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GETTING STARTED AND LEVERAGING AI TO IMPLEMENT EFFICIENT WORKFLOWS AND INNOVATIVE SOLUTIONS TO SAVE TIME, REDUCE ERRORS, AND IMPROVE CONSISTENCY AND EFFICIENCY



RODNEY LUMPKINS
FREEMAN, MATHIS & GARY, LLP



POWER SKILLS

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**EACH SESSION
IS RECORDED**



**YOU WILL
RECEIVE A LINK
TO SLIDES AND
THE RECORDING**

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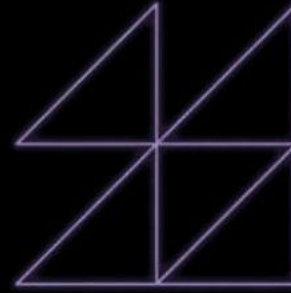


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TECHNOLOGIES



Getting Started and Leveraging AI to Implement Efficient Workflows and Innovative Solutions to Save Time, Reduce Errors, and Improve Consistency and Efficiency

RODNEY LUMPKINS, CLSPM

NOVEMBER 16, 2024

What I Do

Rodney Lumpkins



With over 26 years of legal experience and a Certified Litigation Support Project Manager (CLSP) designation, I bring a unique blend of expertise to legal operations. I lead a multimillion-dollar profit center with a team of 50 professionals supporting over 400 attorneys across 37 offices in 22 states. My department ensures the delivery of top-tier data and technology services to enhance our use of electronic evidence, e-Discovery, data analysis, and paralegal training services, optimizing cost-effectiveness. I lead strategic projects, leveraging my CLSP certification and experience to streamline litigation support.



Background



Passionate about advancing legal operations through Innovative Technology Solutions. I am a decorated US Army Veteran, syndicated writer, youth advocate, frequent speaker on career development, leadership, and law office technology. In addition, I am the Chair of the Atlanta Technical College Paralegal Program, and sit on the Association of Legal Administrators Affinity Group Leadership Committee and am a member of the International Practice Management Association (IPM).

As the Director of Litigation Support for a national Insurance Defense Firm, I am dedicated to revolutionizing the practice of law through cutting-edge litigation technology, efficient project management, and fostering a culture of continuous team development.



Who Can Benefit From AI?

AI isn't just for tech experts. It can be used by professionals in various fields, including project management, healthcare, and sales, improving efficiency by automating repetitive tasks.

By using AI, we can reduce human stress, burnout, and turnover, and instead allow our talented attorneys to focus on the kinds of problems that drew people into the profession in the first place

However, it is important to note the limitations of AI, as it cannot replace human decision-making

What You Already Know About AI Tools

Save Time and Reduce Errors:

- AI saves time and reduces errors, allowing teams to focus on strategic work. But remember,

Streamline Work Product:

- Project managers, HR teams, and finance professionals can all benefit from AI, enabling them to handle data, predict outcomes, and improve decision-making.

Faster Decision-Making:

- AI helps professionals make quicker and more informed decisions by providing insights through predictive analytics and automation.



We Will Not Revisit ~~X~~ that Information in this Session

What We Will Discuss Is “Electronic Evidence”

Smart Phones & Wearables:

- Text/SMS messages, chat history (i.e. Fitbit, WhatsApp, etc.)
- Videos, images (i.e. emoji’s, GIF’s, etc.)

Computers & Collaboration Platforms:

- Collaboration Tools (MS Teams, ZOOM, Constant Contact, etc.)
- CRM’s (Salesforce, Freshworks, HubSpot, Monday Sales, Jira..)

Active Digital Footprint:

- Social Media Platforms (i.e. Facebook, LinkedIn, Snap Chat..)
- Dating Apps: Tinder, Meetup, Bumble, etc.)
- GPS Systems (i.e. WAZE, Google Map, Find a Friend, etc.)

Other Smart Devices:

- Smart Home (i.e. Alexa, Smart Thermostats, Ring Camera’s, etc.)

Financial Records:

- Bank Statements, expense reports, CashAPP transactions



Different Types of Evidence that are Discoverable in a Court of Law!!

Project Managers Should Understand Electronic Evidence



In an era where electronic evidence is crucial for internal audits, regulatory compliance, and legal matters, project managers benefit from understanding how electronic data can serve as evidence. This knowledge empowers them to manage projects more securely and strategically, while reducing risk.



