



Smart Collaboration

HOW TECHNOLOGY CAN SUPPORT FAMILIES THROUGH SEPARATION



Nathan Lee

"We help lawyers turn
technology into business value."

Nathan Lee is a business owner, mentor, and speaker
dedicated to empowering legal professionals with
proven methods to modernize their practice with
technology that delivers results.



EMPOWERING LEGAL
PROFESSIONALS WITH AI

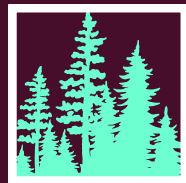
ABOUT US

Origin.

Origin GRC is a forward-thinking consulting firm that helps modernize law firms.



Strategic
Growth



Operational
Excellence



Client
Satisfaction

RORIGINGRC.COM.COM



Modern Lawyer

Modern Lawyer initiative focuses on professional development, digital literacy, and educational content.

✓ Webinars

✓ Workshops

✓ Courses





Welcome to:

How Technology Can Support Families Through Separation

“Today is about how AI and technology can **reduce confusion, repetition, and administrative burden** — so professionals can **spend more time supporting people.**”

Agenda

01

Introduction to AI

What's happening with AI in the industry.

02

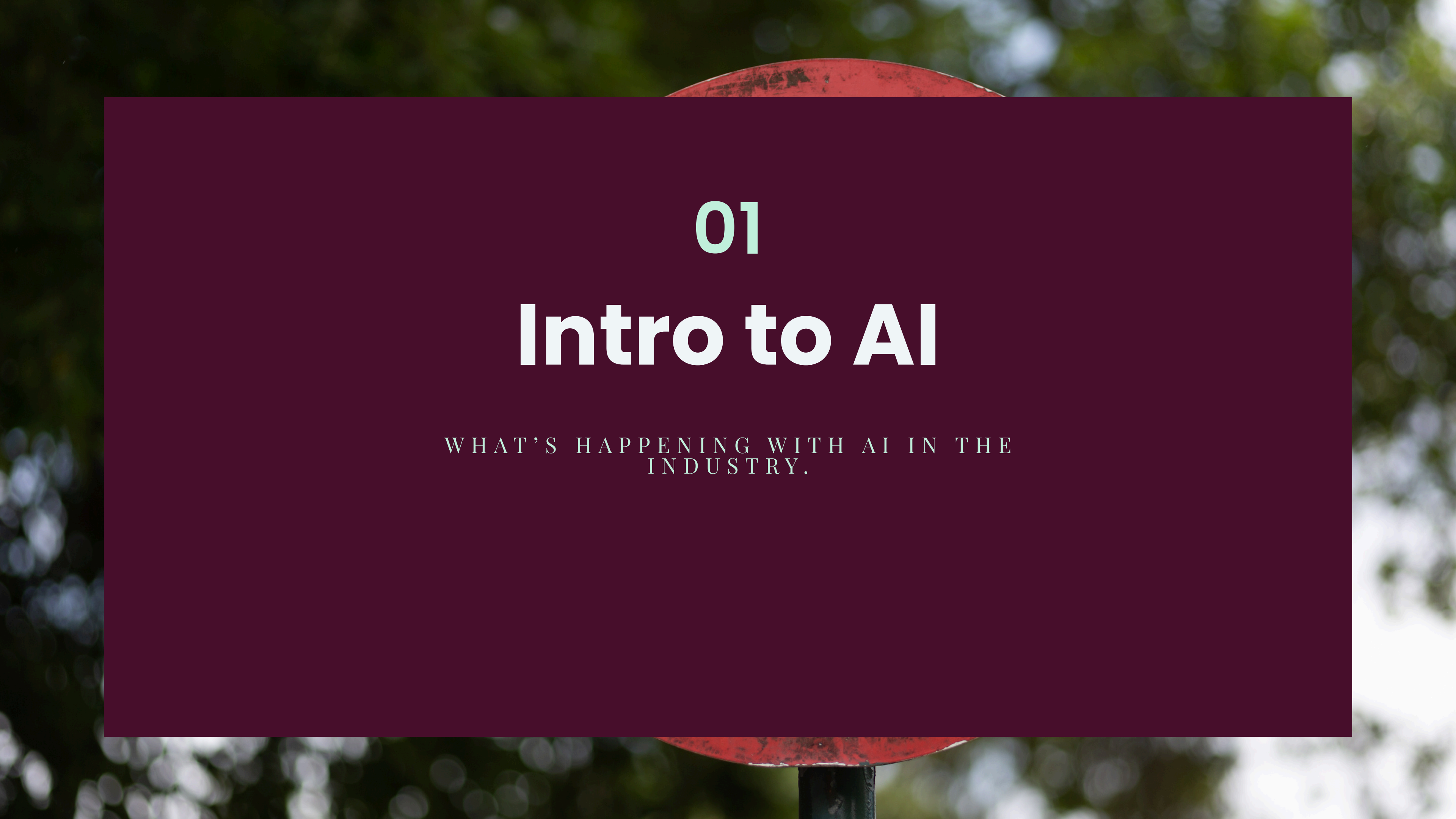
Ethics & Guardrails

How to protect your clients and your firm as you apply technology.

03

6 Practical Use Cases

6 areas to getting started with legal tech collaboration and automation tools.



01

Intro to AI

WHAT'S HAPPENING WITH AI IN THE
INDUSTRY.

AI STATUS

”

“Simply adopting AI will not transform your firm; it must be integrated into your firm.”

1

AI is just a tool

2

AI has many limitations

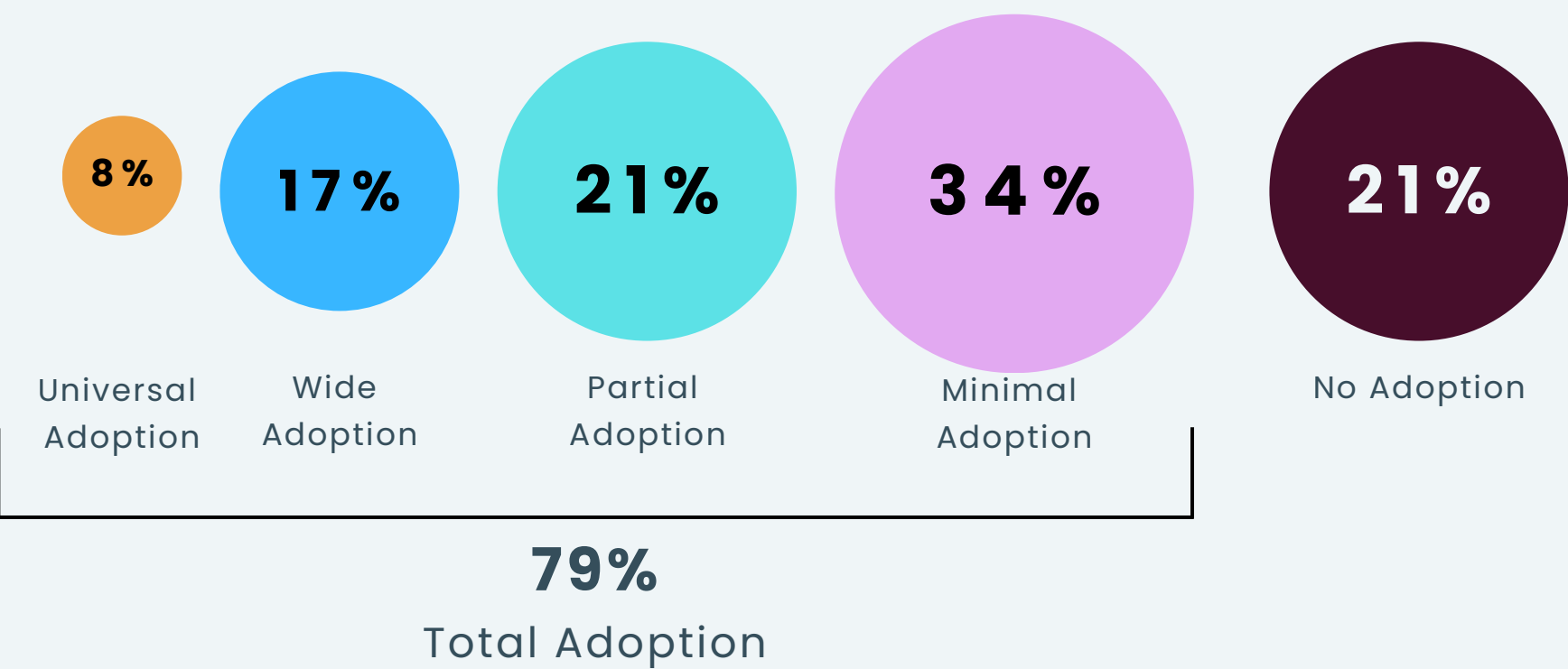
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AI requires time



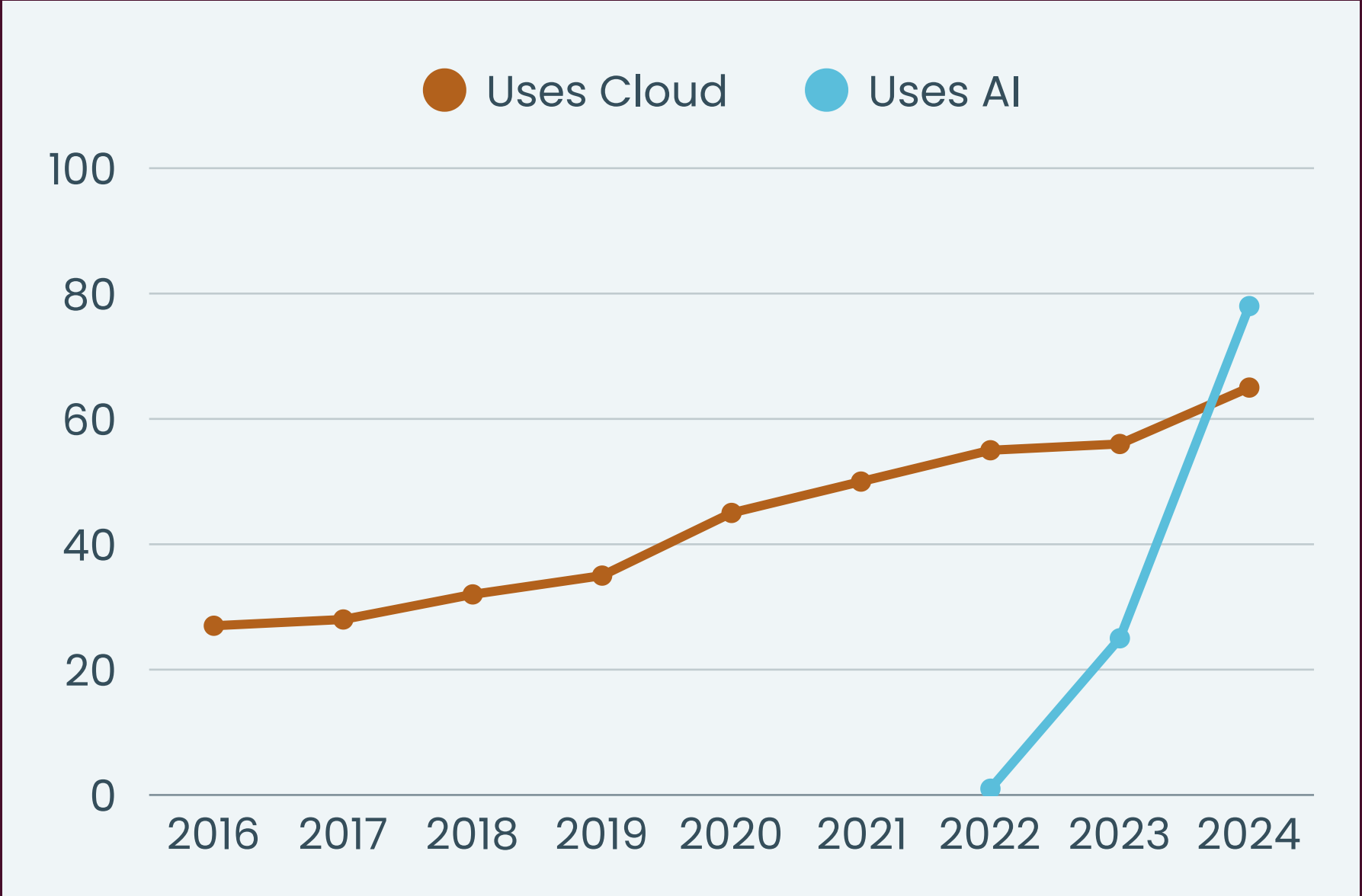
Rise of AI Tech Adoption

AI Adoption Levels



ABA & LTR by Clio Data Source

CLOUD VS AI ADOPTION



AI in Plain English

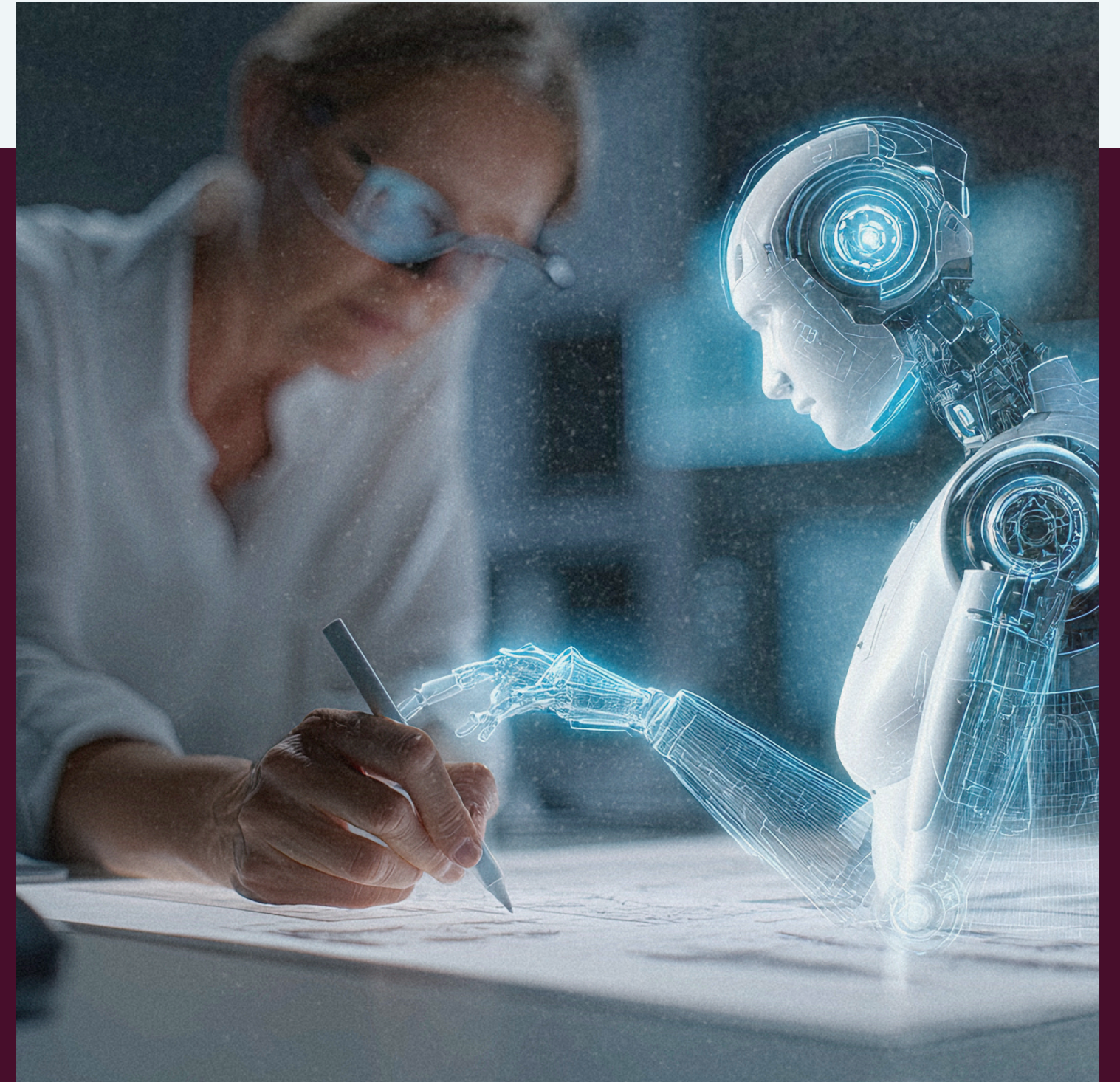
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What AI is.

