

Prompt cheat sheet for legal work

New to using AI on legal work, or getting answers that miss the point? A good prompt is a short brief, the kind you would give a capable junior colleague on their first week. This sheet gives you the structure and the habits that hold up across tools.

Tested on [MODEL], [DATE]: test pending

The six parts of a working prompt

1. Role and reader

Who the AI should act as, and who will read the result. "You are assisting in-house counsel. The reader is the sales lead, not a lawyer."

3. Inputs

The full document, pasted or attached, plus the facts that matter: your side, the deal, the deadline.

5. Output format

Say exactly what you want back: a table with set columns, a one-paragraph summary, or wording you can paste.

2. Task

One task, stated as a verb. "Identify the clauses that depart from our positions" works better than "look at this contract."

4. Your standard

Your positions, governing law, house style and anything it must not do. If you have a playbook, give it the playbook.

6. Checks

Ask it to quote clause numbers, list its assumptions and say where it is unsure. This makes your review faster and safer.

A template you can copy

```
You are assisting [ROLE] at [TYPE OF ORGANIZATION]. The reader is [READER].  
Task: [ONE TASK, AS A VERB].  
We are the [CUSTOMER / VENDOR / DISCLOSING PARTY]. Context: [DEAL FACTS].  
Apply these positions: [YOUR POSITIONS OR PLAYBOOK]. Governing law: [LAW].  
Return: [FORMAT, FOR EXAMPLE A TABLE: CLAUSE | ISSUE | RISK | SUGGESTED POSITION].  
For every point, quote the clause number and the words you rely on.  
List any assumptions, and tell me where you are unsure or the text is unclear.  
Do not invent clauses or facts that are not in the document.  
[PASTE OR ATTACH THE FULL DOCUMENT]
```

Habits that hold up

- **Give it the document, not your summary.** It can only check what it can see, including schedules and order forms.
- **One task per prompt.** Review first, then draft replies, then summarize for the business.
- **Ask for the words it relies on.** Quoted text is quick to check against the original.
- **Follow up.** "What did you leave out?" and "Which point are you least sure of?" are two of the most useful prompts you can send.

- **Keep the good ones.** Save prompts that work and reuse them, so your results stay consistent.
- **Check before you paste.** Use the "Safe to paste?" checklist before any confidential material goes in.

Worth knowing in each tool

Features and names change often, so check the current help pages for your plan. These points are about how to work, and none of them ranks one tool above another.

Claude

Handles long documents well. Put standing instructions and your playbook in a Project so you do not repeat them. Wrapping each document in simple labels, such as <contract> and </contract>, helps it keep sources apart.

ChatGPT

Check which model is selected before a long task. Use custom instructions or a Project to hold your standing context, and attach files rather than pasting long text where your plan allows it.

Microsoft Copilot

Check that you are signed in with your work account, not a personal one. In Word it works on the open document, so open the contract first and then ask; refer to other files by name.

Gemini

In Google Workspace it works from the side panel of Docs and Gmail on the file in front of you. Check whether you are in the Workspace version or the consumer app before you share anything confidential.