AI Tools for Legal Practice: A Comparison Chart

Oct 27, 2026 · Keith Smith

A side-by-side look at the four kinds of AI tools lawyers use, and what to check before client information goes in.

AI in Your Law Practice (NC CLE, November 19, 2026), Handout 1. Prepared by Keith Smith, Summit Legal Technologies. Educational material, not legal advice.

How to read this chart. The training column states only what our sources confirm; "Check terms" means read the vendor's current terms. Account type matters more than brand: a free personal account and a business plan from one company can come out differently in the Rule 1.6(c) “reasonable efforts” review.

1. General Assistants

Tool	Best for	Watch for	Trains on your data by default?	Business tier / pricing
ChatGPT	Drafting, summarizing, brainstorming, explaining	Not a citator; can invent cases when answering from memory	Personal plans: yes. Business, Enterprise, Edu: no.	Yes (Business, formerly Team; Enterprise)
Claude	Drafting, summarizing, brainstorming, explaining	Not a citator; opted-in chats may be kept up to five years	Personal plans (Free, Pro, Max): the user chooses (Settings, Privacy); the pricing page labels it “Opt-out.” Team, Enterprise, API: no by default (Claude pricing page).	Yes (Team; Enterprise)
Gemini	Drafting, general questions	Not a citator; confirm which account staff use	Check terms	Check terms
Microsoft Copilot	Drafting, general questions	Confirm which Copilot product and license staff use	Check terms	Check terms

2. Legal Research AI

Tool	Best for	Watch for	Trains on your data by default?	Business tier / pricing
Westlaw with CoCounsel	Research grounded in Westlaw; agentic "Deep Research"	In 2024 testing, Westlaw AI-Assisted Research (an earlier Westlaw AI product) hallucinated in about one-third of answers. In *Lacey v. State Farm* (2025), counsel said he built an outline with CoCounsel, Westlaw Precision, and Google Gemini; the court did not find which tool, if any, caused the errors.	Check terms	Subscription; self-serve online for up to 10 attorneys
Lexis+ with Protégé (formerly Lexis+ AI)	Research grounded in Lexis, with Shepard's	Lexis+ AI hallucinated in about 1 in 6 answers in the same testing. Protégé also has a general-AI mode using outside models.	Check terms	Yes; online store for solos and 2 to 3 lawyer firms
Clio Work and vLex (Vincent AI)	Research and drafting on the vLex library plus your matter context	In *Creech v. City of Raleigh* (N.C. Ct. App. 2025), counsel attributed two nonexistent cases to a contract attorney's use of Vincent AI (as reported)	Check terms	Clio Manage add-on, or standalone for smaller firms since April 2026

- **Casetext** is no longer a separate product. Thomson Reuters bought it in 2023 and it is now part of CoCounsel. A next-generation CoCounsel Legal with agent features launched Aug. 20, 2026 (section 5).
- **NC Bar Association members** get "complimentary, unlimited access to the vLex Fastcase primary law library" as a member benefit. NCBA's page also lists some of Vincent AI's core case-analysis tools. Exactly which AI features are included is not confirmed, so confirm with NCBA before relying on this.

3. AI Inside Your Practice Software

Tool	Best for	Watch for	Trains on your data by default?	Business tier / pricing
Manage AI in Clio Manage (formerly	Your own Clio data: deadlines from court documents, filing	Does not search case law. Check every extracted date. Names may change after Clio's	Check terms	Per-user add-on to Clio Manage (Lawyerist, June 2026); Clio's "Signature Work" and "Elite Work"

Tool	Best for	Watch for	Trains on your data by default?	Business tier / pricing
Clio Duo)	emails, drafting letters	Oct. 26, 2026 announcements.		packages list "AI practice management." Ask Clio whether your plan includes it.
Microsoft 365 Copilot	Your firm's own email and documents	Confirm your license and what firm data it can reach	Check terms	Check terms

Storing versus processing

Putting a file in a system and running AI on it are two decisions. The State Bar treats a vetted vendor like other third-party software ("practice management, cloud storage, etc.," 2024 FEO 1), but a protective order may allow storage and still restrict AI.