Software designed to organize, summarize, and emphasize information is particularly effective for managing repetitive administrative tasks.

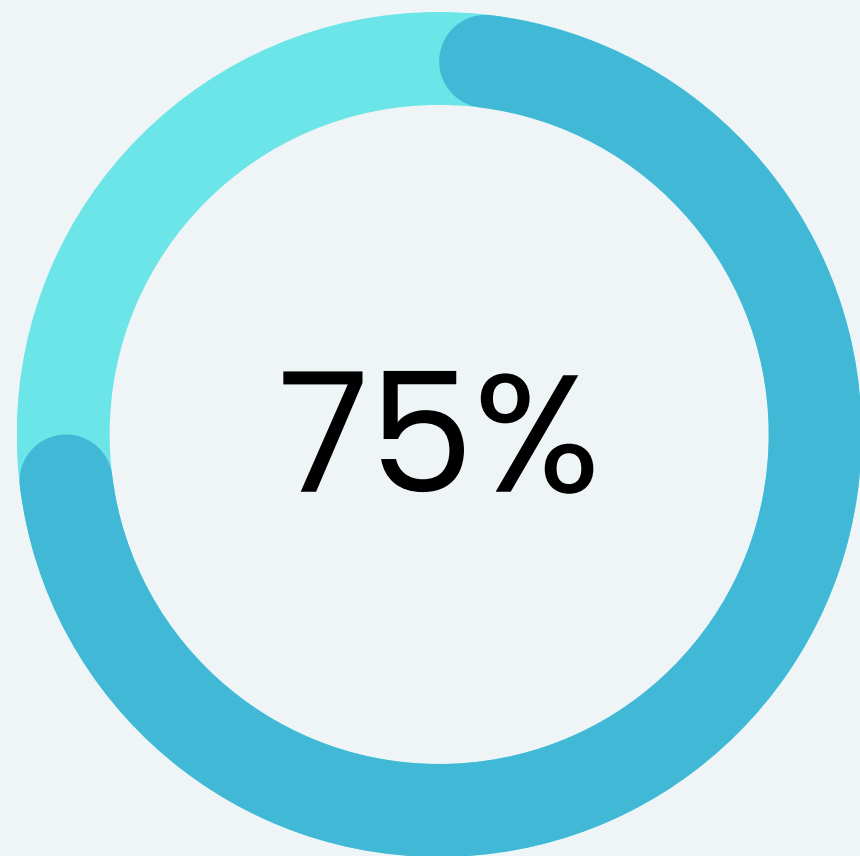
What AI is Not.

It does not substitute for professional judgment. It doesn't determine custody or settlement decisions. It cannot grasp emotions or context in the same way humans do.



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Of hourly **billable work**
could be **automated** by AI



Firms with **above-average**
productivity:

- Spend **12%** more on software
- Spend **41%** more on marketing
- Earn **21%** more on profitability

AI in Plain English

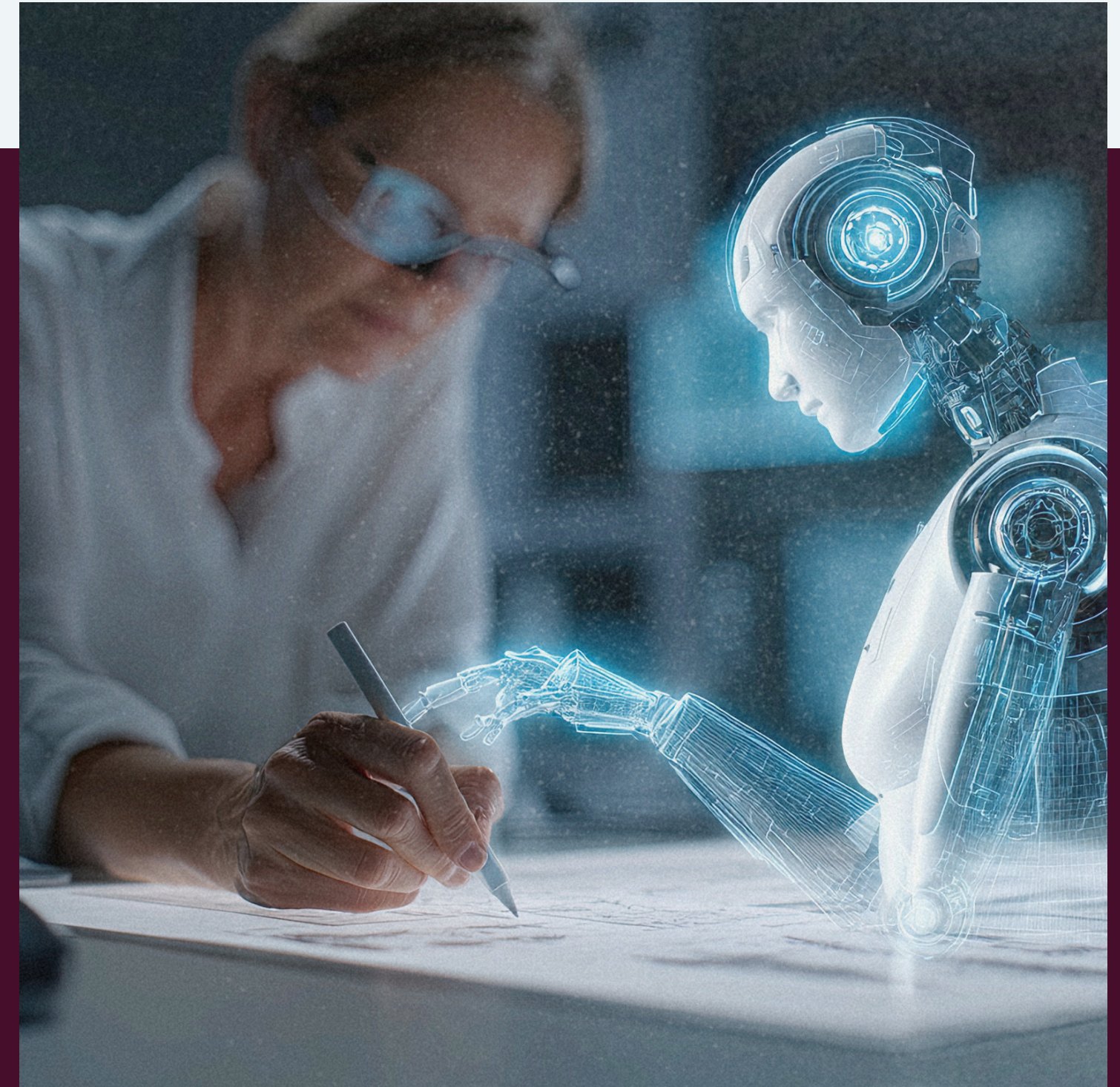
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AI in Divorce Work

- ✓ Volume of information
- ✓ Complexity of coordination
- ✓ Transactional work
- ✓ Standard forms and documents

Clients Perception

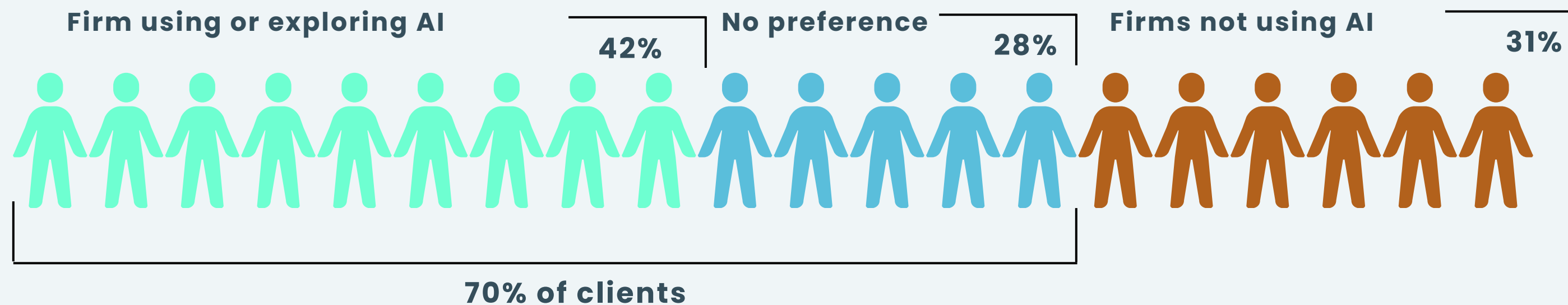
- ✓ Less Time | Faster Turn Around
- ✓ More Accuracy
- ✓ More Chance for Hallucinations
- ✓ Less Judgement
- ✓ More Transparency



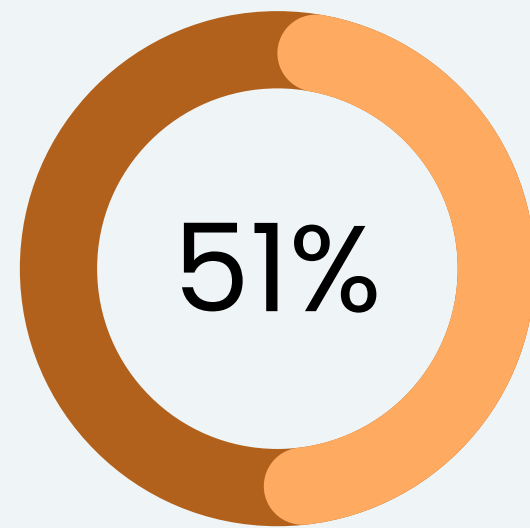
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If you were looking to hire a firm which would you prefer?

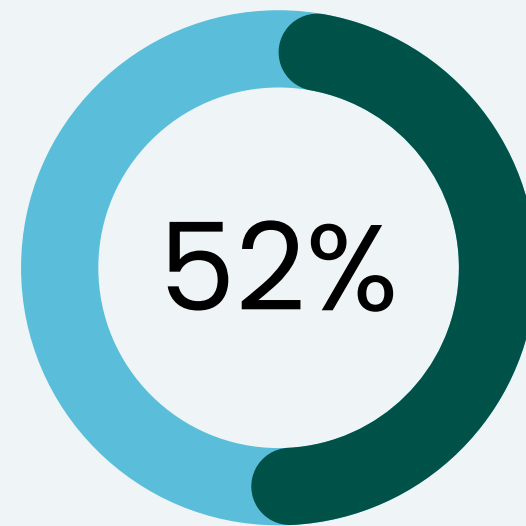
Client preferences on AI usage



Firms using technology – namely, **online schedules, online search ads, and online intake forms** – to enhance client experience have



More client leads



More revenue

Where does AI fit in your practice?

01.

ASSITIVE AI

02.

AUTONOMOUS AI

03.

REACTIVE AI

04.

PROACTIVE AI

05.

AGENTIC AI

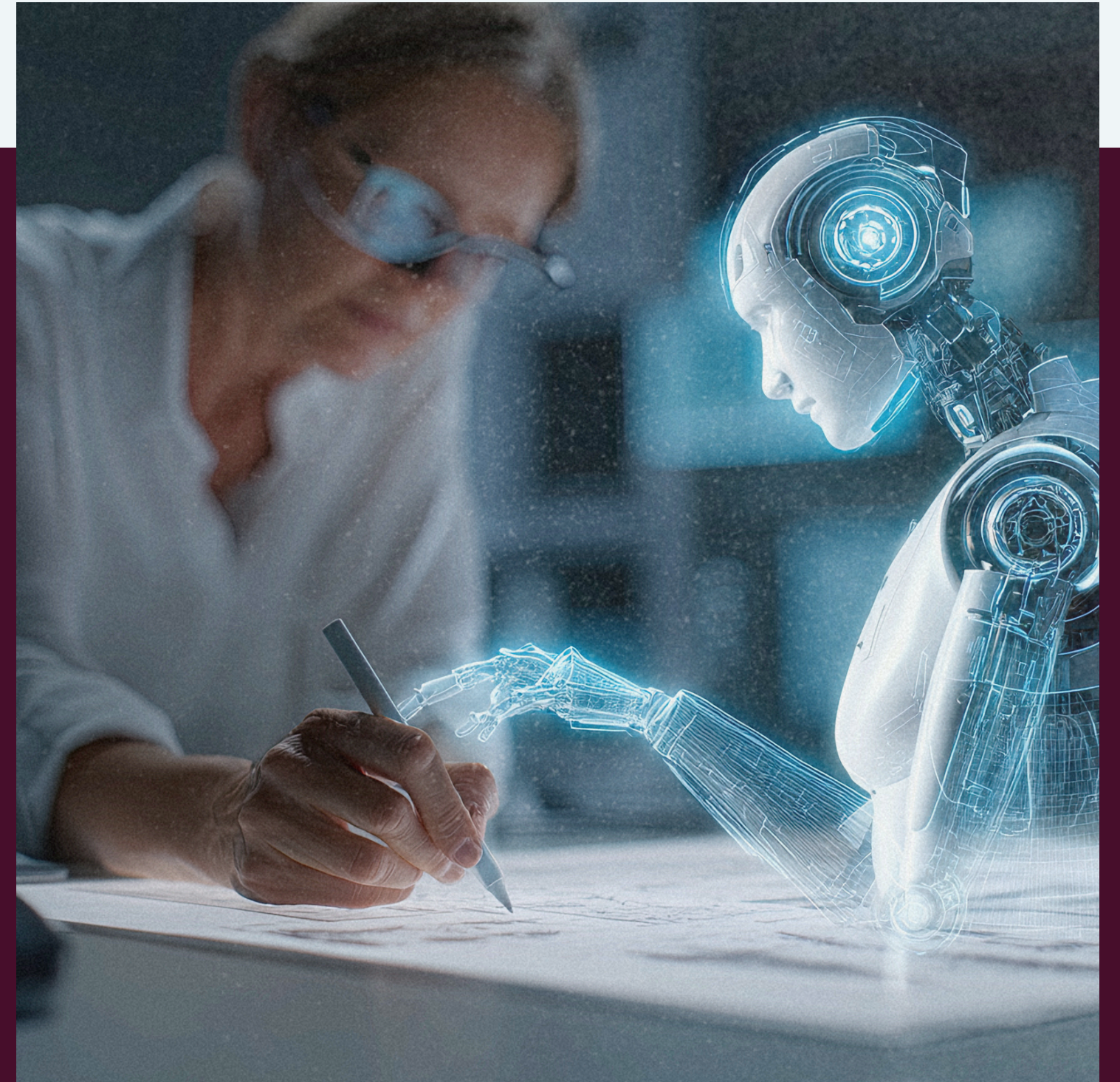
ASSISTIVE AI

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Makes Suggestions

summarize documents, analytics or automate repetitive tasks.

