



AI @ THE BAR & BENCH PROMISE OF AI

LANDSCAPE

USE CASES

LIMITS, AND

LOOKING
AHEAD

PANEL

- Moderator – Eva Novick
 - Panelist – Julia Markley
 - Panelist – Lauren Wallace
 - Panelist – Martin Medeiros
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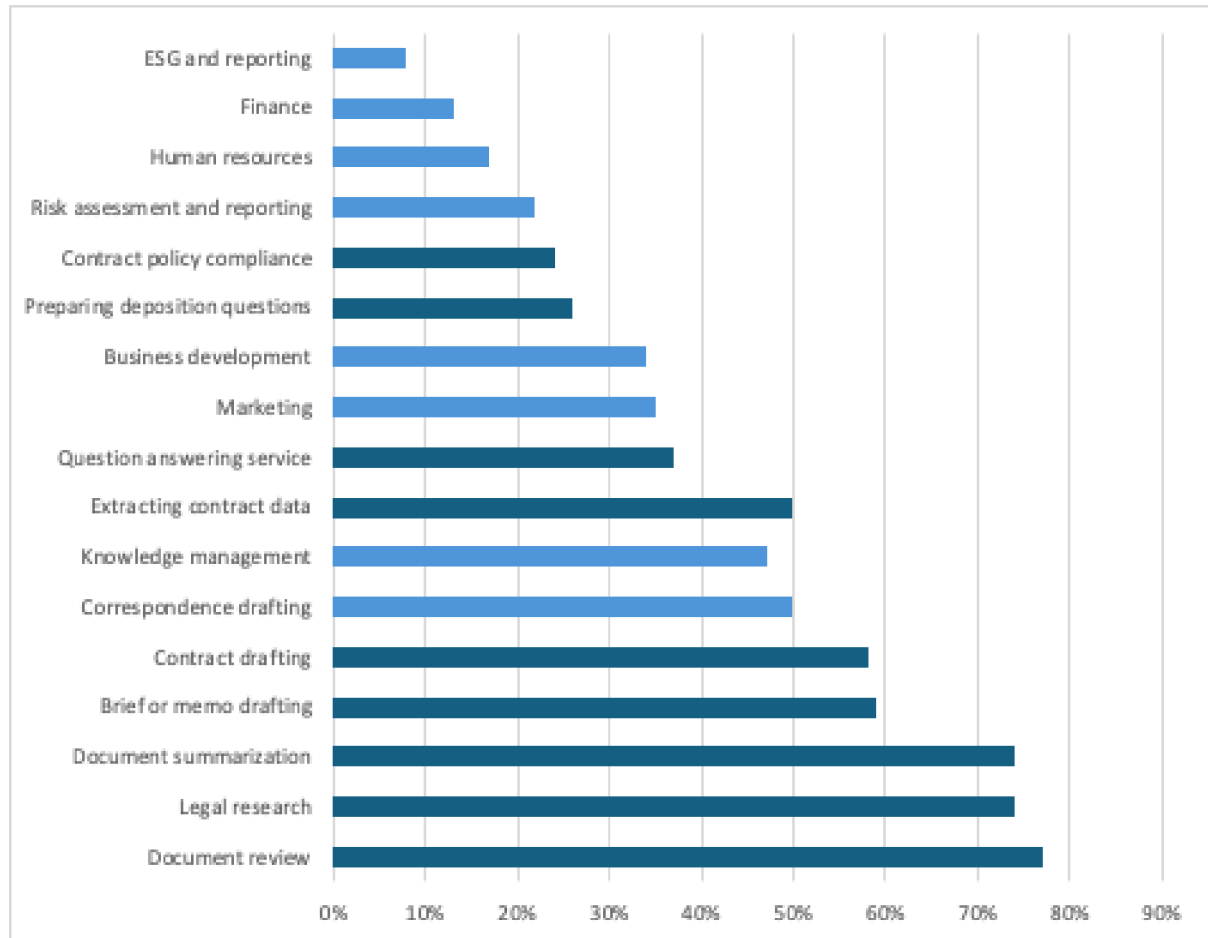
OVERVIEW

- Moderator Intro
 - Solutions / Use Cases / Legal Work
 - Solutions / Use Cases / Business of Law
 - Future Trends - Legal Work / Business of Law
-

CURRENT USE CASES

■ Traditional Legal

■ Business of Law



Source: [Thomson Reuters 2025 Generative AI in Professional Services Report](#)

USE CASES

- Legal work
 - Writing articles
 - Meeting clients & networking
 - Creating slides
-

LEGAL RESEARCH: GOOD RESULTS ...

