

FREE GUIDE · NICHE LAW FIRMS

DIGIVINO

Five AI Tools for a Boutique Law Firm

Five tools that answer, book and follow up with new clients, so your staff spend less time on the phone. About 10 minutes.

5 tools | 8 checks | About 10 minutes | For partners and office managers

> New clients usually reach a small firm by phone, web form or email, often after hours. Each tool below handles one part of that. A lawyer stays in charge of anything that counts as legal advice.

1 Five AI tools that save a small firm time

Each card says what the tool does, and what a person still does.

A question assistant on your website

Answers visitors' general questions from your own pages, like what you handle and how fees work, then offers a consultation.

A person still writes the pages it answers from. It says it doesn't give legal advice.

An intake form that books the consultation

Collects the type of matter, the main facts and the names for a conflict check, books a time and emails your staff a summary.

A person still runs the conflict check before the meeting.

A fee and cost estimator

A visitor answers a few questions and sees your usual fee range for their kind of matter before they call.

A person still sets the ranges and keeps them current. The page says it's an estimate, not a quote.

Follow-up emails that stop on their own

What to bring, what happens next, a reminder. The emails stop once the person books or hires you.

A person still approves every email first.

A tracker that shows where clients came from

Records whether each inquiry came from Google, ChatGPT, a directory or a referral, with totals each month.

A person still asks "How did you hear about us?" at intake.

2 What the ethics rules say about AI

In July 2024 the American Bar Association published Formal Opinion 512 on lawyers' use of AI. It applies rules you already follow. This is general information, not legal advice, and your state's rules may differ.

Competence

Understand the benefits and risks of any AI tool you use.

Confidentiality

Protect client information, including what people tell you when they contact you but never hire you.

Communication

Consult clients about how you'll reach their goals, which can include the tools you use.

Fees

Charge reasonable fees. In most cases you can't bill a client for time spent learning an AI tool.

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3 The 10-minute readiness check

Answer for your firm as it is today. Tick one box on each line.

	CHECK	YES = 2	PARTLY = 1	NO = 0
1	**You know which of your software already has AI features switched on** Email, document and case-management software often add them in an update.	☐	☐	☐
2	**Client information only goes into AI tools that keep it confidential** Read the terms: does the tool keep your data, or use it to train its models?	☐	☐	☐
3	**Your firm has a short written policy on how staff may use AI** Which tools, for which tasks, and what must never be typed in.	☐	☐	☐
4	**Each AI tool has one named person responsible for it** Someone who keeps checking its work, even after months without a problem.	☐	☐	☐
5	**A lawyer reviews everything AI drafts before a client or a court sees it** Including every quote and every case it cites.	☐	☐	☐
6	**Clients are told how you use AI in their matter** A sentence in your engagement letter is enough for most firms.	☐	☐	☐
7	**Your website answers visitors' common questions, typed on the page** A question assistant can only answer from what your pages say.	☐	☐	☐
8	**You know how many new clients came from Google, ChatGPT, directories and referrals last month** If you don't ask at intake, you can't know.	☐	☐	☐

Your total _____ **/ 16**

4 What your score means

13–16

Ready for AI tools

Your safeguards are in place. Start with the tool that would save your staff the most time.

7–12

Ready once a few gaps are closed

Write a short AI policy and name one person for each tool. Then add one tool at a time.

0–6

Safeguards first

Before adding anything new, find the AI features already switched on in your software and decide who checks them.

What to do next

Pick one tool
Choose the one that would save your staff the most time each week, and start there.

Book a complimentary 15-minute call
Go to digivino.com/book and bring your score. We'll talk through which tool would help your firm most.

Run the free AI Visibility Check
Go to digivino.com/ai-visibility-check. See what ChatGPT, Gemini and Perplexity tell people who ask about your firm.