

TAB 8
Report to Convocation
November 30, 2023

Futures Committee

Karen Hulan (Co-Chair)
Quinn Ross (Co-Chair)
Demetra Dimokopoulos
Sarah Letersky
Howard Levitt
Cathi Mietkiewicz
Michael Radan
Natalia Rodriguez
Tanya Walker
Kathryn Whitehead

Purpose of Report: Information

Prepared by the Policy Division
Roy Bornmann (rbornman@lso.ca)

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Law Society
of Ontario

Barreau
de l'Ontario

TAB 8.1

Futures Committee

Trends Report

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Kathryn Whitehead

Prepared by:

Roy Bornmann

Strategic Policy Counsel, Policy Division

rbornman@lso.ca

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BACKGROUND

Purpose of this Report

The purpose of this report is to update Convocation and the legal professions on the issues and trends identified by the Futures Committee since it was struck in 2022 and the work that the Committee has completed; and to engage the professions in the next phase of the Committee's work.

The Futures Committee

The Law Society established the Futures Committee in 2022 to consult with the legal professions and report back to Convocation on:

- the current state of the legal professions;
- how disrupters are affecting and will affect the provision of legal services;
- what new innovations and adjustments have been developed by legal professionals as a result of the pandemic and other developments;
- where further innovation by licensees would be beneficial to the public and the profession.
- what the Law Society could be doing to ensure that it is providing effective regulation in the face of innovations and changes in the legal professions; and
- how the Law Society could help to encourage further beneficial innovation.

WORK COMPLETED TO DATE

Since the Committee was struck, it has received presentations from recognized experts and legal futurists; leaders in the legal innovation sphere as well as legal innovation hubs. This has included meetings with the Ontario Bar Association Innovator in Residence; the Future of Law Lab at the University of Toronto Faculty of Law; the Law Society Access to Innovation Program and noted futurists Ben Alarie and Jordan Furlong.

The Committee's consultation work has been supplemented by a review of international and domestic literature as well as reports and surveys focused on the status and future of the legal profession. The consultation work included:

- reports and materials that set out emerging trends among legal professionals;
- reports and surveys focused on the impact of artificial intelligence and large language models; and
- commentary on the evolving regulation of lawyers.

As a part of the consultation process the Committee retained Earncliffe Strategies, an

opinion research company to conduct five focus groups in March 2023. The focus groups were conducted with licensees from the following firm environments:

1. Lawyers in medium size firms with approximately 6 to 25 licensees
2. Lawyers in small firms with 2 to 5 licensees
3. Lawyers in sole practice
4. Lawyers and paralegals in sole practice or firms with 2 to 25 licensees in French
5. Paralegals in sole practice or firms with 2 to 25 licensees

KEY THEMES THAT THE COMMITTEE HAS OBSERVED

During its work the Committee identified five themes that were recurrent throughout the Committee's consultations and literature review and were corroborated in the focus groups. The Committee is using these themes to guide the next phase of its work. The themes are:

A stressed profession

The legal professions are exhibiting high levels of stress. In October 2022 the National Study on the Psychological Health Determinants of Legal Professionals in Canada¹ included a number of key findings that are troubling to the legal profession. These included:

- More than half of all respondents reported experiencing psychological distress and burnout. Those rates are even higher for professionals living with a disability, articling students, lawyers aged 26-35, legal professionals with less than 10 years of experience, legal professionals identifying as members of LGBTQ2S+ community, and women.
- Work–life conflict is a critical stressor and is associated with a significantly lower level of commitment to the profession and a substantially higher level of intention to leave the profession.
- Legal professionals living with a disability and from minority groups experience higher levels of mental health concerns.
- Alcohol and drug use among legal professionals are at a worrying level.

While the focus groups did not have the same focus on mental health, many participants talked about how their workplaces had changed as a result of the COVID-19 pandemic. The focus group participants broadly framed the increase of remote work and greater adoption of technology across the profession as positive. They noted that hybrid and remote work offers greater flexibility and can improve work-life balance and

that the increased use of technology has introduced efficiencies to practice. At the same time there are downsides from these developments.

