



# *From* INTAKE TO RESOLUTION

Mastering the Case Lifecycle with AI



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Mastering the Case Lifecycle with AI



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11:30am CT

Handle every phase of a case with confidence while using AI tools to work smarter, faster and more effectively!



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Attorney and Law Professor

# WELCOME *&* INTRODUCTION

## 01 **Welcome**

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What we'll cover and why it matters

## 02 **Today's journey**

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Walking through the complete case lifecycle

## 03 **Promise**

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Practical AI integration at every step

## 04 **Q&A**

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Interactive session and wrap-up

# TODAY'S *learning* OBJECTIVES



Understanding Every Case Phase



Managing Multiple Cases



AI Tools for Your Daily Work



Becoming an Essential Team Player



# WHY THIS MATTERS *now*

01 The evolving legal landscape

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02 Technology as a competitive advantage

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03 The paralegal role transformation

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04 Setting yourself apart in today's market

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# 01. THE CASE LIFECYCLE

## *Overview*

# THE UNIVERSAL CASE *journey*

The Seven Core Phases

*phase 1*

Initial Contact & Intake

*phase 2*

Case Assessment & Acceptance

*phase 3*

Discovery & Investigation

*phase 4*

Pre-Trial Preparation

*phase 5*

Trial/Hearing/Negotiation

*phase 6*

Resolution & Settlement

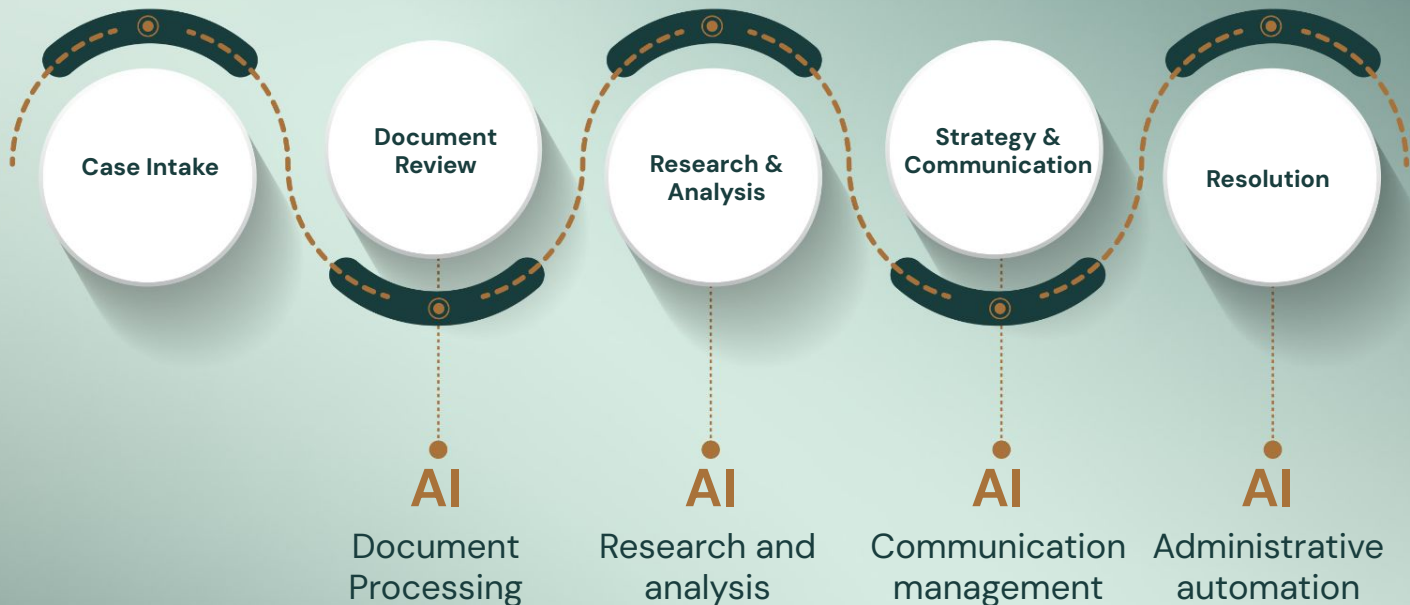
*phase 7*

Post-Resolution & Closure

# THE PARALEGAL'S *evolving role*

- Traditional responsibilities at each phase
- How technology enhances (not replaces) your work
- Becoming a strategic partner vs. task executor

# WHERE AI *fits in*



## 02.PHASE-BY-PHASE

*Deep Dive*



# *phase 1* INITIAL CONTACT & INTAKE

## TRADITIONAL TASKS

- Phone/email screening
- Conflict checks
- Initial documentation
- Appointment scheduling

