# Assembly Neos

# How to Evaluate Legal AI Tools
## (and Avoid Wasting Time and Money)
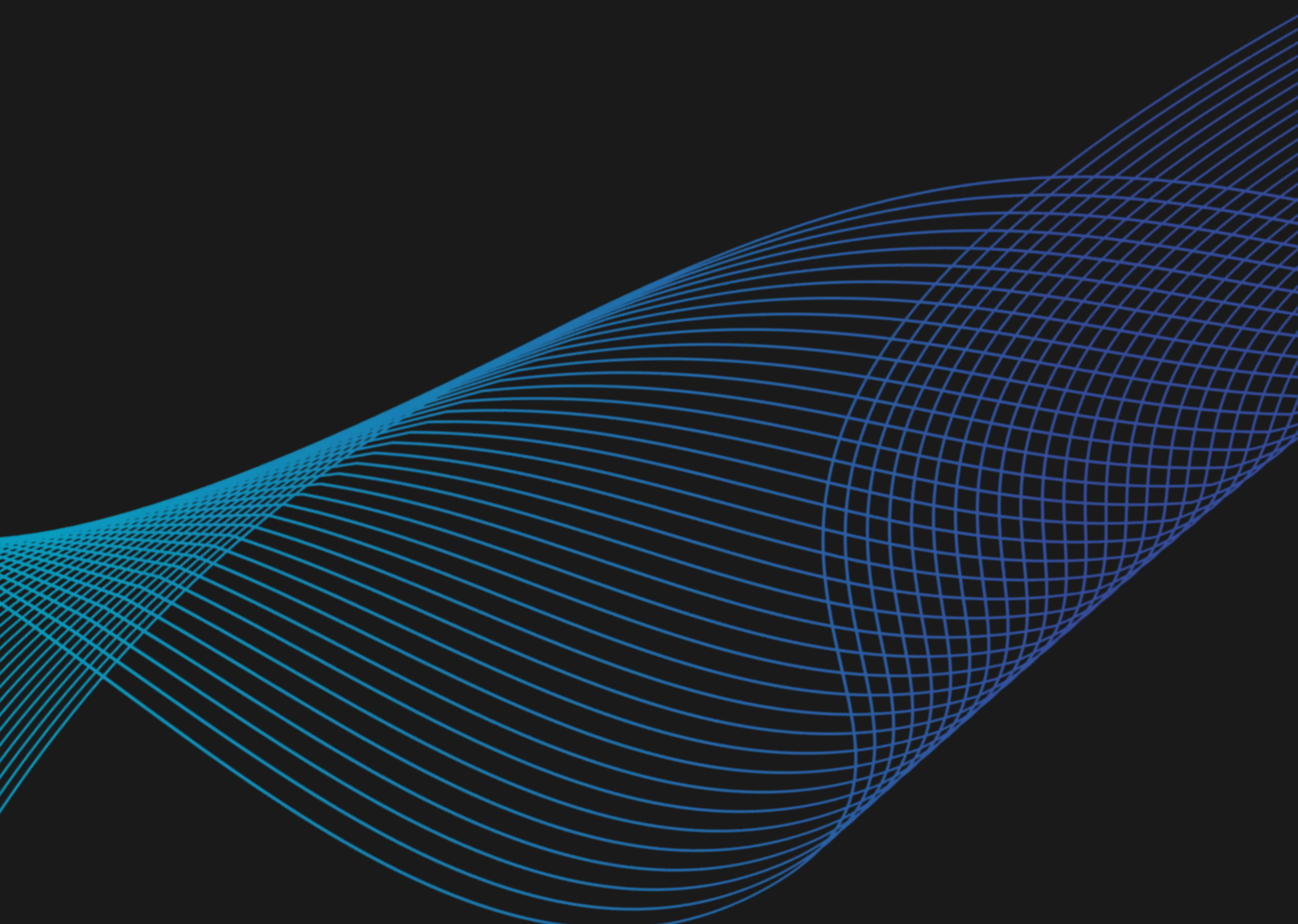
# Key Takeaways from this Article



- **Prioritize Practical ROI** – Choose AI tools that directly reduce manual work, save time, and address real challenges in your firm's workflow, rather than chasing flashy features you don't need.
- **Demand Usability and Security** – Select solutions that are intuitive for your team to adopt and meet stringent legal data security standards, including encryption, zero data retention, and compliance certifications.
- **Insist on Flexibility and Transparency** – Your AI should adapt to your existing workflows, integrate with your current systems, and allow you to verify and edit outputs to ensure accuracy.
- **Seek Strong Vendor Partnership** – Work with providers who offer responsive support, welcome feedback, and maintain a legal-specific development roadmap to keep pace with evolving needs.

Artificial intelligence is rapidly transforming the legal landscape, but with so many tools available (all touting life-changing capabilities, naturally), it's easy to feel overwhelmed.  From document summarization to chat-based assistants and data extraction, the promises of AI are myriad. **But how do you know which tools are right for your firm?**

Whether you're tech-savvy or just beginning to explore what AI can do, here are six essential criteria every legal professional should look for in an AI tool.

## Real-World Application and ROI of Legal AI Tools

**Repeat after us: An AI tool is only valuable if it makes your job easier.** Just because it's new and shiny and promises the world doesn't mean you'll benefit from using it. Furthermore, adopting it comes with an opportunity cost. Your time might be better spent evaluating other tools or, (ahem), focusing on your actual work.