The practice of law is about to undergo significant change

Participants in the LSO focus groups universally felt that the practice of law is about to undergo significant change; however there was no consensus as to what this change would entail.

In the discussions held within focus groups, participants unanimously highlighted the transformative impact of emerging software and tools designed to streamline tasks and enhance services. This surge in technological advancements, coupled with the efficiencies brought about by remote working technologies, emerged as prominent catalysts for future changes in the legal landscape. Additionally, participants underlined the pivotal role played by societal shifts and evolving client expectations, which have been influenced either by the pandemic or generational transitions. This confluence of factors is poised to reshape how lawyers and paralegals engage with their clients, marking a significant evolution in the profession.

While the consensus among participants was that embracing innovation is not only essential but also inevitable, leading to a competitive edge in the legal and paralegal sectors, a prevailing sense of uncertainty loomed. Most participants expressed a keen awareness of the necessity to adapt but grappled with the ambiguity surrounding the specific nature of impending changes. In particular, licensees collectively voiced their need for a deeper understanding of evolving trends and developments in the legal tech landscape. It became apparent that participants recognize the imperative of staying abreast of these innovations, highlighting a gap between their current knowledge and the expertise required to navigate the evolving legal landscape effectively.

Artificial Intelligence presents unique challenges

The Committee reviewed a significant amount of literature regarding artificial intelligence (AI) and Large Language Models (LLMs) and the use of AI and LLMs for legal purposes, both by legal professionals and by consumers. This literature included academic publications, opinion pieces in both print and online media, as well as updates in court practice directions and proposed legislation in Canada and abroad.

During the focus groups, most participants indicated that they saw AI as offering both promise and peril for the legal profession; however most licensees did not feel that their profession was in imminent threat of being replaced by AI.

Some participants noted that AI might be able to be harnessed to facilitate legal research or to act as a research assistant while others believed that it could take over routine or simple drafting processes. Focus group participants also noted the potential pitfalls associated with accountability and public reliance on AI generated advice.

Most focus group participants were not using AI and were not certain how or if they should incorporate it into their practice.

Understanding whether technology fulfills professional obligations

During the focus groups licensees indicated that technology procurement can be a challenging issue. Some participants noted that there are a number of Law Society By-Laws and Rules where technology can be used in order to ensure compliance. These include client verification, cyber security and accounting requirements. It is anticipated that as technologies continue to proliferate additional rule and by-law compliance will be able to be completed or be assured by new technologies.

As licensees increasingly use technology to fulfill their professional obligations, licensees spend increasing amounts of time ensuring that the technology they are procuring meets the expected standard.

The Role of the Law Society

While focus group participants were certain that the legal profession is about to undergo significant change, they did not feel prepared for that impending change. Further, the uncertainty over the nature of that change is has left them unsure about how to prepare themselves for that change.

In this context, the Law Society is seen by licensees as a potentially key player in assisting lawyers and paralegals as they seek to understand and prepare for future developments to the legal profession.

NEXT STEPS

The Committee plans to engage in consultations and further research on several issues that have been identified in the course of its ongoing work. Following this phase, the Committee will periodically publish reports detailing its findings on each of the identified issues. These topics may be expanded to include additional areas that emerge through consultations and the Committee's continuous research efforts.

The issues that the Committee has identified as issues it will be developing reports for are:

Artificial intelligence

The proliferation and rapid evolution of LLMs as well as the incorporation of generative AI into many legal technologies require that licensees understand the benefits and risks of using these products and how to do it in a manner consistent with their professional obligations.

