AlphaForge USA

MARKET RESEARCH BRIEF / NOVEMBER 11, 2026

100 questions law firms are asking *about AI*

A research brief for choosing a first task, evaluating tools, and deciding what people need to check.



WITH A FOCUS ON SMALL ESTATE PLANNING, PROBATE, AND TRUST FIRMS

How to use this report

This public-source research focuses on U.S. law firms, with extra weight on solo and small estate planning, probate, and trust practices. The first 12 questions are ranked by how consistently the concerns appear across source types, the consequences of getting them wrong, and their relevance to smaller firms. The remaining questions are grouped by topic. All are synthesized. This is a consulting priority list based on public evidence. It cannot measure search volume, cover private forums, or establish demand for any particular service.

What the research shows

Confidentiality, accuracy, and cost recur across source types. In the 2026 Secretariat–ACEDS survey of law firms, legal departments, government and e-discovery professionals, 57% cited data privacy or confidentiality as an adoption barrier, 46% cited hallucinations, and 40% cited cost.

Individual use is ahead of policy. In 8am's 2026 report, 69% used general-purpose AI at work and 43% said their firm had no formal AI policy and no plans for one. More than 1,300 primarily North American legal professionals responded in September–October 2025.

Small firms have fewer formal safeguards. In the November 2026 Best Law Firms survey, 26% of solos and 42% of firms with 2–19 lawyers reported clear policies on AI use for client matters. In Clio's separate October 2026 report, 85% of legal professionals reported some level of adoption at their firm. The two surveys measure different things.

Practical concerns include extra time reviewing AI work and clients bringing their own AI-generated estate plans into consultations. October practitioner discussions illustrate both problems. Their prevalence remains unknown.

Sources Secretariat–ACEDS survey · 8am survey and methods · Best Law Firms survey · Clio 2026 Legal Trends Report

Find a topic

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QUESTIONS 1-12

Questions to answer first

1. What client or prospective-client information can we put into which AI tool, under which settings?
2. Can using AI expose confidential information or affect privilege or work-product protection?
3. How do we catch invented cases, fake quotations, misstated law, and missing facts before anyone relies on the output?
4. Which task should a firm our size pilot first, and which tasks should stay under direct attorney control?
5. What do our state bar, court, judge, and client agreements require for this use?
6. When do we need to tell the client, and when do we need informed consent?
7. Is our current business software sufficient, or is a legal-specific tool worth paying for?
8. What should a small-firm AI policy say, and how do we handle staff who already use personal accounts?
9. Who reviews the output, what do they check, and who signs off before it leaves the firm?
10. Will the workflow save time after setup, verification, correction, and training?
11. How do we bill fairly for AI-assisted work and explain the charges to clients?
12. How do we train people to use AI while developing the skills they need to spot mistakes?

Sources ABA Formal Opinion 512 · Florida Bar Opinion 24-1 · Thomson Reuters 2026 law firm interviews · LawyerTalk confidentiality discussion

A starting point for firms

Inventory the tools staff already use. Decide what information each approved tool may handle and who checks the output. Choose one recurring task and establish the current time and error rate. Run a bounded pilot using approved data and count the time spent on setup, review, and corrections. Let the results determine whether to expand, change the approach, or stop.

Talk through one task with AlphaForge

QUESTIONS 13-24

Confidentiality, security, and vendor terms

13. Will the vendor use prompts, files, feedback, or outputs for training, and does the agreement cover every feature?
14. How long are prompts, files, transcripts, and outputs kept, including in logs and backups?
15. Who at the vendor and its subcontractors can access our data, and where is it processed?
16. What contract terms should we require for confidentiality, deletion, incident notice, and changes in data use?
17. Does redaction do enough when the facts could still identify the client?
18. How do we handle medical and financial records, sealed filings, and data covered by protective orders?
19. Can AI surface another client's file, a restricted matter, or documents behind an ethical wall?
20. How do we control access for staff, contractors, and departing employees?
21. What access do we grant by connecting AI to email, shared drives, or practice management software?
22. When would a dedicated or locally hosted system justify the cost and work of securing it?
23. What do we do first if someone uploads a confidential file to an unapproved tool?
24. Can we export and delete data if we cancel, switch vendors, or retire the workflow?

