

IOWA DEFENSE COUNSEL ASSOCIATION · 62ND ANNUAL MEETING · SEPTEMBER 11, 2026

Are Lawyers Obsolete?

Advances in Use of Artificial Intelligence in Defending Your Clients

What has to exist before AI is any use on a real file

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ANSWERING THE TITLE, FIRST

No. And here are the three things I actually hear.

OBJECTION ONE

“I don’t need it. Thirty years in.”

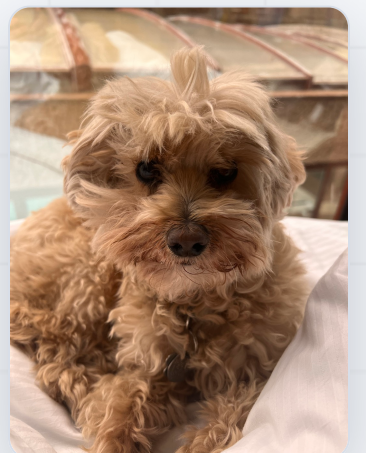
OBJECTION TWO

“It makes things up.”

OBJECTION THREE

“It forgets who I am.”

All three are fair, and all three are correct as stated. **This hour is three answers.**



OBJECTION ONE · STIPULATED

AI is a very good word generator. That is the least of it.

If you are already drafting with it, you know that, and it is genuinely impressive. It is also the only thing anybody has ever demonstrated to you, which is exactly why the objection exists.

So let me stipulate to the drafting and ask something else. Do you know what is happening in your cases right now?

OBJECTION ONE, ANSWERED · THE HALF NOBODY MENTIONS

Managing partners: right now, without calling anyone, what stage is every open matter at, who is on it, and what is due this week?

> /matter-update █

Delgado v. Ridgeline Freight · plaintiff depo Tue 9:00

Vance Properties premises claim · site inspection Thu

Cortland Mfg product claim · expert disclosure Fri

Summit Medical Center · records affidavit due Wed

Harmon Realty dispute · demurrer hearing Fri 8:30

Ackerman adverse action claim · position statement out today

6 active matters · every deadline this week included

ONE SAVED COMMAND, WRITTEN ONCE AND NAMED · IT READS THE MATTER FOLDERS THE FIRM ALREADY HAS

That is every matter, current. In the time it took me to ask the question.

OBJECTION TWO, ANSWERED · WHERE IT IS COMPLETELY TRUE

Hallucination is a word-prediction problem

NOTHING IN FRONT OF IT

“Find me cases holding X.” It produces what a citation looks like, because that is the most plausible thing to come next.

YOUR DOCUMENTS IN FRONT OF IT

“Here are the depositions. Identify every statement about when the roof was inspected.” Pinned to the text, and checkable.

I do not recommend it for legal research. If you use it there, you read every case, every time.

THE WORD YOU HAVE HEARD ALL CONFERENCE

An agent is a set of files, and permission to act on them

WHAT YOU ARE BEING SOLD

Agentic. Autonomous. It runs the practice while you sleep.

WHAT IS ACTUALLY IN THE BOX

Files it reads. An account that decides what it can open. The model underneath is the same one everybody rents.

Ask a vendor two questions. **What does it read, and what is it allowed to open?**

The infrastructure is a set of plain files

- 01

About the firm
Who you are, where you practice, the rules you follow.
- 02

Writing standards
How your documents sound, including what you refuse to say.
- 03

Playbooks
How your firm runs a task, the same way every time.
- 04

A knowledge base per matter
Posture, parties, the dispute, what is open. That is the one building on the right.

> reading about_the_firm.md

0 of 4 loaded

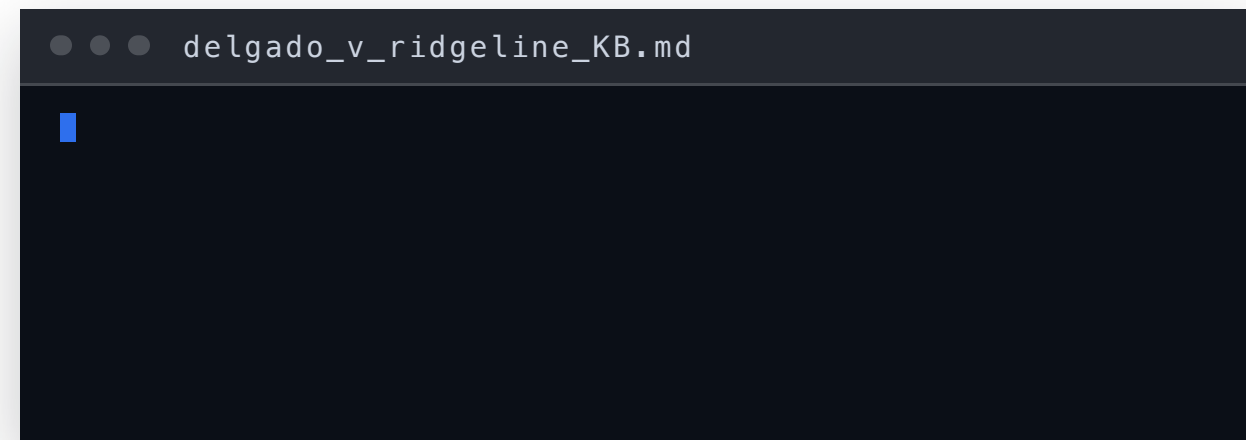


THE TWO THAT MATTER MOST

One holds the case. One holds the standard.