*vs*

## AI ENHANCEMENT OPPORTUNITIES

- Automated intake forms
- Smart conflict checking systems
- Transcription tools for client calls
- Intelligent scheduling assistants

# *phase 2*

# CASE ASSESSMENT & ACCEPTANCE

## TRADITIONAL TASKS

- Document collection
- Initial case evaluation support
- Retainer agreement preparation
- File setup

*vs*

## AI ENHANCEMENT OPPORTUNITIES

- Document classification tools
- Case strength assessment algorithms
- Template generation and customization
- Automated file organization systems

# *phase 3* **DISCOVERY & INVESTIGATION**

## TRADITIONAL TASKS

- Document review and organization
- Deposition summaries
- Discovery request drafting
- Evidence management

*vs*

## AI ENHANCEMENT OPPORTUNITIES

- E-discovery platforms
- Automated document review
- Deposition analysis tools
- Smart evidence cataloging



# *phase 4* PRE-TRIAL PREPARATION

## TRADITIONAL TASKS

- Motion drafting support
- Exhibit preparation
- Witness coordination
- Trial notebook assembly

*vs*

## AI ENHANCEMENT OPPORTUNITIES

- Legal research assistants
- Motion and brief drafting tools
- Exhibit management systems
- Witness preparation aids

# *phase 5* **TRIAL/HEARING/NEGOTIATION**

## TRADITIONAL TASKS

- Real-time support
- Document retrieval
- Note-taking
- Communication coordination

*vs*

## AI ENHANCEMENT OPPORTUNITIES

- Real-time transcription
- Instant document search
- Digital trial presentation tools
- Communication management platforms

# *phase 6* **RESOLUTION & SETTLEMENT**

## TRADITIONAL TASKS

- Settlement documentation
- Calculation verification
- Distribution preparation
- Client communication

*vs*

## AI ENHANCEMENT OPPORTUNITIES

- Document classification tools
- Case strength assessment algorithms
- Template generation and customization
- Automated file organization systems

# *phase 7* **POST-RESOLUTION & CLOSURE**

## TRADITIONAL TASKS

- File closure procedures
- Document retention
- Final accounting
- Client satisfaction follow-up

*vs*

## AI ENHANCEMENT OPPORTUNITIES

- Automated file closure checklists
- Digital archiving systems
- Accounting integration
- Feedback collection tools

# 03. PRACTICAL AI

## *tools & implementation*

# CATEGORIES OF AI TOOLS *for paralegals*

- Document management systems
- Legal research platforms
- Communication tools
- Project management software
- Specialized legal AI

# DOCUMENT *management* AI

## TYPES OF TOOLS

- OCR and text extraction
- Document comparison
- Contract analysis
- Citation checking

## PRACTICAL APPLICATIONS

- Converting scanned documents
- Identifying changes in contracts
- Extracting key terms
- Ensuring citation accuracy

# RESEARCH & ANALYSIS AI

## TYPES OF TOOLS

- Legal research databases with AI
- Case law analysis
- Statute tracking
- Regulatory monitoring

## PRACTICAL APPLICATIONS

- Finding relevant precedents
- Summarizing complex cases
- Tracking law changes
- Compliance updates

# COMMUNICATION & COLLABORATION AI

## TYPES OF TOOLS

- Email management
- Client portals
- Team collaboration platforms
- Transcription services

## PRACTICAL APPLICATIONS

- Email prioritization
- Secure client communication
- Team coordination
- Meeting documentation



# GETTING *started* WITH AI

- Start small: Pick one tool or process
- Evaluate your current pain points
- Consider integration with existing systems
- Build skills progressively
- Document your wins

# 04. MANAGING *Multiple Cases*



# THE MULTIPLE-CASE *challenge*


- Common paralegal reality: 20–50+ active matters
- Where errors typically occur
- The cost of inefficiency

# SYSTEM THAT *scale*

- Master calendar management
- Standardized file organization
- Checkpoint procedures
- Priority matrices

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## Manual Systems:

