

Record Date: September 10, 2025

#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

Topic: Al Training, Education & Adoption

Date: September (Session 5 of SCG Legal's AI Strategy Exchange 2.0)

#### **Presenters:**

- Nikki Shaver CEO of Legaltech Hub
- Sam Moore Consulting Director, Legaltech Hub

### Short Summary

This session focused on the evolving landscape of Al in the legal industry, particularly around **education**, **training**, **budgeting**, **and adoption**. Key insights included:

- **Industry Trends:** Al teams are emerging within firms, separate from IT or innovation departments. There's a shift in lawyer workflows and platforms, and a rise in value-based pricing models.
- **Budgeting for AI:** Larger firms are allocating up to 1% of revenue to AI initiatives, while mid-sized firms are encouraged to budget 0.3–1%.
- Education as a Catalyst: Al education is now seen as foundational for adoption. Law firms and law schools are increasingly integrating Al curricula.
- **Professional Development:** Al tools are being designed to support in-the-flow learning, helping junior lawyers develop skills while working.
- **Training Personas:** Firms are segmenting learners by role, motivation, and learning style to tailor Al education effectively.
- **Skills for the Future:** Emphasis on human skills, critical thinking, advocacy, prompting, and project management.
- Adoption Challenges: Despite intuitive interfaces, AI tools require structured onboarding and change management to ensure meaningful adoption.

### \* Key Action Items & Recommendations

#### For Law Firms:

- 1. Create a Dedicated Al Budget Line Item
  - Helps track ROI and signals commitment to clients.
  - Recommended spend: 0.3–1% of revenue (mid-sized firms); up to 1.5% (larger firms).

#### 2. Develop Internal & External Al Training Programs

o Combine vendor-led training with firm-specific workflows.



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o Consider mandatory training before tool access.

#### 3. Segment Learners by Personas

Tailor training paths based on roles, motivations, and learning preferences.

#### 4. Evaluate Tools for Learning Potential

o Choose platforms that support guided workflows, real-time feedback, and transparency.

#### 5. Focus on Human-Centric Skills

Empathy, reasoning, and advocacy remain irreplaceable by AI.

#### 6. Plan for Change Management

- Don't assume intuitive tools will drive adoption.
- o Provide clear guidance, examples, and support.

#### 7. Engage Clients in Al Conversations

Clients are exploring AI too—be ready to advise and collaborate.

#### (Slightly Edited) RAW TRANSCRIPTION w Time Stamps

**Author:** Zoom

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Michele | SCG Legal: And as shared welcome to the 5th meeting of SCG Legal's AI Strategy exchange 2.0.

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Michele | SCG Legal: Today's topic is AI training, education and adoption, a little expansion on what we had originally.

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Michele | SCG Legal: Um had originally put out in the agenda.

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Michele | SCG Legal: If we've not yet met. I'm Michele Bisceglie. I'm SCG's Director of Business Development and Strategic Initiatives, and with us on the call today is also SCG CEO Alina Gorokhovsky and Membership Coordinator Erin Kane.



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Michele | SCG Legal: So, as always, we remain beyond thrilled to partner on this initiative with legal tech hub. They are the leading insights and analysis platform for legal technology, and today represented by co-founder and CEO Nikki Shaver, who will lead this meeting and introduce her colleague. So just a few housekeeping notes before Nikki takes the mic.

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Michele | SCG Legal: As you noticed, we are recording this meeting, and a link to all recordings plus any support. Materials are housed on the Al Strategy exchange web page. I'll put that URL in the chat in a few minutes as well as circulate it in the post meeting email.

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Michele | SCG Legal: And we always anticipate time at the end of our meetings for Q. And a. But don't hold your questions. Put them in the chat. If we can get to them, we will. If not, we'll capture them and try to get to them at another meeting, or maybe after this one.

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Michele | SCG Legal: And then last, I'd be remiss if I didn't mention. Our annual meeting is in Austin, Texas, next week, and AI is absolutely.

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Michele | SCG Legal: The topic of several conversations. So we look forward to seeing many of you and or your firm colleagues there, and I'll pop the URL for that event in the chat.

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Michele | SCG Legal: As well. So, Nikki, the virtual floor is yours.

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Nikki Shaver - Legaltech Hub: Thank you, Michele, and Hi, everyone so nice to be back here.

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Nikki Shaver - Legaltech Hub: Hard to believe. This is session 5. Already.

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Nikki Shaver - Legaltech Hub: We've been. Uh, we've been working with all of you for.

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Nikki Shaver - Legaltech Hub: My goodness! 3 quarters of a year now so.

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Nikki Shaver - Legaltech Hub: Wonderful to be a part of your journey around generative AI.



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Nikki Shaver - Legaltech Hub: And I'm delighted today to be sharing the stage the virtual stage, as it were, with my colleague, Sam Moore.

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Nikki Shaver - Legaltech Hub: Who is the consulting director.

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Nikki Shaver - Legaltech Hub: At legal tech hub, and I'm going to hand over to Sam to give him a little bit of background on himself and his career journey, and the perspective he brings to the specific.

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Nikki Shaver - Legaltech Hub: Topics of today. Sam, over to you.

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Sam Moore - Legaltech Hub: Thank you so much, Nikki. It's nice to be here, everyone. Uh, I'm going to go in reverse for a change. My career to give you context for how I came to be uh at legal tech hub.

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Sam Moore - Legaltech Hub: Um prior to coming and joining Nikki's excellent team. I was head of innovation for Barbary, which many of you will know as oh, yes, that way that I passed the bar exam.

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Sam Moore - Legaltech Hub: Um, I was head of innovation there for some time, and prior to that I was head of innovation at Skillburst Interactive, the e-learning provider.

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Sam Moore - Legaltech Hub: My main contribution to that business was creating and launching the Gnai fundamentals e-learning course, which was the 1st of its kind, and we'll touch more on curricula in presentation.

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Sam Moore - Legaltech Hub: Prior to that I spent some time vendor side at Raynancourt, and prior to that I was a lawyer and legal technologist and head of innovation for a Scottish law firm called Burnes Paul in Glasgow.

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Sam Moore - Legaltech Hub: And prior to that, I was a computer scientist. So I've been in and around technology and or law for the last.

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Sam Moore - Legaltech Hub: 20 something years of my career.



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Sam Moore - Legaltech Hub: And very happy to also be very heavily engaged now in not just pure legal tech, but also professional development and education.

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Nikki Shaver - Legaltech Hub: Thank you, Sam, and I'm sure all of you can see how lucky we are to have Sam with us today.

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Nikki Shaver - Legaltech Hub: Given that the predominant topic for the day.

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Nikki Shaver - Legaltech Hub: Is around Al training.

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Nikki Shaver - Legaltech Hub: And education. Um, so I'm going to. I have shared my screen.

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Nikki Shaver - Legaltech Hub: Just looking for a thumbs up that everyone can see it. Okay.

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Nikki Shaver - Legaltech Hub: Excellent, so.

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Nikki Shaver - Legaltech Hub: Um. Today, we have a really full agenda. Normally, as you know, we do try to bake in.

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Nikki Shaver - Legaltech Hub: A demo from a provider.

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Nikki Shaver - Legaltech Hub: Today, because we have so many topics we want to cover. We thought.

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Nikki Shaver - Legaltech Hub: That would be a bit of a stretch. We're hoping to get through all of this today, but I'm not sure whether we will. In any case, if we don't, we, of course, as usual.

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Nikki Shaver - Legaltech Hub: We'll share the deck with you, and we can cover off any additional topics.



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Nikki Shaver - Legaltech Hub: Next time I'm going to give a brief overview of some industry updates of.

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Nikki Shaver - Legaltech Hub: Course it has been conference season, so.

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Nikki Shaver - Legaltech Hub: Lots of talk out there want to just give you a little bit of a heads up about some of the main topics around discussion in the industry. We'll be talking briefly about budgeting for Al.

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Nikki Shaver - Legaltech Hub: I'm sure many of you are involved in setting budgets for next year and thinking about how AI fits into that.

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Nikki Shaver - Legaltech Hub: Then we're going to move into the core topics around education. Al education as the impetus for change.

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Nikki Shaver - Legaltech Hub: What types of curricula are available.

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Nikki Shaver - Legaltech Hub: Personas for training, and how to approach that.

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Nikki Shaver - Legaltech Hub: We're also going to touch on professional development for lawyers, and how this is impacted by AI and what the future might look like. There.

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Nikki Shaver - Legaltech Hub: And then we're going to talk a bit about.

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Nikki Shaver - Legaltech Hub: Adoption and change management around Al initiatives.

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Nikki Shaver - Legaltech Hub: And AI usage tracking and auditing. So without further ado, I'm going to move into.

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Nikki Shaver - Legaltech Hub: Our 1st topic, which is industry, updates.



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Nikki Shaver - Legaltech Hub: We um as a company. We have attended Ilta recently. We've also run a series of.

