



Legal Technology Robert T. Simon

THE SIMON LAW GROUP

The age of universal intelligence

INTELLIGENCE IS ABOUT TO BE UNIVERSAL. WISDOM IS NOT. YOUR WORKFLOWS ARE YOUR IP, YOUR MOAT, AND YOUR LEGACY – BUILD YOUR AGENTS NOW.

Every year I write this column about legal technology and where it is going, I make some predictions, some of you tell me I have lost my mind, and then the predictions come true faster than even I expected. So, before we get into this year's big idea, let's check the receipts. And stick with me to the end, because I am going to make some new predictions that will either make you rich or make you email the editor asking for my column to be replaced with a crossword puzzle.

In July 2022 ("Running the virtual law firm"), I wrote that you could run your entire firm from your smartphone, cut your overhead, and – gasp – actually have a quality of life and hang with your family. People thought remote practice was a COVID blip. It became the default. Solo and small firms shed their leases, went cloud-based, kept their surf schedules, and thrived.

In November 2023 ("Practical use of AI in law firms"), I told you everything would claim to be AI (even skincare!), but the winners would be the products trained on specific, fantastic data – the "law clerk in a box" that learns your way. The generic ChatGPT wrappers died on the vine. The data-specific products – the ones trained on medical records, on legal research, on real settlement data – became indispensable. Intelligence is only as good as what it is taught. Remember that line, because it is about to become the thesis of your entire practice.

In May 2024 ("Put the client first when you make deals with your vendors"), I said AI would compress overhead, that we owed those savings to our clients, and that you'd better be asking vendors about SOC 2 compliance and data security. Those questions are now table stakes at every legal tech demo in America.

In June and July 2024, I wrote about passive income through tracked referrals and the power of your network as an

asset. Referral automation went from a napkin idea to platforms moving thousands of cases with every deal tracked from handshake to fee split.

And in August 2025 ("AI disruption and the death of the call center"), I told you AI voice intake would replace the call center for the cost of a nice dinner each month, and I made this prediction about what came next: "The use of AI Agents to order the police report, open the claims, send rep letters, order medical records, constantly engage and update the client... There will be an automation of the entire pre-litigation practice, and it will be here faster than we think."

Folks, it is here. We are living it right now at my firm. Which brings us to this year's big idea.

Intelligence will be universal. Wisdom will not.

Intelligence itself is about to become universal. Every lawyer, every firm, every private equity roll-up, every kid with a laptop will have access to the same raw intelligence. It will be like electricity. Nobody brags about having electricity in their office.

But wisdom? Wisdom will not be universal. Wisdom is knowing which question to ask, which deposition question actually moves the needle, which juror to strike, which expert to call, when to try the case and when to settle it. Wisdom is your workflows – the way you and your firm actually do things, refined over thousands of cases, wins, and yes, painful losses. That is your intellectual property. That is your secret sauce. And in the age of universal intelligence, it is the only moat you have.

Your workflows are your IP

Here is the mind shift I need you to make. Stop thinking of AI as a product you buy. Start thinking of it as a workforce you train. And what do you train it on?

Your wisdom. Your workflows.

At my firm we have been building our agent on our collective brain. It has our trial transcripts. Our deposition transcripts. Our work-product strategies. Our recorded meetings. My book on trying disc injury cases. The transcripts of all the media, podcasts, and lectures we have ever done. Every opening statement, every cross-examination, every voir dire. Fifteen-plus years of how we specifically do it – not how some model trained on the 57th page of Reddit thinks it should be done.

Imagine having the brain of Ruth Bader Ginsburg at your fingertips – being able to ask how she would analyze a situation, and getting an answer grounded in everything she ever wrote and argued. This will be no different. An agent built on your firm's collective brain, answering the way your firm answers, drafting the way your firm drafts, strategizing the way your firm strategizes.

And I did not stop at the documents. I created my own AI persona and dropped it into my firm's Slack, so anyone at the firm can ask a question and get guidance on how I would answer it – my analysis, my strategy, my voice, available at 2 a.m. on a Tuesday, whether or not I am awake. Then I took it a step further and turned that persona into an AI avatar – a hologram that looks like me, answering questions. People thought I was a crazy person! (Well, since I have made a little bit of money being a trial lawyer, as my friend Mauro Fiore would say, they would not call me crazy – just eccentric.)

