



Influencers in the Field

Olivia Bower Marketing Account Manager

571.282.2438 | olivia_bower@ajg.com | [linkedin.com/in/olivia-bower](https://www.linkedin.com/in/olivia-bower)

The Efficiency Mindset: AI Prompts Every Legal Professional Should Use

As a legal professional, your days often feel nonstop. Between client work, research, document drafting, billing and business development, it's easy to run out of time — and energy — before your tasks are complete. The most effective attorneys aren't working more hours to keep up with their caseloads; they're working smarter by using artificial intelligence (AI) to streamline routine tasks.

Before you say objection, I know what you're thinking: Multiple attorneys across the country, from town to federal courts, have been [sanctioned](#) following inappropriate AI use. In many of those cases, the issue was not the use of AI itself, but the failure to properly validate AI-generated information before including it in legal filings.

Much like how your client or firm leadership would be unhappy if you didn't take the opportunity to closely question a witness on cross-examination, it's important you examine AI results with a fine-tooth comb to uncover any "[hallucinations](#)," or instances where false information or fake case law citations made their way into your research.

It's also important to ensure the platforms you utilize in your work are current on the most recent case law, as citing a case that was struck down, successfully appealed or completely false can harm your reputation. Utilizing a legal-specific platform, such as [Clio AI](#), [CoCounsel Legal](#) and [Harvey AI](#) can help ensure your documents remain grounded in real, accurate case law.

However, you must practice due diligence and be cautious no matter which platform you use. According to [Gallagher](#) insights, AI relies on information fed into the platform to create intelligent responses to queries; giving AI platforms access to privileged, confidential or proprietary information can harm your duty to confidentiality if those inputs are used by the platform to generate responses for others.

With the right prompts, secure platforms and appropriate care as demanded by your profession, you can accelerate drafting quality legal text, improve client communication and create marketing content in minutes, all while maintaining the accuracy and professionalism the legal profession demands. It's why more organizations are turning to generative AI, not as a replacement for professional judgment, but as a tool to **save time, improve consistency and enhance value**.

According to the [2026 Legal Industry Report](#) from 8am™, 69% of legal professionals now use general-purpose AI tools, such as ChatGPT, for work-related tasks, compared to only 31% last year. With adoption now embedded in everyday workflows, leveling up your use of these tools is a powerful way to maintain your competitive edge.

1. Draft Client-Friendly Legal Explanations

Potential tools: ChatGPT, Claude, CoCounsel Legal, Harvey AI

Try this prompt:

"Explain [legal concept or situation] in plain English for a client with no legal background. Keep the tone reassuring but realistic, professional and easy-to-understand. Avoid jargon and include a brief summary of what this means for their situation."

Pro tips: To help mitigate risks associated with using AI as a tool:

- Paste in the document or filing, along with a brief background of the client's goal, to help ensure accuracy but also ensure you're protecting their confidentiality — especially if you're using a free AI tool — by removing names, data or personally identifiable information (PII).
- Always confirm that explanations reflect current laws in your jurisdiction.
- Be transparent with your clients and mention that your firm uses AI tools to draft plain-language explanations, but that all legal filings are appropriately vetted by you.

2. Get Faster First-Drafts of Legal Documents

Potential tools: ChatGPT, CoCounsel Legal, Clio AI, Harvey AI

Try this prompt:

"Create a first draft of a [document type: client agreement, NDA, demand letter, etc.] for [scenario]. Include standard clauses typically expected in this type of document. Leave placeholders where jurisdiction-specific language for [list jurisdiction] is required. Write in an active voice, remove unnecessary jargon and do not make up any case law."

Pro tips: For the best results:

- Break a detailed prompt like this into step-by-step instructions to help ensure better drafts. Make sure you define its role, "Act as an experienced [attorney type] in [jurisdiction]," and provide case-specific context to help ensure accuracy.
- Set a powerful baseline by uploading past documentation for AI to use as a precedent for style, formatting and tone.
- Make sure your final document is compliant from all angles before submitting; legal AI hallucinations have gotten many attorneys into hot water.

3. Summarize Complex Documents Quickly

Potential tools: ChatGPT, Claude, CoCounsel Legal, Clio AI, Harvey AI

Try this prompt:

“Summarize the key points of this document in bullet form. Highlight key facts, such as obligations, risks, deadlines and any unusual clauses: [paste document text].”