Prompt:

Under federal law, does a party's duty to preserve potentially relevant documents upon receipt of a notice of a legal claim extend to a party's third-party agents, such that a party should instruct its accountant to preserve and not destroy documents when the party knows the accountant has documents relevant to the legal claim?

JM

Result:

In summary, under federal law, a party's duty to preserve potentially relevant documents does extend to third-party agents, such as accountants, when the party has control over the documents. The party must take reasonable steps to ensure that the third party preserves the relevant evidence, including issuing instructions or notices to prevent its destruction . § 37.120 Availability of Sanctions for Failure to Preserve Evidence, *Campanile v. Daimler N. Am. Corp.*, 2024 U.S. Dist. LEXIS 220822 (2024), Document Requests: Responding to RFPs (Federal) (2026).

-Lexis+ AI | Protégé

...BUT DOUBLE CHECK

Email from opposing counsel:

7. **Objections based on privilege:** We do not plan to create a privilege log. Privilege logs are not part of the Oregon Rules of Civil Procedure. Making such a log entails significant time and effort and is not a reasonable request when not otherwise required. Moreover, making

Prompt:

Under Oregon state law, is a party producing documents obligated to produce a privilege log?

JM

Result:

1. Privilege Log Requirement: Oregon law requires that when a party withholds documents on the basis of privilege, they must provide a privilege log or a description of the claims of privilege. For example, under , [ORCP 36](#). ▼

discovery is permitted for any non-privileged matter relevant to a claim or defense, and privilege claims must be substantiated to prevent improper withholding of discoverable material . [ORCP 36](#). ▼

Additionally, local rules, such as , [D. Or. Civ. Prac. LR 26-5](#). require that a privilege log or description of the claims of privilege be provided within a reasonable time after timely objections to a discovery request . ▼

[D. Or. Civ. Prac. LR 26-5](#).

ANALYZE DOCUMENTS

Client email to me

Thursday at 10:14 am

Hi Julia,

Hope you are well. XXXXXX is invested in a company called YYYYYY. Our auditors sent YYYYY a routine audit request, and we received the [below email](#) which alleges misconduct

We don't have reason to believe that the allegations in the email are accurate

We were hoping you could help draft a response to this email.

I know it is short notice, but we have availability at 12pm PT today to chat or we could schedule time for Monday to give you the full download.

I am hoping YYYYYY has a contractual obligation to provide that info in one of these docs.

- Right of First Refusal
- Compliance Certificate
- Secretary's Certificate
- Stock Purchase Agreement
- Voting Agreement
- Executed Signature Packet
- Disclosure Schedule
- Investors Rights Agreement

ANALYZE DOCUMENTS

Associate's email to me

Friday at 10:31 am

Hi Julia,

Please see below a summary of my findings. I [leverage](#) Harvey, checked its work [and also](#) reviewed the documents. I'm also attaching two Word docs, which is the work product that Harvey provided so you can see how it looks like – it includes a more detailed response and includes citations which is [really useful](#). [Happy](#) to [discuss](#) if you have any questions.



-Harvey

WRITING ARTICLES: THE PROMPT

Julia Markley

write me an internal perkins coie post for Connections about the Oregon Asian Pacific American Bar Association Gala dinner. The firm was a silver sponsor and filled a table led by Portland office managing partner Chris Rich, former OAPABA president and litigation practice co-chair Julia Markley, incoming summer associates and associates, and alumni.

OAPABA's annual fundraising gala

honoring our Pacific Islander members on April 9, 2026. Our Pacific Islander theme this year includes a Hawaiian-style buffet dinner and traditional Polynesian dancing.

