict and generate language.	An LLM can sound confident while still being wrong. That's the core reason human review is non-negotiable.
Machine Learning	A broader technique where software improves at a task by learning from data patterns, rather than following fixed rules.	Established legal tech, such as e-discovery review and document classification, often relies on machine learning rather than GenAI and carries a different risk profile.
Legal-Specific AI	AI tools built or trained specifically for legal workflows, often grounded in case law, filings, or legal databases rather than general internet text.	Legal-specific tools generally carry a lower risk of hallucination than general-purpose tools, but their outputs still require independent human verification before you rely on them.
Hallucination	When an AI tool generates information, including case citations, that sounds plausible but is fabricated or inaccurate.	This is one of the most-cited risks in legal AI adoption, and it's why human review exists at every step of the process.
Prompt	The instruction or question given to an AI tool to produce a specific output.	Prompt quality directly affects output quality. A vague prompt produces a vague, harder-to-review answer.
Model Training	The process of teaching an AI system by feeding it data, which can sometimes include a firm's own documents or client data.	Whether a vendor uses client data to train its models, and whether that use is opt-in or opt-out, is a core vendor diligence question (see Tool 6).
Agentic AI	AI systems that can plan and execute multi-step actions toward a goal, such as drafting, formatting, and routing a document, with limited human input at each step.	The more autonomous a tool is, the more deliberate the review checkpoints around it need to be.

Hallucinations are one of the most commonly cited barriers to broader GenAI adoption in the legal industry. Accuracy and reliability were the top concerns for 40% of legal professionals who said GenAI should not be part of their daily work.²

² Thomson Reuters Institute, "GenAI hallucinations are still pervasive in legal filings, but better lawyering is the cure," January 2026

Where AI Fits in Legal Workflows

Human review remains necessary across all AI-assisted legal workflows. However, the level of oversight varies by task. Some litigation workflows can run through AI with a lighter review step. Others require an attorney's judgment at every step, with AI limited to background prep work. This spectrum sorts common workflows by the level of oversight each requires.

ZONE	EXAMPLE WORKFLOWS	WHAT IT MEANS IN PRACTICE
Supportive (AI-assisted, lower risk)	Scheduling support, transcription formatting, document organization, and internal-only, first-pass summarization.	AI can handle the mechanical work in these workflows. The review is lighter than in the zones below because errors in this category may carry lower client impact, but human review is still required.
Shared Responsibility (AI-assisted, human-reviewed)	Legal research starting points, e-discovery first-pass review, deposition and transcript summaries, draft correspondence, and case chronologies.	AI produces a draft or first pass. A person checks it against the source before using or sharing it.
Human-Led (AI-limited, direct oversight required)	Legal analysis and strategy, court filings and submissions, client advice, privilege determinations, and ethical judgment calls.	AI can support the prep work (an outline, a first draft), but it doesn't substitute for the attorney's judgment, review, or sign-off.

USE THIS WHEN...

Run any new AI use case through this spectrum before you pilot it. A workflow in the Human-Led zone still leaves room for AI to draft the first pass, with an attorney or designated reviewer owning everything that follows.

Legal AI tools can help reduce research time and improve workflow efficiency, but benchmarking studies show that they can still hallucinate in one out of six or more benchmarking queries. That's why public benchmarking and independent evaluation remain important, even for tools marketed as legal specific.³

³Stanford HAI, "AI on Trial: Legal Models Hallucinate in 1 out of 6 (or More) Benchmarking Queries." May, 2024.

TOOL 3

Identifying Your Best Starting Point

A strong first AI use case is practical, repeatable, reviewable, and low risk enough to learn from. Score any candidate use case against the six criteria below before piloting it.

CRITERION	WHAT TO ASK	SCORE (1–5)
Impact	How much time or risk does this save if it works as intended?	
Effort	How much setup, training, or process change does this require?	
Readiness	Does the team have the skills, training, and comfort to use this well?	
Risk	What happens if the output is wrong and no one catches it?	
Reviewability	Can someone verify the output quickly against a source document?	
Repeatability	Will this use case come up often enough to justify the setup?	

SCORING GUIDANCE

20+ TOTAL:
Strong pilot candidate.

14–19 TOTAL:
Workable, but needs guardrails (a defined review step or narrower scope) before piloting.

UNDER 14 TOTAL:
Not your first use case. Revisit after a lower-risk pilot builds internal trust.