- ✓ Enhances human decision-making
- ✓ Requires user input
- ✓ Supports legal workflows
- ✓ Improves task efficiency



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AGENTIC AI

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Act On Behalf of User

case prep or due diligence, copilot agents

- ✓ Pursues defined goals
- ✓ Plans and adapts actions
- ✓ Automates multi-step tasks
- ✓ Requires strong governance



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02

Ethics & Guardrails

HOW TO PROTECT YOUR CLIENTS AND YOUR
FIRM AS YOU APPLY TECHNOLOGY.

QUOTE

“The biggest risk of artificial intelligence is that people conclude too early that they understand it.”

- Eliezer Yudkowsky -

ETHICS & GUARDRAILS

”

“The biggest risk of artificial intelligence is that people conclude too early that they understand it.” .

-
- 1 Compliance
 - 2 Due Diligence
 - 3 Guardrails



What to watch out for

Unanticipated
spread of
confidential
information

Hallucinations
and inaccurate
information

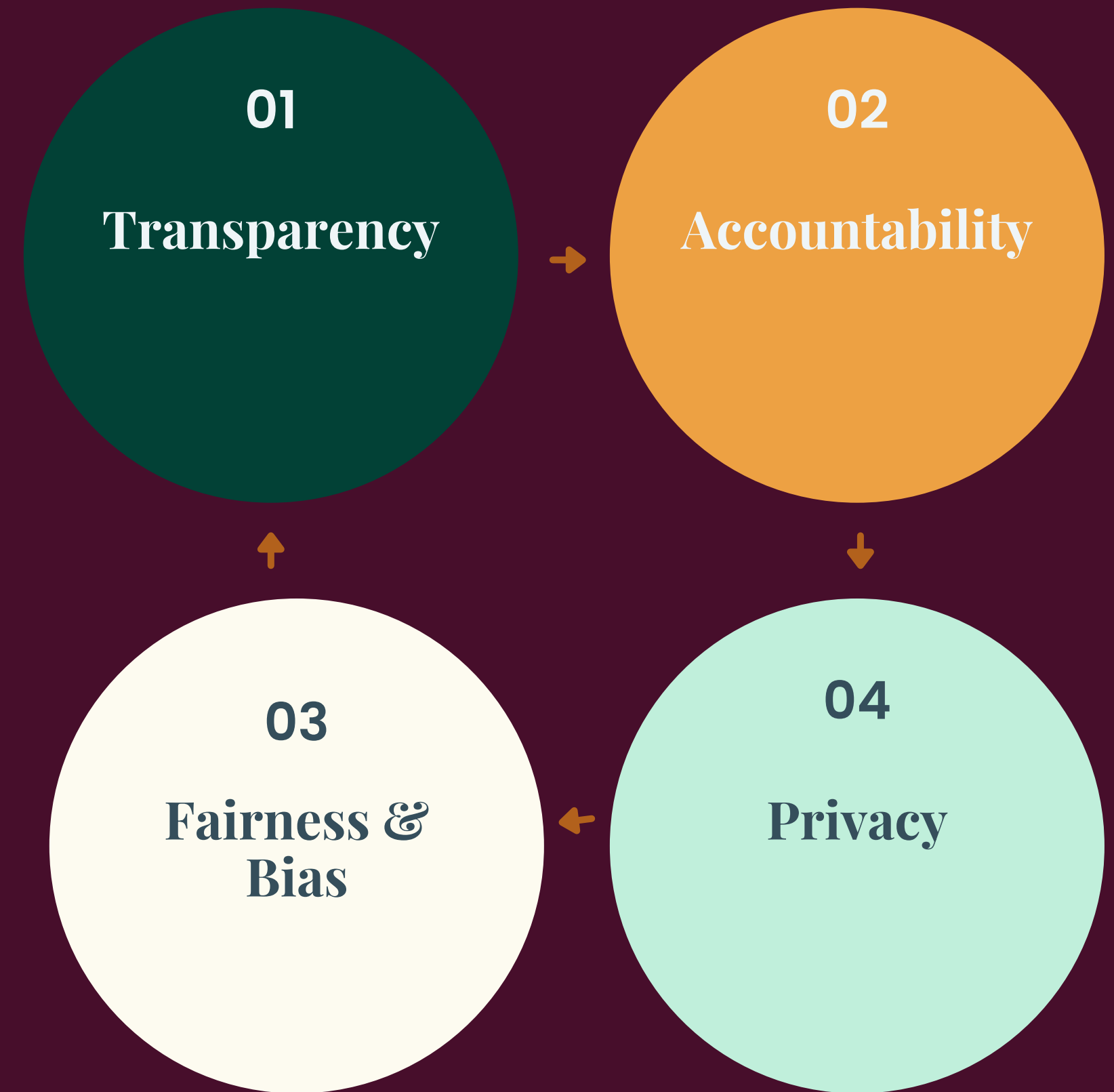


A judge fined a lawyer \$5,500 and mandated attendance at AI school for using ChatGPT to generate fake case law, cautioning that reliance on generative AI for legal research poses significant risks.

Four Pillars of Responsible Use of AI

AI awareness and competency is essential.

Lets explore what each pillar means, why it matters, and the legal implications.



Transparency

CLEAR UNDERSTANDING OF HOW AI SYSTEMS WORK, WHAT DATA THEY USE, AND HOW DECISIONS ARE MADE.

HOW DOES
IT WORK?



01.

FIRMS MUST KNOW THE
ORIGIN AND REASONING
BEHIND AI OUTPUTS TO
ENSURE INFORMED
DECISIONS AND CLIENT
TRUST.

Accountability

INACCURATE INFORMATION
IS A COMMON PAIN POINT
WITH AI.



02.

AI SHOULD ASSIST—**NOT
REPLACE—LEGAL
JUDGMENT.** FINAL
DECISIONS MUST BE
REVIEWED AND
**VALIDATED BY
PROFESSIONALS.**

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Fairness & Bias

AI SYSTEM MAY
INADVERTENTLY PRODUCE
BIASED RESULTS.



03.

**BIASED AI CAN
REINFORCE STEREOTYPES
OR EXCLUDE
MARGINALIZED GROUPS.**

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Privacy

A BREACH IN CONFIDENTIALITY
WITH CLIENTS OR IMPROPERLY
DISCLOSING INFORMATION.



PRIVACY POLICY



04.

FIRMS HANDLE
CONFIDENTIAL
INFORMATION THAT
**MUST NOT BE EXPOSED
OR USED TO TRAIN AI
MODELS.**

WHAT AI SHOULD NOT BE USED FOR

- 1 Making legal, financial, or consulting decisions
- 2 Predicting outcomes with certainty
- 3 Replacing emotional support or professional judgment
- 4 Communicating with opposing parties without review



03

6 Practical Use Cases

6 AREAS TO GETTING STARTED WITH TECH
COLLABORATION AND AUTOMATION TOOLS.

AI TECH TOOLS

1

Client Intake

2

Client Meetings

3

Document Review

4

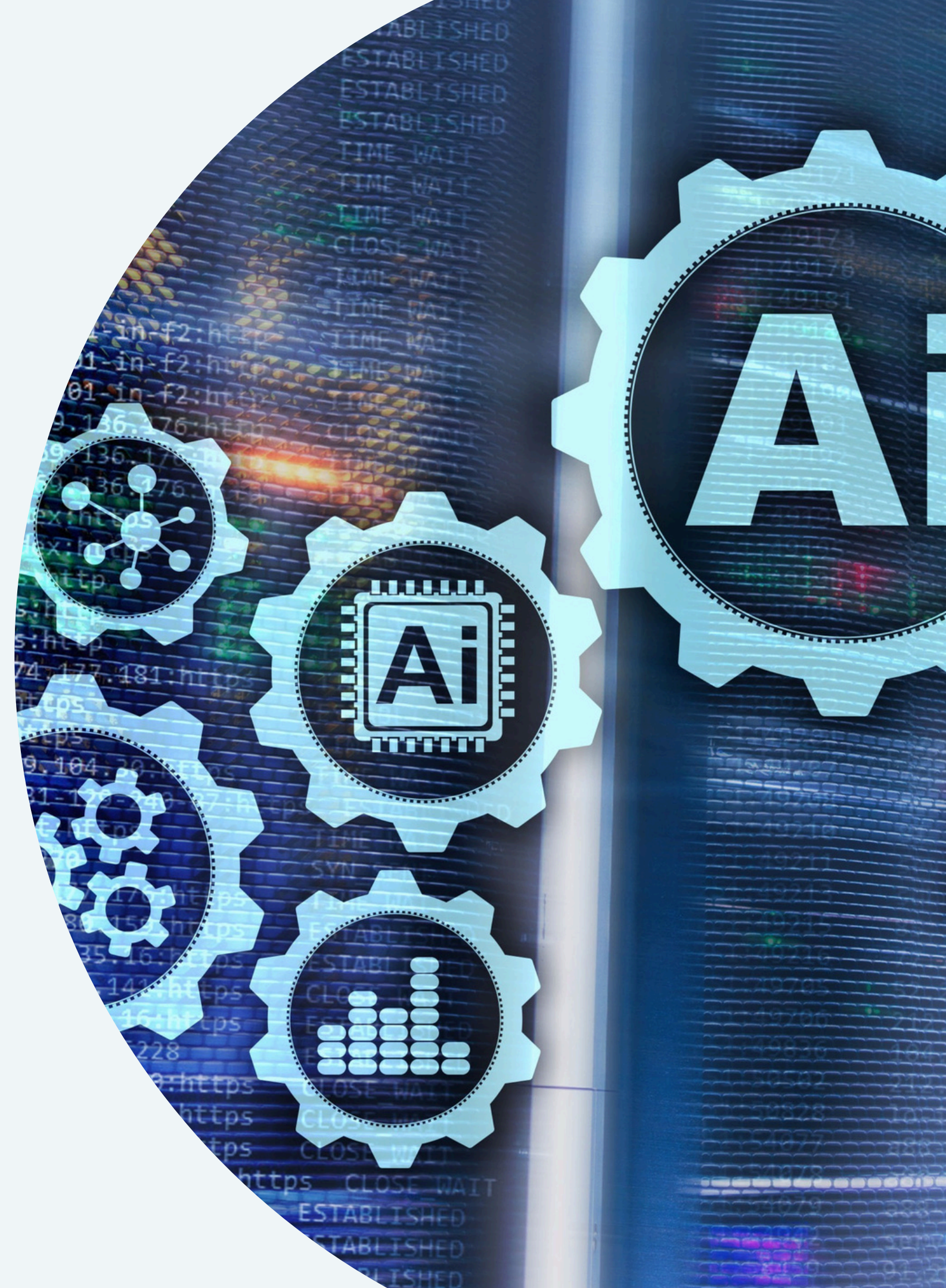
Financial Organization

5

Drafting & Admin

6

Client Communication





QUOTE

“Use AI to amplify your strengths. Focus your time on work that only you can do.” ”

-Brett Wharton-

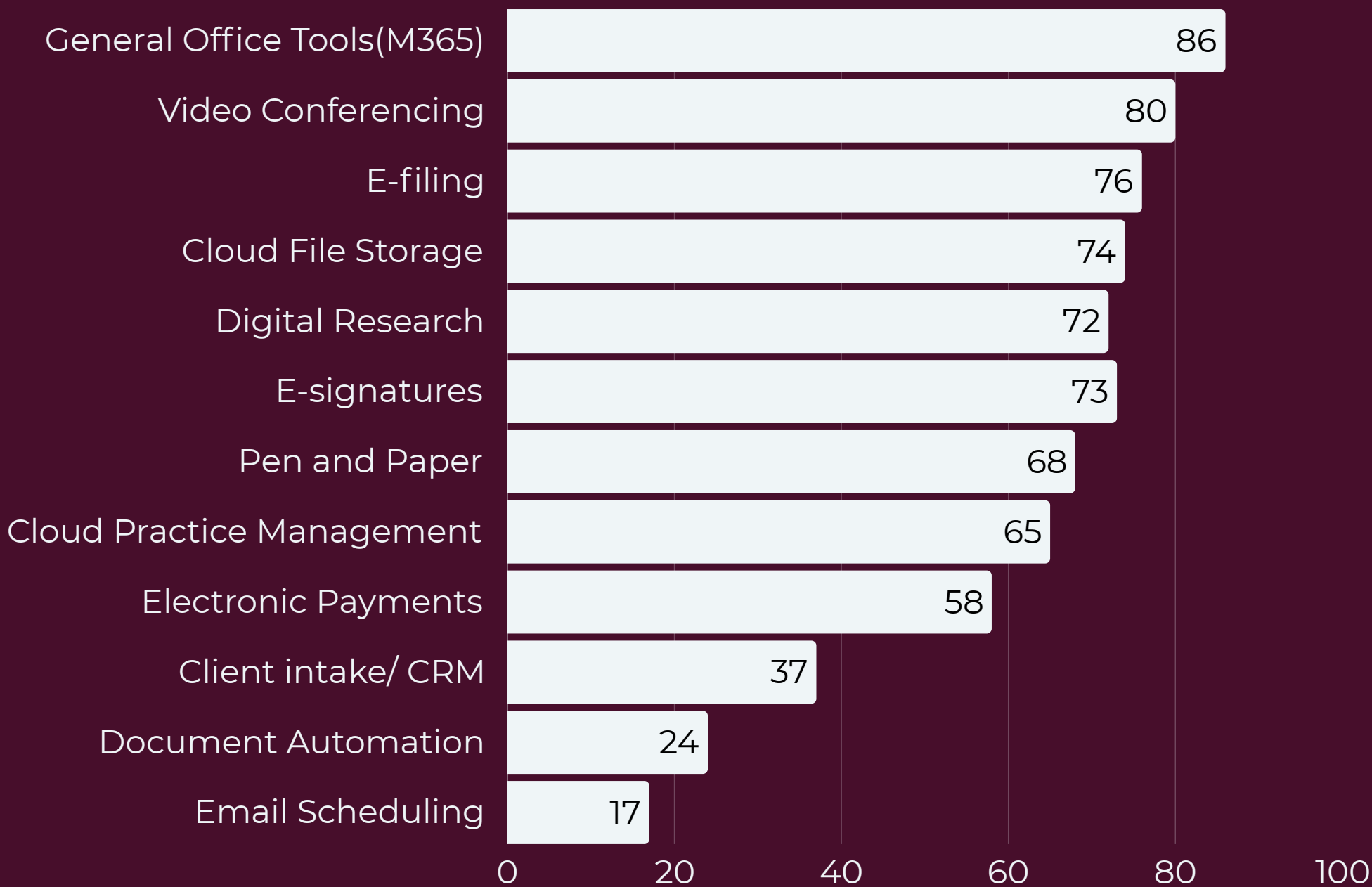
Technologies most used by firms

Tech Stack

The modern legal tech stack typically includes:

- 1.General Office Tools
- 2.Video Conferencing
- 3.E-filing
- 4.Cloud storage
- 5.E-signatures
6. Research databases
- 7.Pen and paper
- 8.Cloud Practice Management
- 9.Electronic payments
- 10.Client intake / CRM
- 11.Document automation
- 12.Email scheduling