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Nikki Shaver - Legaltech Hub: Events for mid law market. So mid-sized firms, which we define as anywhere from between 20 lawyers to 200 or 250 lawyers.

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Nikki Shaver - Legaltech Hub: And that has been really interesting, because, of course, the concerns that.

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Nikki Shaver - Legaltech Hub: That group of firms have around generative AI is a little bit different than the concerns that.

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Nikki Shaver - Legaltech Hub: The large law market has.

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Nikki Shaver - Legaltech Hub: So these industry insights are from those events, as well as just our general interaction with.

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Nikki Shaver - Legaltech Hub: Various players in the industry across verticals, law firms, corporate legal departments.

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Nikki Shaver - Legaltech Hub: Vendors, and also bankers and investors in the industry.

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Nikki Shaver - Legaltech Hub: The 1st topic is, um.

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Nikki Shaver - Legaltech Hub: Market jitters. So there is a significant amount of what I would call almost panic or anxiety in the market on the vendor side, just something to keep in mind as you're meeting with vendors.

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Nikki Shaver - Legaltech Hub: There's a lot of jostling for position, and some indications now that various Al players are coming out ahead.



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Nikki Shaver - Legaltech Hub: Um, which means we also have some Al players that are deciding to leave.

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Nikki Shaver - Legaltech Hub: Excuse me, leave the legal industry, as they recognize that perhaps it might be a little bit too crowded.

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Nikki Shaver - Legaltech Hub: So it's an interesting field at the moment.

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Nikki Shaver - Legaltech Hub: What is particularly industry interesting is the funding in the market which we.

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Nikki Shaver - Legaltech Hub: Have talked about before as being more robust than we've ever seen previously, and which many of you, many of you may have thought was a bubble similar to.

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Nikki Shaver - Legaltech Hub: Um the Silicon Valley bubble um, and something that may soon give way to a more realistic influx of capital.

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Nikki Shaver - Legaltech Hub: We've actually spoken now to a number of investors and bankers in the market who say, actually.

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Nikki Shaver - Legaltech Hub: They think this level of funding in the market is here to stay. That external investors to legal have reevaluated the legal market and found that the total addressable market.

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Nikki Shaver - Legaltech Hub: Is larger than they anticipated it would be, and so the money flowing in is likely to continue for some time. What that means for all of you is startup. Activity is also likely to continue.

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Nikki Shaver - Legaltech Hub: And what we perceive to be hype is also likely here to stay for some time.

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Nikki Shaver - Legaltech Hub: So just giving you a heads up on that one.



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Nikki Shaver - Legaltech Hub: Another trend that we're seeing in the market is the rise of AI teams. So in addition to innovation teams internally, and of course it departments. Some firms are developing separate AI teams that actually sit apart from either of those.

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Nikki Shaver - Legaltech Hub: And work across the entire firm.

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Nikki Shaver - Legaltech Hub: Reporting into the coo. Most commonly, we think, that will settle over time as well as departments kind of find their way, and.

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Nikki Shaver - Legaltech Hub: It's more likely that AI will fall under it, or innovation rather than separately. But this is something we're seeing at the moment with AI teams, sometimes playing a part in building for clients. So external builds.

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Nikki Shaver - Legaltech Hub: Sometimes playing a part in.

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Nikki Shaver - Legaltech Hub: Developing 3rd horizon plays. So around actual generation of revenue for the firm through productizing.

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Nikki Shaver - Legaltech Hub: Legal work and selling it externally or productizing technology and selling it externally. Which means that these teams typically have.

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Nikki Shaver - Legaltech Hub: A strong build.

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Nikki Shaver - Legaltech Hub: Element to them.

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Nikki Shaver - Legaltech Hub: We're also seeing a potential shift. And this has not happened yet. But we're seeing indicators of it that the core platforms where lawyers work and have traditionally worked, may be shifting.



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Nikki Shaver - Legaltech Hub: So where typically outlook and word and the document management system might have been the core areas where.

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Nikki Shaver - Legaltech Hub: Lawyers worked and sat for most of their time. We have seen a little bit of a shift. So, for example, firms saying that.

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Nikki Shaver - Legaltech Hub: Their lawyers, upon being pulled about what they use most often for work, have said things like.

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Nikki Shaver - Legaltech Hub: When I come in in the morning I open up outlook, and I open up Harvey.

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Nikki Shaver - Legaltech Hub: That's a really interesting shift, and it may have an impact on what the document management systems of the future look like and whether they feed into other broader AI systems rather than being the place where lawyers actually do their work.

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Nikki Shaver - Legaltech Hub: Um. We've also seen.

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Nikki Shaver - Legaltech Hub: A shift to newer different pricing models. This is something I've mentioned before continues to be the fact that a lot of firms are exploring.

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Nikki Shaver - Legaltech Hub: How to get to a point where pricing is based on value of legal work rather than a strict billable hours model. It doesn't mean the billable hour is going away.

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Nikki Shaver - Legaltech Hub: It just means that it is being used more often to feed into the way that we budget for and value legal work.

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Nikki Shaver - Legaltech Hub: Rather than purely as a bill by the hour model.

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Nikki Shaver - Legaltech Hub: We anticipate this will continue to shift over time. But interesting that these conversations are so consistently happening at the moment.



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Nikki Shaver - Legaltech Hub: Um. The other big change is Al is over. The past years has really been looked upon in terms of Roi as.

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Nikki Shaver - Legaltech Hub: A productivity tool. So true value from AI was really seen as.

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Nikki Shaver - Legaltech Hub: Increasing Efficiency.

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Nikki Shaver - Legaltech Hub: Interestingly over the past months. We've heard more and more about.

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Nikki Shaver - Legaltech Hub: Firms, looking at AI in a different way, looking at Roi in terms of.

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Nikki Shaver - Legaltech Hub: What can we do now? That was not feasible previously? Are there workflows.

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Nikki Shaver - Legaltech Hub: That we're actually able to undertake that we were not before, which means we can keep more work, internal.

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Nikki Shaver - Legaltech Hub: And also are we able to use AI to ensure that the quality of our work.

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Nikki Shaver - Legaltech Hub: Increases. So that's a little bit of a shift in the way that we're looking at the Roi around AI.

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Nikki Shaver - Legaltech Hub: And finally, we are seeing a little bit of a shakeup in the vendor market with.

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Nikki Shaver - Legaltech Hub: Some of the startups in the market falling and giving way as others.

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Nikki Shaver - Legaltech Hub: Get a little bit deeper into market share, and that's to be expected. Um. So I anticipate that in the next months.



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Nikki Shaver - Legaltech Hub: And the next 6 months especially, we'll see a fair bit of consolidation and M. And a activity in the market.

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Nikki Shaver - Legaltech Hub: Um moving on. We wanted to give you a little bit of a primer around budgeting for AI, because we do realize.

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Nikki Shaver - Legaltech Hub: This is the time, and all of you will be thinking about this in the year to come, and

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Nikki Shaver - Legaltech Hub: The years to come.

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Nikki Shaver - Legaltech Hub: So we've mentioned perhaps before that.

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Nikki Shaver - Legaltech Hub: The way most firms are approaching. Budgeting for AI is not as part of the it budget.

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Nikki Shaver - Legaltech Hub: But actually as an entirely new line item.

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Nikki Shaver - Legaltech Hub: When you look at the way this plays out over types of firms in Amlaw, 100 200 firms, the larger firms in the market.

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Nikki Shaver - Legaltech Hub: Um, they typically will have a dedicated budget for generative AI tools.

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Nikki Shaver - Legaltech Hub: And it tends to be just under 1% of firm revenue, which is a very significant amount when you think about it. But this is total cost.

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Nikki Shaver - Legaltech Hub: On AI, which can include not just licenses for platforms, but also.

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Nikki Shaver - Legaltech Hub: Any additional staff that are required around Al deployment.



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Nikki Shaver - Legaltech Hub: Um, any additional programs, such as educational programs, and so on.

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Nikki Shaver - Legaltech Hub: In addition, what we're seeing in the market is that this budget, this new line item is also set to increase. So rather than decreasing as firms.

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Nikki Shaver - Legaltech Hub: Deploy AI solutions and get underway with initiatives.

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Nikki Shaver - Legaltech Hub: We're seeing actually an interest in increasing spend on Al.

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Nikki Shaver - Legaltech Hub: In mid-sized firms. Fewer of them tend to have a separate line. Item for AI.

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Nikki Shaver - Legaltech Hub: It's about 19%.

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Nikki Shaver - Legaltech Hub: And this is partly because it's still more typical in firms of that size to spend on generic tools that then have generative Al built into them.

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Nikki Shaver - Legaltech Hub: Rather than distinct. Al solutions.

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Nikki Shaver - Legaltech Hub: Um so large firms in terms of the way that tech budgets are expanding.

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Nikki Shaver - Legaltech Hub: It grew 7.6% in 2024.

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Nikki Shaver - Legaltech Hub: And we're expecting kind of a similar growth.

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Nikki Shaver - Legaltech Hub: To 2024 to 2025, and then also 25 to 26.