This just means taking the time to evaluate AI tools thoroughly before making a decision.

For starters, look for features that **reduce manual work** like automatic document generation, immediate transcription, instant summarization of case files, quick extraction of names, dates, and key facts, etc. These aren't just flashy features; they save real time and increase your firm's capacity for taking on new cases without adding headcount.



The best AI tools help you and your staff get more done without adding stress to your day. For example, look for AI that can:

- Draft documents faster
- Review case files more efficiently
- Eliminate repetitive data entry
- Capture insights without manually digging through paperwork

When evaluating a tool, always ask: *How many hours will this save my team each week? What is slowing them down now and can AI assist?*

> **There is no point in adopting an AI tool that solves a problem you don't have.**

## Ease of Use

You already have a law degree; you shouldn't need a computer science degree to use AI.

A good legal AI tool should feel intuitive, not intimidating. If using the tool creates more confusion than clarity, it won't get adopted by your team, full stop. Features like natural language prompts, clear user interfaces, and simple onboarding workflows can make or break your firm's experience with AI.



**Look for tools that allow attorneys and staff to get answers, generate documents, or summarize files with just a few clicks or plain-English questions that come naturally.**

The sooner your team sees success with the AI tool, the more likely they are to adopt it and benefit from it. Tip: Avoid tools with a high learning curve, as they're likely to discourage staff who are already hesitant about adopting new technologies.

## Data Security and Confidentiality

Your clients' information is sacred. Your AI tool must treat it that way. You wouldn't use a case management platform that didn't promise top-level data security; why should an AI application be any different?

Legal professionals deal with highly sensitive and confidential data, and AI tools must adhere to strict privacy standards. At a minimum, ensure your AI provider offers secure cloud hosting (e.g., Microsoft Azure), encryption of data in transit and at rest, and a *zero data retention policy*—meaning any data passed through the AI is not stored or reused.

Generic AI software that does not specifically cater to legal professionals like Co-Pilot or Chat GPT do not promise security and should not be used with any data that needs to remain private.

Ask your vendor if they can share their security certifications or compliance standards (such as SOC 2 or HIPAA, depending on your practice area).

In an ideal world, your AI application should be embedded in your case management platform and follow the same security measures. This keeps your data protected, and as an added bonus, uses only information from your case files, improving output accuracy.



## Customization and Workflow Flexibility

Every legal practice has its own unique way of practicing law. Just like a good case management platform, your AI should adapt to you, not the other way around.

A solid AI tool will expedite your existing successful workflows, without forcing you into clunky workarounds. It should allow for easy integration into your existing case management systems (bonus points if the tool can work natively within your current software instead of forcing you to bounce between platforms!).



Avoid rigid tools that require a complete process overhaul just to implement AI. It's time-consuming and often leads to push back from your staff.

## Transparency and Trust

If you can't verify the output, you can't trust it. Many legal professionals have been tripped up by AI hallucinations because they didn't verify the accuracy of the AI's output.

Legal professionals **must be able to audit and validate the results provided by AI,** whether it's a case summary, an extracted data point, or a draft document. Look for tools that allow you to preview results, highlight where information was pulled from, and edit outputs before finalizing them. This lets you use AI output with confidence, knowing that it only contains truthful and accurate content.

Another benefit of AI embedded in your case management platform is the ability to easily verify results (as long as the tool offers this capability).

## Vendor Support and Responsiveness

The best AI tools come from companies that listen to customer feedback, evolve to ever-changing legal workflows, and provide timely support . Both AI and the legal field are constantly changing; your technology should keep up.



**Ask potential vendors:**
- Do you have a legal-specific roadmap?
- Can customers submit feature requests?
- What's your average response time for support?

Your firm deserves more than just a software license! You need a collaborative partner that's invested in your long-term success.

## Don't Just Adopt AI for the Sake of AI–Adopt the *Right* AI

Artificial intelligence has the potential to dramatically improve how legal professionals work if the tool(s) fit your evaluation criteria. Before you commit to any platform, take the time to evaluate how it performs across these six areas: usability, security, practicality, flexibility, transparency, and support.

By choosing wisely, you'll not only avoid costly missteps–you'll empower your team to supercharge their productivity, lower their stress, and work each case with greater confidence.

**NeosAI Chat**
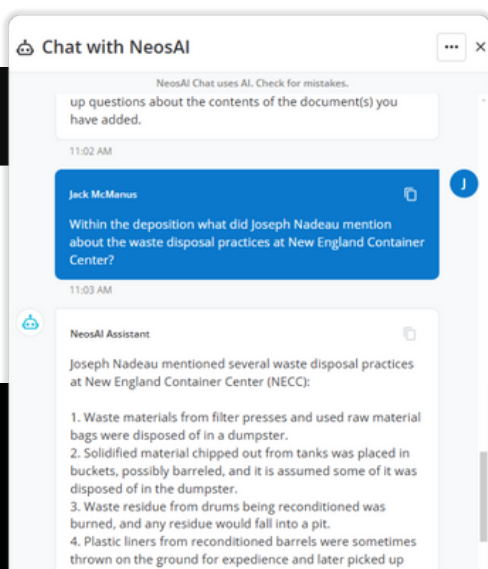


### Need Help Finding the Right Legal AI Tool?

Let us know! Our team can walk you through best-in-class solutions designed specifically for legal professionals.

**Get Consultation** ▶

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