



How to prompt in CoCounsel

This guide provides tips and tricks for prompting in Thomson Reuters CoCounsel.™

General prompting techniques

Image Tips – full Intent + context + instruction (ICI)

Intent	“I’m seeking to discredit an expert witness.”
Context	“The document contains all prior testimony of the expert I’m seeking to discredit. My case involves medical malpractice.”
Instruction	“Does the document contain any explicit or implied contradiction or inconsistency among the prior testimony offered by the expert?”

CoCounsel chat

Chat is the primary method of interacting with CoCounsel. It’s designed to help you focus your tasks and route you to a skill. It’s also where you can link skills together and make certain requests outside of CoCounsel’s defined skills.

THE CHAT

- Can be expressly prompted to initiate specific skills (e.g., “I want to review this contract”)
- Is great for brainstorming, generating examples, reorganizing information, or as a light drafting aid
- Can be prompted to establish rules for personalizing AI interactions
- Is aware of and able to reference most skill output and prior chat history
- If you don’t wish to use a skill and would like a chat-only reply, preface your message with “in chat only”

How prompts are used

The Chat takes your prompt, interprets your intent, and combines it with context from your chat history to complete the instructions that the routed Skill will use for your request

How to ask for reformatting

Once you have results from a Skill, you may want to reformat them. You can ask the Chat to reformat your results by asking:

please reformat these results in a [insert your criteria] [bullet points, table, Q&A]

Skill	Description
Search a database	Pinpoint relevant documents within a large database of your files. CoCounsel conducts a comprehensive search of documents in your database, offers a summary answering your question, and shares the most relevant results
Summarize	Surface and understand relevant information by condensing long, complex documents into your own focused summary.
Timeline	Automatically assemble chronologies of events described in your documents. Request specific timelines and filter the results.
Review Documents	Ask complex questions about a batch of documents and receive a substantive analysis complete with citations. Or obtain precise information about the content of contracts, complete with exact quotes and citations.
Contract Policy Compliance	Provide a set of policies to quickly identify non-compliant contract language and receive automated redlines to bring the contracts into compliance
Draft	Draft tailored letters and emails from a detailed description. Or draft short documents and outlines
Prepare for a Deposition	Easily identify pertinent topics and questions for investigative projects of all kinds.
Compare Documents	Easily compare two or more documents with specificity.

Limitations

- You can bias chat replies with your prompts and/or chat history
- The chat will write around 500-1,000 token in its response, so be mindful to double check reformatted answers you requested.
- Currently CoCounsel does not support data visualization modeling, so be mindful to not request formats like pie charts and graphs.

What's new in 2.0 Core skills

All skills can take prompts	Every skill can now be focused on your specific request, allowing the former Summarize and Timeline Skills greater flexibility.
All skills can now take uploads	Every skill can now use your documents as its starting point. Notably, the former Draft Deposition Questions and Draft Correspondence Skills can now directly draft based on your provided uploads.
All skills can now answer narratively	Every skill is now defaulted to replying with a narrative-style answer you can tweak as you wish, still with citations now as footnotes.
All skills can now stack	You can refer to the results from one skill as the contextual input for another skill, "stacking" them into full workflows.
Review & Extract is now one skill	Reviewing skills have been combined, allowing both extraction and analysis on contracts and other broad document types without having to choose which skill to use
Draft Correspondence is now Draft	The new Draft skill goes beyond drafting correspondence, allowing for drafts of outlines and brief language to be generated, based on your uploads.
New Compare Documents skill	Compare Documents in a 1 v 1 fashion among multiple documents.

Prompt Guidance by CoCounsel Core Skill

Search a Database

Prompt abilities

- Requires a prompt after selecting your database.
- Database should contain materials related to the same use case
- Prompts should be exploratory and conceptual
- Must ask one prompt at a time, but can run requests simultaneously
- NOT to be used for exhaustive searches or surveys

Prompt technique

- Be explicit. Ask a who, what, when, where, or why question.
- Be implicit. Search for conceptual understanding.

Prompt use-case examples

Trends/Sentiment:

- What is the prevailing sentiment regarding data privacy issues in the communications from the Demo Database?
- How are employees reacting to the recent merger in the internal memos from the Demo Database?

Implicit/Nuance:

- What subtle concerns are expressed about the new cybersecurity policy in the internal discussions from the Demo Database?
- Are there any underlying tensions in the negotiations between the U.S. and EU on digital trade agreements?