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Nikki Shaver - Legaltech Hub: Um in addition, overhead, typically in firms is up about 8.6%.



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Nikki Shaver - Legaltech Hub: In the 1st half of 2025.

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Nikki Shaver - Legaltech Hub: With generative AI tooling, cited as a contributor to that overhead cost.

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Nikki Shaver - Legaltech Hub: So what that means for you. If you're a mid-sized firm sort of that 50 to 200 lawyers, or on the outer Rangers.

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Nikki Shaver - Legaltech Hub: 20 to 250.

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Nikki Shaver - Legaltech Hub: You should be looking at a generative Al program. That is about 0 point 3 to 1% of revenue.

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Nikki Shaver - Legaltech Hub: And recognize that while we've cited the 1%.

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Nikki Shaver - Legaltech Hub: That is really more top tier sort of one. Large firms rather than.

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Nikki Shaver - Legaltech Hub: Mid-sized firms. Um may still be top tier, but slightly smaller firms, so it's fine. If you decide you're more on the point 3% rather than the 1% of revenue.

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Nikki Shaver - Legaltech Hub: If you're amlod 200.

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Nikki Shaver - Legaltech Hub: Upper mid think about a slightly higher spend. So 0 point 5% to 1.5% of revenue.

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Nikki Shaver - Legaltech Hub: And probably a more visible overhead, uptick as well.

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Nikki Shaver - Legaltech Hub: But the most important thing to take away from this is, it really is critical to have a separate line item for AI spend. And that's relevant for a number of reasons. One.



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Nikki Shaver - Legaltech Hub: It does demonstrate commitment.

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Nikki Shaver - Legaltech Hub: Um, which is relevant especially for clients. Now, where increasingly, they are.

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Nikki Shaver - Legaltech Hub: Requesting information about the way that you're deploying. Al.

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Nikki Shaver - Legaltech Hub: It also makes it easier for you to track Roi on your investment.

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Nikki Shaver - Legaltech Hub: And finally, studies have indicated that, in fact.

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Nikki Shaver - Legaltech Hub: Having a dedicated budget for AI correlates with improved and faster adoption rates around AI.

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Nikki Shaver - Legaltech Hub: So if that's not a reason for spend as a separate line item, I don't know what is.

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Nikki Shaver - Legaltech Hub: I'm now going to hand over to Sam to talk about AI education as an impetus for change. Sam.

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Sam Moore - Legaltech Hub: Oh, fantastic! Thank you very much. Nikki.

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Sam Moore - Legaltech Hub: So. Um. The 1st thing I wanted to speak about in this section is to set the context that education is just the 1st phase of adoption of any technology. And that's true for everything we've had previously.

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Sam Moore - Legaltech Hub: And the fact that getting education, right or wrong, will either underpin or undermine everything else that you're going to do with Al. So it's extremely important to to take this very seriously.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

00:27:42.000 --> 00:27:53.000

Sam Moore - Legaltech Hub: And the last time that AI was interesting and relevant to our industry. I'm thinking about the times when you know Kira Luminance, Raven abbrevia. When these tools were starting to make ways in the market.

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Sam Moore - Legaltech Hub: We were talking back then around natural language processing pattern recognition, a different type of AI than we're discussing largely today.

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Sam Moore - Legaltech Hub: But at that time I didn't see anything like the kind of interest that we have right now in educating the industry on the fundamentals. First.st

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Sam Moore - Legaltech Hub: I rolled out one of these tools at a law firm.

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Sam Moore - Legaltech Hub: And there was no real interest or budget in establishing a foundational understanding of how AI works. It was much more. The vendor training will take care of this. Just go ahead and start using the products.

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Sam Moore - Legaltech Hub: And it did work. Of course it worked.

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Sam Moore - Legaltech Hub: However, I always thought that the potential for engagement and results was.

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Sam Moore - Legaltech Hub: Far, far higher, if we had been able to more clearly articulate to our users.

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Sam Moore - Legaltech Hub: How technology like this actually works.

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Sam Moore - Legaltech Hub: And I believe this time around the industry, has learned from that, and is now engaging very particularly in.

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Sam Moore - Legaltech Hub: The fundamental understanding of how AI works before.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Sam Moore - Legaltech Hub: We get into the hands-on product, we think, is a very positive thing.

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Sam Moore - Legaltech Hub: I'd also say that as little as a year ago.

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Sam Moore - Legaltech Hub: When I spoke to law school professors about whether they were going to start teaching AI fundamentals, the response was generally love to. But we're not going to.

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Sam Moore - Legaltech Hub: The most common reason I heard was, there's just no space in the curriculum. What do you suggest? I take off my curriculum to make space for this, and that was a.

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Sam Moore - Legaltech Hub: A reasonable perspective. I thought at the time.

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Sam Moore - Legaltech Hub: Although this is changing fast forward to today, only a year later. And we're hearing more and more campuses talking about making that space available and doing something to give their especially final year. Law students.

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Sam Moore - Legaltech Hub: At least some understanding of what they're about to step into.

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Sam Moore - Legaltech Hub: I have next, please.

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Sam Moore - Legaltech Hub: So why do I think this is different than previous big disrupting technologies that we have faced as an industry.

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Sam Moore - Legaltech Hub: Consider the previous big changes in technology. We've had to handle things like switching to client communicating by email.

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Sam Moore - Legaltech Hub: And then clients communicating by SMS instant messenger.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Sam Moore - Legaltech Hub: And then moving to the cloud and engaging with Saas applications. And then, during the COVID-19 pandemic in particular, engaging with electronic signatures.

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Sam Moore - Legaltech Hub: So these were all big, disruptive technologies that our industry had to deal with had to train for.

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Sam Moore - Legaltech Hub: But why is Al different? What does Al have?

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Sam Moore - Legaltech Hub: That these other things did not have.

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Sam Moore - Legaltech Hub: Next, please.

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Sam Moore - Legaltech Hub: Well, the answer is, I think it is contemporary interest with the public.

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Sam Moore - Legaltech Hub: So typically our industry will lag behind other industries and also the general public when it comes to adopting new technology. And that's.

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Sam Moore - Legaltech Hub: More or less assumes to be the case.

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Sam Moore - Legaltech Hub: However, when generative Al arrived with a splash in the market around 2022, 2023 thereabouts, with Chat Gpt. 3.0.

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Sam Moore - Legaltech Hub: That was a big of a surprise to us as it was to the public. We were finding out about this new idea at the same time.

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Sam Moore - Legaltech Hub: So for once we weren't catching up with something that been around for years already.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Sam Moore - Legaltech Hub: We were seeing it evolve in real time. And I believe that's the big difference. And why the impetus for education around AI is so strong.

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Sam Moore - Legaltech Hub: We are learning as we go at the same time as everybody else.

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Sam Moore - Legaltech Hub: Take by comparison, say e-signature.

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Sam Moore - Legaltech Hub: When that became incredibly relevant to our profession, we could lean on years of experience in other industries. We could learn from how they approached it we could see where the mistakes were.

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Sam Moore - Legaltech Hub: We could put in place a much more structured approach.

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Sam Moore - Legaltech Hub: We don't have that benefit this time.

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Sam Moore - Legaltech Hub: We need to be evolving and educating.

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Sam Moore - Legaltech Hub: As we're laying the track essentially.

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Sam Moore - Legaltech Hub: Now to some of you that will be very exciting, and to others will be very frightening, and I think you are both correct.

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Sam Moore - Legaltech Hub: The other reason why there's a large impetus for education training right now is that.

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Sam Moore - Legaltech Hub: The public includes your clients.

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Sam Moore - Legaltech Hub: Your clients are also learning about this technology at the same time, and they're excited about it as well.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Sam Moore - Legaltech Hub: During the the 19 pandemic when I was rolling out e-signature at the firm I was at. I also trained many of our clients in large seminars how to use docusign at the time.

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Sam Moore - Legaltech Hub: And I don't think any of those participants.

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Sam Moore - Legaltech Hub: You know, hung up the call that day, went to the kitchen and told their spouse.

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Sam Moore - Legaltech Hub: On a great news. My lawyers are using e-signature.

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Sam Moore - Legaltech Hub: I don't think they were excited or interested in the technology as such.

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Sam Moore - Legaltech Hub: But I do think they are excited about Gen. Al.

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Sam Moore - Legaltech Hub: There are some hackathons, and we'll touch on this later that were exclusively being booked by law firms last year. This year I'm hearing large clients are booking out those workshops, too.

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Sam Moore - Legaltech Hub: They are experimenting, they are building. They are excited about this.

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Sam Moore - Legaltech Hub: Now, what that means is that every interaction between your firm and a client is potentially a conversation about AI.

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Sam Moore - Legaltech Hub: And that means that your people need to know what to say, what not to say. They have to have some grounding, some understanding of what it's all about.

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Sam Moore - Legaltech Hub: Because failure to understand this, and being unable to speak knowledgeably about AI both in general and also within your firm.