And here is the beautiful part: When you own the data, you own the asset. This is a tangible legacy product. You can pass it down. You can license it. You can monetize it if you wish – imagine the great trial lawyers of our generation licensing their agents to the next one. Your life's work stops retiring when you do.

This is why data sovereignty matters so much. When you build these agents, own your infrastructure and own your data. Do not let your secret sauce become someone else's training data. Demand tenant-level isolation. Demand audit logs. Keep a human in the loop on anything that touches a client or a court. Ask about SOC 2 Type 2 and HIPAA compliance like your license depends on it – because it does. The vendors worth working with will answer these questions before you finish asking.

Build the absolute best workflows for your practice area, and for every niche within it. The disc injury workflow. The negligent security workflow. The trucking workflow. The minor's-compromise workflow (our biggest time sink, now automated). In the age of universal intelligence, poor work product will not be a thing. Every client will expect the best of the best – faster resolutions, lower costs, better results. We should give it to them. The firms whose agents embody the best workflows will simply deliver more justice, faster, for less. That is the whole game.

A practice use case: Intelligence from intake to the finish line

Let me show you what this actually looks like, because we are running it right now – firm wide, not case by case. It starts at intake. Our AI intake screens every single contact. The gentleman who believes the FBI microchipped his neck, and the fellow who wants to sue “the libs” for a stolen election? Politely, empathetically declined – no lawyer anywhere can help them, and now no human on my team spends an hour finding that out. The viable cases that fit our criteria are pushed directly into our firm's workflows, with the client getting a real-time text and email while the transcript lands in our case-management system. And the viable cases outside our practice areas or the states we serve? They are automatically referred out or co-counseled through Attorney Share – matched to the best lawyer for that client, all automated, all tracked from intake to resolution. Nobody who calls us gets told, “We can't help you.” They get told, “Here is your best advocate.”

Then the agents go to work. Our agents connect to the MCP – Model Context Protocol, the new universal plug that lets AI agents talk to software – in Attorney Share to get cases, screen them, and greenlight them straight into our workflows. We built our agents' “skills” the way you would train a new associate. One skill: the moment a case is greenlit, get the policy limits and the financial responsibility picture on every party through Coastal Research – viability score, assets, coverage. We ran one recently where the limits request went out in the morning and the completed report was back before lunch. That used to take weeks of letters and follow-up calls. Know thy coverage, know thy case value, on day one.

Another skill: draft the opening statement and the cross-examinations on any case – but based on how we specifically do it, trained on our transcripts, our structure, our villainizing themes (see my May 2014 article – I have been consistent!). The agent produces the first draft in our voice; the trial lawyer brings the wisdom, the judgment, and the soul. Treat it like the smartest law clerk you have ever had, whose work you still sign.

And it all lives inside an institutional brain. We use Supio's agent hooked into our case-management system, Outlook, SharePoint, Google Docs, and Westlaw's CoCounsel – with robust security wrapped around all of it. Every document, every email, every deadline, every piece of research, one brain, from intake all the way to the finish line. When a paralegal leaves, the knowledge does not walk out the door. When a new lawyer starts, they inherit 15 years of institutional wisdom on day one. That is what firm-wide intelligence means. Not a chatbot on one case. A nervous system for the whole firm.

The elephant with the checkbook: Private equity and the MSOs

Now for the warning label. Private equity has found our industry. The MSO structures are multiplying, and they come with unlimited funds to generate cases and, yes, to build AI workflows of their own. They will dominate the ad buys. They will process cases like widgets. We all

need to be aware, vigilant – and building.

But here is what the money cannot buy: wisdom. Their intelligence will be generic, because their workflows are generic. They optimize for volume and velocity, not for the client sitting across the kitchen table. They have never picked a jury in your county. Their agent has read everything and understands nothing.

