



A PRACTICAL GUIDE

The Small-Firm AI Playbook

How small and mid-sized law firms are using AI to win more clients, reclaim billable hours, and protect client confidentiality — without an enterprise budget or a six-week sales cycle.

Five everyday problems.
Five practical solutions.

Presented by **Embido**
embido.com

INTRODUCTION

The other 99% finally have an edge

For years, serious legal AI was built for the AmLaw 100 — six-figure contracts, long procurement cycles, and seat minimums no three-attorney firm could justify. That has changed. The same capabilities that help large firms move faster are now within reach of solo and small firms, and the firms that adopt them thoughtfully are quietly pulling ahead.

This guide walks through five problems that cost small firms real money and time every week — and shows a practical, security-conscious way to solve each one. Read it as a checklist for evaluating *any* AI tool, not just ours. Where Embido fits a problem cleanly, we say so; where good practice matters more than any product, we say that too.

01 The after-hours lead leak

Prospects who reach a voicemail at 7 p.m. call the next firm on the list.

02 Drowning in your own files

Hours lost hunting through prior matters for work you've already done once.

03 The blank-page drafting tax

Re-typing the same letters, intake responses, and first drafts from scratch.

04 Client confidentiality in the age of AI

The single risk that should decide which tools you let near client data.

05 Turning AI into a system, not a gadget

How to roll it out in an afternoon and actually keep using it.

1 The After-Hours Lead Leak

⚠ THE PROBLEM

Most legal inquiries arrive after hours or on weekends, and the data is unforgiving: a prospect's likelihood of hiring drops sharply within minutes of reaching out. A missed call or a "we'll get back to you" form means the prospect simply contacts the next firm — and you never even know the lead existed.

✅ THE SOLUTION

Put a knowledgeable, always-on responder on your website that greets every visitor instantly, asks the right qualifying questions, and books the consultation while the prospect is still motivated — at 2 p.m. or 2 a.m. The goal isn't to replace your intake team; it's to make sure no inquiry ever hits a dead end.

Where Embido fits: Embido's **Client Intake Agent** is a 24/7 AI receptionist for your site. It qualifies prospects by practice area, matter type, and urgency, runs a conflict-of-interest pre-check, and books straight into your calendar — and it's engineered to be UPL-safe, so it never gives legal advice and adds a disclaimer to every reply.

PRODUCTIVITY

Stop losing hours to your own filing cabinet

The most expensive inefficiency in a small firm isn't marketing spend — it's senior people doing work they've already done, because the prior version is buried in a folder no one can find. AI changes the economics of recall and first drafts.

2

Drowning in Your Own Files

⚠ THE PROBLEM

An associate spends an afternoon searching for the argument the firm made on a similar motion two years ago. Keyword search fails because the right document used different words. The knowledge exists — it's just not *findable* — so the work gets redone at full billable cost, or worse, billed off.

✅ THE SOLUTION

Use an assistant that searches your firm's files by *meaning*, not keywords, and answers in plain language *with citations* back to the source document and page. Ask "What did we argue in the Henderson summary judgment?" and get an answer you can verify in one click — never an invented one.

Where Embido fits: Embido's **Internal Legal Assistant** learns from your briefs, contracts, and prior matters, then answers research questions with a document-and-page citation every time. It's grounded-only — it won't invent case law — and it's private to your staff, never publicly embeddable.

3

The Blank-Page Drafting Tax

⚠ THE PROBLEM

Demand letters, engagement letters, discovery responses, routine intake replies — the same documents get rebuilt from a blank page every week. The firm pays attorney rates for work that is 80% boilerplate and 20% judgment.

✅ THE SOLUTION

Let AI produce the first draft from *your own* templates and prior work, so the attorney's time goes to the 20% that needs judgment. The non-negotiable rule: every draft is clearly marked for attorney review and never leaves the building unreviewed.

Where Embido fits: The Internal Assistant drafts from your firm's templates and clearly labels every output **"DRAFT — attorney review required."** Combined with an append-only audit log of what was asked, retrieved, and drafted, you get speed with a clean record.