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Sam Moore - Legaltech Hub: May signal to those clients that you're not keeping up with this, and it's important to them. Therefore it's important.



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### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Sam Moore - Legaltech Hub: To you.

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Sam Moore - Legaltech Hub: The other reason why I think this is particularly pressing right now is that, unlike some of those other.

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Sam Moore - Legaltech Hub: Tech developments. I think.

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Sam Moore - Legaltech Hub: Gen. Al is also an opportunity for business development.

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Sam Moore - Legaltech Hub: Many of your clients are going to need new advice. They're going to need new supports, and many of them don't know how much advice that they need right now.

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Sam Moore - Legaltech Hub: And if you have time there is a very large leaked archive of Chat Gpt. Public conversations available out there.

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Sam Moore - Legaltech Hub: That is full of very sensitive conversations people have been having with.

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Sam Moore - Legaltech Hub: AI, by clearly.

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Sam Moore - Legaltech Hub: Professional people who didn't know what they were doing, and were unaware that they were exposing very sensitive information to the public web.

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Sam Moore - Legaltech Hub: And how can your people identify opportunities to add value and to win business if they don't understand the basic principles themselves?

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Sam Moore - Legaltech Hub: I'll give you an example of discovery. Practitioners, clients almost certainly need new governance and new retention. Advice.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Sam Moore - Legaltech Hub: But do all of your discovery? Lawyers know that? Are they able to raise that topic with clients and say, Hey, the Edrm framework.

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Sam Moore - Legaltech Hub: Doesn't account for Gen. Al. Conversations because it predates it.

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Sam Moore - Legaltech Hub: We should be thinking about refreshing your retention, perspective, refreshing a data, governance perspective.

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Sam Moore - Legaltech Hub: And that's a very important opportunity.

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Sam Moore - Legaltech Hub: So to summarize. What is the impetus for change right now? Why are we focusing so much education? I think there are push reasons and pull reasons, the push reasons being we must educate.

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Sam Moore - Legaltech Hub: Because and the pool reasons we want to educate because and I think these are fairly self-explanatory. But on the push side.

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Sam Moore - Legaltech Hub: You know, the clients expect us to change. We also need to be mindful of errors, reputational damage, hallucinated citations. We need to learn about these things. To avoid these pitfalls.

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Sam Moore - Legaltech Hub: Arguably. There could be a tech competency requirement from the Aba and others that's still kind of evolving, but it's worth keeping an eye on.

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Sam Moore - Legaltech Hub: And also, frankly, many of our people need to build these skills to protect themselves, to survive in the modern world. They need to learn some of these things.

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Sam Moore - Legaltech Hub: And then on the pull side, as I mentioned a moment ago, there are opportunities to create new business by learning about AI.

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Sam Moore - Legaltech Hub: There are huge potential efficiencies and opportunities for growth.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Sam Moore - Legaltech Hub: You may be able to reach new markets and do work profitably. That could not be done before.

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Sam Moore - Legaltech Hub: And finally, many of our people actually want to develop these skills, not just they have to. They want to learn how to work smarter, and we should be responsive to that.

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Sam Moore - Legaltech Hub: So the next section I want to talk about briefly is internal and external curricula for learning.

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Sam Moore - Legaltech Hub: Now looking at it externally. First, st there are now quite a few options in the market for external curricula.

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Sam Moore - Legaltech Hub: 2 years ago. That was not the case. There was nothing out there that was specifically designed for law.

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Sam Moore - Legaltech Hub: And now we have several vendors, including ourselves, of course, who offer.

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Sam Moore - Legaltech Hub: Off the shelf. Self serve training on AI, which is a huge advancement in only 24 months.

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Sam Moore - Legaltech Hub: I think part of the reason why that's happened is that law firms are now framing Al education as a professional development concern.

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Sam Moore - Legaltech Hub: It's not just an it thing or an innovation thing. It's a professional development topic.

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Sam Moore - Legaltech Hub: And that comes with it. Most firms, professional development budgets being quite large budgets.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Sam Moore - Legaltech Hub: And I think part of that is also being boosted by the fact that some of these options on screen are now cla accredited, which is also a big contributing factor, I think, to why.

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Sam Moore - Legaltech Hub: They have grown so quickly.

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Sam Moore - Legaltech Hub: But as well as the, if you might call them lecture, based or or seminar, based learning hands on hackathons and workshops, are also in really high demand.

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Sam Moore - Legaltech Hub: Getting hands on with AI tools.

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Sam Moore - Legaltech Hub: Guided by knowledgeable tutors, is a very, very powerful thing.

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Sam Moore - Legaltech Hub: The limitation with this, though, is there's not that many organizations or individuals who are capable of doing this, not for a legal audience, anyway. But that capacity is growing.

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Sam Moore - Legaltech Hub: Um. But a cautionary note from the previous slide was that some of that capacity is being taken up by clients right now. So you. Don't be surprised if you try and book into Hackathon and find they're booked up till.

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Sam Moore - Legaltech Hub: The end of the year, because large blue chip companies are now taking those hackathon courses as well.

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Sam Moore - Legaltech Hub: And the final point I want to make on this slide is that vendors themselves are still providing the bulk of tool specific training, which I think is appropriate, and will continue.

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Sam Moore - Legaltech Hub: However, something I'm seeing in the market is a certain weakness around some of those newer um.

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Sam Moore - Legaltech Hub: More kind of headline grabbing entrance to the markets. They're having massive growth potential. They're doing really well.



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### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Sam Moore - Legaltech Hub: But I'm hearing anecdotally that some of those newer companies the training is quite poor.

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Sam Moore - Legaltech Hub: And the reason, I think, is that these newer companies often run by new entrants into our markets don't really know how to teach or train lawyers.

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Sam Moore - Legaltech Hub: And I think that is exposing a weakness. There.

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Sam Moore - Legaltech Hub: So one thing to be aware of, you may not be alone if you find that vendor, provided training is a little lackluster right now.

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Sam Moore - Legaltech Hub: It will self correct.

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Sam Moore - Legaltech Hub: So what are law firms doing about this.

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Sam Moore - Legaltech Hub: In an internal basis. We are seeing some of the larger firms develop what they might call academies, or a center of excellence, something like that where they are.

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Sam Moore - Legaltech Hub: Creating together a toolkit or large learning resource to help their people out, which can involve some degree of external curricula as well as their own.

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Sam Moore - Legaltech Hub: In some cases there is a clear partnership model, for example, Altaclaro and Knel Gates got together last year and and built out this large simulated learning environments for their M. And a lawyers.

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Sam Moore - Legaltech Hub: We're also seeing new learning paths being created for personas, and we'll touch on personas next. I won't say too much right now, but that is now becoming much more relevant, I think, to education and training.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Sam Moore - Legaltech Hub: And interesting. Some some law firms are interesting enough, making some degree of training mandatory before their people are allowed to touch.

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Sam Moore - Legaltech Hub: A tool like Harvey, for example.

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Sam Moore - Legaltech Hub: I haven't seen that before. When I've been rolling out technology products at law firms like, say, for example, you know, E signature, um training was provided, certainly, but I did not come across any firms, saying, we're not going to give you docusign credentials until you attend.

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Sam Moore - Legaltech Hub: Training and tick a box, saying I was there.

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Sam Moore - Legaltech Hub: I am seeking that with AI, and I believe the reason is the potential for harm.

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Sam Moore - Legaltech Hub: So if you are using a Gen. Al research tool, for example, and you haven't taken training to know what hallucinations are.

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Sam Moore - Legaltech Hub: How to stop them, how they happen.

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Sam Moore - Legaltech Hub: I think it is unwise to unleash that that person on a tool that could potentially create that problem.

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Sam Moore - Legaltech Hub: So I think we're going to see more of this. I think the more understanding there is in the markets around how these issues can arise, the more important it's going to be to put some kind of education gateway between.

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Sam Moore - Legaltech Hub: The learner and actually getting to use the tool on real client work.

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Nikki Shaver - Legaltech Hub: And I completely agree with what Sam said. I think it's also.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Nikki Shaver - Legaltech Hub: The mandatory training also comes into play around appropriate use policies. So.

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Nikki Shaver - Legaltech Hub: There are certain tools that are appropriate for certain types of workflows and certain types of work.

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Nikki Shaver - Legaltech Hub: Whereas others may not be appropriate. In other words, you would not perform legal research in a tool that does not have access.

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Nikki Shaver - Legaltech Hub: To sound legal content, and training is part of ensuring compliance internally.

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Nikki Shaver - Legaltech Hub: With your policies.

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Nikki Shaver - Legaltech Hub: I also just wanted to raise this, which is.

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Nikki Shaver - Legaltech Hub: The result of a poll, an informal poll. We ran across about 150.

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Nikki Shaver - Legaltech Hub: Attendees to a conference earlier this year.

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Nikki Shaver - Legaltech Hub: Mainly law, firm attendees. And what this shows is. We asked the question of how many firms had developed internal training. How many had provided external training.

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Nikki Shaver - Legaltech Hub: And then how many firms had offered both.