Pro tip: Closely cross-check any summaries against the original — AI can omit or misinterpret critical details.

4. Streamline Client Intake Responses

Potential tools: ChatGPT, CRM tools

Try this prompt:

“Draft a response to a new client inquiry about [legal issue]. Acknowledge their situation, outline potential next steps and request their contact information and availability to schedule a meeting. Keep the tone professional, empathetic and concise.”

Pro tip: Avoid giving specific legal advice until a formal engagement is established. Casual or informal advice can lead to liability, malpractice and ethical concerns.

5. Turn FAQs Into Website or Blog Content

Potential tools: ChatGPT, Constant Contact

Try this prompt:

“Turn this client question into a short, informative blog post. Start with a strong hook, explain the legal issue in plain English without jargon and include one practical takeaway. Close with a general call to action on how to contact us for a legal consultation.”

Pro tip: Add disclaimers to all public-facing content, such as: “This blog is for informational purposes only and does not constitute legal advice on any subject matter. Please consult a lawyer about your situation.”

6. Create Compelling Thought Leadership Content

Potential tools: ChatGPT, LinkedIn

Try this prompt:

“Write a LinkedIn post on [legal trend or issue] for small business owners. Keep it insightful, approachable and under [word count]. Include one key takeaway and a question to encourage engagement.”

Pro tip: Validate all generated references to laws, rulings or statistics before posting.

7. Organize Notes Into Action Plans

Potential tools: ChatGPT, Notion AI

Try this prompt:

“Turn these notes into a structured task list with priorities, deadlines and next steps, highlighting any urgent or time-sensitive items: [paste notes].”

Pro tip: Always double-check deadlines and filing requirements — accuracy is critical in legal work.

8. Translate Legal Language Into Client Impact

Potential tools: ChatGPT, CoCounsel Legal, Clio AI, Harvey AI

Try this prompt:

“Explain how this legal issue impacts a client’s [type of small business] operations, risk and costs. Keep it concise, jargon-free and practical.”

Pro tip: Bring complex legal requirements back to reality by translating them into real-world concepts, improving client understanding and engagement.

9. Review Content for Risk and Clarity

Potential tools: ChatGPT, CoCounsel Legal, Clio AI, Harvey AI

Try this prompt:

“Review this document for clarity and tone, as well as potential risks or ambiguities. Flag any areas that may require legal review or more precise language: [paste text].”

Pro tip: AI can help identify weak spots — but final responsibility for accuracy and risk always rests with the attorney.

Final Reminder: Use AI Responsibly in Your Legal Practice

AI can support your work as a starting point, but it does not replace your legal judgment. Treat it like you would a junior associate’s brief; **always review, verify and ensure all outputs align with applicable laws, ethical rules and client confidentiality standards in your jurisdiction.**

Before using any AI-generated content, be sure to:

- Verify all legal citations, statutes and case references.
- Confirm jurisdictional accuracy.
- Ensure client confidentiality is protected.
- Review for ethical compliance.
- Adjust tone and content to reflect your professional judgment.

Quick-Start AI Toolkit for Legal Professionals

- **ChatGPT/Claude**
Drafting and communication
- **CoCounsel Legal/Clio AI/Harvey AI**
Legal analysis and summarization
- **Canva/CapCut**
Marketing visuals
- **Constant Contact**
Campaign automation

To explore our insurance products, risk management solutions and member savings programs, or to connect with an expert to assess your current offerings, visit gallagherperks.com/olivia-bower.



The information contained herein is offered as insurance industry insight and provided as an overview of current market risks and available coverages and is intended for discussion purposes only. This publication is not intended to offer legal advice or client specific risk management advice. Any description of insurance coverages is not meant to interpret specific coverages that your company may already have in place or that may be generally available. General insurance descriptions contained herein do not include complete insurance policy definitions, terms and/or conditions, and should not be relied on for coverage interpretation. Actual insurance policies must always be consulted for full coverage details and analysis. Gallagher publications may contain links to non-Gallagher websites that are created and controlled by other organizations. We claim no responsibility for the content of any linked website, or any link contained therein. The inclusion of any link does not imply endorsement by Gallagher, as we have no responsibility for information referenced in material owned and controlled by other parties. Gallagher strongly encourages you to review any separate terms of use and privacy policies governing use of these third party websites and resources. Insurance brokerage and related services to be provided by Gallagher Affinity Insurance Services, Inc. (License No. 100310679 | CA License No. 0783129).