1. Richard, you have a really interesting background. Can you describe it and explain how you got into AI?

That’s a bit like asking a fish when it first got into water.

My computer science journey began a bit more than 45 years ago. A few years into that, while studying at MIT, I began doing research that included AI. After MIT and my first graduate degree, I moved to industry where I worked in the AI space for a few years before heading to the University of Chicago to get my JD.

I practiced law for 14 years at Sidley Austin and then a decade as the General Counsel at Morningstar. I was a corporate lawyer who did a lot of public company M&A work. I never stopped thinking about the flow of information as it related to legal work.

I left Morningstar and returned to Sidley where I created it’s Knowledge Management department and got a chance to think about a broad array of innovative data and language based problems. Some small, some large.

I left Sidley and ended up at Fireman, now part of Epiq.

Along the way I enrolled in a Master’s Degree program in Data Science at UC Berkeley. I expect to graduate in May next year.

I have focused on machine learning and natural language processing. I am now part of the team that teaches that class in our program. ChatGPT hit just as I was completing an interesting large language model project that included, among other things, text generation.

I recently moved from Fireman to Epiq, it’s corporate parent, where I am our Managing Director of Applied AI.

1. What services are you building out with the Epiq AI group? Are those services offered to law firms or corporate legal departments or both?

You can find AI expertise throughout Epiq. Our AI Practice Group consists of the technical experts inside Epiq with a range of AI-related skills. Our work cuts across the organization and is embedded in various groups. Most of us are closely associated with a particular part of the organization. I am fortunate to have a very broad remit and get to work across the enterprise in seemingly every dimension imaginable. I am very busy these days.  
  
Our works touches on all things Epiq including the internal platforms we use to deliver our solutions to clients, the work we do for corporate legal departments and the work we do for law firms.

Like many organizations these days we are working on a variety of exciting use cases. I am not going to pre-empt the things we will announce. We are eager to continue the conversations we have been having with our clients, be they corporate legal departments or law firms, about how we can best harness evolving AI technology on their behalf.

1. Will you be supporting law firms and organizations in building with existing LLMs or setting up sandboxes for them to experiment?

We have not set boundaries in that regard. Our work right now includes models running on different cloud platforms and we routinely flip from on existing LLM to another, one cloud platform to another. We have our own rich, secure sandbox environments. We will work with our clients to develop solutions where they need those solutions to be.

1. What are you seeing law firms do with this technology?  
   * I believe the vast majority are thinking about use cases. There have been a few that have announced internal Gen AI platforms. At a minimum, this approach makes it easier to keep the firm data from being exposed outside the firm. A Gen AI platform can make an ideal front end, a distributor so to speak, to an array of other systems inside the firm.
   * It’s easier to consider an expanded offering from a current vendor – so, for example, if you are an existing TR or Lexis customer, it’s less effort to take advantage of new capabilities compared to bringing a new vendor into your environment. More forward-looking firms will certainly be open to testing offerings from new entrants into the space.
   * All of this is happening as law firms continue their migration of on-premises document management systems to the cloud. The document management system remains the most valuable firm data source. The migration to the cloud goes hand in hand with adoption of a lot of Gen AI technology, especially technology that relies on firm documents.
   * As law firms ponder what Gen AI means for them, they increasingly recognize that they must get their data in order. Expect data strategies, information governance and data governance to loom especially large. So too with taxonomies, like SALI.
2. What do you think law firms and corporate legal departments *should* be doing with this technology right now?

I am not a fan of technology for technology’s sake. I cringe when I see solutions in search of a problem. As always, you must focus on the business problems that matter the most to your organization and wok from there.

Look to use this technology to enhance the ability of your people to get their work done as opposed to substituting the technology for them.

Work to set reasonable expectations of the strengths and weaknesses of the technology and go from there.

Expect that the best solutions will harness the best of new and “classic” approaches. As I am increasingly fond of saying, “sometimes you need hammer and a screwdriver.”