Three Examples



No. 1	Computer Vision: Uses algorithms to classify and recognize images
No. 2	Using AI to Summarize Medical Records
No. 3	Translations with AI

Computer Vision: Using Algorithms

Computer Vision: Uses algorithms to classify and recognize images:

- Pictures as Key Evidence in Lawsuits and Investigations
- Photographs often serve as decisive evidence, helping to quickly resolve cases

Personal Injury Claims:

A plaintiff claiming a severe back injury was shown in a photo winning a weight-lifting competition, resulting in case dismissal. Similarly, a photo of a plaintiff lifting a heavy package led to a swift settlement.

Product Failures: In a case of allegedly failing wood preservative, thousands of photos of rotting wood informed expert testimony, strengthening the evidence.

Product Liability: A photo showing a different manufacturer's label on a gas tank quickly dismissed a motorcyclist's claims against our client.



Computer Vision: Using Algorithms

Key Words:

Any keywords identified in a specific image will be maintained in a custom text field and automatically added to the search index. The keywords can be displayed as a field on the Browse screen and will also be visible from the Doc Viewer.



Filter Applied: 'Dynamic Coding Filtering' = 'Keywords = fence'

Browse Total: 1

Select	Title	LEP Cognitive Recognition Keywords
<input type="checkbox"/>	Uncovered-Pool-West-Palm-Beach	Pool, Fence, Yard, Water, Outdoors, Building, Nature

Doc Viewer

Uncovered-Pool-... Viewing Doc 7 of 7

HITS ORIGINAL HTML PAGE PDF TEXT

DISC DOC NOTES FACTS RELA

Auto Advance Propagate Coding

Document Id

General

Coding

Metadata

LLP Cognitive Recognition

Keywords
Pool, Fence, Yard, Water, Outdoors, Building, Nature

Metropolitan Areas

Pool Maintenance

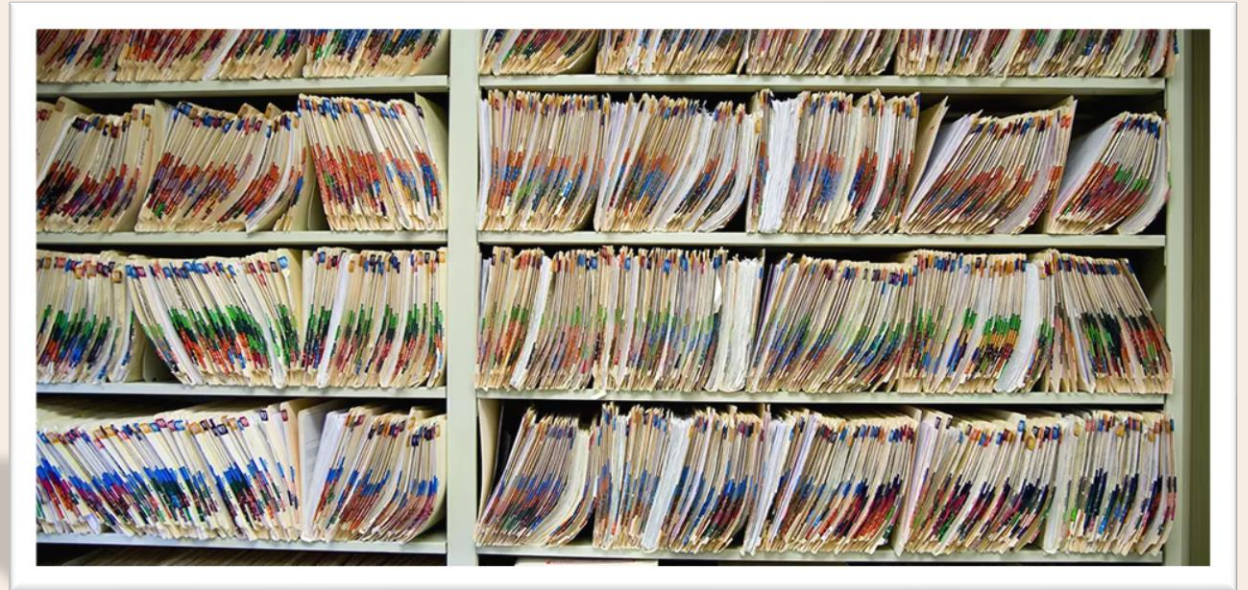
How Generative AI Works in Medical Summarization?

Using AI to Summarize Medical Records:

- AI in medical data provides summarized, time-sequenced insights, aids in tracking patient outcomes.

Contextual Summarization:

- Converts medical jargon into layperson-friendly language, focusing on relevance for case requirements.