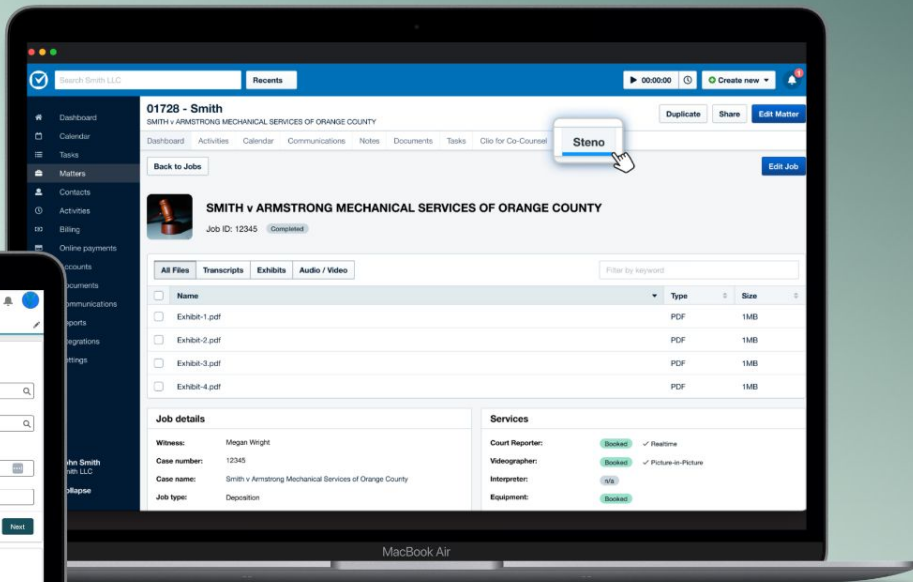
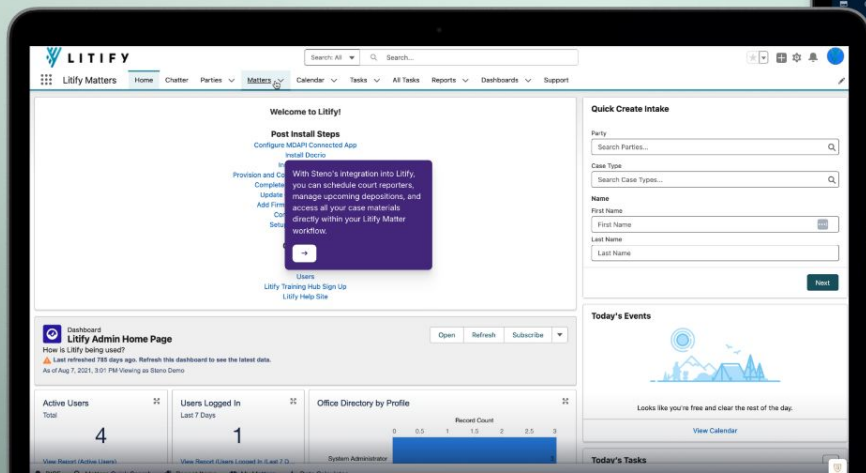
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- Automated deadline calculation
  - Smart reminders and alerts
  - Predictive scheduling
  - Workload analytics

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## AI-Enhanced Systems:



# CASE MANAGMENT *dashboards*



# PREVENTING *dropped balls*

- Automated task generation
- Redundant reminder systems
- Team visibility tools
- Escalation protocols
- Regular audit procedures



# QUALITY CONTROL *at Scale*

- Standardized templates
- Automated quality checks
- Peer review systems
- Error pattern recognition
- Continuous improvement loops

# 05. BECOMING AN ESSENTIAL *Team Player*

# ANTICIPATING *attorney needs*

## TRADITIONAL APPROACH

Reactive task completion

Waiting for instructions

Limited initiative

## AI-ENHANCE APPROACH

Predictive task preparation

Proactive research

Initiative with backup data

Solution-oriented communication

# ADDING *Strategic Value*

- Identifying patterns across cases
- Suggesting process improvements
- Bringing efficiency solutions
- Contributing to case strategy
- Building institutional knowledge



# COMMUNICATION *Excellence*

- Status updates before they're requested
- Problem + solution presentations
- Data-driven recommendations
- Clear, concise reporting
- Managing up effectively

# BUILDING YOUR *Professional* BRAND

- Becoming the go-to expert
- Developing specialized skills
- Leading technology adoption
- Mentoring others
- Contributing to firm innovation



# KEY *Takeaways*

- Every phase offers AI enhancement opportunities
- Start with your biggest pain points
- Build systems that scale
- Focus on adding strategic value
- Technology amplifies good processes

# YOUR *Action Plan*

## THIS WEEK

- Identify your top 3 time-consuming tasks
- Research one AI tool

## THIS MONTH

- Implement one new tool or process
- Document the results

## THIS QUARTER

- Expand successful implementations
- Share learnings with your team

# RESOURCES FOR CONTINUED *learning*

- Recommended AI tools for beginners
- Professional development opportunities
- Industry associations and communities
- Certification programs
- Continued education resources



# FINAL *thoughts*

- The future of paralegal work
- Embracing change as opportunity
- Your competitive advantage
- The importance of continuous learning

Q & A



# CONTACT & CONNECT

Check out Steno's Paralegal Playbooks:

- Your Strategic 90-Day Action Plan
- Trial Excellence: A Strategic Guide
- How to Make the Case for New Technology at your firm

Available at: [steno.com/resources](https://steno.com/resources)



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Thank You