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Nikki Shaver - Legaltech Hub: What you'll see is, of course, the internal is the smallest slice of the pie.

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Nikki Shaver - Legaltech Hub: You may be surprised by that, but when you think about it, in order to develop an internal training and education regime, you actually have to have expertise internally.



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### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Nikki Shaver - Legaltech Hub: And certainly when Gen. Al 1st became a hot topic in legal, very few people had that expertise. So we really.

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Nikki Shaver - Legaltech Hub: Had to draw upon external resources.

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Nikki Shaver - Legaltech Hub: But, of course, external resources, though they are outstanding, they cannot.

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Nikki Shaver - Legaltech Hub: Deeply, innately. Know your internal work policies, and how your lawyers work.

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Nikki Shaver - Legaltech Hub: So it's perhaps not surprising that the overwhelming majority of firms that had released a full AI education program.

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Nikki Shaver - Legaltech Hub: Had done so, combining an external provider with internal programming.

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Sam Moore - Legaltech Hub: Thank you, Nikki. So personas for training is my next section. And I mentioned this very briefly in the previous slide.

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Sam Moore - Legaltech Hub: Um. In my experience it is useful to group your learners into personas before you assign them to a learning path.

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Sam Moore - Legaltech Hub: And I have several different thoughts on how you might do that. By far the most common.

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Sam Moore - Legaltech Hub: Approach I'm seeing is to group learners by role.

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Sam Moore - Legaltech Hub: And that breaks down where they are senior people who have concerns around efficiency, client impacts.

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Sam Moore - Legaltech Hub: Strategic value, and also how to manage teams using Al.



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### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Sam Moore - Legaltech Hub: Or are they more junior roles who are focused on building their skills, executing their day to day matters? Those kinds of things.

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Sam Moore - Legaltech Hub: Are they support staff who care about process and task accuracy, getting things done in a very practical way, are they business services? Legal Ops. People who care most about helping the firm to run smoothly.

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Sam Moore - Legaltech Hub: I think it is valuable to look at that perspective and then figure out what is the correct training path and curriculum for these people based on their roles.

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Sam Moore - Legaltech Hub: I think, as a secondary concern, though I would also mix into it one of the other ways of doing it. For example, by motivation.

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Sam Moore - Legaltech Hub: I think there are learners who really care about the achievements of learning something new. If you have a gamification system, for example, they're the ones who want the badges to show that they have completed something.

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Sam Moore - Legaltech Hub: Probably very big Duolingo users.

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Sam Moore - Legaltech Hub: Are they problem solvers who really care about fixing problems that affect them day to day? They want to find a better way to get their work done.

00:43:02.000 --> 00:43:10.000

Sam Moore - Legaltech Hub: Some people are still skeptics who need to be convinced. This whole thing is a good idea. In the 1st place, that's still a valid perspective. It's becoming a smaller.

00:43:10.000 --> 00:43:14.000

Sam Moore - Legaltech Hub: Segment, I think, of our industry, but there are people who still need to be convinced.

00:43:14.000 --> 00:43:25.000

Sam Moore - Legaltech Hub: And then there's my favorite kind of learner, the ones who are just curious, and want to learn for the sake of learning that I find is somewhat rare in our industry. So cherish those people if you have them.



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### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

00:43:29.000 --> 00:43:40.000

Sam Moore - Legaltech Hub: There are some other ways that you might go about. This um, learning preference, I think, is becoming more of an understood topic, as we have a bigger generational mix in our law firms than I think at any point in history.

00:43:40.000 --> 00:43:49.000

Sam Moore - Legaltech Hub: Plenty of learners are still visual learners. The show me learners. They want to go along to presentations like this. They want to see on screen. Maybe take a handout away.

00:43:50.000 --> 00:43:57.000

Sam Moore - Legaltech Hub: However, there are also plenty of learners who are auditory learners, people who consume ebooks, pardon me, audiobooks, and podcasts by the dozen.

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Sam Moore - Legaltech Hub: And they will listen to the transcription of a meeting like this, and learn best that way.

00:44:03.000 --> 00:44:08.000

Sam Moore - Legaltech Hub: And then there are the kinesthetic learners, the hands-on learners, the ones who say, Let me touch it. Let me try it.

00:44:08.000 --> 00:44:17.000

Sam Moore - Legaltech Hub: Those are the people for whom workshops are far more effective. They'd much rather be given a sandbox to play in, and will learn very quickly that way.

00:44:17.000 --> 00:44:23.000

Sam Moore - Legaltech Hub: So what I'm seeing happen in the most effective education programs in law firms is a mixture of all of the above.

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Sam Moore - Legaltech Hub: And I don't think necessarily that has been offered in other topics. If you think about other cle topics that you were doing.

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Sam Moore - Legaltech Hub: I don't think you are very commonly given a choice. There's a provider been brought in to provide something. It could be a video on demand. It could be some Pdf resources.

00:44:40.000 --> 00:44:53.000

Sam Moore - Legaltech Hub: Could be a quiz. I don't think we are normally giving our learners a choice in how do you learn best? But when it comes to Gen. Al. I would consider that very seriously, because of how large and complicated topic that it is.



Record Date: September 10, 2025

#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

00:44:53.000 --> 00:45:00.000

Sam Moore - Legaltech Hub: You could also consider looking at your personas based on how tech comfortable, how tech, savvy are they? In the 1st place.

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Sam Moore - Legaltech Hub: And you could also think about what is the training outcome you are trying to achieve. Do you have people who are really just going to tick a box, and they don't need to think about it much more than that, I think that group is small and getting smaller, but they exist.

00:45:11.000 --> 00:45:17.000

Sam Moore - Legaltech Hub: Do you have people who are skill builders? They want to build out their own toolbox of skills day to day.

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Sam Moore - Legaltech Hub: Do you have future leaders who are already thinking about? How am I going to contribute to the partnership.

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Sam Moore - Legaltech Hub: As a leader by developing these skills.

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Sam Moore - Legaltech Hub: And do you have those innovators who just want to build stuff and try new stuff? And they are also precious. And we love them.

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Sam Moore - Legaltech Hub: So you may also consider that perspective as well.

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Sam Moore - Legaltech Hub: A couple of final points to say about this topic. I think that AI is a much bigger, broader, and more technical subject matter than most learning in a law firm or law, departments.

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Sam Moore - Legaltech Hub: Going to tackle. Um. This is not something anybody can really understand. After an hour or 2 of learning, it's just not going to happen.

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Sam Moore - Legaltech Hub: The reason why, I think, is that this topic is still evolving very, very quickly.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

00:45:59.000 --> 00:46:08.000

Sam Moore - Legaltech Hub: I think, being generous, you could say that Jenny has been relevant to our market for 2 and a half years, and I would say, that's pushing the boundary. 18 months, probably more accurate.

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Sam Moore - Legaltech Hub: What that means is that everything that's happening is still happening. We are not looking at a settled and understood topic. It is evolving constantly.

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Sam Moore - Legaltech Hub: As recently as last month, when Openai pushed out Chat Gpt. 5 new questions have come into play there as opposed to Gpt. 4.

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Sam Moore - Legaltech Hub: It is really is happening that quickly.

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Sam Moore - Legaltech Hub: And I think we have to realize that most learners don't have the time that it will take to really understand this in a very deep way.

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Sam Moore - Legaltech Hub: I think we have to be practical and be realistic about what each person can reasonably absorb, and then make use of.

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Sam Moore - Legaltech Hub: And I think that persona based learning is how we do that.

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Sam Moore - Legaltech Hub: Because it's not true that everybody has to know everything about AI. But everybody does need to know something about AI.

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Sam Moore - Legaltech Hub: And I think that is a very important distinction.

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Nikki Shaver - Legaltech Hub: Thank you. Sam.

00:46:58.000 --> 00:47:06.000

Nikki Shaver - Legaltech Hub: We're going to turn now to talk about a topic that is related to the one we've just spoken about. So it's also about.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

00:47:06.000 --> 00:47:13.000

Nikki Shaver - Legaltech Hub: Learning. But now we're talking about professional development of your lawyers, and how AI impacts that. And of course.

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Nikki Shaver - Legaltech Hub: This has been a concern in the industry. I'm sure it's something that many of you have been talking about internally.

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Nikki Shaver - Legaltech Hub: Lawyers traditionally have learned, partly by doing so. It's very much what we.

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Nikki Shaver - Legaltech Hub: Talk about um in terms of modeling. You know, you're in a room with a partner who's on a phone call.

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Nikki Shaver - Legaltech Hub: And the facial expressions of that lawyer while they're on the phone, are interesting. They might write little notes to you as they're on the phone. They might put the client on mute and say something to you about why they're responding in a certain way.

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Nikki Shaver - Legaltech Hub: But also we are used to lawyers essentially having to do things. The way that.

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Nikki Shaver - Legaltech Hub: Lawyers of previous generations have done things so.

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Nikki Shaver - Legaltech Hub: You know, the partner that you're working with grew up by.