Chronological Mapping: Summarizes significant events and treatments over time, providing an easy-to-follow timeline



Key Platforms Using AI for Medical Summarization

- **Digital Owl:** Specializes in summarizing medical records by transforming complex medical data into concise, actionable summaries.
- **Parrot:** Uses natural language processing to convert detailed medical histories into clear, relevant summaries, focusing on essential case information.
- **Apex:** Leverages AI to create organized, time-sequenced summaries, enabling faster case assessments and patient outcome tracking.



Medical Summary for Patient Bobby Richards

Abstract

In January 2021, Bobby Richards attended his annual physical exam with Dr. Emily White, where everything appeared normal. However, by February 3, Bobby experienced intermittent chest pain, leading him to visit Dr. Michael Brown, who suspected angina and referred him to a cardiologist. On May 14, Dr. Susan Green diagnosed him with Coronary Artery Disease (CAD) after a positive stress test and an echocardiogram. Bobby underwent a coronary angiography and had a stent placed in his left anterior descending artery. 1 2 3

Throughout the following months, Bobby had several follow-ups to manage his condition. In July, his post-PCI follow-up showed improvement, and his medication regimen was continued. In August, his hypertension was addressed with an adjustment in his Metoprolol dosage. In June, Bobby reported palpitations, leading to the identification of occasional premature ventricular contractions (PVCs). These were found not to be of significant concern. 4 5 6

Bobby's year concluded with routine check-ups and an unexpected bout of Influenza A in November, treated successfully with Oseltamivir. By October 2022, he had recovered fully and maintained stable health, with his coronary artery disease well-managed and no new symptoms. Bobby's diligent adherence to his medication and lifestyle changes, guided by his healthcare providers, allowed him to end the year on a positive note. 7 8 9

An Overview of the Patient's History

[Back to Abstract](#)

Chronology

Date	Entry	Record	Summary
01-15-2021	Annual Physical Exam	Record	Summary
02-03-2021	Chest Pain	Record	Summary
03-20-2021	Blood Pressure Check	Record	Summary
04-08-2021	Cardiology Consultation	Record	Summary
05-14-2021	Coronary Angiography	Record	Summary
06-27-2021	Palpitations	Record	Summary
07-09-2021	Post-PCI Follow-up	Record	Summary
08-18-2021	Follow-up on Hypertension	Record	Summary
05-12-2021	Follow-up on Palpitations	Record	Summary
10-22-2022	Routine Cardiology Check-up	Record	Summary
12-01-2023	Routine Cardiology Check-up	Record	Summary
06-23-2024	Routine Cardiology Check-up	Record	Summary

A Patient's Medical Chronology

[Back to Chronology](#)

06-23-2024 Routine Cardiology Check-up

Summary	Key Findings
Appointment details	<ul style="list-style-type: none"> Provider: Horizon Health Institute 2:1 Admit: 6/23/2024 2:2 Discharge: 6/26/2024 2:3 Service: Observation 2:4
Patient details	<ul style="list-style-type: none"> Name: Bobby Richards 2:5 Gender: Male 2:6 Age: 51 years 2:7
EKG results	<ul style="list-style-type: none"> Vent. Rate: 46 BPM 2:8 PR Interval: 172 ms 2:9 QRS Duration: 98 ms 2:10 P-R-T Axes: 29-47-67 2:11
Difference from previous visit	<ul style="list-style-type: none"> Aberrant conduction is no longer present 2:12 Vent rate has decreased by 22 BPM 2:13 No longer abnormality in inferior leads 2:14 No longer abnormality in anterolateral leads 2:15
Dr. Michael Roberts medical notes	<ul style="list-style-type: none"> Regular sinus rhythm 2:16 Normal P waves preceding each QRS 2:17 No signs of arrhythmia 2:18 Continue with current medication 2:19

A Summary of Each Patient Visit

Translations that Leverages the Power of AI

Leveraging the power of AI, that Swiss team can quickly and securely translate documents and begin reviewing in their business language—without ever leaving their desk.