Sources California State Bar AI guidance · NIST generative AI risk profile · Practitioner confidentiality discussion

QUESTIONS 25-36

Legal research, verification, and court filings

25. Which parts of research can AI speed up while preserving our verification process?
26. How do we confirm an authority exists, remains good law, and supports the exact proposition cited?
27. How do we check for omitted controlling authority, contrary cases, jurisdiction errors, or recent amendments?
28. Can every quotation, date, and factual assertion point back to the source page or record?
29. How do we spot important omissions in a summary that has no obvious falsehoods?
30. How should we test research tools on our jurisdictions and practice areas?
31. Do disclosure or certification requirements apply if the tool only edits, summarizes, or suggests research?
32. How do we keep filing checklists current across courts, judges, and case-specific orders?
33. What record should show who checked a filing and against which sources?
34. What do we do if an AI-related error reaches a court, a client, or opposing counsel?
35. Can AI summarize discovery, medical records, or depositions while preserving source links and privilege review?
36. How should we handle AI-generated or manipulated evidence, including audio, video, and images?

Florida’s 2026 amendment to Rule 2.515(d)(2) requires filing signers in Florida state courts to represent that cited authorities exist and are accurately cited. The statewide change superseded earlier circuit AI disclosure and certification orders. Check federal court and judge-specific requirements separately.

Sources Florida Supreme Court opinion · Florida Supreme Court administrative order · Example federal judge certification requirement · Independent legal-research reliability study

QUESTIONS 37-46

Clients, billing, and professional responsibility

37. What should an engagement letter say, and when do we need a separate conversation about a specific use?
38. How do we apply a client's AI restrictions to everyone working on the matter?
39. What do we tell clients about putting our advice, drafts, or case facts into their own AI tools?
40. How do we handle a consultation when the client arrives with an AI-written plan or theory?
41. How do we scope and price the review of AI-generated material a client brings in?
42. Can we bill for preparing instructions, checking results, and revising AI-assisted work?
43. Which AI costs can we pass through to clients, and which belong in overhead?
44. How should faster work affect flat fees, scope limits, or pricing for repeat matters?
45. What consent, retention, and review rules apply to recordings, AI notes, and client-provided bots?
46. What do our malpractice and cyber policies cover if AI contributes to an error or disclosure?

Sources ABA Formal Opinion 512 · NYC Bar opinion on recording client conversations · October estate-planning practitioner thread · United States v. Heppner · Lawyer billing discussion

QUESTIONS 47-58

Tool choice and pilot design

47. Where is our bottleneck, and would a form, template, or rules-based workflow solve it?
48. What can we already do with software we pay for?
49. When is a general business tool suitable, and when do we need authoritative legal sources or practice-specific tools?
50. What should a vendor demonstrate using representative matters and edge cases?
51. What does the tool cost per completed task, including licenses, integration, setup, and review?
52. What can a two- to ten-lawyer firm pilot without a dedicated technology team?
53. Which files can we use before the pilot handles live client data?
54. What accuracy, time, and adoption thresholds should we set before expanding?
55. What counts as a critical error that should stop the pilot?
56. How do we compare AI-assisted work with our current process using equivalent tasks?
57. What can we keep if we switch vendors, including templates, prompts, test cases, and records?
58. Who owns the workflow when a feature, price, model, or vendor term changes?