System	What it is	Before protected discovery goes in
Box, storage only	Hosted case files	Read the protective order for limits on outside hosting and who may receive the materials.
Box AI on those files	A new step: content goes to an AI model. Box's FAQ says its model providers "do not train on any data that they receive from Box."	Check Box's AI terms, your settings, and the order. FPD staff: your office decides whether it's on.
Clio Manage, storage	Matter files and data	The same hosting question as Box.
Manage AI in Clio Manage; Clio Work	AI on your matter data; Clio's AI workspace for research and drafting	Separate terms and permissions; check them for your plan. A Clio subscription doesn't settle what your order allows.
Consumer ChatGPT, Claude, or Gemini	Personal accounts	Generally not for client-specific information (FEO 1); our policy: never for protected discovery.

In the Northern District of West Virginia, the standing order's definition of an AI tool covers "AI-assisted software tools, whether cloud-based or otherwise," so switching on an AI feature can need the government's consent even when storing the file did not.

4. Specialty Tools

Tool	Best for	Watch for	Trains on your data by default?	Business tier / pricing
Spellbook	Contract drafting and redlines inside Word	Separate vendor, separate terms	Check terms	No public pricing; 7-day trial
Harvey	Assistant, document sets, and workflows for large firms and legal departments	Not aimed at solos	Check terms	Custom quotes only
AI note-takers, intake bots	Recording calls, answering intake inquiries	Each holds client conversations under its own terms	Check each vendor	Varies

5. AI Agents: Tools That Act on Their Own

An agent doesn't stop at an answer. It plans and takes steps in your apps (searching, opening files, drafting, sending) until the task is done. Each of the major vendors below now sells one.

Product	What it can do	Asks before acting?	Status, Nov. 2026
ChatGPT Work (OpenAI)	Works across connected email, calendar, files, and the web; can "stay with a project for hours" (OpenAI, as quoted in press)	Approval before sensitive actions; admin controls on Enterprise	Launched July 9, 2026; which plans include it varies by report
Claude with Cowork (Anthropic)	Reads, writes, and can delete files in folders you grant; uses connectors; Claude in Chrome acts with your logins	Approval settings; asks before permanent deletion. Anthropic "strongly advise[s] against" using it for sensitive information	Merged into Claude Sept. 16 (Pro, Max) and Oct. 23 (Enterprise)
Microsoft Copilot Cowork	Runs multi-step tasks on Outlook, Teams, and SharePoint data	Off by default; admin controls; audit logs and eDiscovery	Generally available June 16, 2026 (press-reported)
Google Gemini agents	Gemini Spark uses a remote browser, Gmail, Calendar, and Drive	Controls not fully described at launch	Spark from June 2026 (press-reported)
CoCounsel Legal (Thomson	Deep Research, Deep Research Verify, Brief Builder, drafting in Word, grounded in Westlaw,	Vendor says every output stays "grounded in verified, traceable	Next generation released Aug. 20, 2026

Product	What it can do	Asks before acting?	Status, Nov. 2026
Reuters)	KeyCite, and Practical Law	legal authority"	
Lexis+ with Protégé (LexisNexis)	Agentic drafting grounded in Lexis content with Shepard's	No audit or approval mechanism described by the vendor	Integration with Anthropic's Cowork legal plugin announced Feb. 24, 2026
Harvey	500+ prebuilt agents and an Agent Builder (per Harvey)	Approval checkpoints in workflows (reported)	Large firms; no small-firm plan found
Clio Work and Agentic Workflows	Agentic mode runs multi-step research and drafting (since Apr. 2026); Vincent searches the web only if the firm's administrator turns it on; Agentic Workflows build steps from your written procedure	You can interrupt a run; approval points announced for Workflows	Workflows announced Oct. 26, 2026; no ship date announced

How good are they? On Harvey's Legal Agent Benchmark, run by Vals (updated Nov. 9, 2026), the best agent fully completed 27% of 120 legal tasks, even though it passed 96% of the individual checks. Harvey's explanation: "A deal-team report that identifies eight of ten risks is not 80% useful; it is materially incomplete."

The new risk: hidden instructions. A document, email, or web page an agent reads can carry instructions someone planted for it ("prompt injection"). OpenAI says prompt injection is "unlikely to ever be fully 'solved.'" Anthropic reports that attacks on its browser agent succeeded 17.6% of the time on an earlier model and 3.8% on a newer one, and close to zero with added safeguards. Those are the company's own numbers.