00:48:02.000 --> 00:48:10.000

Nikki Shaver - Legaltech Hub: Reviewing documents. And so, therefore, you are going to review documents. The lawyer you're working with grew up.

00:48:10.000 --> 00:48:12.000

Nikki Shaver - Legaltech Hub: Professionally by.

00:48:12.000 --> 00:48:22.000

Nikki Shaver - Legaltech Hub: Drafting contracts. In word. Therefore, they want you to draft contracts in word, because that's how how they imagine lawyers learn. That's the only way we've known.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

00:48:22.000 --> 00:48:28.000

Nikki Shaver - Legaltech Hub: Lawyers to learn interestingly. Both Sam and I have worked, of course, in legal innovation, in law firms.

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Nikki Shaver - Legaltech Hub: And every single time you deploy technology in a firm, the same argument arises around.

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Nikki Shaver - Legaltech Hub: This is going to omit the opportunities for lawyers to learn.

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Nikki Shaver - Legaltech Hub: And, in fact, what happens, of course, is that lawyers find new ways to learn.

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Nikki Shaver - Legaltech Hub: Now, as Sam has just outlined.

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Nikki Shaver - Legaltech Hub: This is a far more impactful.

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Nikki Shaver - Legaltech Hub: Technology than those that have come before and the impact on lawyer learning, therefore.

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Nikki Shaver - Legaltech Hub: Is also significant, more significant than those that have come before.

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Nikki Shaver - Legaltech Hub: But when you look at discovery and ediscovery tools.

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Nikki Shaver - Legaltech Hub: It is not true. I don't think any of us would say litigators no longer know how to be lawyers, because they now use.

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Nikki Shaver - Legaltech Hub: Technology for discovery where previously they looked at documents. I don't think anyone would say transactional lawyers are no longer good lawyers, because they don't draft contracts from scratch, and instead.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Nikki Shaver - Legaltech Hub: They use precedents and templates and frequently automated document systems in order to draft.

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Nikki Shaver - Legaltech Hub: Um. In fact, I teach law students, and it's interesting speaking to them, knowing that many of them will never.

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Nikki Shaver - Legaltech Hub: Draft a contract from scratch. They typically don't necessarily do so in law school, and they won't. Once they arrive at a firm, either.

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Nikki Shaver - Legaltech Hub: So rather than dismissing AI, partly because it does away with.

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Nikki Shaver - Legaltech Hub: Lawyers opportunities to learn. I think we need to look to the technology to see whether there are opportunities for learning there.

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Nikki Shaver - Legaltech Hub: And in fact, we call this in the flow learning. And already, although it's nascent.

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Nikki Shaver - Legaltech Hub: We are seeing generative AI tools that themselves are baking in opportunities for learning.

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Nikki Shaver - Legaltech Hub: So this is one thing to look out for as you're evaluating the market and selecting products.

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Nikki Shaver - Legaltech Hub: Some examples. Here are guided workflows that are part of products.

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Nikki Shaver - Legaltech Hub: So Thompson reuters co-council, has word-based drafting.

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Nikki Shaver - Legaltech Hub: But it actually is able to auto, build playbooks from your own precedents.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Nikki Shaver - Legaltech Hub: And then provide guidance within the drafting workflow, so that juniors are able to see why certain things are being redlined.

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Nikki Shaver - Legaltech Hub: Which is not dissimilar to having a precedent document or a template document.

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Nikki Shaver - Legaltech Hub: That has annotations explaining why certain language should be added. If you are, for example, acting for the seller rather than the buyer.

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Nikki Shaver - Legaltech Hub: Similarly, lexus plus AI and protege.

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Nikki Shaver - Legaltech Hub: Adds guided research, which actually explains responses.

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Nikki Shaver - Legaltech Hub: And the steps that it took in order to get to certain answers which allows lawyers to learn.

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Nikki Shaver - Legaltech Hub: On the fly in the flow. How good research is conducted.

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Nikki Shaver - Legaltech Hub: Then you have drafting coaches effectively within certain technology platforms.

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Nikki Shaver - Legaltech Hub: Clearbrief, which is a technology that operates on the litigation side.

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Nikki Shaver - Legaltech Hub: Has scores that.

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Nikki Shaver - Legaltech Hub: Are applied to each sentence.

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Nikki Shaver - Legaltech Hub: Um, and therefore associates can learn which.

00:51:31.000 --> 00:51:35.000

Nikki Shaver - Legaltech Hub: Of their expressions are more effective. They also.



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### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Nikki Shaver - Legaltech Hub: Hyperlink assertions back to sources.

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Nikki Shaver - Legaltech Hub: And provide feedback on those so that associates learn whether the evidence that they are hyperlinking is appropriate for what they're currently writing.

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Nikki Shaver - Legaltech Hub: In briefcatch. You have real time, legal writing, suggestions.

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Nikki Shaver - Legaltech Hub: As you draft, and again it incorporates scoring dashboards for style and clarity.

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Nikki Shaver - Legaltech Hub: So that lawyers actually can learn how to draft more effectively as they use the tool.

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Nikki Shaver - Legaltech Hub: In draftwise, and some of the other tools that similarly provide this kind of Al smart drafting functionality.

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Nikki Shaver - Legaltech Hub: It marks up your precedent, language and playbooks, but junior lawyers still see the preferred clause, the fallback.

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Nikki Shaver - Legaltech Hub: And they also see the rationale for negotiation one way or the other, as they work.

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Nikki Shaver - Legaltech Hub: Um. Then you have co-council and Westlaw, as well as Lexus, with their shepherdizing tools.

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Nikki Shaver - Legaltech Hub: That allow for now baked in, verify as you write, so that.

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Nikki Shaver - Legaltech Hub: Rather than having to move from an AI tool that provides citations.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Nikki Shaver - Legaltech Hub: To another tool where you can verify those citations. It's being baked in as you work.

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Nikki Shaver - Legaltech Hub: So that verification doesn't require additional time from the lawyer as they are.

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Nikki Shaver - Legaltech Hub: Doing legal research in an Al Um.

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Nikki Shaver - Legaltech Hub: Platform. We've also seen firms that have launched programs that actually formalize this type of in the flow learning.

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Nikki Shaver - Legaltech Hub: So auric and Knl Gates are good examples of this. They've added generative Al modules for summer associates specifically.

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Nikki Shaver - Legaltech Hub: And they actually increase skills around generative AI by introducing modules.

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Nikki Shaver - Legaltech Hub: For prompting to mark up.

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Nikki Shaver - Legaltech Hub: Ndas, reviewing of contracts, using generative AI, and then afterwards they have a debrief session with instructors to talk about.

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Nikki Shaver - Legaltech Hub: How they might improve their prompting. So in some ways we've seen learning and skills shift from.

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Nikki Shaver - Legaltech Hub: What we might have previously seen as core legal work to prompting around that legal work in order to improve output.

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Nikki Shaver - Legaltech Hub: We've also seen a number of platforms that have partnered with law schools.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Nikki Shaver - Legaltech Hub: Harvey is the most recent to announce this, they recently announced, just, I think, last week or the week before, that they have now launched law school programs with 5 different law schools. And this is growing.

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Nikki Shaver - Legaltech Hub: All the time making available tools.

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Nikki Shaver - Legaltech Hub: That also include curricula within Harvey to push skills, training.

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Nikki Shaver - Legaltech Hub: And I will say I'm as I mentioned. I do teach at a law school, and the Dean of the Law school. I work at.

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Nikki Shaver - Legaltech Hub: Um has explicitly asked me to use Harvey for skills training during my course, which is really interesting also, perhaps even more interesting.

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Nikki Shaver - Legaltech Hub: The reason that he did so is because he's been encouraged by law firms.

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Nikki Shaver - Legaltech Hub: That often hire graduates of this particular law school to make this kind of Al Skills-based training available within their law school programs.

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Nikki Shaver - Legaltech Hub: One additional thing to watch out for is, as you deploy, agentic and workflow based solutions.

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Nikki Shaver - Legaltech Hub: It's really critical that those come with some transparency, so that.

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Nikki Shaver - Legaltech Hub: Agentic programs. The way that they would typically work is they're able to undertake.

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Nikki Shaver - Legaltech Hub: An end to end. Workflow with some degree of autonomy. But of course you can't have that autonomy. Be a black box. You have to know how the solution is going to act, and indeed, protege.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Nikki Shaver - Legaltech Hub: Is a gentic, but it actually shows the planned research steps ahead of time before answering, which provides a scaffold for juniors.

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Nikki Shaver - Legaltech Hub: Which can be helpful from a learning perspective, because it's showing them how the AI is thinking, but it also then allows them to have that transparency where they can say, actually, I'd rather you do it this way.

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Nikki Shaver - Legaltech Hub: Um, which gives you some satisfaction that this is not a black box.

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Nikki Shaver - Legaltech Hub: So just to summarize. This is something that is happening. It's still, as I said, in the nascent stage, it's emerging. But.

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Nikki Shaver - Legaltech Hub: It is real. We are seeing major platforms, especially so more established. Generative AI players are very much increasing.