Sources ABA comparison of AI tool types · Attorney at Work small-firm examples · Clio solo and small firm report · Tool selection discussion

QUESTIONS 59-69

Drafting and practice-specific work

59. Can AI use approved templates without inventing clauses or borrowing facts from another matter?
60. Can we turn a questionnaire into a draft memo that flags missing or contradictory facts?
61. Can we draft a will, trust, or power of attorney while keeping attorney control of elections, exceptions, and execution requirements?
62. Can we compare trust amendments and restatements and trace each change to the governing text?
63. Can we extract fiduciaries, beneficiaries, and asset details into a draft inventory for staff to verify?
64. Can we build a probate checklist while separately verifying deadlines and notices?
65. Can AI flag inconsistencies in names, relationships, distributions, and versions across an estate plan?
66. How do we catch issues involving blended families, capacity, special needs, taxes, or assets in another jurisdiction?
67. Can we make a medical or case chronology with source pages and gaps marked?
68. Can we compare a contract with our clause playbook and send exceptions to a lawyer?
69. Can we draft plain-language updates or translations and check for changes to legal meaning before sending?

Sources ACTEC trust and estate resources · ABA estate-planning workflow example · Estate-planning staff discussion

QUESTIONS 70-80

Intake, reception, and client service

70. Can AI handle overflow or after-hours calls and give callers a quick way to reach a person?
71. What should we collect before conflict screening, and what should we avoid asking?
72. How do we keep a chatbot from giving advice, quoting unapproved fees, or implying we accepted a matter?
73. How should the system identify a possible emergency or imminent deadline and get it to a person?
74. What disclosures, permissions, and retention rules apply to AI calls, recordings, transcripts, and texts?
75. How do we handle accents, accessibility, language needs, distressed callers, and requests for staff?
76. Can the system distinguish an inquiry from an existing client, court, or opposing counsel without exposing matter details?
77. How do we get details into the right record without duplication or misassignment?
78. Which bookings, reminders, and follow-ups can go out automatically, and which require approval?
79. What happens when phone, calendar, or matter systems are unavailable?
80. How do we measure callback time, qualified consultations, missed escalations, and complaints?

Sources Florida Bar Opinion 24-1 · NYC Bar non-client recording opinion · Small-firm intake discussion

QUESTIONS 81-90

Training, supervision, and adoption

81. What should partners, associates, paralegals, and intake staff each be trained and authorized to do?
82. How do we enforce review standards when a partner hands AI-assisted work to a junior lawyer?
83. How do junior lawyers get practice doing research, drafting, and analysis themselves?
84. How do we teach staff to verify output using examples from their own work?
85. Who maintains approved prompts, templates, checklists, and examples?
86. How does someone take over an AI-assisted matter when the usual owner is away?
87. How do staff report an error or accidental upload, and who decides whether to escalate?
88. Why do staff avoid approved tools or continue to use personal accounts?
89. What do we measure besides logins and prompt counts?
90. How often should we revisit permissions, retrain staff, and test approved tasks?

Sources Thomson Reuters 2026 law firm interviews · Wolters Kluwer 2026 Future Ready Lawyer survey · LawyerTalk handoff discussion

QUESTIONS 91-100

Integration, agents, and ongoing oversight

91. How do we integrate existing software without creating a second record staff must maintain?
92. Which system is authoritative when an AI summary disagrees with a signed document or verified record?
93. Can AI prepare actions while people control sending messages, changing records, and filing documents?
94. How do we prevent instructions hidden in an email, attachment, or webpage from triggering a disclosure or action?
95. What should we log, and how do we keep the logs from becoming another store of sensitive information?
96. How do we catch and reverse an incorrect update, duplicate action, or message sent to the wrong person?
97. How do we test a model or software update before it affects live matters?
98. What is the manual fallback during an outage or sudden drop in quality?
99. How do we demonstrate the value of faster turnaround or greater capacity, and how does it affect staffing or pricing?
100. What evidence should make us expand, redesign, or retire a workflow?

Sources OWASP agentic application risks · ILTA 2026 Technology Survey · Thomson Reuters 2026 legal report