This is our moat, and this is how we win. And I will say it plainly: Solos and small firms have an extreme advantage as we enter the age of universal intelligence. You are nimble. You can rebuild your workflows in a weekend, not a fiscal year. Your niche wisdom is deeper than anything a roll-up can replicate, and now – for the first time in history – you can scale it. The tools that used to require an IT department cost less than your Westlaw bill. David just got handed a very smart slingshot.

The trusted Rolodex: The other half of the moat

One more thing the machines cannot replicate, and it may be the most valuable asset you have: your trusted Rolodex.

The age of universal intelligence will put human-to-human interaction and trust at the absolute forefront. When every brief is polished and every demand letter is perfect, what differentiates you? The referral partner who knows you will treat their client like family. The adjuster who knows your word is good. The doctor who takes your call. The client from 2015 who still sends you their neighbors. The goodwill of your firm – every present and past client, every relationship built over decades – will have extreme value. Trust is the one thing that cannot be generated by a prompt. Feed your rolodex. It is the other half of your moat.

Keep your finger on the pulse

None of us can track this alone – the ground is moving weekly. That is exactly why we run a monthly Pulse of the Industry session at Justice HQ, keeping everyone updated on all the happenings in AI, private equity, grassroots marketing, and health and wellness. Yes, health and wellness belongs on that list – what good is getting your time back if you do

not protect the human getting it? Find a community doing the same, or come join ours. Thirty minutes a month keeps you ahead of 90% of this profession.

This year's BIG 3 predictions

I promised you new predictions, so here they are – clip this page and check my math next year.

First: AI will make the really good lawyers extremely valuable, and it will give them their time back. The lawyers who leverage this will be managing agents that do their work while they step out for coffee, take the kids to school, be present. Agents built on their workflows, doing their emails, their pleadings, their discovery, their media, acting as their executive assistant. The age of universal intelligence will lead to a higher quality of life. For those who leverage it. For the lawyers who do not, I am sorry to be blunt, but it will be an extinction event – the firm across the street will reduce its overhead, compress its timelines, and deliver faster, better, and less expensive results, and clients will not pay more for slower, or worse, out of loyalty. They never have.

Second: The great consolidation is coming, in both the legal space and the legal tech space. Many law firms will combine forces, and lawyers will land in specific niche skill-set situations where

they are meant to shine – the trial lawyer trying cases, the operator operating, the connector connecting, everyone in their sweet spot instead of everyone pretending to be everything. And the legal tech companies? Many will go belly up, and many will combine forces to survive, because in a world of universal intelligence a thin feature is not a company.

Third: Everyone will simply talk to their phone. Your agent will live in your pocket, you will tell it what needs to get done – the rep letter, the discovery responses, the client update, the referral – and it will do the work while you live your life, and your job will be to check it and oversee it at the finish line. Lawyer as editor-in-chief. Dictate the mission in the school pickup line, sign off on the work product after dinner.

Conclusion

Intelligence is about to be as common as electricity. Wisdom will stay rare. Your workflows are your IP – protect them, feed them, build your agents on them, and own your data. Screen at intake, refer what you cannot help, automate the mundane, and pour the hours you get back into the two things that will always win: your craft and your people. The private equity shops have the money. We have the wisdom. Build your moat

now, and let the best lawyers win.

And I will leave you with my own hope for where all this goes. My hope is to create an AI agent built on all of my institutional knowledge – every trial, every deposition, every strategy session, every lesson learned the hard way – and license it for all to use. Every young lawyer, every solo who cannot yet afford to hire a mentor, every client who deserves the best of the best. That is the legacy play, folks. Not a name on a building. A brain that keeps fighting for justice long after I have stepped out for coffee and never come back.

Now imagine if one had the power of all the licensed super agents to run their firm. Imagine a marketplace, or app store, where you can purchase/license the IP of the best of the best. Welcome to a law firm in a box. Welcome to 2027 and beyond.



Robert Simon, aka Planetfunbob on the IG, is a multiple-time Trial Lawyer of the Year winner, co-founder for The Simon Law Group aka the Justice Team, Justice HQ, Attorney Share, Bourbon of Proof, Law Di Gras, and author of Trial Guides' Trying Disc Injury Cases. Robert is licensed with offices in California, Arizona and Texas.