



Thomson Reuters Institute

The Emerging Technology and Generative AI Forum Executive Summary

Thursday, September 25th, 2025
Austin, TX

#TRIGenAI25



Foreword

We stand at an unprecedented inflection point in professional services, as artificial intelligence has evolved from a promising technology to a transformative force reshaping the very foundations of how we deliver value to clients. The rapid acceleration of AI adoption across all organizational levels has fundamentally altered the competitive landscape, with executives increasingly leading the charge in implementing generative AI solutions throughout their operations.

The Emerging Technology and Generative AI Forum, which is hosted in different regions throughout the US and Canada each year, continues to bring together industry leaders, technologists, and visionaries to examine this critical transformation. This gathering in Austin represented a vital moment for our industry to collectively navigate the complexities of AI adoption while ensuring responsible implementation across professional services firms.

The urgency of this dialogue cannot be overstated. Professional services firms face a unique challenge: they must simultaneously embrace AI's efficiency gains while maintaining the trust, transparency, and human judgment that clients expect from their most critical business partnerships. Organizations are strategically applying AI where it can generate the most value—from service operations optimization to knowledge management enhancement—creating new paradigms for client engagement and service delivery.

The insights shared during this forum reveal both the remarkable potential and the nuanced challenges ahead. From agentic AI systems that operate with unprecedented autonomy to human-in-the-loop learning paradigms that enhance rather than replace human expertise, the technologies discussed represent more than incremental improvements—they signal a fundamental reimaging of professional service delivery.

Perhaps most significantly, this forum addressed the ethical imperatives that must guide our industry's AI journey. As AI becomes intrinsic to operations and market offerings, companies require systematic, transparent approaches to confirming sustained value from their AI investments while maintaining the highest standards of client trust and data security.

The conversations captured in this executive summary reflect Thomson Reuters' commitment to advancing AI innovation while fostering essential industry dialogues that shape our collective future. By bringing together thought leaders, practitioners, and visionaries, we ensure that as we unlock AI's transformative potential, we do so responsibly—enhancing human dignity, maintaining client trust, and creating sustainable competitive advantages while upholding the highest standards of ethical innovation and professional integrity.



Mike Abbott
Head of Thomson Reuters Institute

Moderator



Matthew Schmitt
Sales Director
Confidencial Inc.

Panelists



Luis Perez
Director Global Tax
AI Automation
Dell Technologies



Zen Van Loan
VP of Workforce Development
Austin AI Alliance



Zach Warren
Technology & Innovation
Insights Lead
Thomson Reuters Institute

Hello World!: The State of Emerging Technology and Generative AI

The Forum's opening panel emphasized that the most value in AI lies in data consistency, gradual digital transformation, and human oversight during implementation. With one panelist citing that 91% of professionals believe AI should be held to higher accuracy standards, it's clear that trust and data protection are paramount across the board. Furthermore, panelists highlighted the importance of aligning AI strategies with specific business objectives to maximize value creation. Looking ahead, the focus should remain on prioritizing the critical factors that make implementation possible while harnessing AI's potential, ultimately securing the positive change and innovation that AI promises.

Moderator



Rakshak Talwar
Co-Founder
Zenus, Inc.

Panelists



Joe Kendall
Director
AI Product Management
DLA Piper



Ray Meiring
CEO
QorusDocs



Scott Turner
Co-Founder & CTO
Kizen

AI on Autopilot: Exploring the Rise of Agentic AI and Its Potential within Professional Services

The second panel of the day delved into the world of Agentic AI, with panelists focusing largely on its applicability to client demands and its potential within professional services. The discussion centered on adjusting expectations surrounding AI's capability, breaking down complex problems into manageable chunks, and benchmarking AI's impact with quantifiable data. The panelists touched upon the importance of keeping the human in the loop, citing that agents do their best work with sufficient oversight. Panelists emphasized understanding risk factors before deploying AI agents and briefly discussed alternative fee arrangements, examining AI's dual role as assistants and autonomous agents, ultimately harmonizing technology with elevated workflow management.