- **Essential for any business with electronic data in multiple languages.**
 - **AI tools support fast searching through translated content, using filters for keywords, phrases, dates and topics Decision accountability:**
 - **Built in workflows can trigger translation automatically when new data is added, ensuring timely access to translated content.**
-

Translations that Leverages the Power of AI

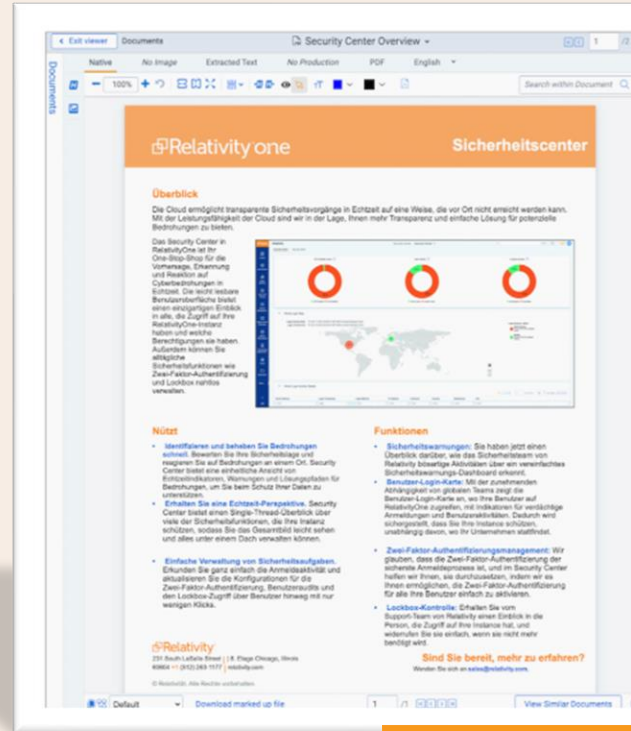
- **AI-Driven Document Translation Platforms**

- **Instant Translation Across Languages**

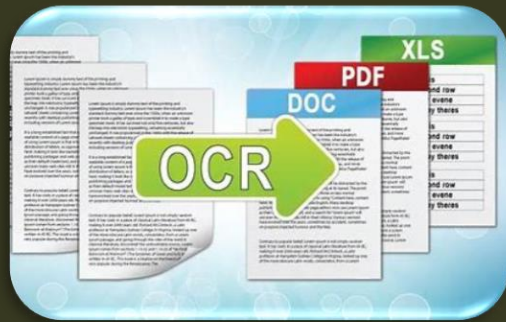
AI technology enables the rapid translation of large document collections, ensuring that critical information is accessible across linguistic barriers in seconds.

- **Key Platforms with Translation Capabilities**

- **Epiq:** Provides comprehensive translation for legal documents, integrating seamlessly with eDiscovery workflows.
- **Everlaw:** Utilizes AI to translate case documents, making cross-border collaboration easier and faster.
- **TransPerfect:** Offers robust multilingual support for legal and business documents with expert-level translation accuracy.
- **Lexbe:** Specializes in automated translation for litigation, helping streamline the review of foreign-language documents.
- **Veritone:** Features AI-powered translation across over 100 languages, ideal for large-scale, multilingual projects.



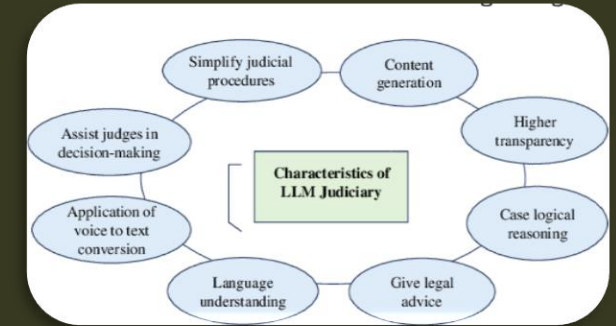
How We Are Leveraging AI to Garner Efficiency



- **Essential for any business with electronic data in multiple languages.**
- **Essential for any business with electronic data in multiple languages.**



- **Provides assistance with legal document analysis.**
- **Can assist with legal research by relevant cases, statutes, and regulations**
- **Can help analyze contracts by searching for key clauses (i.e. termination, indemnification)**
- **Simplify the eDiscovery process by categorizing documents**



- **Reference point for Judges.**
- **Can help reduce the timeframe that cases are open.**

A More Recent Example of Error Reduction?

Example: 16 Attorney's had to review over 16, 000 documents, in a 3 day period to create a summary for the judge.

AI: Allowed my project team to:

- Day 1: Review the documents.
- Day 2: Validate our findings with the Attorney's.
- Day 3: Create a streamlined summary document.



Thank you

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UP NEXT:



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AFTERNOON KEYNOTE

AI FOR HUMANS: WORKFORCE OF THE FUTURE
-ASHIMA SHARMA

HAPPY HOUR: SPONSORED BY ENCORE
TECHNOLOGIES

LINDNER HALL ATRIUM

SUMMIT 2024 SURVEY



Conference presentation

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