Our keynote speaker will be Dr. Lagipoiva Cherele Jackson, an Indigenous climate journalist and scholar from Samoa in the South Pacific.

We will also be honoring the recipient of our annual Nakamoto Award, Multnomah County Circuit Court Judge Elisa J. Dozono, .

-PC Chat

MEETING CLIENTS


Tell me about current business, economic, and regulatory issues facing owners and operators of a hospice business in Multnomah County, Oregon so I can prepare as a lawyer to meet a new client in this space.

Prompt

Results:


1. Regulatory & Compliance: The "Fraud" Era

The most critical shift for a lawyer in 2026 is the **unprecedented focus on enforcement**.

- **False Claims Act (FCA) Expansion:** State-level False Claims Act enforcement is surging. Regulators are no longer just looking at Medicaid; they are using state FCA laws to target tax reporting and patient eligibility. 

3. Labor & Operations: The Multnomah Context

Labor is the largest line item for a hospice, and Oregon's legal landscape is changing rapidly.

- **Workforce Standards Boards:** The 2026 Oregon Legislature is considering a board to set **industry-wide wages and working conditions** for long-term care, which could significantly hike labor costs for hospice operators. 

-Gemini

CREATING POWERPOINTS



Create a classic, vibrant cartoon illustration of four lawyers (Julia Markley, Eva Novick, Lauren Wallace, Martin Medeiros) in an American courtroom scene.



Edit the image to have Judge Adrienne Nelson as the judge using this image

-Gemini



Edit the image so a lawyer is using the result of an AI tool.

Edit the image to include both a U.S. and Oregon state flag and make the courtroom windowless.

Edit the image to remove the Oregon state flag on the wall, and change the expressions of the three lawyers on the right to give them poker faces.

-Gemini



-Gemini

IMPROVING THE OPERATING SYSTEM AROUND LEGAL WORK

AI is transforming how legal teams handle the day-to-day mechanics of their work — from the moment a request comes in to the moment it's resolved. By reducing friction at every touchpoint, legal operations teams can respond faster, scale more consistently, and focus human attention where it matters most.

Client & Matter Intake


- Triage inbound requests by urgency and type
- Route matters to the right team or attorney
- Standardize follow-up questions for consistency

Administrative Workflow

- Scheduling support across time zones and calendars
- Auto-generated meeting summaries and action items
- Correspondence drafting and template application

Internal Knowledge Access

- Quickly locate prior forms, playbooks, and policies
- Surface institutional know-how on demand
- Reduce duplicative research and rework

 **The result:** Less friction, faster response times, and more consistent operations— without adding headcount.

CHANGING HOW LEGAL ORGANIZATIONS MANAGE THEMSELVES

Beyond individual tasks, AI is giving legal leaders a clearer view of how their organizations actually operate — where time and money are going, where bottlenecks form, and where process redesign would have the greatest impact.

Billing & Invoicing Support

AI enables cleaner bill narratives, catches errors before submission, and accelerates invoice preparation — reducing write-downs and improving realization rates.


- Cleaner, more defensible billing narratives
- Fewer errors reaching the client
- Faster invoice prep and approval cycles

Matter & Workload Analytics

Operational data, once trapped in siloed systems, can now be synthesized to reveal staffing patterns, identify workflow bottlenecks, and measure cycle times across matter types.

Financial & Management Insight

Trend analysis across spend and profitability, forward-looking forecasting, and resource allocation modeling help leadership make more informed strategic decisions.

 **Key shift:** AI helps legal organizations see patterns in their own operations — and act on them before problems compound.

PRODUCT EVALUATION & THIRD-PARTY RISK MANAGEMENT

Responsible AI adoption begins before a tool is deployed. Legal operations leaders must ask hard questions during vendor evaluation — and insist on clear, documented answers. The following framework covers the essential due diligence categories for any AI product under consideration.

Data Inputs & Lineage

What data enters the tool? Can you document exactly where it comes from, how it flows, and who can access it at each step?