Keynote presentation

Human-in-the-Loop: Machine Learning for Robot Navigation and Manipulation

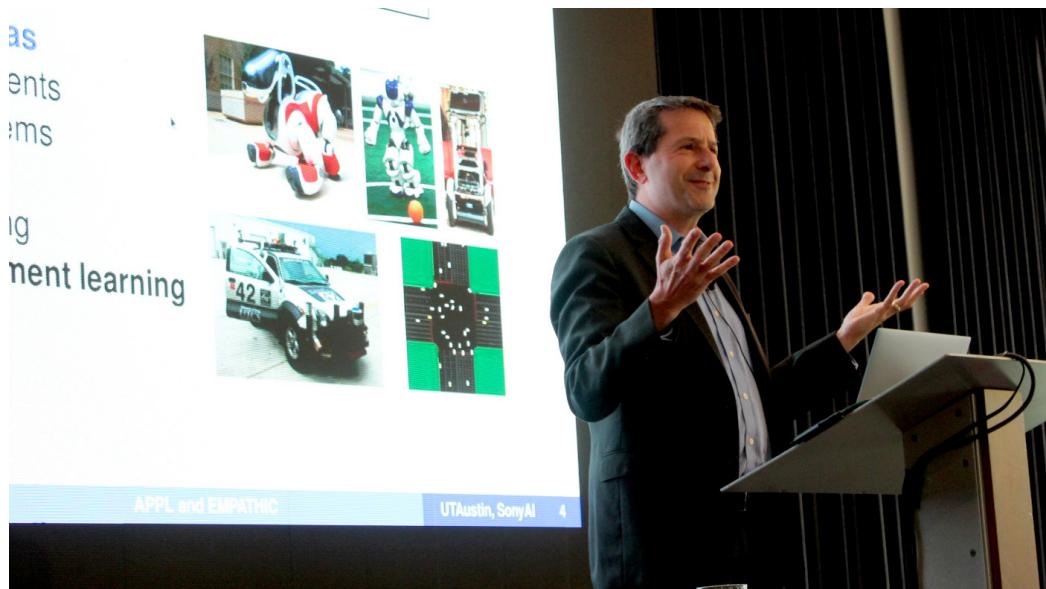
Prof. Peter Stone
Truchard Foundation Chair in Computer Science, UT Austin;
Chief Scientist Sony AI

The keynote address, delivered by Professor Peter Stone, Truchard Foundation Chair in Computer Science at University of Texas – Austin and Chief Scientist at Sony AI, focused on an alternative form of machine learning—robot navigation and manipulation.

Prof. Stone's research explores creating autonomous intelligent agents that adapt, interact, and embody complex, human-like behaviors. He demonstrated such feats through engaging videos of robots playing soccer (and scoring goals) and robots learning to master the skills of Tetris.

His approach revolutionizes robotic navigation and manipulation in complex environments. The audience gleaned that Prof. Stone's work has significant implications for various applications, including healthcare and manufacturing, where the integration of intelligent robotic systems can transform operational efficiency and innovation.

Furthermore, Prof. Stone highlighted that the advancements in autonomous robotic agents have parallels with the development of AI for businesses, where similar principles of adaptability and human-like interaction are engines to enhance service delivery. He emphasized the importance of training with the human-in-the-loop, clearly establishing that we are still in the nascent stages of agentic machine learning, despite our vast amounts of development over the past decade.



Moderator



Brooke Daniels
Senior Vice President
Market Lead
Harbor

Panelists



Christopher Cyrus
Director
Westlaw, AI
Thomson Reuters



Lynne Kilgore
Associate Director Competitive
Intelligence Data Science & Analytics
Baker Botts



Isabelle Lowe
Lead AI Analyst
CB Insights

Wired for Success: Creating a Forward Focused, Client Centric Technology Strategy

This client-centric panel explored how professional services firms can develop technology strategies that both enhance client engagement and drive value creation. Echoed often during the Forum, the panelists emphasized the need to ensure that AI's work is thoroughly checked, treating it like any other employee. Panelists discussed various aspects of assessing value in the eyes of the client, including competitive intelligence and the importance of organizing data to make it AI-compatible, particularly in the legal technology industry. The discussion acknowledged the challenge of data organization prior to implementation but determined that technology doesn't need to be perfect to accelerate workflows—we only need to ensure our metrics reflect a realistic qualification of value.