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Nikki Shaver - Legaltech Hub: The extent to which they bake in learning opportunities to their platforms. This is something absolutely that you can also speak to your vendors about and let them know. This is important to you.

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Nikki Shaver - Legaltech Hub: More and more vendors become partners of firms. So this is another reason why that's really important, that when you're selecting a vendor, you're selecting one that has.

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Nikki Shaver - Legaltech Hub: Sufficient customer service representatives, sufficient resources to be able to help your firm, not just in the implementation, deployment and adoption of the technology.

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Nikki Shaver - Legaltech Hub: But also in ensuring that it hits the mark for your lawyers around education.

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Nikki Shaver - Legaltech Hub: Um. And interesting, too, is that there's increasing evidence that.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

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Nikki Shaver - Legaltech Hub: It is really important for this kind of learning to be baked into tools, partly because it also.

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Nikki Shaver - Legaltech Hub: Reinforces for lawyers and other staff.

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Nikki Shaver - Legaltech Hub: Correct ways of working with AI responsible ways of working with AI. So.

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Nikki Shaver - Legaltech Hub: Those that input learning workflows often also enforce verification, or have.

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Nikki Shaver - Legaltech Hub: That type of thing baked into them as well.

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Nikki Shaver - Legaltech Hub: So when you are looking at tools and we will. This, of course, will be part of the deck that we circulate. It's a little checklist for you when you're looking at evaluating tools on the market. One of the things to look for is that learning potential.

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Nikki Shaver - Legaltech Hub: And these are just a number of things that you can really ask vendors and think about.

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Nikki Shaver - Legaltech Hub: The applicability of these will vary, depending on the purpose of the tool that you are deploying. But it's something to keep in mind, and certainly additional questions to potentially add to your vendor questionnaires.

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Nikki Shaver - Legaltech Hub: If you're serious about using technology for skills-based training as well.

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Nikki Shaver - Legaltech Hub: Now I will say, of course, this is one area that we're seeing growth. But there are other things as well that you can think about and consider.

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Nikki Shaver - Legaltech Hub: When you're looking at skills-based training internally, and how this will develop over time. And so I will hand back over to Sam.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

00:58:02.000 --> 00:58:07.000

Nikki Shaver - Legaltech Hub: To talk through some of the things that you should think about. If you're doing this yourself internally.

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Sam Moore - Legaltech Hub: Thank you, Nikki. So these are on screen the 5 skills areas that I would be focusing on right now to complement.

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Sam Moore - Legaltech Hub: The advancement of AI in the workplace.

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Sam Moore - Legaltech Hub: The 1st one is human skills. And this one, I think, is hugely important because as much as AI can sound convincing and sound human. It's not human.

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Sam Moore - Legaltech Hub: There is a particular vendor right now advertising on TV about their empathetic AI, which grates me because it's literally not true.

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Sam Moore - Legaltech Hub: And AI cannot empathize with your clients.

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Sam Moore - Legaltech Hub: Um, it doesn't have the capacity to think ahead and see the bigger relationship pictures.

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Sam Moore - Legaltech Hub: It doesn't provide real customer support in key moments of stress.

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Sam Moore - Legaltech Hub: And many times our clients are coming to us in very stressful situations.

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Sam Moore - Legaltech Hub: So those skills are active listening.

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Sam Moore - Legaltech Hub: Empathy, reasoning, and making human cognitive leaps.

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Sam Moore - Legaltech Hub: Will always set lawyers aside from the tools that lawyers are using.



Record Date: September 10, 2025

### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

00:59:02.000 --> 00:59:12.000

Sam Moore - Legaltech Hub: So these skills, I believe, should be brought into even sharper focus than ever. They should be incentivized. They should be championed in your organizations, because ultimately clients don't want an AI.

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Sam Moore - Legaltech Hub: That behaves like a lawyer.

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Sam Moore - Legaltech Hub: They want lawyers who behave like human beings.

00:59:19.000 --> 00:59:30.000

Sam Moore - Legaltech Hub: The second point is critical thinking hallucinations will never go away 100%. That's my position. They will always be improved upon, but they will become a point of diminishing returns in how much you can improve the system.

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Sam Moore - Legaltech Hub: So, being able to understand that what I would call final mile parts of the results coming out of an AI system.

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Sam Moore - Legaltech Hub: And the lawyer being able to critically evaluate what the output is, and know if that sounds right, know when to.

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Sam Moore - Legaltech Hub: You know, do more manual checking.

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Sam Moore - Legaltech Hub: That is a very important skill.

00:59:49.000 --> 00:59:58.000

Sam Moore - Legaltech Hub: And I think many lawyers don't have that critical thinking skill the way that say a scientist or an engineer would. So the time is now to really focus on that area.

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Sam Moore - Legaltech Hub: Client advocacy is also hugely important.

01:00:02.000 --> 01:00:12.000

Sam Moore - Legaltech Hub: Lawyers are going to be looked to for strategic advice more than ever from their clients and clients might expect more time to be spent in those areas.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

01:00:12.000 --> 01:00:21.000

Sam Moore - Legaltech Hub: Since Al starts to take on some of the the research, the drafting what clients might see as lower value parts of what we do. Rightly or wrongly.

01:00:21.000 --> 01:00:31.000

Sam Moore - Legaltech Hub: In my experience. Clients don't mind paying for negotiating, strategizing, advocating for you. Those really human parts are very highly valued.

01:00:31.000 --> 01:00:34.000

Sam Moore - Legaltech Hub: And I think that will continue to be the case.

01:00:35.000 --> 01:00:38.000

Sam Moore - Legaltech Hub: In terms of technical know-how. Prompting is the main one right now.

01:00:38.000 --> 01:00:49.000

Sam Moore - Legaltech Hub: But as tools get more and more sophisticated, that might matter less. Chat. Gpt. 5, for example, is better at figuring out what the user is actually looking for.

01:00:49.000 --> 01:00:51.000

Sam Moore - Legaltech Hub: Than chat. Gpt. 4 was.

01:00:51.000 --> 01:00:56.000

Sam Moore - Legaltech Hub: Make it arguably a little less valuable for lawyers to learn to prompt right now.

01:00:56.000 --> 01:01:04.000

Sam Moore - Legaltech Hub: This, however, would presume that there's going to be a constant rate of improvements, which I think is starting to slow down in the technology.

01:01:04.000 --> 01:01:06.000

Sam Moore - Legaltech Hub: So for the immediate future at least.

01:01:06.000 --> 01:01:13.000

Sam Moore - Legaltech Hub: Understanding how to create your prompt is still very important, I think, will be for the immediate future, at least.

01:01:14.000 --> 01:01:18.000

Sam Moore - Legaltech Hub: And then finally, project management skills, I think, are going to become far more important.

01:01:18.000 --> 01:01:20.000

Sam Moore - Legaltech Hub: The reason why I think that's the case.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

01:01:20.000 --> 01:01:31.000

Sam Moore - Legaltech Hub: Is that AI is going to make how your day shakes out a little different. You might right now spend 2 h, 3 h on a single task for a single client, and put that time in.

01:01:31.000 --> 01:01:40.000

Sam Moore - Legaltech Hub: And I believe that very shortly you're going to have more. I'll spend 10 min here 10 min here, because an AI, especially an agentic. AI.

01:01:40.000 --> 01:01:47.000

Sam Moore - Legaltech Hub: Is doing various parts of work, and then you are checking in to supervise, evaluate, tell it what's next, and then move on.

01:01:47.000 --> 01:01:51.000

Sam Moore - Legaltech Hub: That constant context, switching between dozens of different clients per day.

01:01:51.000 --> 01:01:56.000

Sam Moore - Legaltech Hub: Is familiar to certain lawyers, particularly people in real estate. For example.

01:01:56.000 --> 01:02:02.000

Sam Moore - Legaltech Hub: But it's not familiar to all lawyers, and I think that is going to call for more education training around project management.

01:02:03.000 --> 01:02:05.000

Sam Moore - Legaltech Hub: Thank you. Nikki.

01:02:04.000 --> 01:02:11.000

Nikki Shaver - Legaltech Hub: Thanks, Sam. So we're going to with the time we have left move to a slightly different topic, which is adoption and change management.

01:02:12.000 --> 01:02:15.000

Nikki Shaver - Legaltech Hub: Um, this is really critical, because.

01:02:15.000 --> 01:02:23.000

Nikki Shaver - Legaltech Hub: You know, it bears saying, I think we all know this. But technology deployment in the absence of adoption is not and cannot be, transformative.

01:02:23.000 --> 01:02:28.000

Nikki Shaver - Legaltech Hub: Just having Al doesn't mean that it is going to return any kind of value.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

01:02:28.000 --> 01:02:33.000

Nikki Shaver - Legaltech Hub: You actually have to have your people using it and using it frequently.

01:02:33.000 --> 01:02:35.000

Nikki Shaver - Legaltech Hub: So.