In order to provide guidance to licensees the Committee will be examining:

- How do large language models and other forms of generative AI work and what do licensees need to understand about that when using LLMs and AI.
- What are the risks and benefits of licensees using LLMs and AI; and what steps should licensees be taking to minimize the risks and maximize the benefits.
- How do the Law Society's Rules and the use of LLMs and AI interact and what steps can be taken to ensure that licensees are compliant with their professional obligations.
- What role does the LSO play in providing the public with protection when they are using LLMs or AI to deal with legal issues.
- How does the LSO and how do licensees ensure that LLMs and AI can be used in a manner that encourages access to justice solutions.

Technologies that aid rule compliance for licensees

Increasingly technologies can be relied upon to perform functionality associated with licensee professional obligations including technologies addressing accounting requirements; cyber security and client verification. Technologies focused on rule compliance not only safeguard licensees' professional obligations but also uphold the trust and confidentiality crucial to the lawyer-client relationship, thus enhancing the legal profession's ethical standards and client confidence.

- How do licensees determine which technologies can assist them in rule compliance.
- Do licensees feel confident making technology selection decisions.
- Is there a role that LSO could and should play in helping licensees make these determinations.

The evolving role of legal professionals:

The role of legal professionals in society is undergoing a profound transformation. This metamorphosis is shaped by technological advancements, shifting societal values and evolving client expectations as well as the emergence of alternative legal service providers (ALSPs). As we navigate the future, lawyers and paralegals will need to acquire a diverse array of skills and behaviors to adeptly maneuver through this multifaceted landscape.

The Committee will be examining:

- What are the skills, knowledge and behaviours that the lawyers and

paralegals of tomorrow will need.

- What does society need from licensees and what will it need in the future.
- How are generational values changing the expectation of how lawyers and paralegals are expected to interact and communicate with their clients.
- What is the impact of ALSPs on the legal landscape, and how should legal professionals adapt or collaborate.

Practising in an increasingly stressful profession; managing mental health and well-being

Lawyers and paralegals find themselves amid a burgeoning mental health crisis, demanding urgent attention for the sake of both their well-being and the quality of legal services they provide. The demanding nature of their profession has led to alarming levels of stress, anxiety, and burnout within the legal community.

The Committee will be examining:

- What steps need to be taken to build on the work done by the Law Society and legal organizations across Ontario to date to address mental health issues in the profession.

TAB 8.1.1

Bibliography

Materials that the Futures Committee relied on in drafting this report included:

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Law Society of Ontario

Futures Committee
Research

thinking forward

About the research

Research objectives

- The research objectives are threefold:
 - Explore recent innovations that legal professionals have adopted and are employing
 - What, if any, future actions could be taken by the Law Society of Ontario (the Law Society) as a result of these innovations
 - And what are the most effective pathways to better encourage innovation within the profession

Research approach

- A series of 5 focus groups were conducted on March 6th and 20th, 2023:
 - Lawyers in medium size firms with approximately 6 to 25 licensees
 - Lawyers in small firms with 2 to 5 licensees
 - Lawyers in sole practice
 - Lawyers and paralegals in sole practice or firms with 2 to 25 licensees in French
 - Paralegals in sole practice or firms with 2 to 25 licensees

The background features a series of overlapping, semi-transparent geometric shapes in shades of orange and yellow, creating a layered, architectural effect. The shapes are primarily trapezoidal and rectangular, with some having diagonal edges. The colors range from a deep, muted orange to a bright, sunny yellow.

**Mood of lawyers and
paralegals today**

Top priorities



Changes in practice: opportunities

- Impact of the COVID-19 pandemic on remote work and greater adoption of technology across the profession
 - Major source of preoccupation over the last three years

- Practice changes at both the personal and professional levels:

Personally: hybrid/remote work offers greater flexibility and improved work-life balance

Professionally: increased use of technology has introduced efficiencies including those passed on to clients

- Questioning around increased specialization did not elicit much conversation
 - Few indicated they had changed the specialization of their practices as a result of the pandemic

In their own words...