Moderator



Doreen Lorenzo
Assistant Dean, School of Design
and Creative Technologies; Professor
of Practice; Fellow of Marguerite
Fairchild Centennial Professorship,
University of Texas - Austin

Panelists



John Dubois
Americas AI Strategy Leader
Ernst & Young LLP



Paige L. Fults
Head of School
Alpha School &
2 Hour Learning



Betsy Greytok
Associate General Counsel
Responsible Technology
IBM Corporation

A Unified Field: Ethical Considerations amid AI Development and Deployment

The final panel tackled the ethical considerations surrounding AI development and deployment head-on. Panelists underscored the need for organizations to establish clear guidelines and harness diverse perspectives for ethical AI practices. As AI continues to evolve in highly personal applications like facial recognition technology, ethical decisions become less straightforward. Additionally, the panel delved into the next generation and their interaction with AI, posing the question of whether or not it's ethical to harness AI to teach children through a new approach to education. The panel's discussion emphasized that ethical AI is a collective responsibility that falls on all users' shoulders, setting the stage for a future where AI development is both responsible and visionary.



Closing remarks

The Emerging Technology and Generative AI Forum concluded with a clear mandate: the future of professional services will be defined not by whether firms adopt AI, but by how thoughtfully and strategically they integrate these transformative technologies into their core operations. The comprehensive dialogue spanning from agentic AI systems to human-in-the-loop learning paradigms revealed that we stand at a critical juncture where technological capability must be balanced with ethical responsibility and client trust.

The insights shared throughout this forum underscore a fundamental truth—successful AI implementation requires more than technological sophistication; it demands a holistic approach that encompasses data strategy, talent development, client engagement, and unwavering commitment to ethical standards. As professional services firms navigate this transformation, the frameworks and strategies discussed provide a roadmap for sustainable innovation that enhances rather than replaces human expertise.

The forum's emphasis on human-centered AI deployment reinforces that our industry's greatest strength lies not in replacing human judgment, but in augmenting it with intelligent systems that amplify our capacity to serve clients more effectively. The collaborative learning models presented demonstrate how AI can enhance professional capabilities while maintaining the trust, transparency, and personalized service that define excellence in professional services.

As we move forward, the conversations initiated at this forum must continue within our organizations and across our industry. The ethical considerations discussed are not merely compliance requirements but fundamental principles that will determine whether AI serves as a force for positive transformation or becomes a source of unintended consequences. The responsibility lies with each of us to ensure that as we harness AI's potential, we do so in ways that uphold the highest standards of professional integrity.

In closing, we extend our deepest gratitude to the sponsors who made this forum possible and to all attendees who contributed their expertise, insights, and commitment to advancing our industry's understanding of AI's transformative potential. The path ahead requires continued collaboration, shared learning, and collective commitment to responsible innovation. By embracing both the promise and the responsibility that AI presents, professional services firms can create sustainable competitive advantages while contributing to a future where technology truly serves humanity's best interests.



Mike Abbott
Head of Thomson Reuters Institute



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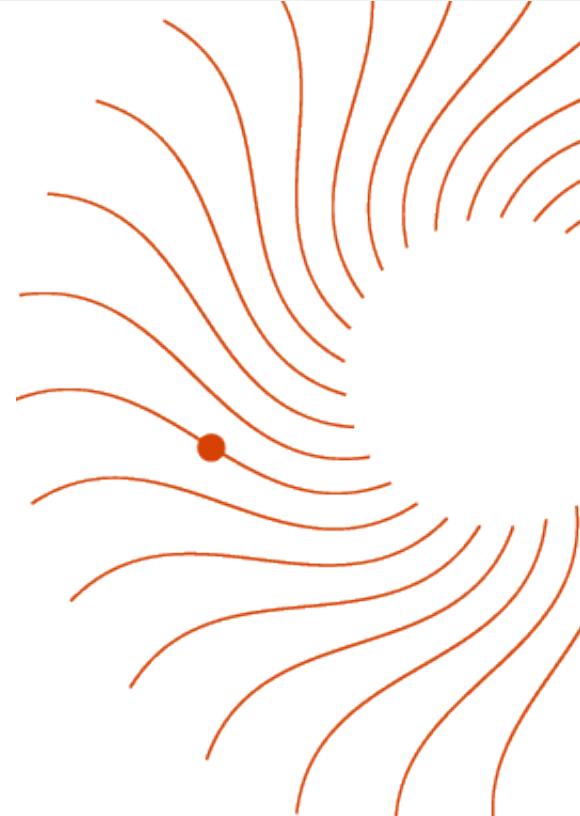
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