Technologies most used by firms

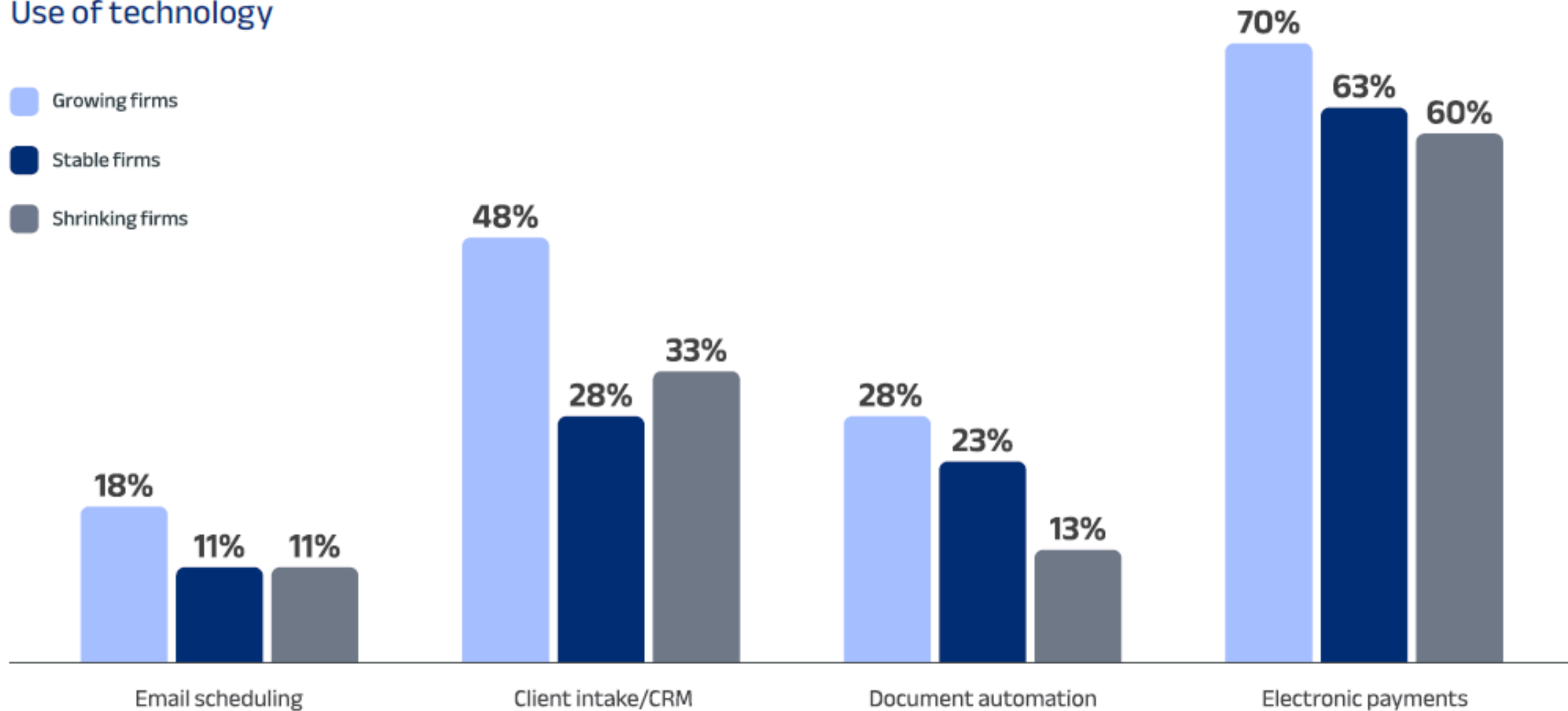
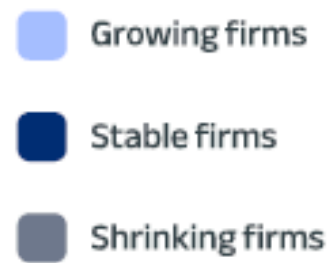


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What should lawyers be looking for in technology and AI?

Use of technology



ABA & LTR by Clio Data Source

IT Balanced Scorecard

A framework to ensure proper adoption of technology in your legal practice.

Why spend hours, and thousands of dollars on the wrong technology, that's CRAZY!

It happens all the time.

Perspectives



Client Perspective

CUSTOMER – SATISFACTION,
LOYALTY



02.

- FOCUSES ON **CLIENT SATISFACTION, LOYALTY, AND MARKET SHARE.**
- KPIS: CUSTOMER SATISFACTION SCORES, RETENTION RATES, **SERVICE QUALITY.**

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Client Intake & Early Organization

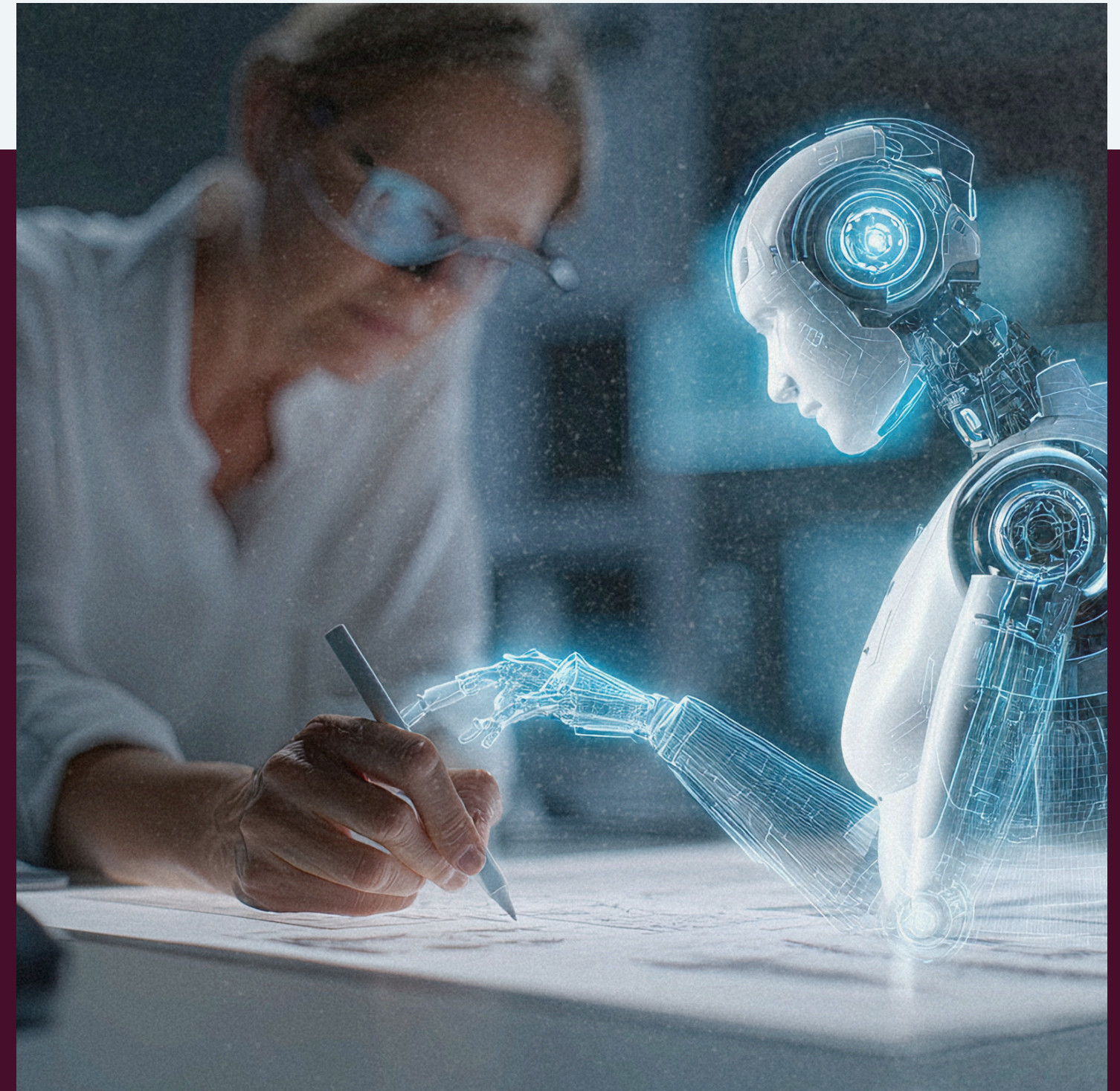
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What AI can support

- ✓ Organizing intake information before first meetings
- ✓ Identifying missing financial or parenting details
- ✓ Structuring background information into clear summaries

Why this matters for clients

- ✓ Fewer times retelling painful stories
- ✓ More focused, supportive first meetings
- ✓ Faster movement from chaos to clarity



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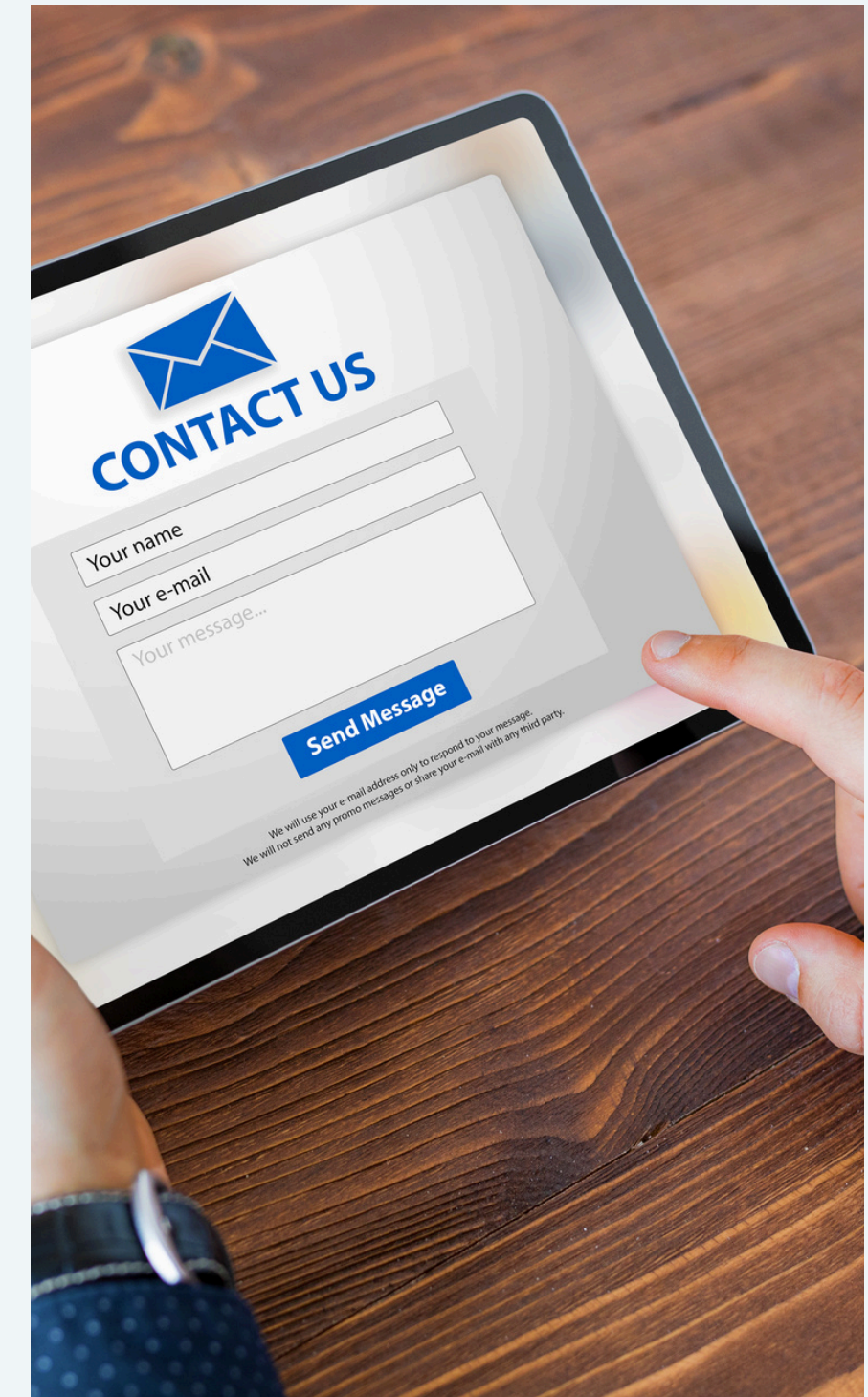


Client Portals

Personalize dashboards and surface relevant updates instantly, reducing manual client follow-ups.

Client Intake

Streamlines data collection with smart forms and chatbots, minimizing errors and speeding up onboarding.



Client Intake, Scheduling and Portals



Clio Grow / Manage

- ✓ Custom online intake forms
- ✓ Email templates for forms
- ✓ Secure portal for document sharing
- ✓ Scheduler with payment integration



ActionStep

- ✓ Automated intake workflows
- ✓ Triggered reminders based on workflow
- ✓ automation from intake to billing
- ✓ Real-time client updates



Leap

- ✓ specific intake forms
- ✓ Centralized email management
- ✓ LawConnect portal
- ✓ Mobile app with time tracking



CosmoLex

- ✓ intake forms with logic-based
- ✓ Automated drip campaigns
- ✓ document sharing, and invoice payments
- ✓ Built-in CRM with marketing automation

Meeting Support & Documentation

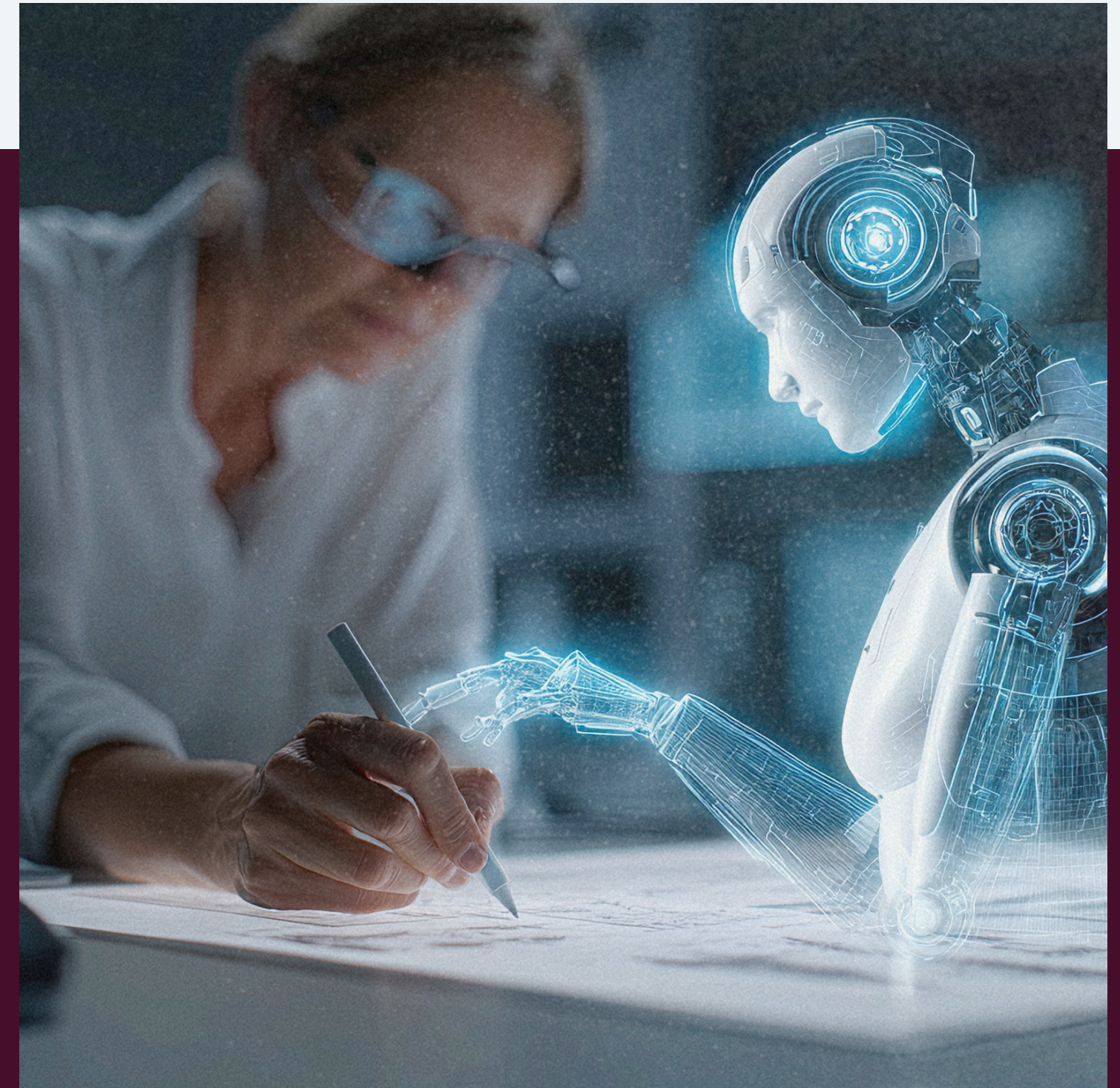
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What AI can support