Focused Detail:

- What specific contributions has John Doe made to the discussions on renewable energy initiatives, and what is the tone of his input?
- How is Jane Doe involved in the strategic planning for the Asia-Pacific market, and what are her main concerns

Critiques:

- What criticisms have been raised about the new data protection strategy in the internal reviews from the Demo Database?
- How are stakeholders responding to the proposed changes in international trade policies?

Impact Assessment:

- How might the proposed tax reforms influence the financial strategies of multinational corporations?
- What are the potential effects of the new environmental regulations on the manufacturing sector?

Consistencies:

- What are the common themes and differences in the discussions about the Digital Privacy Act, the Data Security Initiative, and the Cyber Protection Bill?

- How do the objectives of the Green Energy Plan align with those of the Sustainable Development Strategy?

Suggestions:

- What best practices are recommended for companies to enhance their data security measures?
- How can organizations effectively address employee concerns about remote work policies?

Concerns:

- What potential risks are associated with the implementation of the new AI technologies, and who is voicing these concerns?
- What environmental challenges are highlighted in the recent reports, and which stakeholders are involved?

Action Items:

- What steps should be taken to address the regulatory challenges in the pharmaceutical industry, and who are the key contacts?

Summarize

Prompt abilities

- Can now prompt for specific summaries
- Can prompt for summaries in a particular POV
- Can now prompt for reformatting the summary
- Summary output can be referred back to in order to form prompts to Review by the Chat
- The referral request can also be from a POV and brainstorm based on your summary in the Chat
- Can stack into the Review skill with the generate prompts I requested

Prompt technique

- Length + Focus + Context:
- I want a [brief] summary of [X Topic] because of [Y Context]

Prompt use-case examples

- I want a summary of just the disclosure categories and who each category applies to
- Can you summarize my document from the POV of a small business owner not familiar with legalese?
- Please reformat this Summary as a chart with a column for disclosure and a column for the affected positions
- Use the Summary results above to brainstorm contextual prompts to review my document
- Use the Summary results above to brainstorm contextual prompts to review my document that an ethics investigator for the state government might ask
- Now run these ethics investigator prompts on my document to review it in detail REVIEW

Review Documents

Prompt abilities

- Able to perform tasks requiring advanced reasoning
- Requires a prompt after uploading your documents
- Prompts should be specific, contextual, and detailed
- Can input multiple prompts simultaneously across multiple documents simultaneously

Prompt techniques

- Identify + Describe
- Review my [name of doc/type of doc]. Identify and Describe [topic + context]

Prompt use-case examples

Identifying key terms in your document:

- Identify and describe the Term provision.
- Identify and describe the Termination provision.
- Identify and describe the Payment provision.
- Identify and describe the Pricing provision.
- Identify and describe the Limitations on Liability provision.
- Identify and describe the Governing Law provision.
- Identify and describe the Entire Agreement provision.
- Identify and describe any clauses related to handling disputes.
- Identify and describe any clauses related to overcharges

Analyzing material information from your document:

1. What is the main purpose of the document?
2. What material changes are being made, specifically as they relate to payment?
3. What material changes are being made, specifically as they relate to access?
4. What material changes are being made, specifically as they relate to overcharges

Contract Policy Compliance

Prompt abilities

- Requires a prompt after uploading your documents
- Prompts should be one to two sentences of singular policy claims for compliance

Prompt technique

- Clause + requirement + context
- All customer data must be encrypted both in transit and at rest DRAFT

Prompt abilities

- Can now access a document directly and be prompted based on that document.
- Alternatively, the Draft skill can be performed after Summarize and Review skills are used on your document to provide context for your Draft prompt.
- Perform template/outline drafting
- Perform light contract drafting based on a template (limit of a few pages)

Prompt technique

- Type + tone + context+ intent
- I want to draft an [outline, email, etc].
- The tone should be [X] and [legal jargon should should not] be used.
- My draft should include [Y] because my intent is to express [Z].

Prompt use-case examples

- Draft correspondence from the POV of the ethics investigator explaining whether the city's ethics code reasonably complies with standard expectations and note any lingering ambiguities or areas of concern you'd suggest clearing up
- Based on the[summary or review above], now draft correspondence from the POV of the ethics investigator explaining whether the city's ethics code reasonably complies with standard expectations and note any lingering ambiguities or areas of concern you'd suggest clearing up
- Draft a template for a Statement of Work proposal for a SAAS product from the buyer's point of view.
- Upload a completed contract and ask to “draft a template contract based on the model I provided”.