01:02:35.000 --> 01:02:47.000

Nikki Shaver - Legaltech Hub: I think again, one of the reasons why it's important to think about this is because when Chatgpt launched, there was the sense that this is so easy to use. You just ask a question, and it magically gives an answer.

01:02:47.000 --> 01:02:49.000

Nikki Shaver - Legaltech Hub: And there was a sense that.

01:02:49.000 --> 01:02:56.000

Nikki Shaver - Legaltech Hub: We don't really need adoption anymore. We don't need to drive adoption. This is not an area where we really need to think about.

01:02:56.000 --> 01:03:02.000

Nikki Shaver - Legaltech Hub: Putting resources, and I've seen quite a few firms make this mistake over the past years, which is.

01:03:02.000 --> 01:03:08.000

Nikki Shaver - Legaltech Hub: Deploy an Al tool, and then be somewhat surprised when adoption is not what they believe. It will be.

01:03:08.000 --> 01:03:11.000

Nikki Shaver - Legaltech Hub: Um. But that's because, of course.

01:03:11.000 --> 01:03:14.000

Nikki Shaver - Legaltech Hub: Generative AI in and of itself.

01:03:14.000 --> 01:03:19.000

Nikki Shaver - Legaltech Hub: Doesn't actually work the way that lawyers work. It's intuitive, but.

01:03:19.000 --> 01:03:25.000

Nikki Shaver - Legaltech Hub: Only when we're interacting with it in a very simple way. And law is complex. It's not simple.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

01:03:25.000 --> 01:03:33.000

Nikki Shaver - Legaltech Hub: There is a great thought leader who frequently posts on Linkedin, and I encourage all of you to follow him, called Connor Grennan.

01:03:33.000 --> 01:03:49.000

Nikki Shaver - Legaltech Hub: And he talks about the adoption problem with generative AI. And he says, in the broader business world at large, we just assumed adoption would be incredibly high of generative AI, because, you know, Chat Gpt sprinted to a million users in record time.

01:03:49.000 --> 01:03:54.000

Nikki Shaver - Legaltech Hub: But in fact, he says, when you think about the way we interact with generative Al.

01:03:54.000 --> 01:04:06.000

Nikki Shaver - Legaltech Hub: It doesn't actually replace anything else that we were already doing. It feels like search. But it's actually not search. It's something brand new. It's interacting with technology in almost a human way.

01:04:06.000 --> 01:04:14.000

Nikki Shaver - Legaltech Hub: And people don't know how to do that, because they have never done anything similar to it before. It's a brand new skill which actually has to be taught.

01:04:15.000 --> 01:04:20.000

Nikki Shaver - Legaltech Hub: Similarly a Chatbot interface, though it seems simple, is actually.

01:04:21.000 --> 01:04:26.000

Nikki Shaver - Legaltech Hub: Quite anxiety provoking in some circumstances. I don't know if any of you have been confronted with this, where you have.

01:04:26.000 --> 01:04:34.000

Nikki Shaver - Legaltech Hub: A chat. Bot copilot is a good example. They did this initially where it just appears on your screen, and it says, Ask me anything.

01:04:34.000 --> 01:04:41.000

Nikki Shaver - Legaltech Hub: Well, you tell me to ask anything, and my mind immediately goes blank on anything I could possibly ask.

01:04:41.000 --> 01:04:46.000

Nikki Shaver - Legaltech Hub: You need some examples you need to understand. What is it exactly that I can ask.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

01:04:46.000 --> 01:04:49.000

Nikki Shaver - Legaltech Hub: How does this work? What sorts of responses can it provide.

01:04:49.000 --> 01:04:59.000

Nikki Shaver - Legaltech Hub: When you do not provide that guidance, you result in frustration. So I use copilot in Powerpoint, for example, and I will commonly say things like.

01:04:59.000 --> 01:05:08.000

Nikki Shaver - Legaltech Hub: Please, can you change this slide in this way, or can you please look for a picture of this type? And I inevitably get a response, saying, This is not possible.

01:05:08.000 --> 01:05:15.000

Nikki Shaver - Legaltech Hub: Well, I'm not going to use it anymore. Adoption decreases because I haven't had enough guidance around what is actually possible.

01:05:16.000 --> 01:05:26.000

Nikki Shaver - Legaltech Hub: The reality is that a chat interface is not suitable for most types of legal work, because we work in workflows, not in discrete tasks, but in chat interface.

01:05:26.000 --> 01:05:29.000

Nikki Shaver - Legaltech Hub: Is really about one discrete task at a time.

01:05:29.000 --> 01:05:38.000

Nikki Shaver - Legaltech Hub: All of this to say, driving adoption remains critical, even though we think what we have is technology that is much easier than ever before.

01:05:38.000 --> 01:05:40.000

Nikki Shaver - Legaltech Hub: In terms of adoption.

01:05:40.000 --> 01:05:51.000

Nikki Shaver - Legaltech Hub: So there are a number of things when you're thinking about adoption, that you can do. Some of those operate on the pre-deployment side where, actually, your selection of technology is really critical.

01:05:51.000 --> 01:06:03.000

Nikki Shaver - Legaltech Hub: Others happen on the post deployment side, where once you have selected technology and you start to develop your pilot and deploy and then drive adoption with training, and so on.

01:06:03.000 --> 01:06:10.000

Nikki Shaver - Legaltech Hub: Um. There are other methodologies that become really relevant. I'm just seeing actually, Michele, that we are at.



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#### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

01:06:10.000 --> 01:06:31.000

Nikki Shaver - Legaltech Hub: 1157, and I'd rather not skip over these, because I think they're really critical. So I'm going to suggest we pause there since we covered the main topic for today around learning and education. And just see in the remaining moments, if anyone has any questions and we can bring the adoption piece into our next session.

01:06:32.000 --> 01:06:38.000

Michele | SCG Legal: Oh, that's great! Thank you. I haven't seen any questions in the chat, but you're welcome to unmute yourself or throw one in there.

01:06:38.000 --> 01:06:40.000

Michele | SCG Legal: Anybody.

01:06:45.000 --> 01:06:47.000

Michele | SCG Legal: And hearing Nandi.

01:06:47.000 --> 01:06:53.000

Michele | SCG Legal: Have 60 seconds left of anything you want to share about what's coming next, and then I'll come back on.

01:06:54.000 --> 01:07:00.000

Nikki Shaver - Legaltech Hub: We do have just one session left. So one thing that I would throw out to people is.

01:07:00.000 --> 01:07:02.000

Nikki Shaver - Legaltech Hub: If there are things that.

01:07:02.000 --> 01:07:08.000

Nikki Shaver - Legaltech Hub: You really would like to know things that you would like to have covered, that we haven't yet covered in the program.

01:07:08.000 --> 01:07:13.000

Nikki Shaver - Legaltech Hub: Please send them to Michele and Alina, and we will happily.

01:07:13.000 --> 01:07:16.000

Nikki Shaver - Legaltech Hub: Try to incorporate that into our final session.

01:07:16.000 --> 01:07:21.000

Nikki Shaver - Legaltech Hub: Um also, as always. If you have questions for myself or for Sam.



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### Transcription Summary (Author: CoPilot) + Raw Transcription (Author: Zoom)

01:07:21.000 --> 01:07:34.000

Nikki Shaver - Legaltech Hub: Very happy to work with anyone and speak to anyone. Offline, separate to these sessions, and finally, I will just reiterate again, as well that by virtue of being members of Scg. Legal.

01:07:34.000 --> 01:07:46.000

Nikki Shaver - Legaltech Hub: All of you are entitled to a discount on Lth premium, which is a resource you can use for self-serve learning. We write about these topics all the time, and we have a lot of useful content on the site.

01:07:46.000 --> 01:07:50.000

Nikki Shaver - Legaltech Hub: So please do reach out to us. If you're interested in exploring a subscription.

01:07:51.000 --> 01:08:05.000

Michele | SCG Legal: Perfect. And I will highlight some of those things in our post meeting email which will also include today's recording and maybe even a transcript because I did try the AI companion with this meeting, so we'll see how it goes. So uh Nikki.

01:08:05.000 --> 01:08:26.000

Michele | SCG Legal: And Sam. Thank you both for another great session with practical AI application, tips and information so obviously no questions at this time, but our next meeting, as um, we spoke about is November 19 from 11 to noon, Eastern time, and it focuses on prompting and prompting and building. But, as Nikki said. If there's something else that you'd like us to focus on, do let me know.

01:08:26.000 --> 01:08:30.000

Michele | SCG Legal: And if you don't have the meeting on your calendar also, let me know.

01:08:30.000 --> 01:08:35.000

Michele | SCG Legal: So I should have that that email out to you all no later than Monday, and thank you for your time and attention today.

01:08:35.000 --> 01:08:37.000

Michele | SCG Legal: Appreciate it.

01:08:36.000 --> 01:08:38.000

Nikki Shaver - Legaltech Hub: Thanks. Everyone.

01:08:37.000 --> 01:08:39.000

Sam Moore - Legaltech Hub: Thank you.