Before you let an agent act on a client matter:

- ☐ Scope: list what it may touch (folders, mailboxes, sites) and what it may not.
- ☐ Approval: a lawyer okays anything it can't undo, such as sending, filing, deleting, sharing, or paying.
- ☐ Record: you can see what it did, when, and on whose instruction.
- ☐ Orders: no agent touches protected discovery unless the order allows that tool (Handout 3, Tier C).
- ☐ Untrusted content: assume any document or web page it reads could contain instructions.
- ☐ Verification: check its work product like any other AI output (Handout 2).

As of Nov. 10, 2026, no N.C. State Bar or ABA guidance mentions AI agents. New York's bar adopted an agent-specific guideline on Oct. 31, 2026 (Guideline 9E: define the scope, get lawyer approval before

consequential actions, and keep a record of "what the AI System did, when, and on whose instruction"). Oregon (Formal Op. 2026-208) and Alabama (FO 2026-01) also address agents.

Questions to Ask Any AI Vendor

Based on the vetting factors in 2024 FEO 1, Inquiries #2 and #3.

- ☐ Is the vendor experienced, reputable, and stable?
- ☐ Do the terms of service address confidentiality and security?
- ☐ Can we get our data back, or have it safely destroyed, if the vendor closes, is sold, or the service ends?
- ☐ Does the vendor keep our inputs, claim rights in them, or train on them?
- ☐ If the tool is built on another company's AI, do our inputs go back to that program?
- ☐ Who re-checks these answers, and when? The duty continues for as long as we use the tool.

Personal Accounts and Prices

- **Turning training off:** in ChatGPT, Settings, then Data controls, then "Improve the model for everyone." In Claude, Settings, then Privacy (read the label on screen). This does not make a personal account appropriate for client data. FEO 1 advises against putting client-specific information into publicly available AI tools.
- **Approximate published prices:** ChatGPT Plus about $20 a month, and ChatGPT Business about $20 to $25 per user a month (eWeek, June 2026, a secondary source; confirm before relying on this). Claude Pro $20 a month, and Claude Team standard seat $20 to $25 per user a month (Claude pricing page, October 2026). Clio Work launched at $199 per user a month as a Clio Manage add-on in 2025; ask Clio for current pricing. For the other legal tools, our sources found no published price, so ask for a quote.

Sources

- OpenAI Data Controls FAQ
- OpenAI Enterprise Privacy
- Claude pricing
- Anthropic privacy settings
- eWeek AI pricing cheat sheet (June 29, 2026)
- Clio Work as a standalone product (LawSites, Apr. 21, 2026)
- NCBA vLex Fastcase member benefit
- Magesh et al., Hallucination-Free? (2025)
- Lacey v. State Farm, order of May 6, 2025 (C.D. Cal.)
- Lawyerist, Clio Manage AI review (June 2, 2026)
- Clio packages and pricing
- N.C. State Bar, 2024 FEO 1
- Box Support, Box AI FAQ
- N.D. W. Va. Standing Order No. 1:26-mc-38 (June 16, 2026)
- Thomson Reuters, next-generation CoCounsel Legal (Aug. 20, 2026)
- Vals AI, Harvey Legal Agent Benchmark leaderboard (updated Nov. 9, 2026)

- Harvey, Introducing Harvey's Legal Agent Benchmark (May 6, 2026)
- OpenAI, Continuously hardening ChatGPT Atlas against prompt injection (Dec. 22, 2025)
- Anthropic, Claude in Chrome generally available (Aug. 26, 2026)
- Claude Help Center, Use Claude Cowork safely
- VentureBeat, OpenAI introduces ChatGPT Work (July 10, 2026)
- NYSBA, AI ethics guidelines approved Oct. 31, 2026
- Oregon State Bar Formal Op. 2026-208
- Alabama State Bar FO 2026-01
- LexisNexis, Lexis+ with Protégé integrates Anthropic Cowork legal plugin (Feb. 24, 2026)

As of November 2026. Prepared October 27, 2026; revised November 11, 2026. Products, settings, and prices change quickly; check each vendor's current terms. No vendor reviewed or sponsored this handout.