Prepare for a Deposition

Prompt capabilities

- Can now access a document directly and be prompted based on that document.
- However, using Summarize on your document first and then telling the Depo skill to refer back to that output to draft may produce a better answer
- Can explicitly ask for an number of questions and categories of questions.

Prompt technique

- Intent + context + quantity
- I want to draft deposition questions for [X person] about [Y context]. I want [#] of questions.

Prompt use-case examples

- Upload doc and ask draft deposition questions to the city attorney about the city's conflict of interest policy

- Use the summary above to draft deposition questions to the city attorney about the city's conflict of interest policy
- Draft deposition questions to the city attorney about the city's conflict of interest policy. Draft 10 questions per these 3 categories: exempt employees, nonexempt employees, elected officials

Timeline

Prompt capabilities

- Upload your document and ask for a general or specific timeline
- Can reformat the timeline as a narrative. Default is a table

Prompt technique

- Length + focus + context
- I want a [length of timeline] timeline focusing on [X Context] or focusing on [Y time frame].

Prompt use-case examples

- I want a brief timeline focusing on the closing dates.
- I want a comprehensive timeline of all events that occurred only in 2016.
- I want a timeline just of the procedural events
- Reformat this timeline as a narrative

Compare

Prompt capabilities

- Can be prompted or unprompted
- Can compare multiple documents but not in an “us v 1” format
- Can compare with a prompt that asks to fact check if it is 1:1
- Should provide specific prompting so CC does not determine itself which elements to compare, and also to request additional analysis

Prompt technique

- Intent + clarity + instruction
- Request what elements you want the comparison over

Prompt use-case examples

- Upload documents and just request ‘Compare.’
- I uploaded 5 documents and wanted 4 of the docs compared just against the other 1, but instead, each document is compared with each other 1 by 1.
- Can you compare and fact check my toolkit to see if it has incorporated the information found in the trainees guide.
- Compare my client alert to the case memo and (1) fact check the accuracy of my

client alert statements in explaining the case (2) recommend key details not included in my client alert that should be included based on the review of the case memo.

Ask Practical Law AI tips

REMINDERS

Practical Law is for finding practice guidance and regulations. Therefore, the **ICI prompting technique**, or asking prompts in the form of a command or instruction, works!

For example, you can use a prompt that has a citation, such as: “Find document (1908) 5 CLR 765.”

BEST PRACTICES

- Ask your question in everyday language
 - Include key facts and details when possible.
- Use specific terms
 - For example, “Is the waiver of consequential damages enforceable under New York law?” or “How can I strengthen a payment terms provision in a Sale of Goods agreement for my buyer client?”
- Provide feedback on results
 - Indicating whether results were helpful or not will help improve this tool.

AI-Assisted Research tips

LIMITATIONS

- Commands to execute certain tasks
- Finding documents by citation
- Boolean or fielded queries
- Requests for legal statistics
- Requests for comprehensive document retrievals
- Instructions to filter supporting authority
- Requests for timing or mathematical calculations
- Questions about predictions of outcomes
- Requested comparisons across many jurisdictions

BEST PRACTICES

- Do not use the ICI method While this works well with CoCounsel Core skills, this method is at odds with the AAR best practice (below) of avoiding commands.
- Do not write a query in the style of a prompt, command, or instruction
 - Avoid including extra words or phrases such as “find cases that ...” which bookend the query but aren’t substantive. Instead, construct a query with words or phrases you would expect to find in cases and legislation.
- Focus on a single issue or question
 - Where it’s easy to distinguish separate issues, ask about those issues in

separate questions dedicated to the issues, rather than combining them.

- Avoid including proper names of people or parties
 - Using these can artificially focus the search on results that might only be moderately relevant but contain the same name.
- Broaden prompts to avoid yes/no
 - Instead of asking “Does X have rights to do Y under Z,” use AI-Assisted Research with prompts with an “In what circumstances ...” construction. This invites more in-depth analysis rather than a binary yes/no outcome, by prompting for an exploration of the various legal considerations.

Looking for more information?

For additional training materials, visit the [CoCounsel training page](#).

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For assistance using Westlaw Precision Australia, call 1800 020 548

To request training, click <https://support.thomsonreuters.com.au/request-training>

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