“The style of life and the way of working has changed. It is much more flexible now in that the hybrid model is no longer seen as negative or as lazy.” – Sole, Small, and Medium Sized Firms (FR)

“There was a lot more efficiency in family law during the pandemic. A lot less waiting needlessly in waiting rooms, you just showed up when you had your Zoom appointment.” – Sole, Small, and Medium Sized Firms (FR)

“Before, I could go to one or two courts if they were close. Since the pandemic, I can be in four courts in one day across Ontario. It’s incredible.” – Sole, Small, and Medium Sized Firms (FR)

“COVID was disastrous but at least it dragged the law profession, if not into the 21st century, at least the 20th century. We were forced into becoming more modern and offering more ways of connecting with clients.” – Lawyers in Medium Sized Firms (EN)

“I hope to never meet a client in-person again. I’m quite enjoying Zoom.” – Lawyers in Sole Practice (EN)

“I hope the savings are being passed along to clients because no longer billing for all the time in the car, the parking, the mileage.” – Lawyers in Medium Sized Firms (EN)

“It’s been fantastic for mediations to do it over Zoom as we no longer have to worry about power imbalances, or history of trauma. On Zoom they don’t have to see each other.” – Lawyers in Medium Sized Firms (EN)

Changes in practice: drawbacks

- While the changes in practice were broadly framed as positive ones, some of the downsides included:
 - The struggle to recruit support staff to work in-person
 - Dependence on (costly) legal software
 - Erosion of opportunities for networking and mentoring
 - Challenge of building rapport or servicing all clients in the virtual environment

In their own words...

“There have been some challenges with interaction with the digital system. Some clients don’t always have access to technology which makes it hard.” – Sole, Small, and Medium Sized Firms (FR)

“We’re really struggling with how we get over the [hurdles of working remotely] and redevelop the collaborative discussions.” – Lawyers in Medium Sized Firms (EN)

“Recruiting has been difficult.” – Lawyers in Medium Sized Firms (EN)

“I’ve been at this for 43 years, and I felt like I’ve spent 43 years developing advocacy skills for courtrooms. Those skills are diminished when you’re put in a little box [Zoom]. So, in a way Zoom is positive in that it’s an equalizer, but at the same time it has diminished a lot of intuition, memory, and the theatre of advocacy.” – Lawyers in Medium Sized Firms (EN)

“How do we integrate virtuality into our practice while still ensuring the authenticity of who we’re dealing with?” – Lawyers in Medium Sized Firms (EN)

Changes in client expectations

Digital expectations

- Expectation that lawyers and paralegals be digitally literate; offer a full suite of digital options (e.g., Zoom meetings, DocuSign)
 - And while this was largely framed as beneficial, there was a sense digitization is contributing to the anonymization of the legal profession and the erosion of the counsel-client relationship

Efficiency expectations

- Expectation from clients that lawyers be more expedient and efficient with the services they offered
 - Some felt clients were less patient, more demanding, and expected access “at any time of the day or night”

In their own words...

Digital expectations

“Sometimes learning technology for older audiences was stressful and anxiety inducing... Older clients still want to see you in person, more face-to-face, but the younger audiences were much more open to it.” – Sole, Small, and Medium Sized Firms (FR)

“During the pandemic, I didn’t have a single client who wanted to meet me in person.” – Sole, Small, and Medium Sized Firms (FR)

“They expect pretty sophisticated levels of electronic communications, and they expect you to be keeping up.” – Lawyers in Medium Sized Firms (EN)

Efficiency expectations

“There’s no such thing as business hours anymore.” – Lawyers in Medium Sized Firms (EN)

“Clients expect you to be more efficient.” – Lawyers in Sole Practice (EN)

“People want access to their lawyer quickly. Doesn’t matter if it’s online or in-person.” – Sole, Small, and Medium Sized Firms (FR)

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Innovation in the legal profession

Thoughts on innovation in the legal profession

- Legal profession in Ontario is behind the times when it comes to innovation and much room for improvement
 - Many routine tasks in the that could be streamlined by using technology
- However, they also claimed that the pandemic spurred long overdue innovation improvements that have resulted in increased efficiencies
- Most felt that innovation will increasingly offer a competitive advantage (especially for larger firms)
 - But for the time being few felt that they were losing business or clients due to a lack of innovation
- The sense was that while innovation is both necessary and inevitable, the pressure to innovate depends on the innovation

