The AI Advantage for Solo & Small Firms

Save Time, Get Found, and Protect Your License

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Miami-Dade Bar Association | Virtual Success Summit



Save Time



Get Found



Protect Your License

WELCOME

A quick word before we start

I'm not a lawyer.

Nothing in this session is legal advice. The rules, your ethics counsel, and your own judgment are the authority.

What I do

I'm Founder & Chief AI Officer of RealEdge Labs. We help attorneys and other professionals turn AI into time saved and authority earned.

Where I'm coming from

Radio and digital marketing. I think about how people find, hear, and trust an expert.

How today works

Live demos use fictional client data only. Prompts, the checklist, and sources are in the appendix.

THE OPPORTUNITY

Your advantage is speed

A LARGE FIRM HAS

- A marketing department
- An IT team
- An AI committee that meets quarterly

vs

YOU HAVE

- **A decision made on Monday**
- **A tool tested by Tuesday**
- **A better client experience by Friday**

79%

of legal professionals report using AI tools (Clio Legal Trends Report)

Save time

Get found

Protect your license

LIVE DEMO

Intake: messy inquiry to clean file

WHAT ARRIVES

"Hi, this is Maria. My landlord kept my whole deposit even though I left the place clean. I work nights, so call after 2."



WHAT YOU GET IN ABOUT A MINUTE

- Matter type and one-line summary
- Key facts, dates, and amounts
- Anything time-sensitive
- Every name to run for conflicts
- Questions you still need answered
- A draft reply, for your review

TRY THIS PROMPT

You are an intake assistant for a Florida [practice area] law firm. Do not give legal advice. From the message below, list: matter type, key facts, anything time-sensitive, names for conflict checks, questions we still need answered, and a warm reply under 120 words inviting a consultation.

Guardrail: fictional or anonymized details only, unless the tool has passed your checklist (slide 12)

LIVE DEMO

Client updates in plain English

THE DOCKET SAYS

Defendant's motion to compel granted in part; production of documents responsive to RFP Nos. 4–9 due within 20 days.

THE CLIENT READS (AFTER YOUR REVIEW)

The judge ordered the other side to hand over some, not all, of the documents we asked for. Nothing is needed from you this week.

Status updates

Next-step explainers

Hard conversations: fees, delays, bad news

TRY THIS PROMPT

Rewrite this case update for a client with no legal background. Calm and reassuring, never promising an outcome. Use four parts: what happened, what it means, what happens next, what we need from you. Under 150 words.

You review it. You send it. The client hears your voice and your judgment.

LIVE DEMO

Drafting: first drafts in minutes

1

Give context

Facts, audience, jurisdiction, and the goal.

2

Ask for structure

An outline first, then one section at a time.

3

Mark the gaps

Flag [CITE NEEDED] and list assumptions. No invented authority.

4

You edit and verify

Every citation, quote, date, and number.

Good fits: demand and engagement-letter drafts | contract summaries | meeting and deposition outlines | checklists and client FAQs

Every citation. Every quote. Every time.

Check it against a primary source before it leaves your office (see slide 11).

A prompt that works has five parts

1

Role

Who the AI should act as.

"You are an intake assistant for a Florida estate-planning firm."

2

Context

The facts and the audience.

"The reader is a first-time client with no legal background."

3

Task

The one thing you want done.

"Summarize the key dates and obligations."

4

Format

The shape of the answer.

"A table, then a 100-word summary."

5

Guardrails

What it must not do.

"Do not invent citations. Mark anything you are unsure of."

Tip: the guardrails line is the one that protects your license. Six ready-to-use prompts are in the appendix (A1 and A2). More are in the Legal Edge Prompt Library (last slide).

GET FOUND

Clients now ask AI before they call

1 Discover

A prospect asks ChatGPT, Gemini, Perplexity, or Google's AI who handles their issue in Miami-Dade.

2 Confirm

They search your name on Google: your website, reviews, profile, and credentials.

3 Call

They contact the firm that looked the clearest and most credible.