WORKED EXAMPLE: DEPOSITION TRANSCRIPT SUMMARIZATION

Here's how the scoring works for a common litigation support workflow: internal-only deposition transcript summaries for case prep.

CRITERION	SCORE (1–5)	WHY
Impact	4	Saves meaningful attorney and paralegal review time on every matter with depositions.
Effort	4	Low setup. Most firms already have transcripts in digital form.
Readiness	4	The team needs a brief training pass on the prompt and review step.
Risk	3	Low. Internal use only, not client facing, and not filed with a court. Human review helps ensure the summary accurately reflects the source transcript.
Reviewability	5	Easy to check the summary against the original transcript.
Repeatability	4	Comes up in every case that includes depositions.

Total: 24. Strong pilot candidate.

AI adoption varies meaningfully by firm size. Firms with 51 or more lawyers reported 39% adoption, compared to approximately 20% at firms with 50 or fewer lawyers.⁴

⁴American Bar Association and MyCase. "The Legal Industry Report 2025." 2025.

TOOL 4

Building the Business Case for AI

Resistance to AI adoption inside a firm often centers around billable hours, client trust, and whether a new tool is worth the effort. Address each concern directly instead of talking around it.

CONCERN	HOW TO RESPOND	PROOF POINT OR EXAMPLE
<i>"AI will cut into our billable hours."</i>	AI shifts time away from lower-value mechanical work, such as formatting and first-pass summarization, toward strategy, preparation, and judgment work that remains billable and differentiated.	Among corporate clients that use outside law firms, 57% want those firms to use GenAI, but 71% don't know whether their outside firms currently do. ⁵ That's a visibility gap that can be addressed through clear client communication about how the firm uses AI.
<i>"We don't know if this is actually paying off."</i>	Tie any pilot to a small, measurable baseline, such as hours saved on a specific task or turnaround time on a specific deliverable, before expanding it.	Only 20% of respondents said their organizations were measuring ROI for GenAI tools. Measuring from day one can help firms evaluate results and make informed decisions about expanding their AI efforts. ⁶
<i>"Our clients expect a person doing their legal work, not a machine."</i>	Frame AI as support behind the scenes for attorney judgment and client-facing work. Clients care about outcomes and oversight more than which tool touched a first draft.	Consistent with the firm's AI Use Policy (Tool 5), attorney review and client disclosure stay in the attorney's hands.
<i>"Our team is already stretched. This feels like more work."</i>	Start with one narrow, repeatable, low-risk use case rather than a broad rollout. A single successful pilot builds internal trust faster than a mandate.	Use the Opportunity Scorecard (Tool 3) to deliberately choose the first use case.
<i>"What if this creates more rework than it saves?"</i>	Build the review step into the workflow from the start, not as an afterthought. Reviewable, low-risk use cases are the ones least likely to create rework.	See the Use Case Spectrum (Tool 2) for which workflows are ready for this today.

⁵ Thomson Reuters Institute, "2025 Generative AI in Professional Services Report," Page 3, Key Findings. April 2025.

⁶ Thomson Reuters Institute, "2025 Generative AI in Professional Services Report," Page 3, Key Findings. April 2025.

TOOL 5

Build Your AI Use Policy

A written policy is what keeps AI adoption from outrunning governance, but 48% of law firm professionals still lack a formal GenAI policy.⁷ The sections below are a starting point for internal discussion, organized by what's required, what's optional, and what needs a closer look from counsel.

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STATUS GUIDE



REQUIRED



NEEDS LEGAL REVIEW



OPTIONAL

POLICY SECTION	STATUS	WHAT TO INCLUDE
Purpose		State why the firm is adopting AI and what specific work it's meant to support.
Approved Tools		List the specific AI tools cleared for use. State plainly that unapproved tools are off limits for firm or client work.
Prohibited Uses		Define the uses that are not permitted under any circumstances, regardless of review. These are typically about which tools and which data, such as entering client-identifying or privileged material into a tool the firm has not approved.
Review-Gated Uses		Define the workflows where AI may assist, but the output cannot be used or sent until an attorney has reviewed it, such as court filings, client advice, and privileged communications.
Confidential & Client Data		Specify what data can and cannot be entered into an AI tool, including client-identifying information.
Privilege		Address whether and how AI use could affect attorney-client privilege or work product protection.
Attorney Review & Supervision		Require attorney review of any AI-assisted work product before it leaves the firm, consistent with applicable supervisory obligations.
Client Disclosure		Define when and how the firm will disclose AI use to clients, if at all.
Vendor Approval		Require new AI tools to pass the Vendor Due Diligence Checklist (Tool 6) before adoption.
Training		Outline how staff will be trained on approved tools and this policy.
Escalation		Name of the point of contact for staff regarding questions or concerns about AI use.