Innovation improvements and challenges

Innovation improvements

- ✓ Rise of software and tools to facilitate routine tasks and streamline services
- ✓ Efficiencies introduced by remote working technologies
 - ✓ Ability to practice (remotely) in under-serviced areas
 - ✓ Ability to participate in multiple courts, meetings, etc. in a day
 - ✓ Law specific improvements (e.g., removing power imbalances in mediations)
- ✓ Cost savings passed on to clients

Innovation challenges

- ✗ Cost of software, subscriptions, and other technological tools for sole or small sized practices
- ✗ Interoperability of different legal software (and proprietary tools)
- ✗ Increased competition due to the proliferation of online legal services
- ✗ The risk that (semi-)automated legal services will provide poor or inaccurate legal advice
- ✗ Retaining the human element of the client-counsel relationship in an increasingly virtual environment

Where innovation is most needed

- Participants expressed frustration with the wait times in the legal system in Ontario, as well as its impacts on access to justice
 - Courts were highlighted as an area in which innovation was needed
- Rise of new forms of assets and transactions associated with digital technologies would require innovations in how some branches of law are practiced
- And not enough has been done to make justice more accessible in French or to provide recent innovations equally in both languages

In their own words...

Access to justice

“It now takes 4 years to have a jury trial in the GTA and 2-3 years to have a regular civil trial. To me that’s a disgrace. If ever there was a place for innovation, it’s somehow in accelerating disputes through the justice system so people don’t have to opt out into private arbitrations.” – Lawyers in Medium Sized Firms (EN)

“I really think there’s a serious access to justice problems.” – Lawyers in Sole Practice (EN)

“There is such a loss of time and resources in the courts.” – Sole, Small, and Medium Sized Firms (FR)

“One area where I want to see innovation is in the court system.” – Lawyers in Sole Practice (EN)

Challenges for those practising in French

“[Innovation in the legal profession in Ontario] is done for English speakers, not French speakers.” – Sole, Small, and Medium Sized Firms (FR)

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**How technology is
being leveraged**

Technology and the legal profession

- The profession in Ontario is characterized as slow to adapt relative to other sectors (e.g., healthcare) and jurisdictions (e.g., Québec)
- In addition to those already mentioned, participants noted that the integration of new and existing technologies (e.g., online client intake forms) had streamlined their client relationships and helped minimize unnecessary administrative work

Sole practitioners and small firms

- Fears of being able to compete due to uneven access to technology
- and the high cost of existing legal software and programs

Medium firms

- The disruption of traditional firm structures with the rise of alternatives that offer different fee splits made possible through the increased use of technology

Artificial Intelligence (AI)

- Most volunteered that they saw AI as offering both promise and peril for the legal profession
- Most did not feel that their profession was in imminent threat of being replaced by AI due to the importance of human connection

Potential promises

- Facilitating legal research/acting as a research assistant
- The possibility of reducing unconscious bias
- And taking over routine/simple drafting processes

Potential perils

- The lack of relevant (e.g., dataset, statistical) training in the legal profession
- Questions of accountability
- Possibility for large firms to dominate/monopolize access to AI resources
- And increased public reliance on (poor) AI generated legal advice

In their own words...