Storage & Model Training

Where is data stored — and critically, can the vendor use your data to train or fine-tune their model? This must be addressed explicitly in writing.

Subprocessors & Model Providers

Who are the downstream parties? Understand the full vendor chain, including any third-party LLM providers or infrastructure partners.

Testing & Validation

What testing exists for accuracy, security, and bias? Ask for documentation of red-teaming, hallucination rates, and known failure modes.

Audit & Exit Rights

Can you audit usage logs? What does data retrieval and exit look like at contract end? Lock-in is a real risk if exit mechanics aren't defined upfront.

Human Review & Escalation

Are human checkpoints and escalation paths built into the workflow, especially for consequential outputs? AI should augment, not replace, professional judgment.

CONTRACTING CONSIDERATIONS FOR AI VENDORS

Negotiating AI vendor agreements requires attention to terms that may not appear in standard SaaS contracts. These six areas represent the minimum baseline for any AI tool handling sensitive legal or client data.

01

Confidentiality & Data-Use Limits

Define precisely what the vendor can and cannot do with your data. Broad "improvement of services" carve-outs can inadvertently permit uses you'd never accept.

02

Risk Allocation — Liability & Indemnification

Ensure the contract reflects appropriate risk-sharing. Standard vendor templates often cap liability far below the realistic exposure your organization faces.

03

No Training on Customer Data

Require an express prohibition on using your data to train, fine-tune, or improve AI models, without your written consent. This should be a non-negotiable term.

04

Security Controls & Incident Notification

Specify required security standards (SOC 2, ISO 27001, etc.) and set clear timelines for breach notification, typically no later than 72 hours post-discovery.

05

Validation & Performance Commitments

Hold vendors to defined accuracy benchmarks and uptime SLAs. Vague "best efforts" language is insufficient when AI outputs carry professional or legal consequences.

06

Audit, Termination & Exit Support

Retain the right to audit usage and outputs. Secure data portability guarantees and a clear wind-down process, including data deletion confirmation, before signing.

1

YEAR

2026 – 2027

CONSOLIDATION
& ACCOUNTABILITY

FORECAST

What Will Define the Next 12 Months

✓ WILL HAPPEN



AI adoption doubles in mid-size firms & in-house counsel



Sanctions accelerate — 4–5 hallucination cases filed daily



Courts mandate AI disclosure certificates & citation hyperlinks

✗ WON'T HAPPEN



Billable hour dies — judgment & strategy still command premium rates



Lawyers replaced — legal sector headcount continues to grow



Hallucinations solved — they are baked into LLM architecture

5 YEAR HORIZON
Structural Transformation
2026–2031

\$10.82B

Legal AI market by 2030

THE PRACTICE



- **AI = baseline assumption, not a differentiator**
- Routine drafting fully AI-generated
- Attorneys focus on validation, judgment & strategy
- Junior training pathways must be redesigned

THE TECHNOLOGY



- **LLMs replaced by better models.**
- Grounded, citeable models become standard
- Multimodal AI enters courtroom & deal rooms
- Legal-specific platforms dominate
- General chatbots abandoned for legal work for practitioners as used as commercial engine

THE BUSINESS



- **Value-based billing expands significantly**
- Small firms compete with BigLaw via AI
- Mature legal AI vendor ecosystem emerges
- AI governance = client-facing requirement

ETHICS & REGULATION



- **State bars enact AI and statistical model competence standards**
- AI literacy embedded in CLE requirements
- EU AI Act reshapes international practice
- Mandatory verification workflows normalized

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YEAR HORIZON

A Transformed Profession 2026–2036

77.4%

of legal professionals say
AGI will NOT arrive by 2026



THE PRACTICE

Recognizable but Fundamentally Changed

- AI handles all routine work.
- Attorneys concentrate on judgment under uncertainty, adversarial advocacy, and ethics.
- The profession's irreducible human core becomes its defining value proposition.