⁷ Thomson Reuters Institute, "2025 Generative AI in Professional Services Report," Page 27, Figure 25. April 2025.

TOOL 6

Vendor Due Diligence Checklist

Before approving any AI tool for legal work, run the vendor through these questions. Ask for evidence to support every answer instead of taking the vendor's word for it.

	QUESTION TO ASK	WHY IT MATTERS
SECURITY & DATA USE	 <i>Where is data stored, and who can access it?</i>	Helps determine your exposure if the vendor is breached.
	 <i>Is our data used to train the vendor's models?</i>	If yes, and the vendor does not provide a clear way to opt-out, client data could be used in ways that affect future outputs for other customers.
CONFIDENTIALITY & PRIVILEGE	 <i>Does the vendor sign a confidentiality agreement covering the specific data we'll share?</i>	Establishes contractual protection for sensitive material rather than verbal assurance.
ACCURACY & SOURCE GROUNDING	 <i>Can the tool cite the specific source for each output?</i>	Source grounding enables an output to be verified against the underlying record.
AUDITABILITY	 <i>Can we see a log of what was entered and generated?</i>	Supports internal review and makes it easier to explain decisions if questions arise later.
WORKFLOW FIT	 <i>Does this integrate with our existing case management or document systems?</i>	A tool that requires manual re-entry adds work instead of removing it.
TRAINING & SUPPORT	 <i>What onboarding and ongoing support does the vendor provide?</i>	Determines how much internal lift is required to use the tool well.
PRICING	 <i>Is pricing per seat, per use, or usage based, and does it scale with our matter volume?</i>	Affects whether a pilot's economics still work at firm-wide scale.

89%

of respondents said they can see GenAI use cases in their own work, which is why these questions matter: interest is already ahead of most firms' governance and training.⁸

RED FLAGS

-  Unclear or unanswered data retention policy.
-  No ability to trace an output back to a source.
-  No access controls or audit log.
-  Client data used for model training without clear, explicit permission or option to opt out.
-  No confidentiality agreement covering shared data.

⁸ Thomson Reuters Institute, "2025 Generative AI in Professional Services Report," Page 3, Key Findings. April 2025.

TOOL 7

Starter Prompt Library for Litigation Workflows

Choosing a use case, setting the policy around it, and vetting the tool all come first. These prompts are for what happens after, when the firm is ready to put AI to work within the guardrails it has already set.

Every prompt below follows the same formula: role, task, context, constraints, format, and a built-in review reminder. Paste the prompt, add the material it calls for, and run the output through the review step before it goes anywhere near a filing or a client.



PROMPT FORMULA

ROLE + TASK + CONTEXT + CONSTRAINTS + FORMAT + REVIEW REMINDER

If a prompt you write from scratch is missing one of these six pieces, the output produced is more likely to be vague or unreliable.

1. DISCOVERY PLANNING CHECKLIST

Use when:	Scoping an initial discovery plan for a new matter.
Prompt:	<i>Based on the attached case summary, draft a discovery planning checklist covering likely document custodians, categories of relevant records, and potential deposition witnesses. Flag any areas that need attorney input before finalizing scope.</i>
What to paste in:	Case summary or complaint.
Review before relying:	Attorney should confirm scope decisions. This is a starting checklist, not a final discovery plan.

2. TRIAL BINDER PLANNING

Use when:	Structuring a trial binder ahead of trial.
Prompt:	<i>Draft a trial binder table of contents based on the attached case materials, organized by witness, exhibit, and legal issue. Note where supporting exhibits are still missing.</i>
What to paste in:	Witness list, exhibit list, and key pleadings.
Review before relying:	Confirm the structure matches attorney trial strategy and that no section is missing supporting material.

3. ATTORNEY REVIEW CHECKLIST GENERATOR

Use when:	Creating a quick review checklist for any AI-assisted draft before it leaves the firm.
Prompt:	<i>Based on the attached draft, generate a short review checklist an attorney should run through before this document is finalized, covering accuracy, completeness, tone, and any privileged or confidential content that should not be included.</i>
What to paste in:	The AI-assisted draft itself.
Review before relying:	This checklist supports the review. It doesn't replace an attorney actually reading the full document.

