How Lowenstein Sandler Developed a Client-Facing Gen AI Chatbot

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Last week, Lowenstein Sandler became the first U.S. law firm to launch its own generative AI-powered client-facing chatbot, which provides access to information on the firm's website.

Kevin Iredell, the chief marketing officer at the firm, said that he believes the chatbot, currently in beta, is "the future" of law firm-client communication. Iredell said that the firm wanted to be "the first" to make a client-facing generative AI chatbot, and stressed that the tool isn't intended to provide legal advice.

Below, Legaltech News caught up with Iredell to discuss how the idea for the chatbot came about, the unique data structuring efforts to make it possible, and the development challenges the firm faced along the way.

The following conversation has been edited for length and clarity.

How did the idea of the chatbot come about?

It was back [when] Open AI launched their custom GPTs, allowing anybody who's subscribed to go in and build their own Chatbot.

Courtesy photo

Kevin Iredell, chief marketing officer at Lowenstein Sandler.

So I was thinking, we sit on a lot of unstructured data, like a lot of [law] firms. How could we use this to better uncover insights and what can we use it for? And really, how can it help us and help our clients?

I kept thinking about it, and I know that there was going to be a use for it. So over Thanksgiving weekend, I played around with it and actually built a prototype using the custom GPT

on some of the information that we have on our website [like] our attorney profiles, and it was very rough, but it worked. I thought, this is incredible. And this could be really, really useful for our clients and visitors to the website.

So I brought it back to the development team and the IT department and our marketing technology department and said, "This is something that we should do." So that was kind of the genesis of the idea. And then, developers worked on it for the last four or five months and came up with [a chatbot trained on] not just the attorney profiles, but the entire site.

What is the technology that underpins the chatbot?

We use a technology called retrieval augmented generation, which means that the functionality of the chatbot is based on the bigger large-language model. The content that it returns is through this RAG that limits the answers to the content that we have, so the hallucinations are [mitigated].

Lowenstein is using a third-party platform called CustomGPT, which, in turn, uses OpenAI's LLM and APIs to provide the chatbot function.

What data sources is this chatbot is trained on?

Everything on lowenstein.com. That includes everything on our website, our attorney bios, our press releases, our news items, media mentions, our podcast series, our video series, everything that lives on lowenstein.com. But we limit it to content that's contained within our site.

What struggles and data governance challenges did you face creating the chatbot, and how did you address them?

We looked and obviously tried to learn from what other people have done so we kind of had to go outside of legal to look and see what other companies had done since there were no other law firms [deploying client-facing generative AI chatbots].

I think one of the biggest things that we've learned from the technology standpoint is the way that the data on our website is structured works well—or [at least] worked well for search engine optimization, but not necessarily for this type of chatbot. So the AI retrieval works differently than search engine optimization works. So structuring the pages, the way that data is tagged, the way that content is laid out on the site [was where] a lot of companies had problems with their chatbots because of the way their websites were structured.

So moving things around, redesigning the site, retagging somethings, helped eliminate a lot of those the holes and the hallucinations that were happening because of the way things were structured.

We've seen so many companies utilize gen AI-powered chatbots. What do you think are some of the most important qualities of a tool like this, especially as it applies to law firms?

One of the biggest drivers for this is to be able to answer our clients' inquiries faster. So our whole web strategy is to serve content as early in the visitor-journey as we can. Being able to engage in natural language

was a big driver for us, instead of a typical search engine or search box that returns a list of results that the client then has to decide which one is the most relevant or click through a couple of times.

I think that making sure that that first answer is correct was paramount for us. So looking at making sure our content is up to date, making sure that it's indexing the right content, returning relevant results, not hallucinating, pointing to things that are outside of the scope of the question and those types of things. So that was definitely high on the list of our requirements here.

Do you worry about clients confusing it for legal advice?

We have very sophisticated clients, so we're not too concerned that anyone is going to mistake an answer on a chatbot as legal advice or [that it] will create any sort of attorney client relationship. But out of an abundance of caution, we [have] that kind of disclaimer [on the website]. I think it'll be important to include that going forward as these things get more sophisticated and the answers become more specific, and we add more content and we're able to deliver even more robust answers. But for now, I think we're OK.

What are some of the other ways in which Lowenstein Sandler is experimenting with generative AI technology?

We have an AI practice. So we work with clients on their exploration and development of both, using AI tools and developing their AI products. So we, you know, we're constantly looking at all types of software products and services that we can use, and that our clients can use. [This includes] everything from business of law like this [chatbot] to marketing automation [and] presentation tools. Then on the practice of law side, we're working with a lot of the … legal technology providers on the AI tools that they're developing.