- ✓ Creating structured, neutral meeting summaries
- ✓ Capturing decisions and next steps
- ✓ Identifying follow-ups for professionals and clients

Why this matters for clients

- ✓ Meetings are emotionally overwhelming
- ✓ Clients fear “missing something important”
- ✓ Clear summaries reduce anxiety, conflict, and misinterpretation



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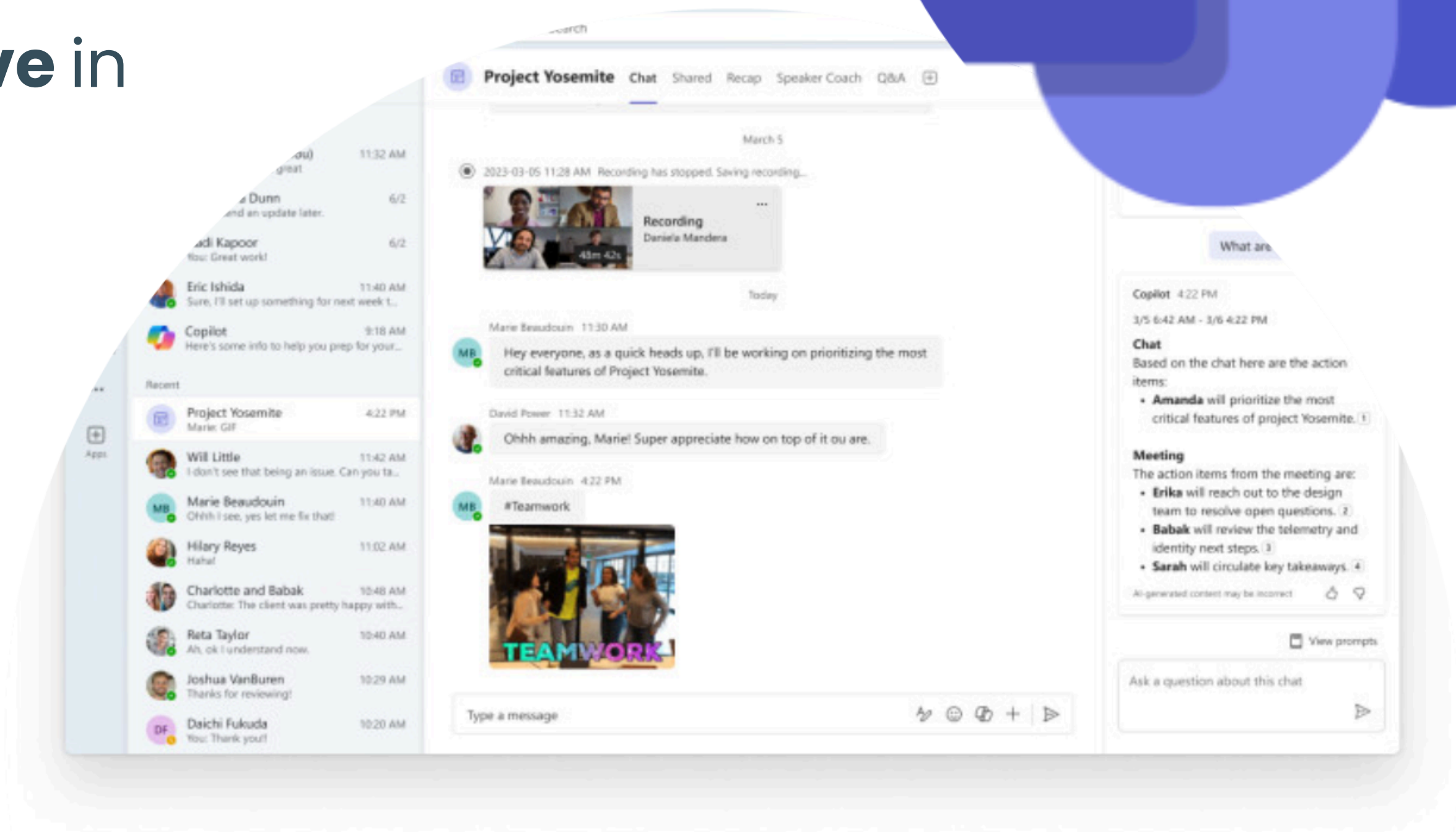
Calendar Email Scheduling

AI coordinates meetings, avoids conflicts, and **sends reminders** without human intervention.

COPILLOT IN TEAMS

Be more **collaborative** in
Team

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Document Review & Plain-Language Summaries

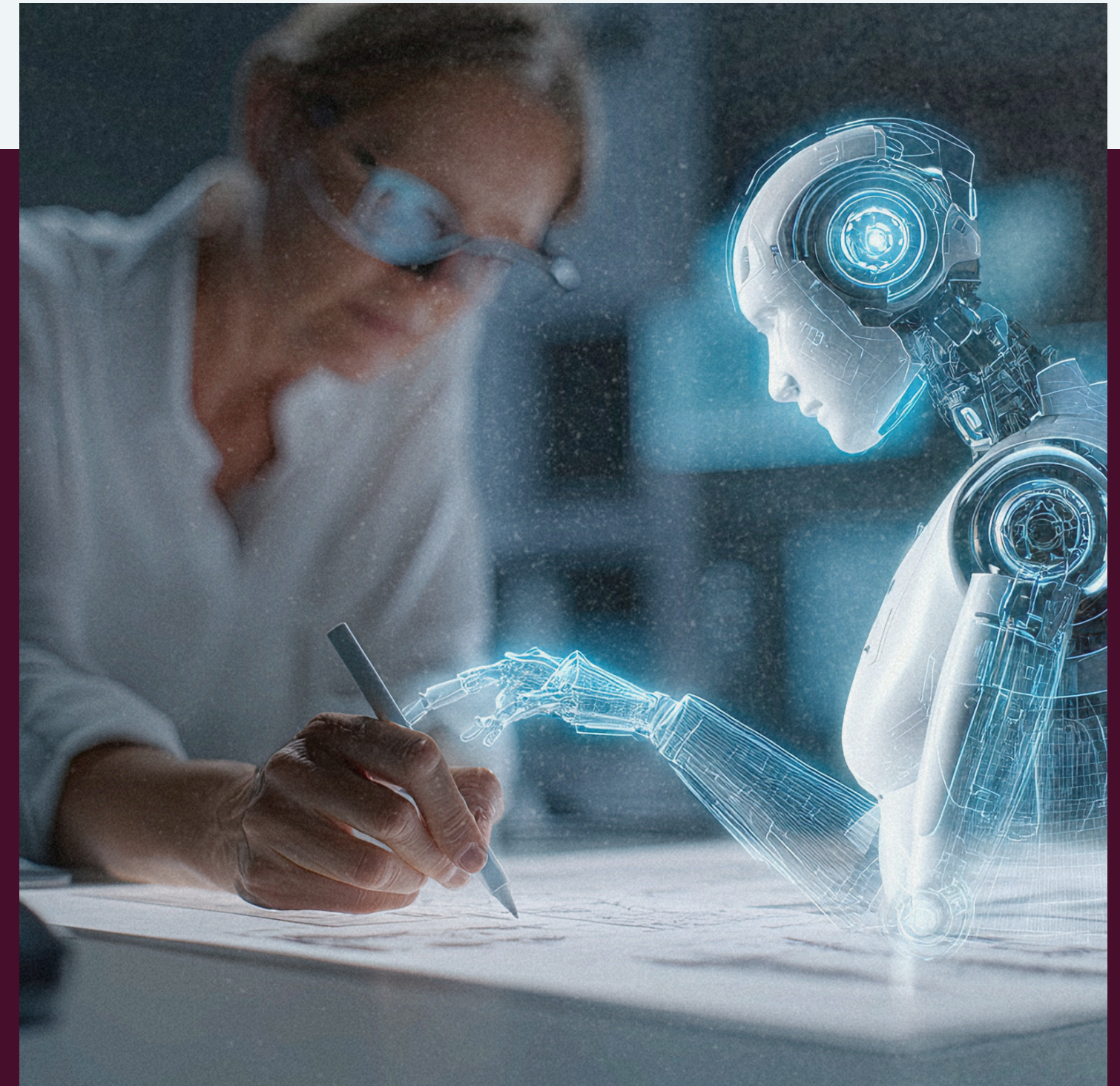
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What AI can support

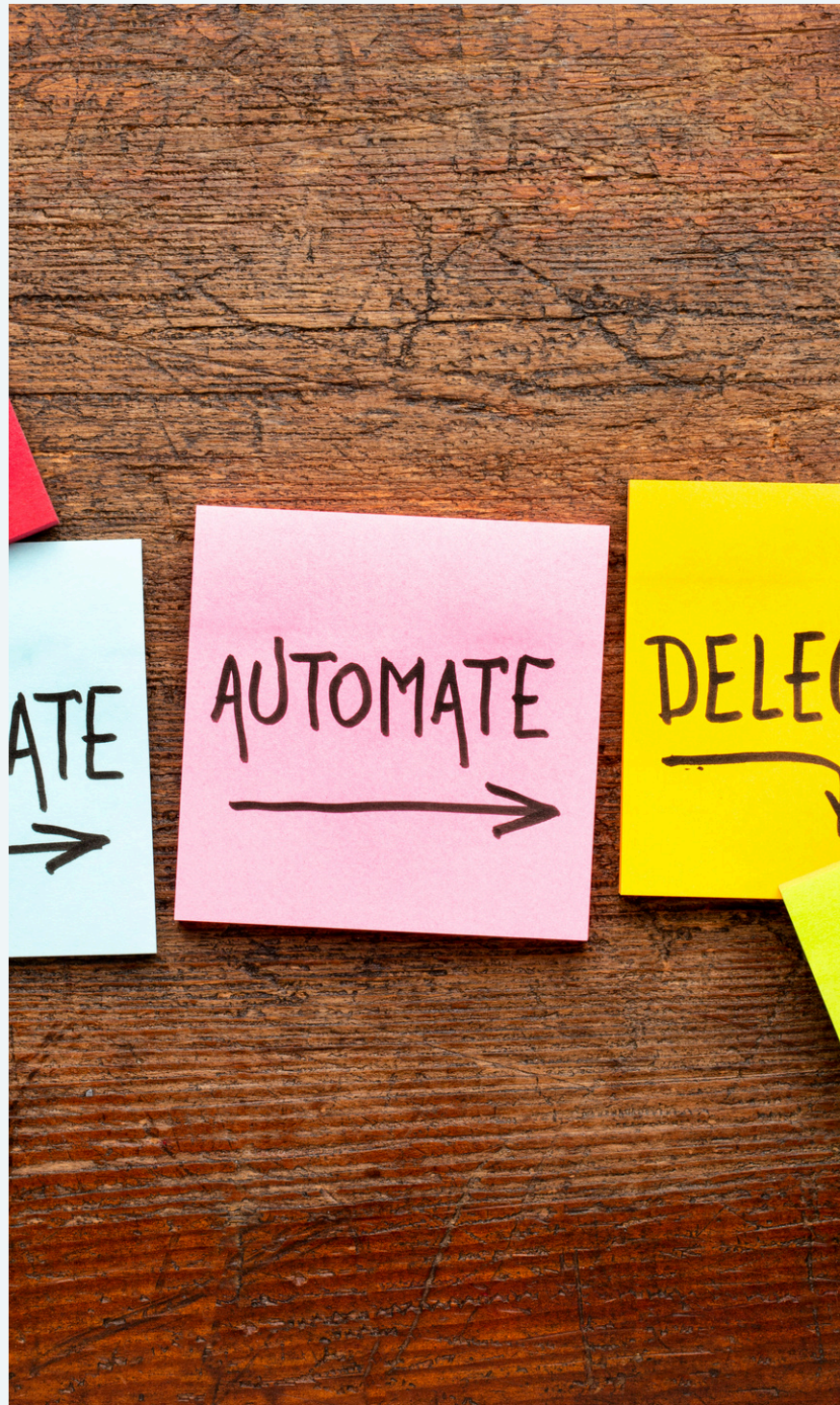
- ✓ Summarizing long agreements or disclosures
- ✓ Highlighting key obligations, timelines, and decisions
- ✓ Creating plain-language explanations for clients

Why this matters for clients

- ✓ Legal documents are cognitively and emotionally heavy
- ✓ Understanding improves informed consent and confidence



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Automate Routine Tasks

AI handles repetitive admin work like document filing and profiling, freeing up staff time.

Contract Review & CLM

AI rapidly aids in both the **review and drafting of contracts**, ensuring they adhere to firm clauses and comply with jurisdictional requirements.

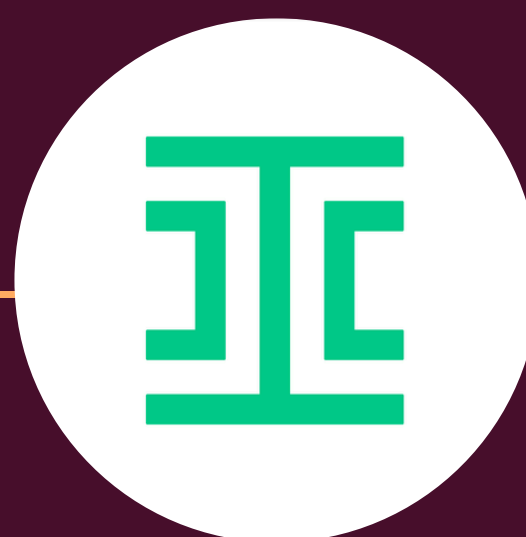


Contract Review & Contract Lifecycle Management (CLM)



Spell Book

- ✓ AI Clause Analysis
- ✓ Smart Compliance Check
- ✓ Clause Library
- ✓ Instant Risk Assessment



Ironclad

- ✓ Clause detection & Customization
- ✓ Lifecycle Presets & Tracking
- ✓ Security & Compliance
- ✓ Workflow Automation



Juro

- ✓ AI Contract Review Agents
- ✓ Self-serve Contracting
- ✓ Enterprise Grade Compliance
- ✓ Ai Power Search and Data Extraction



DocuSign CLM

- ✓ Clause Review & Drafting
- ✓ Workflow Conditional Logic
- ✓ Audit Trail and Version Control
- ✓ Pre-approved Clause Library and Playbooks

