Beginner prompting techniques

Best methods for using the following skills:

- The Chat
- The Review Skill
- The Search a Database Skill
- The Summarize Skill
- The Timeline Skill
- The Draft Skill
- Prepare for a Deposition Skill
- Contract Policy Compliance Skill
- Compare Skill

Best methods for using the Chat

Use the formula **Intent + Context + Instructions** (also known as ICI Method).

1. This is our intent
2. This is our context
3. This is our instruction

For example: "I am seeking to discredit an expert witness. My document contains all prior testimony of the expert I'm seeking to discredit. My case involves medical malpractice. Please assist in crafting an effective prompt directly in the chat."

Best methods for using the Review Skill

Use the **Identify and describe method.**

1. The overarching context of my document (s)
2. The command for this specific question
3. The example to instruction the desired output

For example: "We are exploring dog bite jury verdicts. Identify the case name and provide a brief description in the IRAC format such as issue, rule, analysis, and conclusion."

Best methods for using the Search a Database Skill

Use the **Mad Libs method.**

1. The "what" for which type of documents we care about
2. The action for the way we want to see how our "what" is analyzed
3. The "subject matter" we care about finding

For example: "Which contracts contain clauses that allow for termination without cause?"

Best methods for using the Summarize Skill

Use the formula **Length + focus + context**

1. Length: This where we stipulate how long we want the summary
2. Focus: This where we give a focus area/topics we want the summary to be about
3. Context: This is where we provide context to better communicate our intent

For example: "I want a brief summary of discussions Natalie had with Valerie to determine if they talked about confidential information."

Best methods for using the Timeline Skill

Use the formula **Length + focus + context**

1. Length: This where we stipulate how detailed we want the timeline
2. Focus: This where we give a focus area/topics we want the timeline to be about
3. Context: This is where we provide context to better communicate our intent

For example: "I want a comprehensive timeline of all events in 2016 initiated by the seller."

Best methods for using the Draft Skill

Use the formula **Type + tone + context + intent**

1. Type: This where we specify what type of document we want drafted
2. Tone: This where we specify tone and word choice preferences
3. Context: This is where we specify context that should be included or used
4. Intent: This is where we specify our intention to stay focused

For example: "I want to draft an (outline, email, letter). The tone should be (x) and (legal jargon should/not be used). My draft should include (Y) because my intent is to express (Z)."

Best methods for using the Prepare for a Deposition Skill

Use the formula **Intent + context + quantity**

1. Intent: Where we specify what we want to do
2. Context: This where we provide context, such as who you are deposing and what the matter background
3. Quantity: This is where we specify how many questions we want drafted

For example: "I want draft deposition questions for (X person) about (Y context). I want (Z #) of questions."

Best methods for using the Contract Policy Compliance Skill

Use the formula **Clause + requirement + context**

1. Clause: This where we specify what clause topic we want to check
2. Requirement: This where we provide a clear requirement from our policies
3. Context: This is where we qualify the requirement with context

For example: "All customer data must be encrypted both in transit and at rest."

Best methods for using the Compare Skill

Use the formula **Intent + clarity + instruction**

1. Intent: This where we express the two documents we want compared
2. Clarity: This where we express the type of comparison we want
3. Instruction: This is where we express further analysis

For example: "Compare my client alert to the case memo and (1) fact check the accuracy of my client alert statements in explaining the case and (2) recommend any key details not included in my client alert that should be included based on the review of the case memo."

Intermediate variations of prompt techniques

Request for formatting

Review Skill

1. Still giving our overarching theme
2. And our command and context
3. And an explicit instruction
4. But now we also include a specific format in which we want these results to appear

For example: "We are exploring an opinion. Identify and describe the opinion. Answer in a list exactly like this: {name of the case: date of the case, brief description of the case, holding}"

All Skills

1. This lets CoCounsel know you want to reformat and to refer back to the previous result from your last Skill run
2. This our specific format request
3. This puts our request in context with the answer CoCounsel is looking to reformat.

For example: "Reformat my results in a bullet point format, for each criteria I requested."

Skills Stacking

Skills- stacking (reference prior skill's work to produce next skill's work).

All Skills

1. Note how I can reference the results just completed by a different skill in my same chat to use the info for a new request
2. I am invoking the Draft skill by name
3. I give explicitly thorough instructions, so it knows what matters to me
4. I reduce ambiguities and set myself up for further research with one sentence

For example: "Using the Review Documents results above, use the Draft skill to write a letter to a colleague working on the privacy law project. Explain with sophistication the results, hitting on all questions previously asked and answered in the results above. Make note of any lingering ambiguities and suggest follow-up legal research questions to address."

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Advanced prompt techniques

Meta Prompting (2-Part Step)

Part One: Meta Prompting= Have CoCounsel suggest questions

1. This specifies what type of document you want CoCounsel's help with
2. This is where you request how many questions you want CoCounsel to brainstorm, and what your intent is/what the purpose behind the questions are
3. This instructs CoCounsel to respond with its Chat instead of launching a Skill

For example: "I am reviewing a (Master Service Agreement). Recommend a set of (15) contextual prompts I can use to (extract key data privacy provisions). Draft directly in the chat."

Part Two: Meta Prompting= Turn CoCounsel's suggested questions in to prompts

1. This refers to previous information we gave CoCounsel in the Chat
2. This orients CoCounsel's understanding of our template and what to do
3. This is our review technique, but adjusted to become a template

For example: "I want to turn this information into prompts. I have a format I would like you to use. Here it is, please use it on all the questions: "We are analyzing a Model Limited Partnership Agreement. Identify the (insert the subject matter of the question) which (insert the context for the question)."

Using Templated to Prompt

Upload a template and file you wanted drafted in accordance: template + file + instructions.

1. This specifies what file is our template
2. This specifies what file is our context
3. This instructions CoCounsel to draft our specific type of document.

For example: "Please use the context of the case from (Ryan v FTC) file and the model template from the template (mediation summary) file to draft a (mediation summary) for the (Ryan v FTC) case."

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