



WSSFC 2025

Technology Track – Session 3

Practical Uses of AI Outside of Client Matters

Presenter:

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About the Presenter...

At Ogden Glazer + Schaefer, **Fatimeh Pahlavan's** draws from her background in cooperative governance, intellectual property, and nonprofit leadership to help clients build organizations that reflect their values. She approaches her work with a focus on clarity and collaboration, offering strategies that reflect each client's unique goals and context. A natural educator, Fatimeh's approach is grounded in curiosity and connection. She aims to make legal processes feel relevant and meaningful by tapping into everyday language and relatable ideas. Based in Chicago, Fatimeh views her legal practice as an extension of her belief in fostering spaces where both people and ideas can flourish. She is committed to supporting clients through every step of their work and regularly shares her expertise through workshops, mentorship, and community engagement.

Practical Uses of AI Outside Client Matters

2025 Wisconsin Solo and Small Firm Conference

Thursday, October 16th at 1:45 PM - 2:35 PM

1. Who this is for, and what we are doing

This is a conversation for attorneys who are skeptical of AI and weary of hype. The goal is not to convert anyone. The goal is to show that there is a cautious, de-risked way to use modern tools for work that surrounds client matters without touching legal deliverables. If all that happens this month is a softening of stance and one low-risk experiment, that is a win.

2. First principle: privacy before productivity

Before we talk about use cases, we set the floor on data protection. Treat privacy as a prerequisite, not a feature. This is the baseline that makes careful experimentation possible.

- Choose a deployment that gives contractual control over training and retention. Team, business, enterprise, or firm-managed options are designed for this. Avoid consumer tiers for anything sensitive.
- Keep confidential and personal data out of public models unless you have both a contract and a configuration that keeps inputs isolated.
- Assume anything you paste could be discoverable. Treat internal drafts as records that may surface.
- Record light provenance for important outputs: tool and version, core prompt, key sources, reviewer.

3. Scope of this session

We focus on the administrative, editorial, and project-management layer that keeps a practice running. Your stance shifts from never to perhaps, under conditions. You leave with one or two reusable prompts. You are not necessarily working faster; you are working with less drag.

4. A practical risk lens

Today’s defensible posture is to keep client-identifying inputs out of public AI unless you have a contract and configuration that prevents training, governs retention, and preserves confidentiality; to document human authorship for copyright and inventorship for patents; and to prepare for prompt and output discoverability. With those controls, limited internal uses outside client deliverables can be piloted in a way that is both practical and compliant.

Start with confidentiality as a threshold issue. The current consensus from leading ethics bodies is that lawyers may use generative AI, but only with protections that preserve client confidentiality and other duties of competence, supervision, communication, and reasonable fees. The ABA’s Formal Opinion 512 frames these duties explicitly for AI, and Florida’s Opinion 24-1 goes further, advising informed client consent if using a third-party AI tool would disclose confidential information. In practice, that means either using deployments that contractually bar training on your data and let you control retention, or removing client identifiers before use.

What counts as disclosure. The most conservative approach is to treat pasting client facts into a public model without a confidentiality contract as disclosure to a third party. If your subscription tier or enterprise deployment disables training and limits retention under contract, the risk profile is closer to other vetted vendors; if not, do not paste.

Trade secrets and internal confidences. Trade secret status depends on maintaining “reasonable measures” to keep information secret. Disclosing a trade secret to a public model that trains on user prompts can undermine those measures. Use only contracted deployments that prohibit training and restrict access, or strip all identifiers and sensitive technical details.

Work product, privilege, and discoverability. Assume prompts, settings, and outputs can be discoverable. Courts and commentators have begun addressing whether AI prompts and outputs must be produced, and how work-product protection applies when parties rely on AI. Early decisions and practitioner reports signal that, depending on how you plead or use AI, you may be ordered to preserve and produce prompts and outputs, and to adapt legal holds and retention to

cover AI interactions. Plan for preservation; keep light provenance; avoid embedding privileged analysis in third-party tools without appropriate protections.

Copyright: what we know. The U.S. Copyright Office’s policy requires human authorship. Purely AI-generated material is not copyrightable; human-authored works that include AI assistance may be protected to the extent of the human contributions, and applicants must disclose AI-generated portions when registering. For law-firm uses, this means you can rely on AI to draft internal artifacts, but you should not assume protectable authorship in text or images the model produces without meaningful human creative control. If you plan to reuse outputs publicly, document the human contributions and edit accordingly.

Patents: human inventorship and disclosure. The USPTO’s 2024 guidance confirms that patents may issue for AI-assisted inventions if a natural person made a significant contribution under the Pannu framework; AI cannot be listed as an inventor. The Office has also warned practitioners to disclose significant AI involvement and to verify AI-assisted drafting to avoid errors. For internal R&D support, you may use AI as a tool, but name only human inventors who meet the contribution standard and document their role.

Vendor and deployment choices that de-risk. Reasonable, defensible approaches include: foundation-model subscriptions or enterprise plans that contractually prohibit training on your data and offer admin controls for retention and access; legal-vertical tools with comparable commitments; or private deployments hosted by a provider under your firm’s DPA. State bars and the ABA emphasize vendor diligence, configuration, and client communication.

When anonymization helps and when it hurts. Redacting names and unique facts can lower risk, but over-anonymizing can also remove the context the tool needs and add workflow burden.

5. Tools you can name and how to think about them

Foundational models from major vendors are improving quickly and often deliver the best cost-to-capability ratio for internal tasks. Legal-specific layers exist and can be useful, but they may

cost a multiple of foundational tools while relying on the same underlying models. Research suites with AI features help find sources and summarize, but they are not substitutes for legal analysis.

6. Three concrete use cases that return time

Matter memory threads. Create a private, matter-specific thread in your chosen tool. Seed it with a short case or deal summary, the latest status email, and the next deadline. When you step away and return days later, ask for: “Concise status, open issues, next three steps, and what you need from me to proceed.” Add new information as it arrives. This becomes an external brain for non-deliverable context that reduces re-orientation time.

Challenging client communications. When a client is upset or you must deliver bad news, draft in private first. Give the model a neutral brief: who the client is, what happened, what you own, what you propose, and the tone you want. Ask for two or three variant drafts: calm and direct, empathic and corrective, brief and factual. The tool gives you starting points that are emotionally intelligent without being inflammatory.

Billing hygiene and timekeeping. Feed your firm’s time-entry rules and three rough entries. Ask for present-tense, client-visible lines that are short and precise. Have it flag vague verbs and propose better ones. Use it to generate a weekly billing checklist: capture, review, consolidate per client, and finalize. Cleaner entries reduce write-downs and rework without touching legal substance.

Other internal wins to consider: Meeting hygiene, policy-to-practice one-pagers, marketing that is not client work such as bios, talk abstracts, and event follow-ups.

7. Prompts you can experiment with today

Each prompt assumes human review!

- “Create a matter status snapshot from this seed: background, current posture, deadlines, risks, next three steps, information needed from client. Write in short paragraphs with clear headings. Keep under one page.”
- “Draft three versions of a client email delivering unfavorable news. Inputs: context, what we own, proposed path, next step request. Tone: calm, candid, respectful. Vary length and structure. Do not speculate or assign blame.”
- “Apply these time-entry rules [paste]. Rewrite the following rough entries into present-tense, client-visible lines that are specific and brief. Flag any line that is not billable under these rules.”

8. Bottom line

Protect privacy first. Stay outside deliverables. Deploy modest experiments. If a tool helps you manage time, clarify communication, and keep flow without trading away responsibility, keep it. If not, close the tab. Skepticism is healthy. Sophistication is better.