01 · CASE KNOWLEDGE BASE

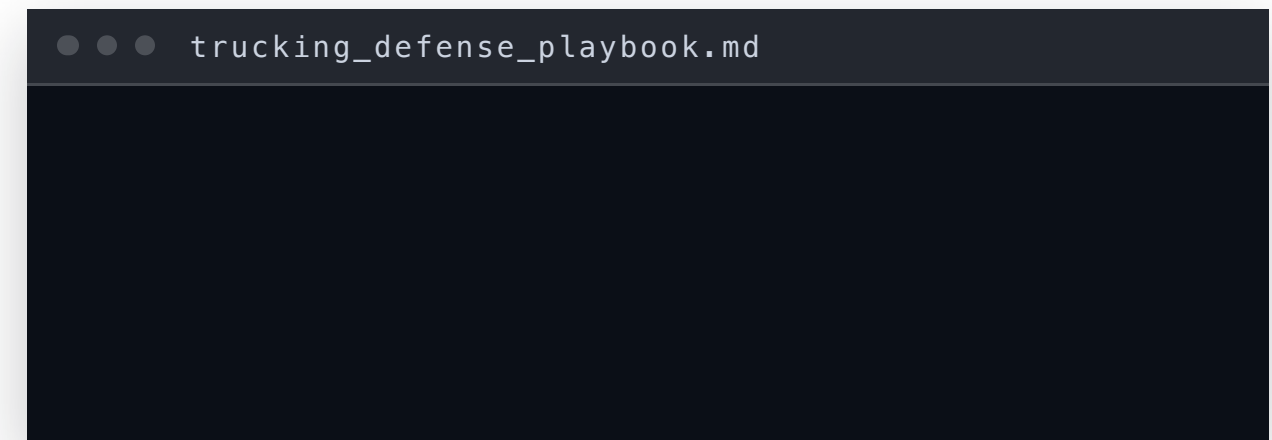
One per matter.



● UPDATED TODAY · CHANGES CONSTANTLY

02 · PLAYBOOK

One per practice area.



● UNCHANGED SINCE MARCH · HOLDS STILL

One moves with the case. The other one holds still on purpose.

WHY THIS YEAR

From one lawyer in a chat window to a team on one file

SINGLE PLAYER

One chat history. It dies with the tab.

MULTIPLAYER

One set of files. Every tool reads the same context.

Write it down this year. [The next wave of tools will need it written.](#)

WHY THE LOCATION MATTERS AS MUCH AS THE CONTENT

Plain text, in the shared drive the whole firm already opens

Claude

THE PROGRAM ON TOP, WHICHEVER ONE IT IS

Your infrastructure, unchanged

OneDrive, SharePoint, Dropbox, whatever you already pay for. **Six people can work the same file on the same day.**

THE LAYER ON TOP

Your team already has somewhere to reach the context

ON YOUR OWN MACHINE

Reads a folder. The shared drive is the input.

IN SLACK

Tag it. It answers with firm context.

ALLY, IN OUR TEAMS

Tagged like a colleague. Silent until called.

Three front doors. Each one only as good as the files underneath.

BEFORE WE GO FURTHER

I just told you to point an agent at your matter files. So what governs the data?

FIVE TRIAL COURTS SINCE EARLY 2026 • THREE FEDERAL, TWO STATE

Privilege and work product turned on which tool you used

WHERE CONFIDENTIALITY FAILED

A consumer account, no attorney direction, under terms permitting training and disclosure to third parties.

WHAT THE COURT ACTUALLY ASKED

Retention, training, and who else gets to see it.

You have had this argument about email and about the cloud. The answer was never stop. It was read the contract.

WHAT THE CONTEXT LAYER CANNOT DO FOR YOU

Teach the agent your policy. It still inherits your permissions.

You would never screen a lateral by asking them not to open the file. **Do not screen an agent that way either.**

B A A · BUSINESS ASSOCIATE AGREEMENT

HIPAA has a paperwork requirement. Plenty of firms never need it.

YOU NEED ONE WHEN

Your client is a covered entity. Med-mal, hospital, clinic work.

EVERYONE ELSE

No BAA. Rule 1.6 still covers every file you hold.

