

Generative AI in Client Service: Promise, Pitfalls & Practice

California Minority Counsel Program 2026 CMCP MCLE Marathon

Date & Time: Friday, February 6, 2026, 9:00 am - 10:00 am

Title: Generative AI in Client Service: Promise, Pitfalls & Practice

Description: Explore how generative AI is reshaping client service—accelerating research, personalization, and delivery—while examining lawyers’ ethical obligations related to confidentiality, competence, supervision, and professional judgment. This session distills practical frameworks, guardrails, and use cases to help professional teams adopt AI responsibly in both internal and client-facing work.

Panelists:

- Amir Amir, Director of Legal, Gen Digital
- Shaunak Turaga, CEO, DocSum
- Ming Zhu, Senior Counsel, Google LLC

Moderator:

- Michael Lavine, Of Counsel, Jones Day

CA MCLE credit: 1.0 hr (.50 hr in Legal Ethics and .50 hr in Technology)

OUTLINE:

- SECTION 1: SESSION OVERVIEW & SPEAKER INTRODUCTIONS

Generative AI has moved very quickly from experimentation to real client-facing workflows—often faster than professional norms, policies, or regulations can keep up.

Today’s session is not about whether generative AI is good or bad. It’s about how it’s being used right now in client service, where it delivers real value, and where it introduces new legal, ethical, and operational risks.

For lawyers and other professionals, this raises familiar—but newly urgent—questions: How do we meet our duty of competence? How do we supervise tools we didn't build? When is reliance on AI reasonable, and when does it cross a line?

Our panel brings together perspectives from legal, product, and operational leadership. We'll focus on practical frameworks, real guardrails, and concrete use cases—so you leave with ideas you can apply, not just concepts to debate.

- SECTION 2: PROMISE

The panel will discuss where AI delivers its value—where clients feel the difference.

Panel Questions:

1. In the context of technology in legal practice, where have you seen GenAI tools—when used under attorney supervision--meaningfully improve client service, and what changed in how lawyers actually deliver advice or work products to clients?
2. Which attorney workflows were appropriate early candidates for GenAI adoption, and what characteristics made those tasks suitable from a risk-management and professional responsibility standpoint?
3. What surprised you – positively or negatively – once attorneys began incorporating GenAI tools into real legal workflows, particularly with respect to accuracy, over-reliance, or supervision obligations?

- SECTION 3: PITFALLS

ABA Model Rule 1.1 and corresponding state rules (e.g., California Rule of Professional Conduct 1.1 similarly requires lawyers to maintain competence, including understanding relevant technology.) mandate that lawyers provide competent representation, defined as possessing the legal knowledge, skill, thoroughness, and preparation reasonably necessary for the matter. Competence includes staying abreast of changes in law and technology. Failure to act competently may involve intentional, reckless, or repeated negligence.”

The panel will discuss that GenAI's true value lies in enhancing—not replacing—legal judgment, while also introducing speed and scale that can bring meaningful risks when things go wrong.

Panel Questions:

1. Once GenAI tools are used in client-facing legal work, what risks most directly implicate a lawyer's ethical duties—such as competence, confidentiality, and professional judgment—under the California Rules of Professional Conduct?
2. How do you explain GenAI risk to non-technical stakeholders – like boards, partners, executives – in a way that reflects lawyers' professional responsibility obligations without overstating the risk or minimizing ethical constraints?
3. Where have you seen attorneys or legal teams over-rely on AI-generated outputs in ways that raised concerns about a lawyer's duty of competence or supervision, preservation of privilege, and how was that addressed?
4. How do you draw the line between permissible internal experimentation with generative AI and client-facing legal work, particularly in light of a lawyer's ethical obligations around confidentiality, supervision, and client communication
5. How do you assess whether reliance on an AI-assisted legal work is reasonable under a lawyer's professional obligations—especially the duties of competence, independent judgment, and supervision—rather than simply whether the output appears correct?

SECTION 4: PRACTICE

The panel will discuss what responsible adoption of generative AI looks like in practice and why, while it doesn't alter lawyers' ethical duties, it heightens the need for thoughtful compliance.

Panel Questions:

1. What AI governance structures are being implemented for deploying generative AI tools at scale—such as centralized model review, embedded technical guardrails, or business-unit ownership – and why?
2. What security or architectural questions are deal-breakers for vendor tools?

3. From a professional responsibility standpoint, which generative AI policies or ethical guidelines looked sound on paper but proved ineffective in practice—or conversely, which informal practice safeguards turned out to be more effective at supporting a lawyer's ethical duties?
4. What is one GenAI use case you think outside counsel firms should not deploy yet, because it might present significant risks of their ethical duties, for example, duty of competence, duty of confidentiality?
5. What guardrails must be in place before AI can be used in client-facing legal work, consistent with lawyers' professional and ethical obligations?

SECTION 5: AUDIENCE Q&A

SECTION 6: CLOSING / WRAP UP

Final Question: What's one thing attendees can do in the next 90 days to help them adopt AI more responsibly?"

ADDITIONAL RESOURCES:

Cynthia H. Cwik, Christopher A. Suarez & Lucy L. Thomson, *Artificial Intelligence: Legal Issues, Policy, and Practical Strategies* (American Bar Association 2024).

Thomson Reuters, *Ethical Uses of Generative AI in the Practice of Law* (Aug. 2025), available at <https://legal.thomsonreuters.com/blog/ethical-uses-of-generative-ai-in-the-practice-of-law>.

Practising Law Institute & American Arbitration Association, *AI and the Future of Law* (podcast), available on Apple Podcasts.

American Bar Association, *Ethics and Innovation: Navigating Generative AI in Law*, Law Practice Today (podcast).

State Bar of California, *Practical Guidance for the Use of Generative Artificial Intelligence in the Practice of Law*, available at <https://www.calbar.ca.gov/sites/default/files/portals/0/documents/ethics/Generative-AI-Practical-Guidance.pdf>.