* + Is building the right way to go?
    1. Some organizations like to build their own technology solutions. I have always been somewhat skeptical of that approach. Once you build something you need to maintain and support it. But for organizations where that approach resonates, I think that’s fine.  
         
       But saying that you want to build your own solution around a Gen AI platform is not the same thing as saying you want to build your own foundation model.
  + Can law firms get a competitive advantage, for example, from fine-tuning an LLM with a layer of their own data?

There are plenty of large language models that are still purpose built for a narrow range of use cases. Text classifiers come to mind. Training these or fine tuning one of these can be relatively easy if you have sufficient data. These are likely to outperform ChatGPT out of the box for that particular task. However, it’s important to recognize that ChatGPT may do a reasonably good job without the additional work. So the question will be if the incremental benefit is worth the effort. The jury is out as to whether it is worth the effort to fine tune GPT-4 for example. Until recently you could not do that at all.

* + Do you think that firms that decide to "wait and see" will be behind the 8-ball, or is this a viable option for now? If yes, how long do you think that is a viable position?

People use law firms for the results they deliver, not the technology they use. Now some practices are more of an efficiency play than others. For commodity, high volume work, I expect the need to adopt this technology will be more acute. Then again, GPT 4 is expensive.

1. What impact do you think advanced AI such as generative AI and the new large language models will have on the legal market broadly? When do you think that impact will hit - in a year, three years, 5 years, ten years?  
   * Incumbent product makers have an opportunity to feather in the benefits of new technology to enhance their traditional offerings. The best solutions will harness new technologies while relying on the strengths of what came before. The technology advances will draw new players into the space – but they risk not fully appreciating the nuances of the legal market. Incumbents who rest are at risk of extinction and naïve new entrants risk misreading the market. Between those two land mines lies great opportunity.
   * Law firms and corporate legal departments need to stay focused on the most valuable use cases. Do not be distracted by shiny new toys, or solutions searching for a problem. The technology, amazing as it is, is not a magic bullet. Data still needs to be clean and well organized. Beware the hype. On the other hand, do not think this is a passing phase. This wave has been building since 2017. It is not a bolt of lightning out of nowhere. Do not expect perfection. The current technology is still most effective in the hands of someone skilled at the task at hand. I view it as an accelerant, not a replacement, for the attorney or other knowledge professional. Expect rapid change.
   * ALSPS have an opportunity as well. Here, it’s largely an efficiency play. But the new technology is not cheap. The right choice might not be the most advanced offering.
2. Beyond your group, what are Epiq's plans to integrate this new technology into its products and services?
   * Our Generative AI services and solutions will utilize the Epiq Service Cloud infrastructure, which we are enhancing to support large language models and adjacent components, all within a secure, encrypted data lake built using our experience across the data life cycle.
   * We are not new to the AI space. Our offerings include AI-enabled knowledge management, discovery, contracts review, compliance offerings, and Metrics that Matter dashboards and insights. We our extending our offerings to take advantage of what Generative AI offers.
   * Our law firm and corporate legal department consultants stand ready to provide Generative AI focused advisory services.

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1. What about corporate legal departments?  
   * Like the law firms, they are thinking about use cases.
   * Corporate legal departments are also key stakeholders in the development of corporate policies regarding the use of AI and likely the evolution of data privacy policies.
   * If you broaden the scope of corporate legal departments to encompass legal operations, they can think about how to use Gen AI to help manage and monitor outside counsel, review fidelity to outside counsel guidelines and provide better ways to provide internal updates on matter status inside the organization.
   * As with the law firms, corporate legal departments would be well advised to see that they relevant data strategies, information governance and data governance policies and practices are in place. These will be important prerequisites to getting the best out of Gen AI.
   * Corporate legal departments have an opportunity to enhance internal compliance efforts, often communication focused, with Gen AI.
   * On the commercial side of the house, lawyers involved in the day to day contracting business of the company should benefit from the efficiencies offered by new drafting and negotiation focused technology.