4. LEGAL RESEARCH STARTING POINT

Use when:	Getting oriented on an unfamiliar area of law before turning to primary sources.
Prompt:	<i>Provide a general overview of the legal framework around [topic], including the types of primary sources that would typically govern this issue. Do not cite specific case names or statutes unless you can confirm they are accurate. Treat this as a starting point for research, not a citable answer.</i>
What to paste in:	Nothing. This is a standalone research-orientation prompt.
Review before relying:	Verify every legal citation independently before it appears in any filing or client-facing document. Never cite AI-generated case law without confirming it exists.

5. DOCUMENT REQUEST DRAFTING SUPPORT

Use when:	Preparing a first draft set of document requests.
Prompt:	<i>Based on the attached case summary, draft an initial set of document request categories relevant to the claims and defenses described. Group them by custodian type and note where a request may be overbroad and need narrowing.</i>
What to paste in:	Case summary or complaint.
Review before relying:	An attorney should confirm scope, proportionality, and compliance with the applicable rules before service.

6. WITNESS PREPARATION TOPIC OUTLINE

Use when:	Building a preparation outline ahead of a witness meeting.
Prompt:	<i>Using the attached case materials, draft a topic outline for a witness preparation session, organized by subject area. Note where the witness's expected knowledge appears limited and flag topics that may need attorney direction.</i>
What to paste in:	Case summary and any prior witness statements.
Review before relying:	The outline supports attorney preparation. It does not substitute for the attorney's judgment about strategy or line of questioning.

7. CASE CHRONOLOGY FIRST PASS

Use when:	Assembling a working timeline early in a matter.
Prompt:	<i>From the attached documents, build a chronological timeline of events with dates, participants, and the source document for each entry. Mark any entry where the date or sequence is unclear from the source.</i>
What to paste in:	Pleadings, correspondence, and key dated records.
Review before relying:	Verify each entry against its source document. Flagged entries need resolution before the chronology is relied upon.

8. INTERNAL STATUS SUMMARY FOR CASE TEAM

Use when:	Bringing a case team up to speed on current posture.
Prompt:	<i>Draft an internal status summary of the attached matter covering procedural posture, upcoming deadlines, and open items by owner. Keep it to one page and note anything that appears to be missing from the materials provided.</i>
What to paste in:	Docket, recent filings, and current task list.
Review before relying:	For internal use only. Confirm deadlines against the docket before the team acts on them.

CHOOSING THE TOOL YOU RUN THESE PROMPTS THROUGH

CONSIDERATION	GENERAL-PURPOSE AI TOOL	PLATFORM BUILT FOR LEGAL WORKFLOWS
Source grounding	Generates from broad training data. Output often cannot be traced back to a specific document in the matter.	Works against the record itself, so an output can generally be checked against the underlying source.
Data handling	Terms vary. Inputs may be retained or used to improve the model, sometimes by default.	Data use terms are typically defined contractually, with client material excluded from model training.
Security and compliance	Consumer and general business terms are not written with privileged or protected health information in mind.	Built to support the compliance requirements that apply to litigation material, including SOC 2 Type 2 and HIPAA.
Human review	Review is a step the firm has to add and remember to enforce.	Independent, human verification is built into the workflow rather than added around it.

USE THIS WHEN...

A prompt calls for material you would not paste into a general-purpose tool. Deposition transcripts, medical records, and privileged communications are the clearest examples. Purpose-built litigation platforms handle these categories of work with human review and data protections already built in, which is why they are worth evaluating separately from the general tools a firm may already have access to.

Learn more about **remote deposition technology**, **deposition summary services** and **medical record summarization** built to increase productivity and accelerate case strategy.

