

YOUR FIRST 30 DAYS WITH AI

Legal Professionals

Five practical actions for lawyers, paralegals, and in-house counsel who want to use AI more confidently -- and more responsibly -- starting this month.

These five actions do not require technical knowledge or special tools. They require professional judgment -- which you already have. Each one takes under 30 minutes. Together they build the foundation for AI use that is confident, consistent, and professionally defensible.

01 Inventory the AI already in your workflow

Before you can use AI responsibly, you need to know where it already is. Most legal professionals are surprised to find AI active in tools they use daily -- document review platforms, legal research subscriptions, case management systems. You cannot govern what you have not identified.

START HERE

Open the three platforms you use most. Look for any feature labeled AI, smart, automated, suggested, or assisted. List what you find. That list is your starting inventory.

02 Set a personal standard for what you verify

Not every AI output carries the same risk. A first-pass summary of a long document is different from a case citation you plan to submit. Professionals who use AI without a verification standard are making implicit decisions about risk -- usually without realizing it. Making that standard explicit takes ten minutes and changes how you work immediately.

START HERE

Write down two categories: outputs I will use after a quick review, and outputs I will independently verify before relying on them professionally. Assign the AI tools you use to one of the two categories.

03 Decide what client information stays out of AI tools

AI tools process the information you put into them. Some retain it. Some use it for training. The confidentiality obligations that govern your practice do not pause for convenience -- and the data handling practices of consumer AI tools are not designed with legal professional obligations in mind.

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For each AI tool you use, find its data retention and privacy policy. One specific question to answer: does this tool retain my inputs, and if so, for how long? Your answer determines what can safely go in.

04 Have one honest conversation with a colleague about AI use

Most legal professionals are using AI tools at work without discussing it openly with colleagues. That silence creates inconsistency -- different standards, different risks, no shared understanding of what the firm or team considers acceptable. One conversation starts to close that gap.

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Ask one colleague this week: what AI tools are you using, and what is your personal rule for when you verify the output? Their answer will tell you more about your firm's current AI governance reality than any policy document.

05 Read one current piece of guidance from your bar or professional body

The professional guidance on AI use in legal practice is moving quickly. State bars are issuing opinions. The ABA has issued formal guidance. Staying current is not optional -- it is part of the competence standard. You do not need to read everything. You need to read something recent and specific to your jurisdiction.

START HERE

Search your state bar website for AI or artificial intelligence. Look for any ethics opinion, formal guidance, or advisory issued in the past 18 months. Read it. Fifteen minutes of reading that most of your colleagues have not yet done.

QUICK REFERENCE

Five questions. Five signals.

Keep this page. Return to it when you are about to use AI for consequential professional work.

BEFORE YOU USE AI FOR PROFESSIONAL WORK

- Does this tool retain or train on the data I input?
- Can I explain what role AI played in this work product if asked?
- Have I independently verified any AI output I am relying on professionally?
- Does my bar association have current guidance on this type of AI use?
- Would I be comfortable disclosing this AI use to my client if asked?

SIGNALS WORTH PAYING ATTENTION TO

- You cannot name the AI features active in your current tools.
- You have used an AI-generated output professionally without verifying it.
- You have input client matter information into a consumer AI tool.
- You have not read any bar guidance on AI use in the past 12 months.
- You could not confidently answer a client question about your AI use.

These five actions are your starting point. AI Wise for Legal Professionals takes you significantly further -- covering the governance frameworks, professional obligations, disclosure requirements, and accountability standards that make AI-assisted legal work defensible when it matters. Seven modules. Role-specific. Built for how AI actually shows up in legal practice.

Ready to go further?

Enroll in AI Wise for Legal Professionals and earn a verifiable credential that documents your AI literacy at a professional level.

aiwise.training/product/ai-wise-for-legal-professionals/