THE DECIDING FACTOR

Client confidentiality in the age of AI

Your duty of confidentiality doesn't pause because a tool is convenient. The right question isn't "Can AI help?" — it's "Can I trust this vendor with privileged information?" For a law firm, security isn't a feature comparison; it's the gate every tool must pass first.

4 The Three Risks That Should Decide Your Tool

- **Your data training someone else's model.** Many consumer AI tools reserve the right to use what you type to improve their models. For privileged documents, that is disqualifying.
- **One bucket for everything.** If public website chat and confidential staff research share the same data store, a misconfiguration can expose privileged material to the public.
- **Unauthorized practice & bad advice.** A public bot that "answers legal questions" can create UPL exposure and client confusion. It should qualify and route — not advise.



No training on your data

Embido never uses your firm's documents or conversations to train AI models. Your work product stays your work product.



Encrypted & separated

Documents and credentials are encrypted at rest. The public intake chat and the private staff assistant are architecturally separate — confidentiality-scoped retrieval, by design.



Ethics walls & matter access

Staff retrieve documents only for matters they're assigned to, so conflicts and access controls are enforced inside the tool — not just on paper.



Append-only audit log

An immutable record of every internal query, retrieved document, and draft — exportable per matter when you need to show your work.

☑ Before you let any AI tool touch client data, confirm:

- ✓ It contractually does **not** train on your data or conversations.
- ✓ Confidential and public data are **separated**, not pooled together.
- ✓ Access is scoped by matter, with real **ethics-wall** controls.
- ✓ Public-facing chat is **UPL-safe** — it qualifies and disclaims, never advises.
- ✓ A **BAA** and data-residency options are available when your matters require them.
- ✓ The vendor describes only protections it actually implements — **no fabricated certifications**.

How Embido measures up: every item on this checklist reflects how Embido is built — no-train by policy, separated public/private architecture, matter-level ethics walls, UPL-safe intake, and a BAA plus data-residency options on the Pro plan. We describe only the protections we actually implement, and we'll never claim a certification or audit we don't hold.

PROBLEM 05 — MAKE IT A SYSTEM

Live in an afternoon, not a six-week rollout

The firms that win with AI don't run a year-long pilot. They start with one painful problem — usually after-hours intake — prove the value, then add the internal assistant once the team trusts it. Embido is built for exactly that: self-serve, flat pricing, no demo gate, and your data stays yours and exportable. Two assistants, one platform, transparent from day one.

Free**\$0** / mo

- Client Intake Agent
- 50 intake conversations / mo
- Basic conflict pre-check
- 1 seat · no card required

MOST POPULAR

Growth**\$99** / mo

- Everything in Free
- Internal Legal Assistant
- Cited research + drafting
- 500 documents · 3 seats
- Audit export

Pro**\$299** / mo

- Everything in Growth
- Matters + ethics walls
- BAA + data residency
- 5,000 docs · 10 seats
- No-train guarantee

Start free today — no sales call, no contract.

Add the intake agent to your site in an afternoon and see your first booked consult.

Get Started Free
embido.com

Want the numbers for your firm first? Embido's free calculators (no login) estimate the revenue you may be losing to slow intake and the staff hours you could reclaim — using deliberately conservative assumptions, so the figures are honest, not hype:

- **Client Intake ROI & Lead-Response Cost** — revenue at stake from after-hours response · embido.com/calculators
- **Internal Assistant Hours-Saved & Legal AI ROI** — time reclaimed vs. subscription cost

This guide is provided for general informational purposes only and does not constitute legal, financial, or professional advice. AI tools described here are intended to assist licensed attorneys and their staff; all AI-generated drafts and outputs require attorney review. Calculator outputs are estimates based on user-supplied inputs and conservative assumptions, not guarantees of results. Product capabilities, plans, and pricing reflect Embido as of June 2026 and are subject to change — see embido.com for current details. © 2026 Embido. All rights reserved.