

LEGALZOOM

# The AI Customer Call Simulator

EMPOWERS OUR TEAM TO DELIVER MORE  
PERSONALIZED, EXPERT SUPPORT FROM DAY ONE.



## Powering the Next Generation of Legal Services: Inside LegalZoom's AI Call Simulator

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LegalZoom

Life is more legal than you think.

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At LegalZoom, we know life is more legal than you think. Supporting our customers with expertise throughout every stage of their journey is so important to us – and is why we are making strategic investments in Artificial Intelligence to transform the customer experience. We're excited to pull back the curtain on just one of the many ways we're using AI to build the future of legal services: our new, internally-developed AI Customer Call Simulator.

This powerful tool allows our customer-facing specialists in sales, support, and fulfillment to hone their expertise by practicing realistic phone conversations with an AI that roleplays as a customer in real-time. It's designed to ensure every member of our team is exceptionally prepared to help customers navigate their legal and business challenges.

## The Business Impact: From a 3-Month Ramp-Up to First-Week Proficiency

The impact of this new training method pilot has been transformative, drastically cutting down the time it takes for new specialists to become effective.

- **Before:** Our compliance specialists typically required up to three months to reach full proficiency.
- **After:** In our AI simulator pilot, new hires achieved **94% of tenured agent performance within their first week** of talking to customers. By the end of their third week, they had reached nearly **300% to their plan for the month**.

### The AI Call Simulator Experience

The AI Customer Call Simulator allows employees to engage in live, voice-to-voice conversations across multiple scenarios. Here's a look at the user journey:

- **Choose a Scenario:** A trainee can select from a library of scenarios tailored to different



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practice calling to help a customer who forgot to file a legally-required Annual Report for their LLC. New scenarios can be requested via a simple Google Form or added almost instantly through a connected Google Sheet.

### CONSUMER ▾



Welcome to the LegalZoom AI Call Simulator! Please select a training scenario below:



Pick a scenario to begin training:

Last Will & Testament

Living Trust

Financial Power of Attorney

Healthcare Directive

Real Estate Deed Transfer

Real Estate Lease

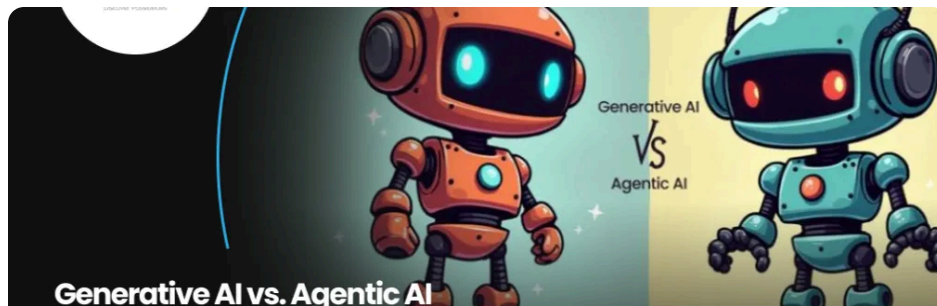
- **Start the Roleplay:** The AI, acting as the customer, responds with a realistic voice in real-time to begin the training session. The call is transcribed in real time and transcripts are saved for future reference.
- **Get Instant Feedback:** At any point, the trainee can say the voice command "Grade my call now". The simulation immediately ends, and the AI provides a detailed performance breakdown based on a customizable rubric. Users can also see all their past conversations and track their progress over time.

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You're very welcome, Maria. If you allow me, I'm going to send you an email with my contact information right after this call, and I can give you a follow-up call this next Monday at 9 a.m. How about that?



That sounds great! I'll look out for your email and I'll be ready for your call on Monday at 9 a.m. Thanks again for your help!

Perfect. Is there anything else I can assist you with today, María?



No, I think that covers everything for now. Thanks again for your time and the information!

Well, thank you for calling LegalZoom and hope you have a great weekend.



Thank you, you too! Bye now!

Grade my call now



ENTERING GRADING MODE.

Let's break down your performance step by step:

1. Greeting (5 pts): Yes, you greeted me, introduced yourself, and mentioned LegalZoom. Full points here. (5/5)
2. Empathy and Active Listening (5 pts): You did acknowledge my questions and listened actively, but there wasn't a clear paraphrasing of my main concern before moving forward. I'll give you partial credit. (3/5)
3. Phone Etiquette (10 pts): No long periods of dead air, and you did ask for permission when gathering personal information. Great job here. (10/10)
4. Effective Probing (20 pts): You asked good clarifying questions about the ownership and property state, but you didn't dive too deeply into the exact nature of what I was asking (the difference between quitclaim and warranty). I'll give you partial credit. (15/20)
5. Information Accuracy (20 pts): You provided somewhat accurate information on general

The story behind this application's creation is as important as the technology itself. In a testament to a new, more agile way of working, this project went from an initial concept to a fully deployed internal application in under 24 hours—*without a single meeting*.

This speed was possible through clear vision, technical readiness, and outstanding partnership between Operations and Engineering:

- **Business-Led Vision:** Our Central Operations team provided a thoroughly documented proposal for the tool, including a mini-pilot they had already conducted using ChatGPT's Advanced Voice Mode to prove the concept's value.
- **Rapid Execution:** Armed with this well-crafted plan, our AI Enablement team was able to build and deploy a working application within a day. This was facilitated by our ongoing investment in tech platforms designed for rapid prototyping and continuous deployment.
- **Efficient Collaboration:** The project leaned heavily on efficient, asynchronous communication, which is crucial for turning great ideas into functional prototypes without the bottleneck of meetings.

### For the Tech-Curious: A Glimpse at Our AI Stack

For those interested in the technology, our ability to move this quickly comes from a versatile and scalable internal platform. A typical AI service at LegalZoom is built using a stack that includes:

- **Backend Service:** FastAPI for high-performance API development.
- **AI Agent Framework:** PydanticAI for building structured, reliable AI agents.
- **LLMs:** We use a variety of LLMs from OpenAI, Anthropic, and Google.
- **Frontend:** Either Chainlit or React, depending on the application.
- **Infrastructure:** Kubernetes for scalable container orchestration and AWS services like Bedrock Knowledge Bases to power Retrieval-Augmented Generation (RAG) use cases.

### Just the Beginning

The AI Customer Call Simulator is a huge leap forward in how we empower our teams, making training faster and more effective. Our investments in AI are focused on creating tangible, real-world value for both our employees and our customers today. This is just one of many steps we are taking as we build the cutting-edge AI capabilities that will power the next generation of legal services.



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