

Introduction

Welcome and Overview

Objectives:

- Explore successful AI implementation strategies in legal and marketing.
- Discuss the challenges and benefits of AI adoption for in-house.
- Provide guidance on how lawyers can position themselves for success in the AI era.

Introduction of Panelists

Alex Chung: Founder at Protege AI, a marketing & compliance platform for brands.

Jess Smith: Director, Head of Marketing Legal & Commercial Transactions at Uber

Moustafa Badreldin: Senior Managing Counsel, Advertising & Marketing

Exploring AI Solutions

Evaluating AI Tools

Uber's Exploration of GPT-Based Solutions:

Considered automating content review but had concerns about risks.

Identifying Key Use Cases and Requirements:

Defining specific pain points and workflows that could benefit from AI.

Developing AI Agents for Legal Teams

LinkedIn's AI Agent:

- Identified frequent questions from the sales team.
- Mapped existing resources and documentation.
- Spent months testing and refining before rollout.

Collaborative Approach

- Importance of involving legal, engineering, and product teams in the evaluation process.
- Aligning AI initiatives with organizational goals and compliance requirements.

Business Solutions through AI in Legal and Marketing

Overwhelming Workload and Flat Headcount

Uber's Marketing Legal Team:

Reviewed almost every piece of content due to risk, which became unsustainable as the business grew and headcount remained flat.

LinkedIn's Legal Team:

Inundated with repetitive, basic questions from the sales team, causing inefficiencies.

Difficulties in Getting Buy-In for AI Tools

Perceived Risks of Nascent Technology:

Resistance due to unclear "risk vs. reward" calculus.

Concerns About High-Risk AI Approaches:

Caution in deploying AI tools that could introduce compliance risks.

Resistance to Change

- **Legal teams cautious about AI potentially making mistakes or generating non-compliant content.**
- **Challenges in aligning AI solutions with existing legal and compliance standards.**

Implementing AI Tools

Building Compliance Guidelines ("Sources of Truth")

Uber's Compliance Framework:

- Created detailed guidelines, acceptable language, and model disclosures (Source of Truth = SOTs)
- Served as a foundation for automated content review.

Standardizing Guidelines for AI Integration

- Identified frequent questions from the sales team.
- Mapped existing resources and documentation.
- Spent months testing and refining before rollout.

Deploying AI Tools into Workflows

Uber's Brand Review Tool:

- Integrated as a custom check for content creation.
- Provided pre-written real-time suggestions for non-compliant language, w/link to SOTs
- Route low risk content to deployment and audit monthly for compliance with SOTs

LinkedIn's AI Agent for Legal Queries:

- Centralized resource for the sales team.
- Streamlined responses to routine questions.

Integration into Existing Processes

Seamless incorporation of AI tools to encourage adoption.

Training and educating teams on how to use new technologies effectively.

Evaluating and Advocating for AI Tools

Focusing on Novelty and Disruptive Potential

Build vs. Buy Decision-Making Process

- Collaborative evaluation with legal, engineering, and product teams.
- Considering existing resources and in-house capabilities.

Importance of Data and Resource Tracking

Challenges:

- Implementing time tracking and data collection.
- Quantifying inefficiencies to justify AI investments.

Using Task Manager Tools:

- Track time and tasks.
- Identify areas where AI can have the most impact.

Securing Buy-In and Resources

- Demonstrating potential cost savings and efficiency gains.
- Educating stakeholders on the benefits and ROI of AI tools.
- Aligning AI initiatives with broader business objectives.

Benefits of AI Integration

Automating Routine Tasks and Reducing Manual Effort

Contract Management:

Automated tracking of terms, deadlines, and obligations.

Marketing Compliance:

Streamlined review of marketing materials against guidelines.

Measurable Impact and ROI

Uber's Results with the Writer Tool:

- 35% reduction in legal touchpoints.
- 86% compliance rate in audits.

LinkedIn's Efficiency Gains:

- Freed legal team from routine queries.
- Provided quick, consistent answers to the sales team.

Empowering Teams and Shifting Ownership

- Content creators take on more responsibility with the help of AI tools.
- Legal teams can focus on higher-value tasks.

Ensuring Consistent and Reliable Responses

- Centralized information leads to uniform guidance.
- Reduces the risk of errors and non-compliance.

Positioning Lawyers for Success in the AI Era

Impact of AI on Legal Jobs

- AI is transforming administrative and routine legal tasks.
- Lawyers need to adapt to stay relevant.

Strategies for Attorneys

Stay Informed:

Keep up-to-date with the latest AI technologies and legal applications.

Develop New Skills:

Focus on strategic thinking, problem-solving, and areas where human judgment is essential.

Embrace Technology:

Get hands-on experience with AI tools.

Collaborate with IT and Engineering Teams:

Work together to shape AI solutions that meet legal needs.

Focusing on Higher-Value Work

- Shift attention to tasks that require human expertise.
- Complement AI capabilities rather than compete with them.

The Future of AI in Legal

Focusing on Novelty and Disruptive Potential

Document Review and Redlining:

More accurate and comprehensive analysis.

Knowledge Search and Summarization:

Quickly scan large repositories to surface relevant information.

Exploring New AI Use Cases

- Opportunities beyond routine tasks.
- Leveraging AI in underutilized areas of the business.

Cross-Functional Collaboration

Stay Informed:

- Involvement of legal, brand, engineering, and product teams.
- Creating checklists and frameworks for AI use in content creation.

Preparing for Continued AI Integration

- Organizations must be proactive in adopting and adapting to new AI technologies.
- Continuous learning and flexibility are essential.

Conclusion

Summary of Key Takeaways

Balanced Approach:

Carefully evaluate and implement AI tools.

Measurable Impact:

Use data to demonstrate ROI and secure support.

Positioning for Success:

Lawyers should adapt and develop skills to thrive alongside AI.

Thank you for attending!