



CLARION AI PARTNERS

Capturing AI's Upside

Key Takeaways · Plenary Keynote

Utah State Bar — Summer CLE
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THE PLAYBOOK FOR ADVISING CLIENTS ON AI

- 01 AI is a new operating layer — not a tool.**
The goal isn't to "use AI"; it's to improve the outcomes that matter and turn AI into repeatable advantage.
- 02 Start with use cases, not hype.**
Target narrow, data-centric, repetitive work. Adoption — prompt discipline, workflow design, training — matters as much as capability.
- 03 Build vs. buy is usually hybrid.**
Buy the general and mature; build where value depends on your proprietary workflows and data. Buy the model, build the moat around it.
- 04 Your data and judgment are the moat.**
Proprietary knowledge + your people's expertise + strong controls is where efficiency becomes true competitive advantage.
- 05 Trustworthy agents need architecture.**
RAG grounds outputs in your knowledge, Constitutional AI sets the rules, and QC bots check output. Design for testing from the start.
- 06 Governance accelerates adoption.**
Guardrails and streamlined approvals don't just prevent risk — they create and protect momentum.
- 07 Build defensibly for a shifting landscape.**
Utah is pro-innovation and human-centered; the federal posture is deregulatory — but the patchwork and AG enforcement aren't going away.

Move deliberately, learn quickly, and build systems you can trust.