A floor under one kind of data. [How far above it you sit is yours.](#)

VERIFIED SEPTEMBER 2026 · RE-CHECK BEFORE YOU RELY ON IT

All four will sign. Each draws the line somewhere different.

MICROSOFT

E3, E5, Business Premium. Web search sits outside.

OPENAI

Enterprise, yes. Business, despite the name, no.

GOOGLE

Gemini in Workspace, on certain plans.

ANTHROPIC

Chat and projects. Cowork never.

They all sign. Ask for the covered list, then count what your people actually use.

THE ENFORCEMENT VERSION

Split the work by folder, rather than by platform

THE RECORDS FOLDER

One assistant's account can open it. The other one cannot.

EVERYTHING ELSE

No health information, so it stays open to whichever program does that job best.

An agent cannot read what its account cannot open. That is a wall. An instruction is not.

PART FOUR

That is the foundation, and the whole team can reach it. So what does a firm actually build on top of it?



TWO INPUTS, AND ONLY ONE OF THEM IS PUBLISHED

The standards they cut you on never appear in the guidelines they gave you

CARRIER BILLING GUIDELINES

Published, and different at every carrier.

YOUR OWN BILLING RECORDS

What they actually cut. Where the unwritten rules live.

We searched all thirty-eight pages for the words they cut us on. **Boilerplate, aggregate, nominal: zero hits.**

WHAT WE BUILT · TWO GATES

Read the pre-bill against that carrier's rules before anyone sees it

LIKELY TO PASS

Nothing fires.

WORTH A SECOND LOOK

Turns on facts only the biller knows.

UNLIKELY TO BE PAID AS WRITTEN

This carrier has cut this pattern before.

It never tells you whether to bill. **That stays yours.**

BOTH ATTORNEY WORK · ILLUSTRATIVE, FROM REAL DEDUCTION REPORTS

The carrier wants to know what came out of the work

ZEROED · CALLED CLERICAL

“Review file for objections to subpoena.”

NOT ADJUSTED

“Review/analyze claim file, identify relevant parties and information, to support preparation of trial subpoenas.”

One describes a check. **The other says what the check produced.**

THE WRITING-STANDARDS FILE

We read 33 of his coverage letters and wrote down how he writes

Three days a letter became six and a half hours. [And he stopped discounting his own bills.](#)

A SELF-INSURED CLIENT'S COMPLIANCE PORTAL

When a system has no way in, you build the bridge yourself

WHAT THE PORTAL ALLOWS

Every narrative typed by hand. Nothing in, nothing out.

WHAT WE BUILT

One shared file. The portal gets filled from it.

Nobody will build a connector for one client's portal. You do not have to wait for one.

WHAT IT REFUSES TO DO

A chronology in your format, and proof it read the file

PROOF OF READING

Quotes three pages back, verbatim, before writing a row.

RECONCILED

Every page accounted for, or it rebuilds.

CONTAINED

Four people, read-only, logged.

It records what the chart says. **No causation. No liability. No opinion.**

THREE OTHER FIRMS

What else it has paid for

CAPTURED TIME

3.7 hours recovered from three days' work.

NOVEL THEORIES

Seven to eight, from the record and the law.

INTAKE

Six questions answered up front. Turnaround halved.

Different practices. One context layer underneath all of it.

THE WHOLE ARGUMENT

Your firm already has the data. The work is reaching it.

- 01 **Visibility across every matter.**
- 02 **A summary a partner can act on.**
- 03 **Time captured where it was earned.**
- 04 **Every entry checked against that carrier's rules.**

Measure before you buy.

STEP ONE, THE VERSION YOU CAN RUN YOURSELF

Four questions, before you buy anything

01

What admin work are you doing that you are not getting paid for?

02

What is the thing you personally dread doing every single week?

03

Where are you entering the same information in more than one place?

04

What could you learn from your own data that nobody has ever analyzed?

Notice none of them is “can AI write this email.” **Measure before you build, and before you buy.**

NONE OF THIS REQUIRES BUYING ANYTHING

Four things you can start Monday

- 01 **Draft the knowledge base on one matter. Correct it.**
- 02 **Five documents of one type. Draft the playbook.**
- 03 **Open your matter drive. See who can reach what.**
- 04 **Give it data you already have. Ask for the pattern.**

BACK TO THE QUESTION IN THE TITLE

AI makes you a better lawyer

- 01 You see every matter and what is due.
- 02 The newest person works to your standard from day one.
- 03 Whoever picks up a matter starts current.
- 04 Your time goes to judgment.

It is here, your clients are using it, and so are your competitors. Choose the right tool and it makes you a better lawyer.

THANK YOU

THANK YOU

Questions, and where to find me

Reach out through the code and I will send you these slides, along with an example knowledge base and an example playbook you can adapt to your own matters.



SCAN IT, OR TYPE IT
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