Financial Organization & Scenario Support

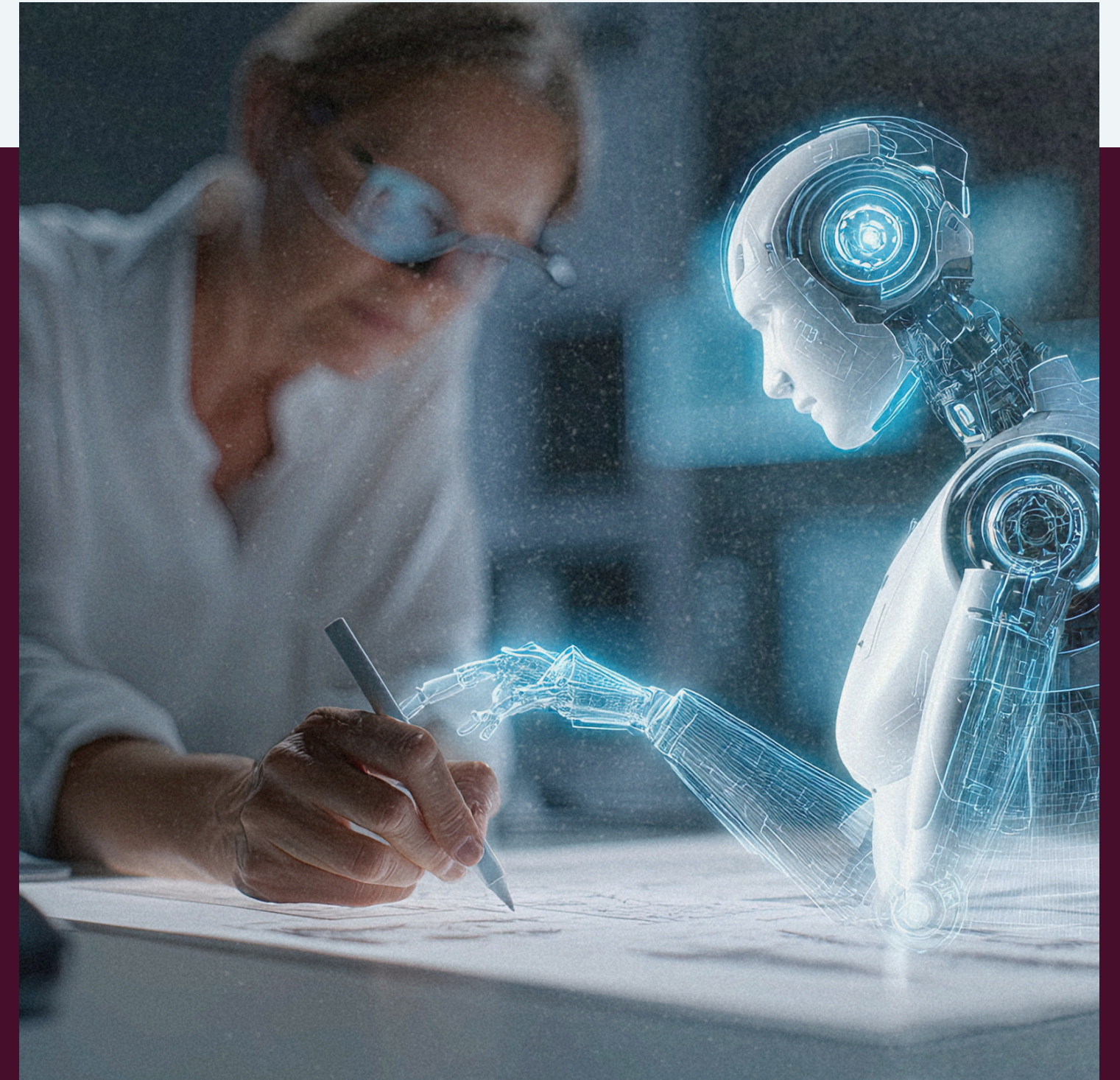
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What AI can support

- ✓ Organizing financial disclosure
- ✓ Summarizing assets, liabilities, and cash flow
- ✓ Helping professionals model scenarios (with oversight)
- ✓ Accurate billing and invoice descriptions.

Why this matters for clients

- ✓ Financial uncertainty drives conflict
- ✓ Clear summaries reduce fear and unrealistic expectations
- ✓ Ease of access to matter account balance and payment.

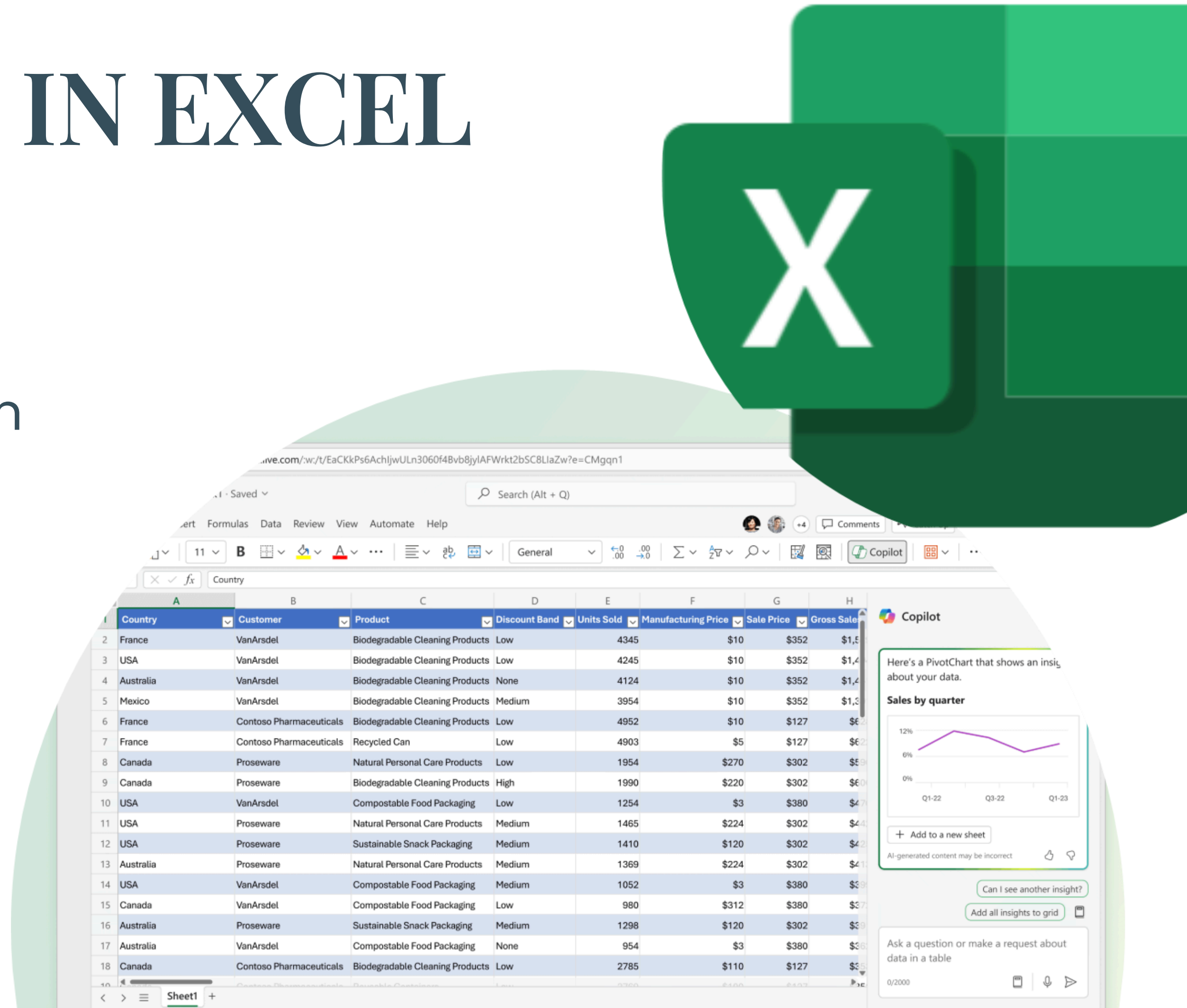


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COPILOT IN EXCEL

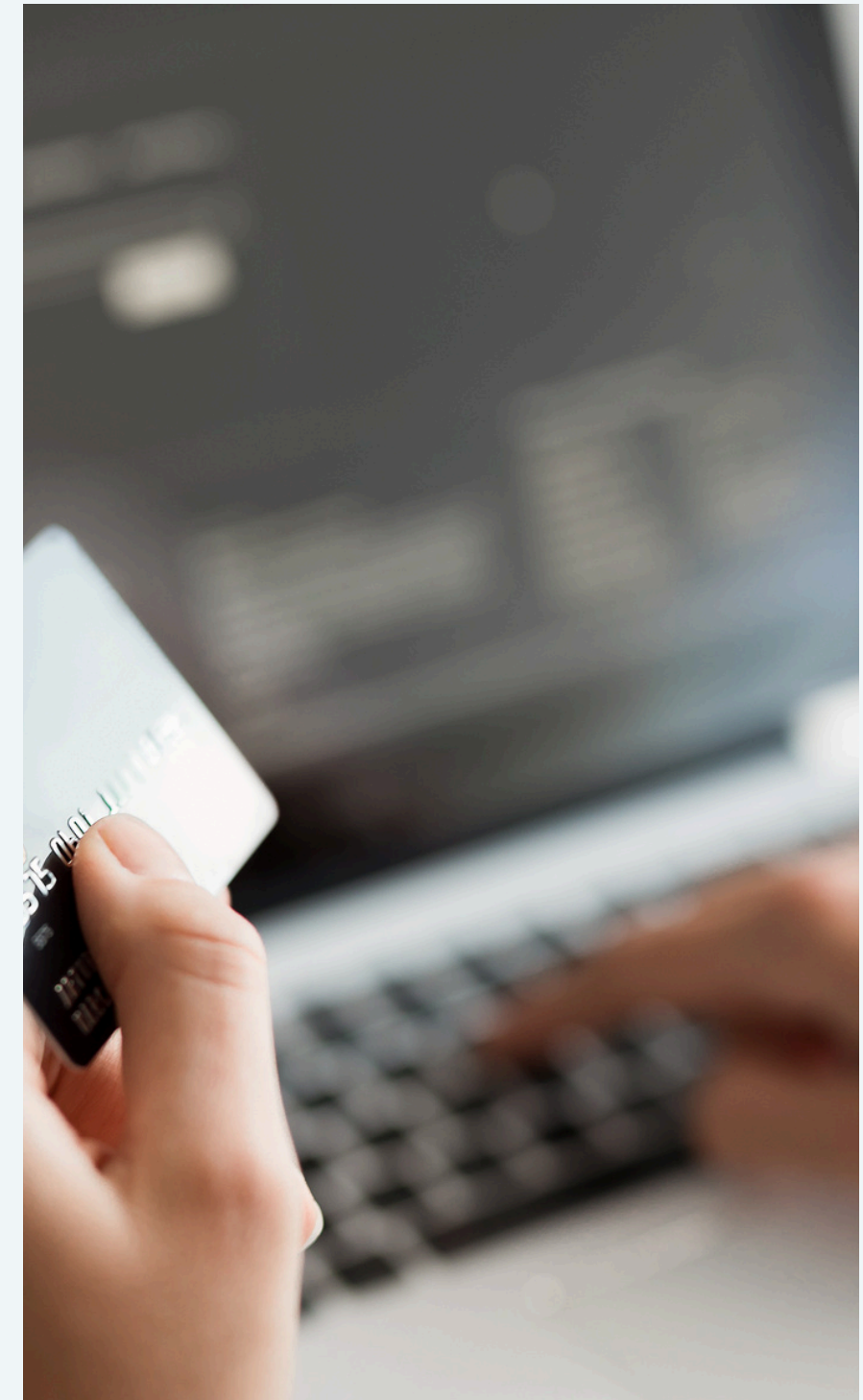
Be more **analytical** in
Excel

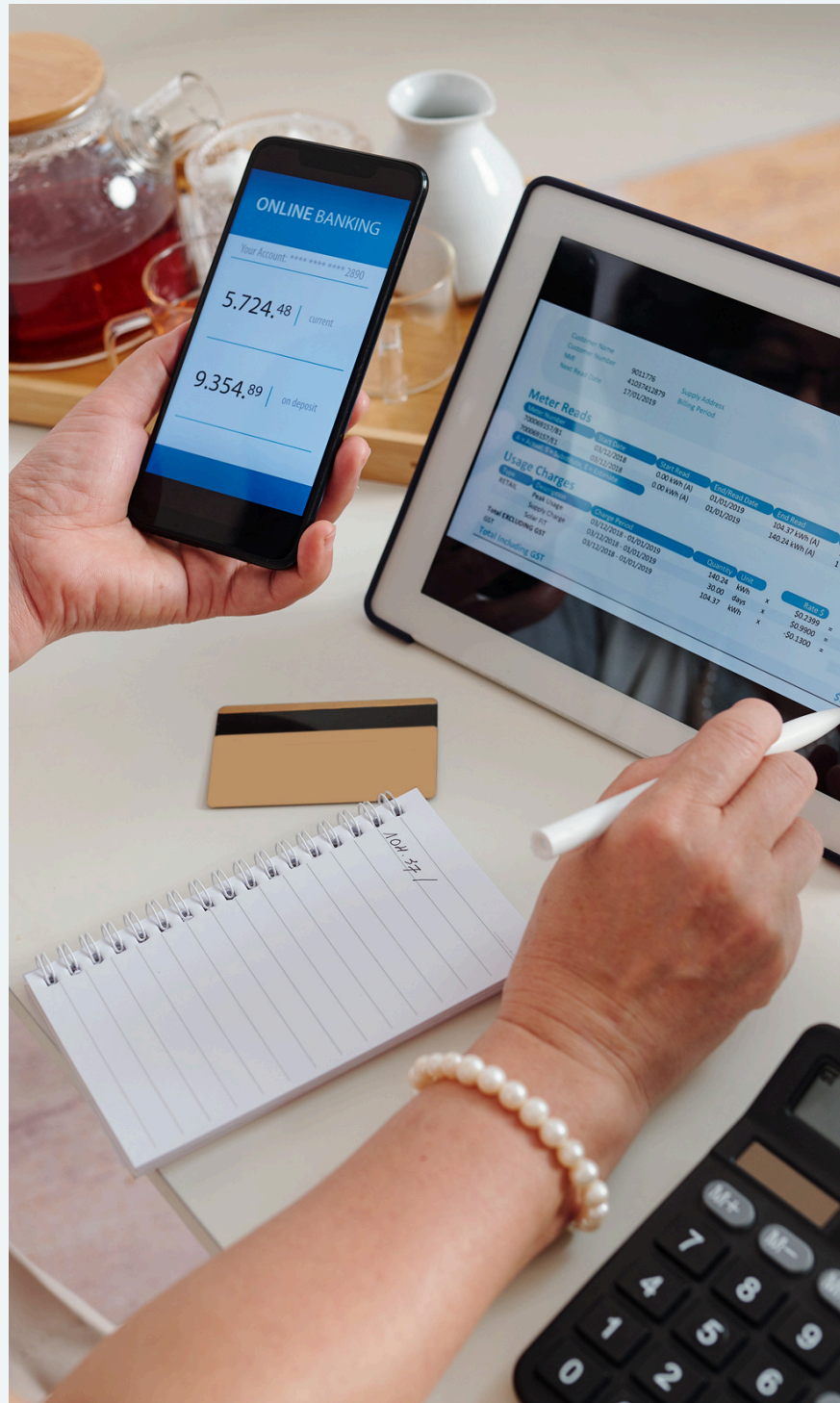
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Online Payments

AI ensures secure, **seamless transactions** and can flag anomalies or delays automatically.





Time and Billing

AI tracks billable hours and generates **invoices with precision**, reducing leakage and disputes.