80%

of Americans have unmet legal needs — AI expands access



THE HUMAN IMPERATIVE

What AI Cannot Replace

- Creativity, negotiation, influence, persuasion, moral reasoning, empathy, and innovation require human cognition.
- MIT research confirms AI use suppresses the neural processes that generate original thought. The attorneys who thrive protect and develop these capacities.

83%

of AI users cannot recall their own AI-assisted work product



THE OPPORTUNITY

Access, Innovation & New Roles

- Legal AI expands access to justice for the 80% of Americans currently underserved.
- New roles — AI Compliance Counsel, Legal Technology Directors, AI Output Auditors — emerge as permanent features of the legal landscape.

17–28%

CAGR — Legal AI market growth through 2030

SKILLS FOR THE NEW LAWYER

What Law Students Must Master Now



Foundational Legal Reasoning

First. Before AI.

- Statistical knowledge essential.
- Research, analyze & write independently.
- You cannot supervise what you've never done yourself or don't understand the technology.



AI Literacy & Verification

Know the tool's failure modes.

- Understand hallucination & sycophancy.
- Verify every citation.
- Treat AI like an unreliable first-year associate.
- Statistical model literacy.



Ethics & Professional Responsibility

Rules 1.1 · 1.6 · 3.3 · 5.3

ABA Opinion 512, state bar guidance, sanctions cases, and confidentiality duties in the AI context.



Prompt Engineering

Precision inputs = better outputs.

- Craft bounded, adversarial queries.
- Specify jurisdiction, standards, format.
- Test conclusions — don't just accept them.



Human Skills AI Cannot Replicate

Your permanent competitive advantage.

- Negotiation, Persuasion and Influence Skills
- Self Awareness
- Empathy
- Client counseling
- Ethical judgment



Legal Tech & Data Literacy

Lead, don't just use.

- Evaluate AI vendors
- Design firm policies
- Measure accuracy, and
- Lead the profession's transformation.

"The student must be the bread on both sides — what the student puts in, and how the output is assessed, matters more than the AI tool in the middle." — Prof. O'Leary, Suffolk Law

BIOS



- **Eva Novick** is a Certified Information Privacy Professional (AIGP, CIPP/US, CIPP/E, CIPM, FIP, PLS) and leads Miller Nash's privacy & data security team. Eva is a trusted advisor with extensive knowledge and experience in matters of privacy and data security. She advises clients on compliance with state, federal, and international privacy laws; navigates data security incident response; and represents clients in privacy-related litigation, including class action claims involving alleged data breaches, website tracking technologies, and consumer protection violations. Eva's strategic insight into emerging technologies, such as generative artificial intelligence, helps organizations understand and mitigate legal risks.



- **Julia Markley** is the firmwide co-chair of Perkins Coie's Litigation practice group and a member of the firm's Executive Committee. She enjoys advocating for clients to resolve their business and intellectual property disputes and has particular experience working with technology and retail companies. Clients have commended her as a "good strategist," "extremely dedicated and thoughtful," and for providing "good follow through and good results." She is a graduate of University of Washington School of Law (J.D. 1999), Stanford University (B.A. 1995), and Central Catholic High School (1992).



- **Lauren Wallace** is a technology and AI governance attorney who advises organizations and legal teams on how to responsibly adopt artificial intelligence and integrate emerging technologies into legal and compliance practice. Previously, Lauren was Chief Legal Officer at RadarFirst, an AI-enabled legaltech platform for data incident management. Before entering the legal profession, she worked in the technology sector at companies including Microsoft and Apple, experience that continues to shape her practical approach to legal risk and technology adoption. Lauren holds the AIGP, CIPP/US, CIPM, and FIP certifications from the International Association of Privacy Professionals. www.wallacetechl.com



- **Martin Medeiros** has practiced in Oregon and Washington for over 30 years in technology law, and is a Shareholder at Buckley Law, past chair of the Technology Law Section, former Special Assistant Attorney General, and a contributing author and editor of the Oregon State Bar five volume, "Advising Oregon Business." He helped launch an AI company in Singapore in 2016 and still serves on the board of that company now in Texas. He has written six books including "Negotiating in the Technocracy" and teaches a yearly course on negotiation, persuasion, and influence.
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