WHAT HELPS YOU SHOW UP AND EARN THE CALL

- Practice-area pages that answer real client questions
- Consistent name, address, and practice details everywhere
- Real reviews and credentials, within the advertising rules
- Fresh, local content that shows your expertise

Idea: "discover on ChatGPT, hire on Google." Gyi Tsakalakis, ABA Law Practice Magazine (Mar./Apr. 2026)

One conversation, many assets

One 15-minute conversation

Record yourself answering a question clients really ask. Speaking is faster than writing, and it is your voice.

- **Audio clip or podcast episode** Your voice builds trust before the first call.
- **FAQ page on your website** Answers the exact question clients and AI tools ask.
- **Short captioned video** For LinkedIn and your Google profile.
- **Newsletter or LinkedIn post** Keeps referral sources and past clients warm.
- **Practice-area page refresh** Fresh, local, and specific.

AI-assisted content is still advertising. No guarantees, no unverifiable “best” claims, and human review before anything is published (Rule 4-7.13).

The rules haven’t changed. The tool has

Florida Bar Ethics Opinion 24-1 (Jan. 2024) | AI language now in the comments to Rules 4-1.1, 4-1.6, 4-5.1, and 4-5.3 | ABA Formal Opinion 512 (July 2024)



RULE 4-1.1

Competence

Understand the benefits and risks of the tool, including generative AI. Keep your CLE current.



RULE 4-1.6

Confidentiality

Vet where client data goes. Get informed consent when confidential information could be stored or learned from.



RULES 4-5.1 / 4-5.3

Supervision

Treat AI like a non-lawyer assistant. You supervise it, you verify it, and you answer for it.



RULE 4-1.5

Fees and costs

Bill real time, not AI speed. Charge actual cost only, and tell the client up front, ideally in writing.



RULE 4-7.13

Advertising and intake

A chatbot must say it is AI, not a lawyer. You answer for what it tells prospects.

Ethics opinions are advisory; the Rules Regulating The Florida Bar are what bind.

Courts are watching

FLORIDA RULE 2.515(d)(2) | EFFECTIVE JUNE 15, 2026

Your signature now speaks to AI and accuracy

By signing a filing, you represent that it has been checked for accuracy, including AI-assisted work and citations. Courts can sanction filings that don't match. It replaces the patchwork of circuit-level AI orders.

JUNE 2026 | FEDERAL COURT, MISSISSIPPI

Lawyers on both sides sanctioned over AI-fabricated citations. Two were barred from appearing in the district for two years.

MARCH 2026 | SIXTH CIRCUIT

$15,000 punitive sanction on each of two lawyers over fabricated and misrepresented citations.



Legal-specific tools aren't immune: a 2024 Stanford study found hallucinations in more than 1 in 6 queries.

AI drafts. You verify. You sign.

Before AI touches client data

1. **Who can see my data?**
   Vendor staff, subcontractors, human reviewers.
2. **Does it learn from my inputs?**
   Get the answer in writing. Use business-grade tiers.
3. **Where does it live, and for how long?**
   Storage location, retention, deletion on request.
4. **Is it secure?**
   Encryption, multi-factor sign-in, independent audit (such as SOC 2).
5. **What does the contract promise?**
   Confidentiality, breach notice, subpoena handling.
6. **Can I verify its output?**
   Linked sources I can check against the original.
7. **Who in my firm can use it?**
   Admin controls and an activity log.
8. **Does my client know?**
   Engagement-letter language; informed consent when confidential data is involved.

Any “no” or “I don’t know”? Client data stays out until it’s answered.

The next twelve months



From chat to “do it for me”

AI agents that complete multi-step tasks: intake, conflicts, scheduling, a first-draft engagement letter. Pilot one workflow with human checkpoints; analysts expect many agent projects to stall.



AI inside the tools you already use

Word, Outlook, and practice-management software are adding AI. The Florida Bar’s program with Clio offers eligible members free access to Clio Work.



More discovery inside AI answers

Expect more clients to start in ChatGPT, Gemini, and Google’s AI. Clear, local, expert content is how you get recommended.



More guardrails, not fewer

Court certification rules are spreading and the Bar’s AI committee keeps studying new requirements. Technology competence now includes AI.

YOUR NEXT STEP

Your first seven days

DAY 1



Pick one tool and run the checklist.

DAY 2



Test the intake prompt on fictional data.

DAY 3



Write a one-page AI policy.