Online Payments & Time and Billing



Intapp Time

- ✓ AI-Powered Activity Capture
- ✓ Ask Intapp (GenAI Chatbot)
- ✓ Quick Add via Voice/Text
- ✓ Compliance Reporting



Clio Manage / Payment

- ✓ Real-Time Time Tracking
- ✓ Flexible Billing Methods
- ✓ Online Payments with Click-to-Pay
- ✓ AI assistant for automating tasks



TimeSolv

- ✓ Multi-Timer Tracking
- ✓ Custom Approval Workflows
- ✓ Budget Tracking & Alerts
- ✓ Custom Abbreviations & Auto-Fill



Leap

- ✓ AI Time Capture
- ✓ Integrated Legal Accounting
- ✓ Online Payments via FeeWise
- ✓ State-Specific Automated Forms

Drafting & Legal Support

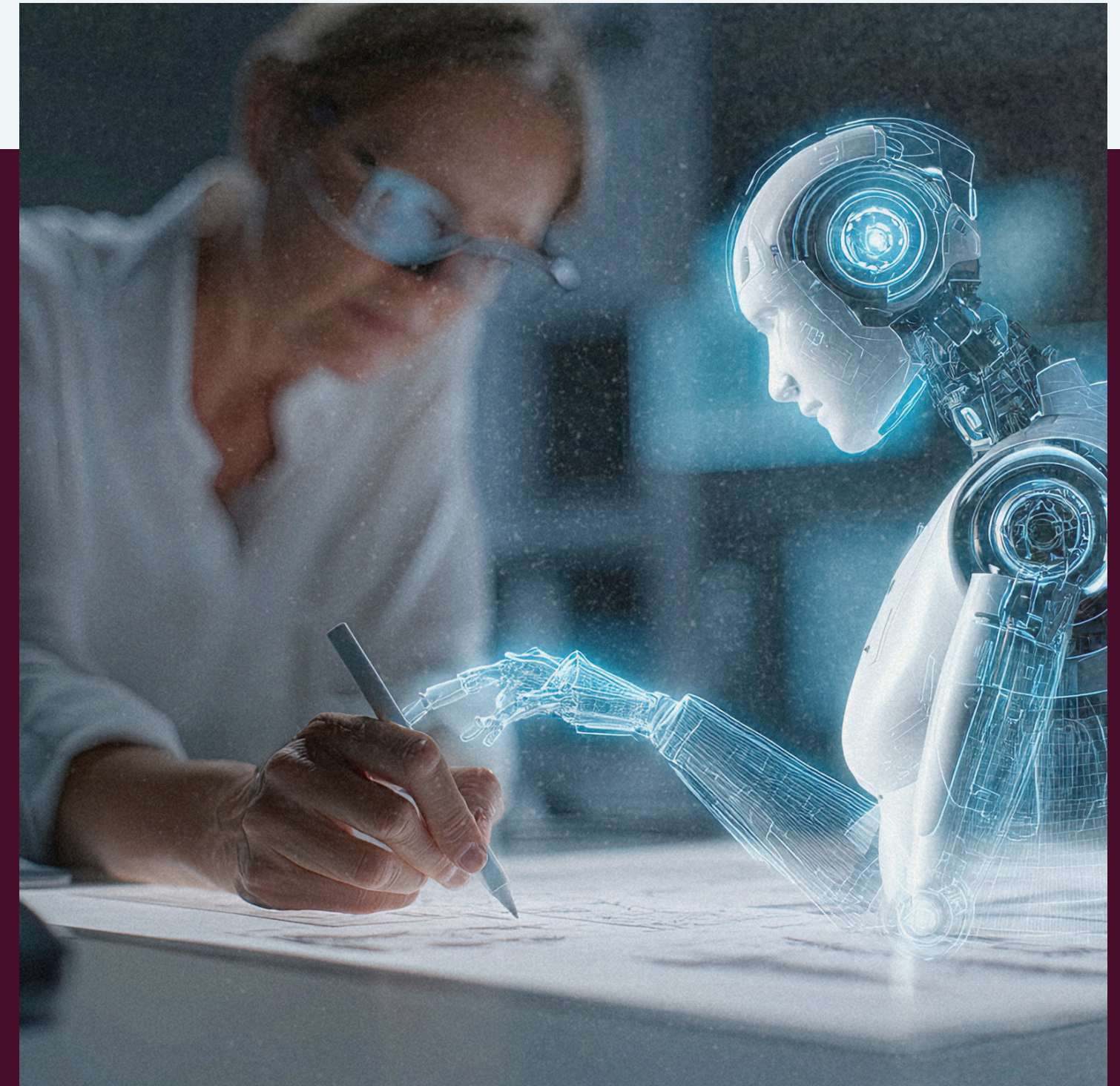
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What AI can support

- ✓ Drafting initial versions of correspondence or summaries
- ✓ Creating chronologies or outlines
- ✓ Reducing administrative workload

Why this matters for clients

- ✓ Faster responses
- ✓ More professional time spent on care, not paperwork



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Legal Research AI Assistant

AI is transforming how law firms handle **research, drafting, and document analysis**—each offering distinct strengths tailored to different firm sizes and workflows.

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Legal Research AI Assistant



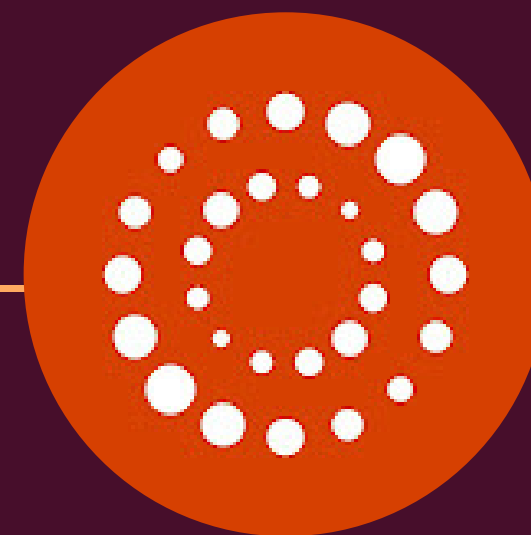
Lexis +AI (Protege)

- ✓ AI Clause Analysis
- ✓ Smart Compliance Check
- ✓ Clause Library
- ✓ Instant Risk Assessment



Harvie Ai

- ✓ Clause detection & Customization
- ✓ Lifecycle Presets & Tracking
- ✓ Security & Compliance
- ✓ Workflow Automation



Co-Counsel

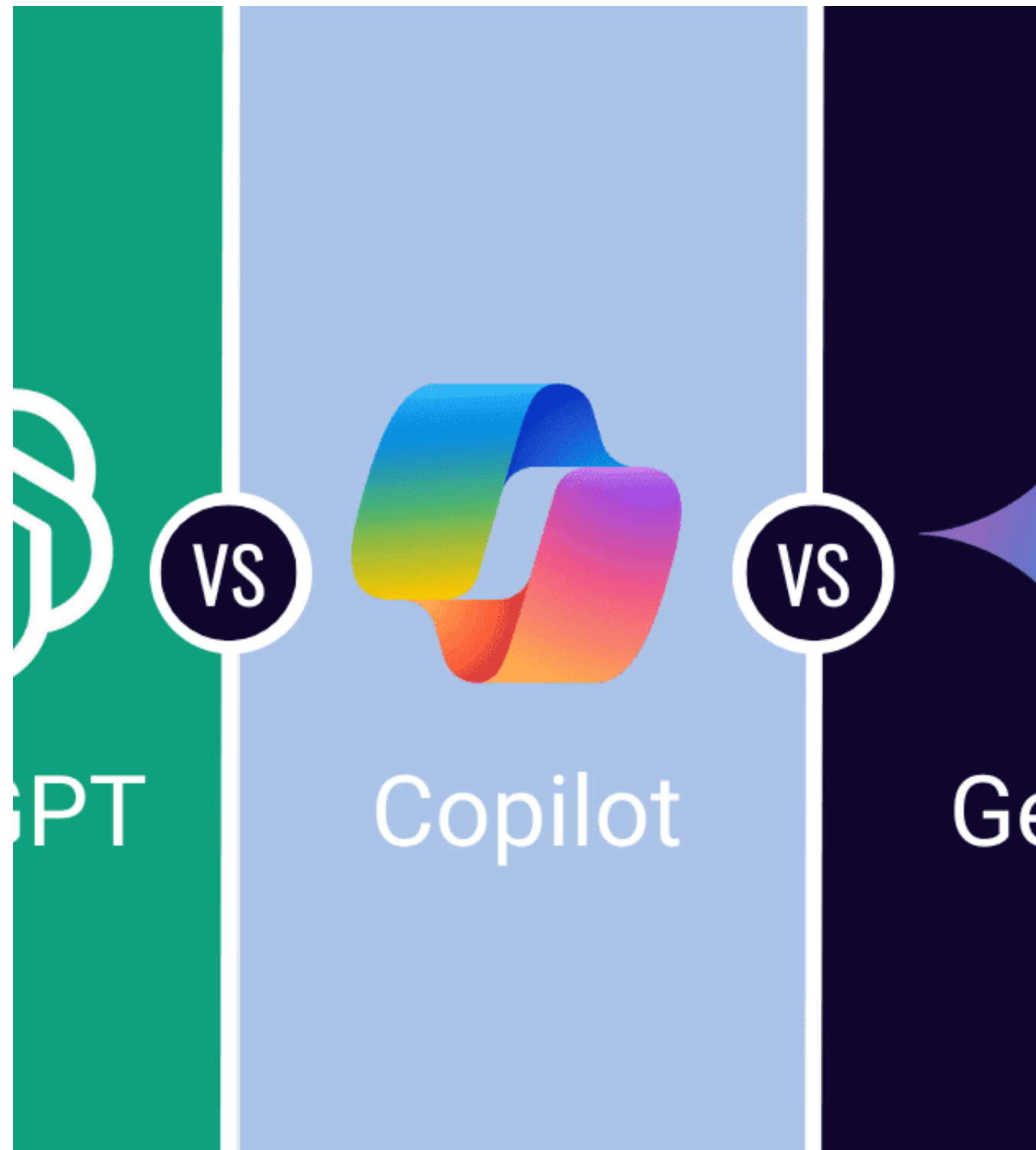
- ✓ AI Contract Review Agents
- ✓ Self-serve Contracting
- ✓ Enterprise Grade Compliance
- ✓ Ai Power Search and Data Extraction



Clio - Vlex

- ✓ Clause Review & Drafting
- ✓ Workflow Conditional Logic
- ✓ Audit Trail and Version Control
- ✓ Pre-approved Clause Library and Playbooks

WHY COPILOT

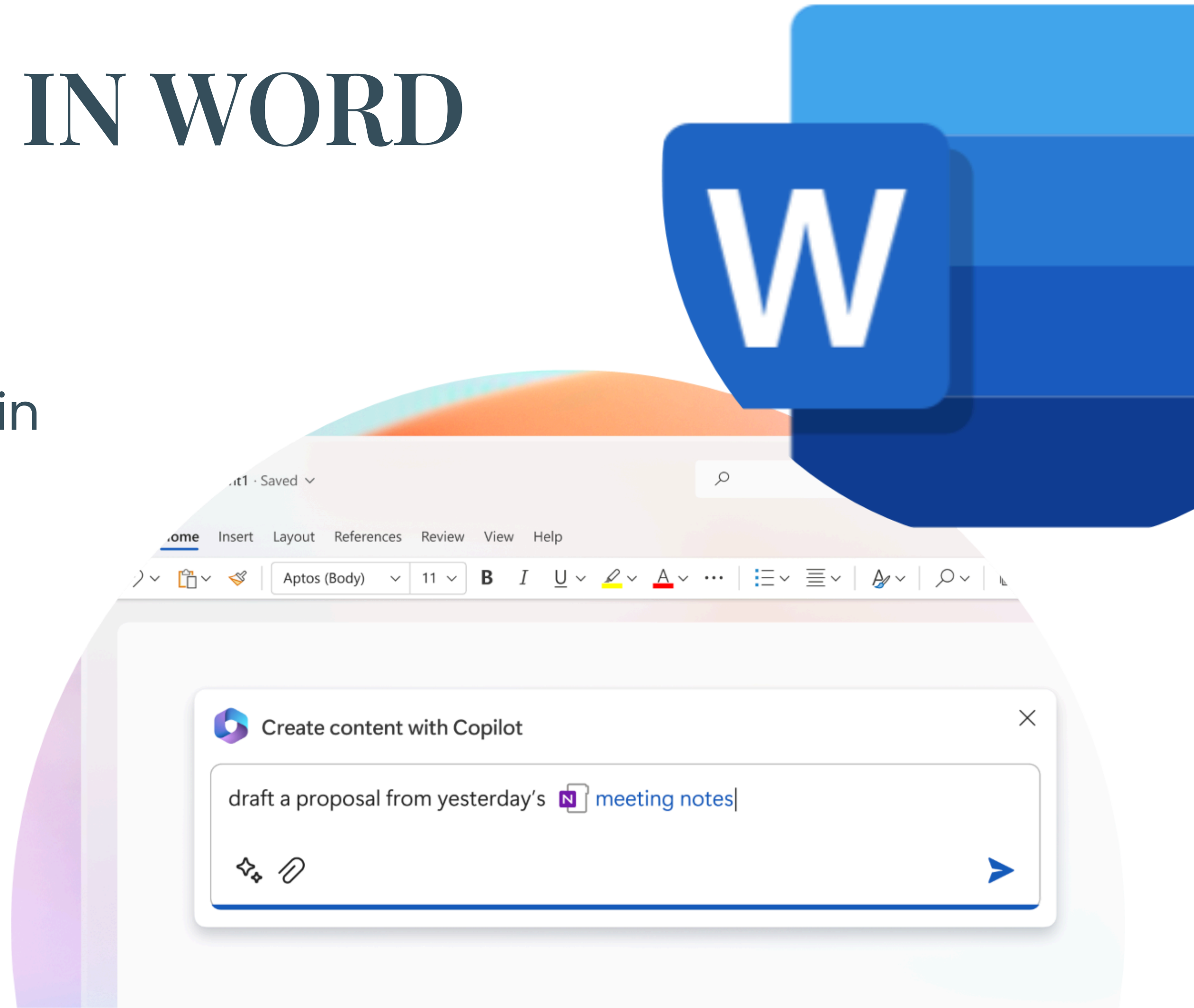


- Law Firms operate in the Microsoft Office environment.
- Tailored to enhance productivity in MS Applications.
- Has the power of GPT-4 for improved performance.
- User data is not used to train the model.
- Integration with leading Document Management Systems

COPILOT IN WORD

Be more **expressive** in
Word

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Client Education & Preparation