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TOOL 2

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CONCLUSION

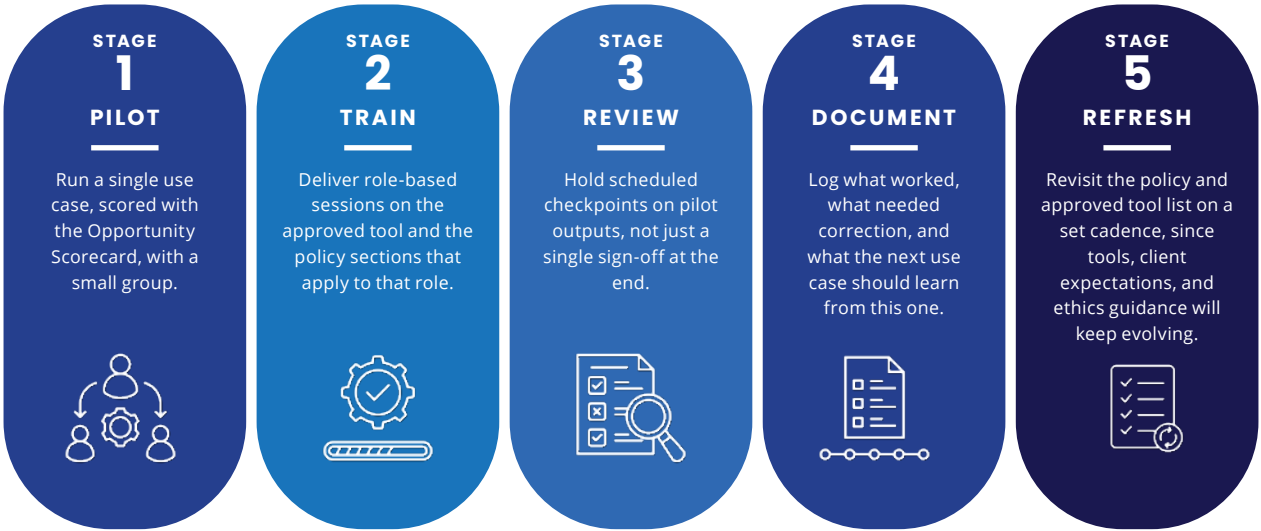
TOOL 8

Train the Team and Keep AI Use Top of Mind

Rolling out AI effectively comes down to training people and building the right process around it. Pair role-based training with scheduled check ins, and the policy stays something the team actually uses instead of a document nobody reads after week one.

ROLE	TRAINING FOCUS
Attorneys	Ethics obligations under applicable rules (including ABA Formal Opinion 512), review responsibilities for AI-assisted work, and criteria for determining when a matter needs additional scrutiny.
Paralegals & Litigation Support	Approved tools and prompts, what to flag for attorney review, and documentation expectations for AI-assisted work.
Legal Administrators	Approved tools for administrative tasks only, and clear data-handling boundaries.
Legal Operations	Vendor management, policy maintenance, and usage tracking across the firm.
Firm Leadership	ROI visibility, policy sponsorship, and ownership of the escalation path.

ROLLOUT TIMELINE



CONCLUSION

Where a Litigation Support Partner Fits

Adopting AI responsibly means using it where it adds value, and building the guardrails around it before it scales.

The right litigation support partner extends that discipline across deposition and transcript services, record retrieval, and the human oversight that keeps accuracy and confidentiality intact as case volume grows. U.S. Legal Support applies AI responsibly within select platforms and internal processes, with human review and security standards built around its use, so firms get the benefit without carrying the governance burden themselves. That support runs nationwide, backed by 5,000+ court reporting professionals and 5,000+ interpreters covering more than 200 languages.

LITIGATION SUPPORT PARTNER FIT CHECKLIST

Use these questions to find the gaps in how your own firm handles litigation support today. Where the answer is no, a partner may be worth evaluating.



Do we have consistent, certified human oversight on transcripts and records?

Why it matters: A missed detail in a transcript or record can affect case outcomes.

How a litigation support partner helps: A dedicated point of contact backed by certified professionals reviews and stands behind the work.



Can we securely handle confidential and privileged material at scale?

Why it matters: Vendor access to confidential material is a recognized factor in data breach risk.

How a litigation support partner helps: A SOC 2 Type 2 and HIPAA-compliant client portal, with client materials excluded from AI model training.



Can we absorb high-volume litigation without slipping on turnaround?

Why it matters: Case backlogs are rising while internal teams have limited bandwidth.

How a litigation support partner helps: Nationwide access to court reporting, record retrieval, process service, and litigation consulting resources.



Does our technology keep human expertise in the loop?

Why it matters: Firms need efficiency without losing accountability.

How a litigation support partner helps: AI-supported platforms are built around human review at every step.

Use AI where it creates leverage. Rely on people where judgment, accountability, and strategy matter most.

How U.S. Legal Support Can Help

For nearly 30 years, U.S. Legal Support has provided litigation support services to law firms, enterprise legal teams, and insurance carriers nationwide. With a full suite of court reporting, record retrieval, process serving, interpreting, translations, and trial services, we help legal professionals work smarter, faster, and with greater confidence at every phase of litigation.



NEXT STEPS

Connect with U.S. Legal Support to learn how our litigation support services, nationwide team, and security and compliance standards can strengthen your firm as AI becomes part of how litigation work gets done.

CONTACT US TODAY