DAY 4



Update your engagement-letter language.

DAYS 5–7



Record one expert conversation. Publish one FAQ.

YOUR ONE-PAGE AI POLICY

Approved tools | what data may go in | verify every citation | bill real time and actual costs only | train your staff | review quarterly

Move quickly. Verify carefully. Be easy to find.



Save Time



Get Found



Protect Your License

Questions?

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realedgelabs.com

Legal Edge Prompt Library
59 prompts with safety guidance
promptedge.realedgelabs.com

Free 3-Day AI Confidence Challenge
20–30 minutes a day
legaledgeservices.com/resources

The Book on AI for Attorneys
Read chapters 1–2 free
promptedge.realedgelabs.com/book

APPENDIX A1

Prompt pack: intake and updates

Intake summary

USE FOR: NEW INQUIRIES

You are an intake assistant for a Florida [practice area] law firm. Do not give legal advice. From the message below, list: 1) matter type and one-line summary; 2) key facts, dates, and amounts; 3) anything time-sensitive; 4) every person and entity to run for conflicts; 5) questions we still need answered; 6) a warm reply under 120 words inviting a consultation.

Message: [paste]

Client update

USE FOR: STATUS EMAILS

Rewrite this case update for a client with no legal background. Tone: calm and reassuring, never promising an outcome. Use four parts: what happened; what it means; what happens next; what we need from you (or "nothing this week"). Under 150 words.

Update: [paste]

Document summary

USE FOR: CONTRACTS, LONG DOCUMENTS

Summarize the document below in a table: parties; key dates; obligations of each side; payment terms; termination; unusual or one-sided clauses; and questions to ask the client. Cite the clause or page number for every row so I can check it against the original.

Document: [paste]

Replace [brackets]. Use fictional or anonymized information unless your tool has passed the checklist. Review every output.

APPENDIX A2

Prompt pack: drafting and content

Draft outline

USE FOR: LETTERS, MOTIONS, MEMOS

Act as a careful associate. Using only the facts below, draft an outline of [document type] under Florida law. Mark every legal proposition that needs authority with [CITE NEEDED]. Do not invent citations. List your assumptions and any missing facts at the end.

Facts: [paste]

Red-team review

USE FOR: STRESS-TESTING YOUR DRAFT

Review the draft below as opposing counsel. List the five weakest points, every statement of law that needs a verified source, and any fact not supported by the record I provided. Do not add new citations.

Draft: [paste]

FAQ from a transcript

USE FOR: WEBSITE AND SOCIAL CONTENT

Turn this transcript of my answer to a client question into a 400-word FAQ page for [city and practice area]. Plain English. No guarantees or predictions of results, no claims that I am "the best," and end with a line that this is general information, not legal advice.

Transcript: [paste]

Replace [brackets]. Use fictional or anonymized information unless your tool has passed the checklist. Review every output.

APPENDIX A3

Sources and resources

ETHICS AND RULES

Florida Bar Ethics Opinion 24-1
Generative AI (Jan. 19, 2024). floridabar.org/etopinions/opinion-24-1

In re Amendments to Rules Regulating The Florida Bar, Chapter 4
AI comments to Rules 4-1.1, 4-1.6, 4-5.1, 4-5.3 (Fla. Sup. Ct.)

In re Amendments to Fla. R. Gen. Prac. & Jud. Admin. 2.515
No. SC2026-0673 (Fla. May 28, 2026; effective June 15, 2026)

ABA Formal Opinion 512
Generative Artificial Intelligence Tools (July 29, 2024)

PRACTICE RESOURCES AND REPORTING

The Florida Bar Guide to Getting Started with AI
Free on LegalFuel (legalfuel.com)

Gyi Tsakalakis, "AI-Powered Search Visibility for Law Firms"
ABA Law Practice Magazine (Mar./Apr. 2026)

Bloomberg Law reporting
Mississippi AI sanctions (June 2026); Florida Rule 2.515 (May 2026)

Whiting v. City of Athens
No. 25-5425 (6th Cir. Mar. 13, 2026)

Clio and The Florida Bar
Preferred Bar Program announced at the 2026 Florida Bar Annual Convention

Ethics opinions are advisory. Verify current status and exact wording before relying on any source.