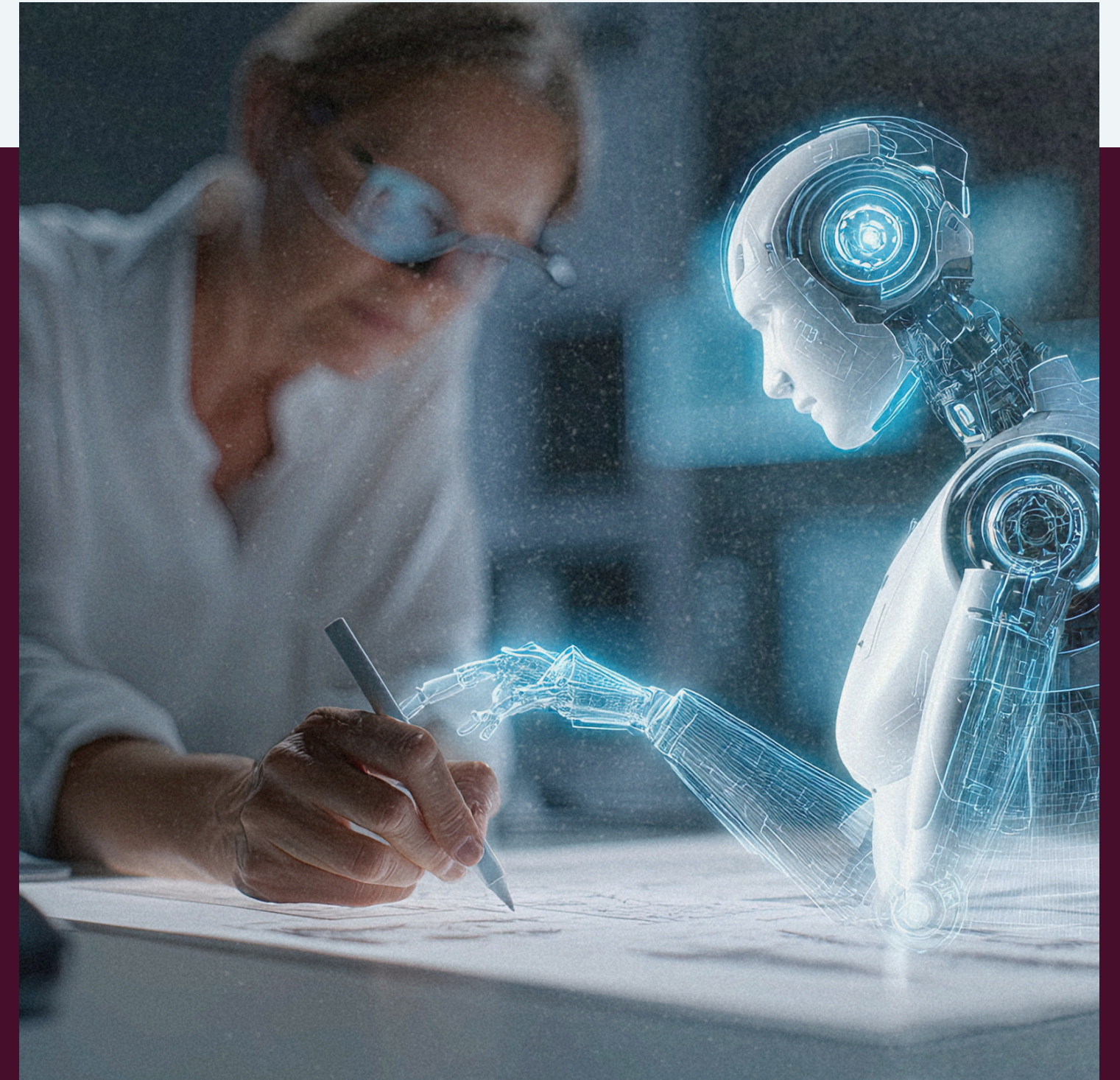
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What AI can support

- ✓ Explaining general divorce concepts in accessible
 - ✓ language
 - ✓ Helping clients prepare questions
- Organizing thoughts before difficult conversations

Why this matters for clients

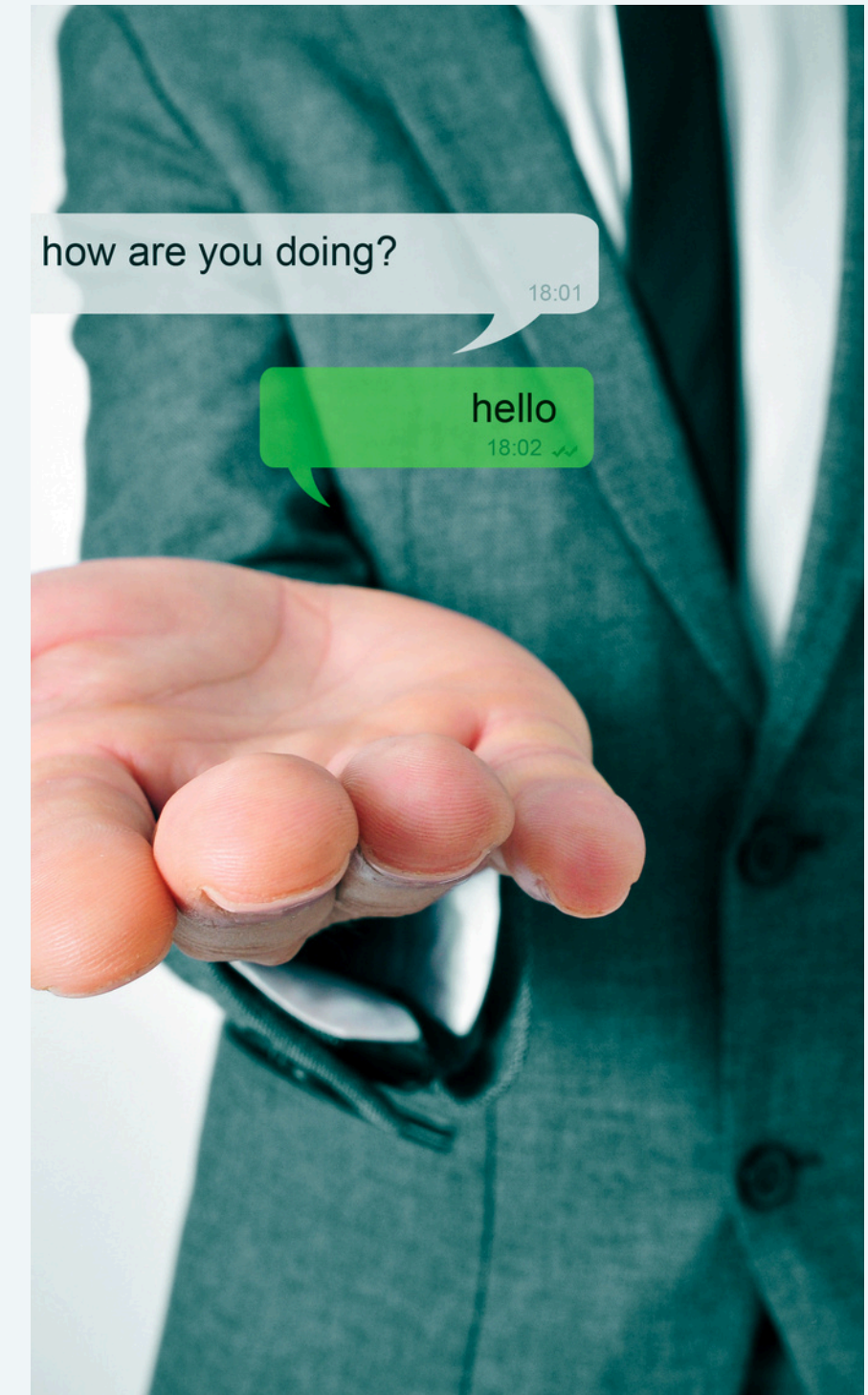
- ✓ Increased confidence
- ✓ Better engagement with professionals
- ✓ Reduced intimidation
- ✓ Adjust the tone of the message



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Client Communication

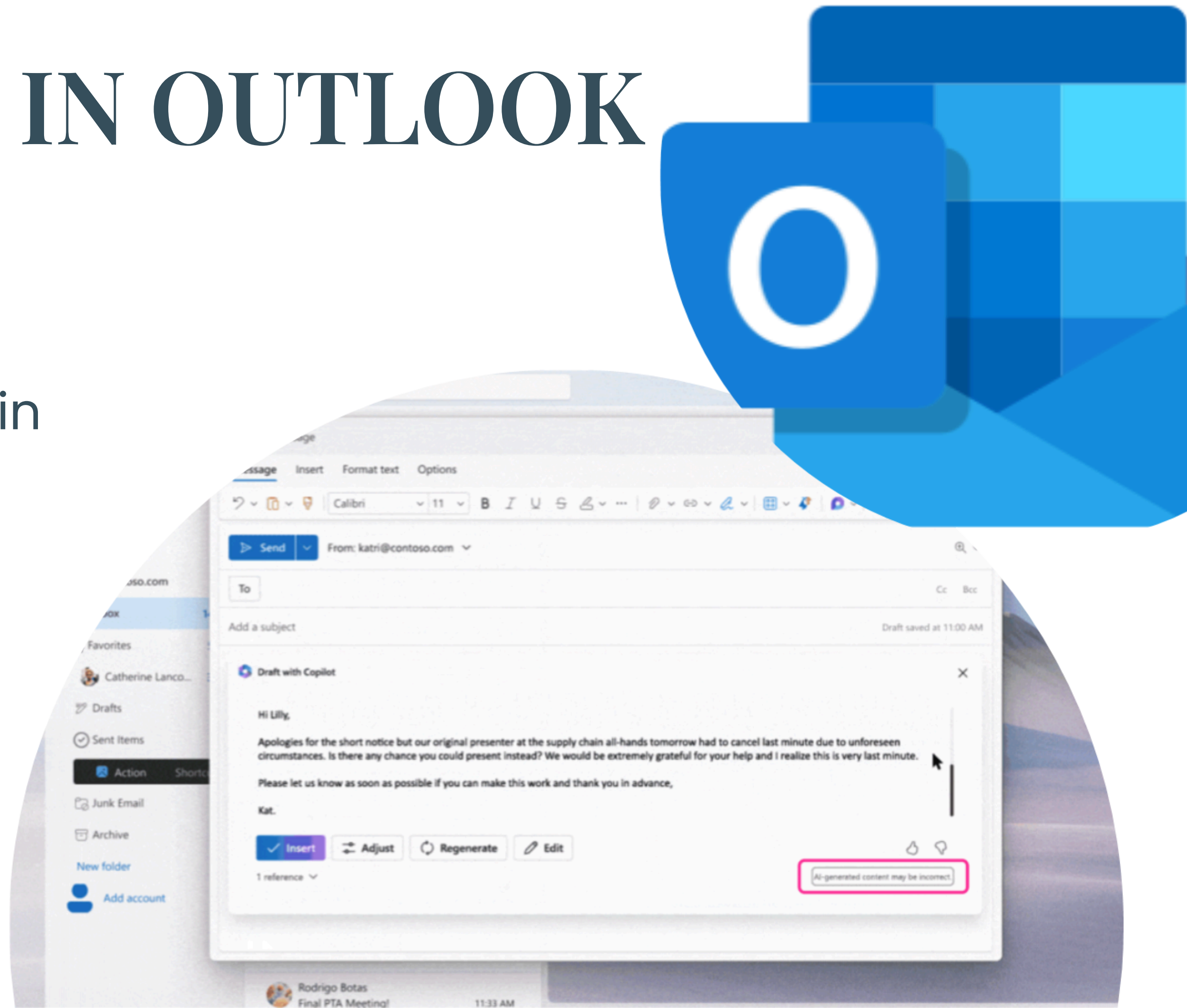
AI enables timely, consistent messaging through **automated responses and follow-ups.**



COPILOT IN OUTLOOK

Be more **productive** in
Outlook

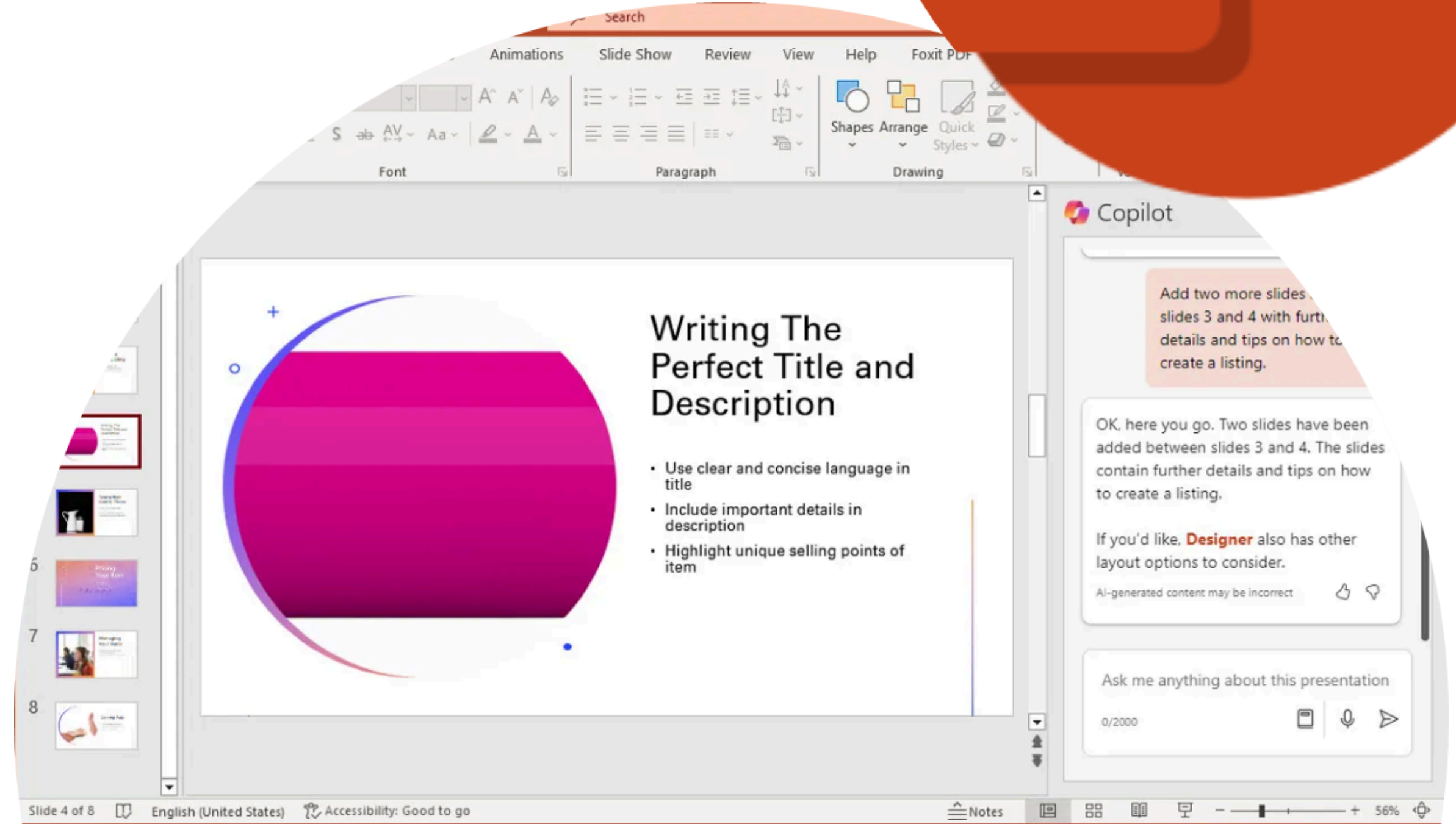
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COPILOT IN POWERPOINT

Be more **creative** in
PowerPoint

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Sample 2% of revenue IT budget breakdown

Growth-mode firms or those undergoing digital transformation:
Often closer to 4%–7% of revenue, especially when including advanced tools, cloud migration, and training.



USING LEGAL TECH TO REDUCE HARM, NOT JUST TIME

- 1 AI is most valuable when it supports clarity and continuity
- 2 Small improvements can significantly reduce client stress
- 3 Ethics and transparency are essential in divorce contexts
- 4 AI can contribute to a healthier client experience by minimizing stress and confusion



From Burnout to Breakthrough

Scale Your Business And Accelerate Your Results!

Learn the **The Four Phases of the Modern Lawyer Model**. Each phase seamlessly connects with the next, leading law firms from initial digital resistance to a state of scalable innovation.

- ✓ **Result-Oriented Approach:** Our work is aimed directly at achieving measurable outcomes.
- ✓ **Proven Frameworks:** Benefit from tried-and-true processes, removing the guesswork.
- ✓ **Customization Flexibility:** Easily tweak settings to match your specific needs.



**Strategy
Session**



Testimonials

Origin.

“I am amazed at how much we have accomplished; it wouldn't have been possible without support.”

“It was a pleasant surprise to discover hidden technology we already had in place—who would have thought?”

“We appreciate the clarity and results we've achieved thanks to the valuable insights and structured approach provided.”



Thank You

for Participating

**Apply for one of
our Modern
Lawyer
Programs.**



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