“Our work requires a very deep intelligence. There’s a lot of intervening facts and connected laws. It’s complex. People are complex. Yes, AI could help in legal research, but that’s just one aspect. I don’t think it’s going to menace the lawyer-client relationship. It’s really that relationship that keeps things going.” – Sole, Small, and Medium Sized Firms (FR)

“The AI can do the brute force and track down the relevant jurisprudence and doctrine, much better than a human can.” – Lawyers in Sole Practice (EN)

“Where I think it’ll be important is when it will be able to do some critical thinking – not there yet – but also taking advantage of AI software with their own proprietary datasets. This is something that’s going to help larger firms and harm smaller firms.” – Lawyers in Medium Sized Firms (EN)

“Of course, it poses a threat. As soon as you get a self-aware AI, you can kiss the legal profession goodbye.” – Lawyers in Sole Practice (EN)

The background features a series of overlapping, slanted rectangular blocks in shades of orange and yellow, creating a sense of depth and movement. The top block is a bright yellow, while the others are in various tones of orange, from light to dark. The text is positioned on the left side of the image.

**Role of the Law Society in
supporting on innovation
and technology**

Sources of information on innovation

- Lawyers and paralegals turn for information on innovation in the legal profession to practice-specialized social media networks
 - Virtually no one cited the Law Society as a go-to source of information
- Most respondents felt the Law Society was not as current as they should be in using technology and adopting new practices
- Though there was widespread agreement that this could be something in which the Law Society could get involved
- At the same time, some expressed doubt about whether the Law Society could take on this role

The roles the Law Society could play in advancing innovation

- Adding “Technology Adoption and Innovation” to the CPD curriculum
- Publishing or conducting webinars on “best-in-class” examples of innovation in the profession
 - Additionally, providing subject matter expertise in this area on the Practice Management Hot-Line
- Pro-active regulation of new and emerging technologies
- Dealing with the issue of proprietary legal software not integrating with each other
- Interfacing with software innovators to explain and help them better understand the unique needs of the profession in Ontario
- Endorse software and online systems and offering a “good housekeeping” seal of approval on new innovations and products that are compliant with the Law Society standards

The background features a series of overlapping, semi-transparent geometric shapes in shades of orange and yellow. On the right side, there are three stacked trapezoidal shapes that appear to be part of a larger, stepped structure. The top-most shape is a bright yellow, the middle one is a medium orange, and the bottom one is a darker, reddish-orange. The text 'Key takeaways' is positioned on the left side, overlapping the bottom-most of these shapes.

Key takeaways

Key takeaways: mood of lawyers and paralegals

- COVID-19 pandemic catalyzed a greater adoption of technology which, in turn, enabled a wide range of changes across the legal profession
 - Benefits included increased efficiency, ability to determine when, how, and to whom they provide services, work-life balance, the ability to offer services in historically under-serviced areas, and a reduction in fees charged to clients
 - Downsides included a further encroachment on work-life balance, changing employee expectations, and an erosion of the client-counsel relationship
- Most clients have become comfortable with the digital literacy of legal professionals, their ability to offer a suite of digital options, and the efficiency of services rendered
- The legal profession (in Ontario in particular), is behind-the-times when it comes to adopting legal and technological innovations.
 - Despite this, recent programs (e.g., the ability to file online) are seen to be steps in the right direction.

Key takeaways: innovation and technology

- Innovation is both necessary and inevitable and provides a competitive advantage in the legal and paralegal professions
- The majority also felt that they needed more knowledge about innovation trends and developments than they currently possess
- And, while the increasing adoption of technology was broadly welcomed some were concerned about the cost of accessing new technologies
- On the role of AI in the legal profession, most participants saw both pros and cons, including:
 - The opportunity to provide research assistance and perform routine tasks
 - And the potential pitfalls associated with accountability and public reliance on AI generated advice
- Most did not perceive their profession as being under imminent threat of being replaced by AI
- At this time, where further innovation and technology would be most welcomed, included access to justice, addressing wait times in the court system, and accessing resources in French

Key takeaways: role of the Law Society

- Most do not see the Law Society as a current source of information on innovation in the legal profession
- Widespread agreement that this could be something in which the Law Society could get involved
- Some doubt that the Society has the necessary subject matter expertise to take this on
- Recommendations of the types of programs and services that the Law Society could offer included
 - Education and publishing, interfacing with software developers and even endorsing new software and online systems
- Desire for consultation with those in the legal profession



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