THE AUTOMATED ATTORNEY

Legal AI Prompt Library

120+ tested prompts for contract review, litigation support, client communication, legal research, correspondence, compliance, billing, and intake.

Edition 1.0

How to use this library

Prompts marked in [brackets] are placeholders — replace them with your matter's specifics.
Every AI output must be reviewed and verified by a licensed attorney before use.

Important Notice

This library contains prompt templates intended to help legal professionals use AI tools more efficiently. It is a productivity aid, not a source of legal advice, and it does not create an attorney-client relationship between the purchaser and The Automated Attorney.

AI output can be incomplete, outdated, or simply wrong — including fabricated case citations. Every output generated using these prompts must be independently reviewed, fact-checked against primary sources, and verified by a licensed attorney before it is relied upon, sent to a client, or filed with a court.

Before using any prompt with real client information, confirm that your AI platform's data-handling and confidentiality terms are appropriate for privileged or confidential material, and comply with your jurisdiction's rules of professional conduct regarding technology competence and client confidentiality.

Contents

1. Contract Review & Drafting *(30 prompts)*

2. Discovery & Litigation Support *(23 prompts)*

3. Client Communications & Correspondence *(18 prompts)*

4. Legal Research & Memo Drafting *(14 prompts)*

5. Demand Letters & Formal Correspondence *(10 prompts)*

6. Compliance & Risk Management *(10 prompts)*

7. Billing, Time Entries & Practice Management *(8 prompts)*

8. Intake & Case Assessment *(7 prompts)*

1. Contract Review & Drafting

Prompts for reviewing incoming contracts, drafting from scratch, and comparing against your firm's standard positions.

⚠️ **Guardrail:** Always paste your firm's actual playbook/fallback positions into these prompts when available — generic output should be treated as a first pass, not a final position.

1. Clause-by-clause risk scan

You are reviewing a [contract type] on behalf of [our client, the Buyer/Seller/etc.]. Go through the attached contract clause by clause and flag any provision that is unusual, one-sided, or missing a standard protection a party in our position would expect. For each flag, state the clause, the risk in plain English, and a suggested edit.

2. Redline against playbook

Here is our firm's standard position on [issue, e.g. limitation of liability]: [paste playbook language]. Compare it against the attached clause from the counterparty's draft and produce redline suggestions that move the language toward our standard position while remaining commercially reasonable.

3. Missing clause check

Given this is a [contract type] governed by [jurisdiction] law, list the clauses a well-drafted agreement of this type would typically include. Cross-reference against the attached draft and tell me which standard clauses are missing entirely.

4. Plain-English summary for the client

Summarize the attached contract in plain English for a client who is not a lawyer. Organize by: what they're agreeing to do, what the other party is agreeing to do, key deadlines, termination rights, and what happens if either side breaches.

5. Indemnification analysis

Analyze the indemnification clause in the attached contract. Explain who indemnifies whom, for what triggering events, whether it's capped, and whether it's mutual or one-sided. Flag anything that departs from market-standard mutual indemnification.

6. Limitation of liability check

Review the limitation of liability clause below. Identify the cap amount/formula, any carve-outs (e.g. gross negligence, IP infringement, confidentiality breach), and whether consequential damages are excluded. Note if any standard carve-out is missing.

7. Termination rights comparison

Compare the termination-for-convenience and termination-for-cause provisions in these two draft versions [paste both]. Summarize what changed and whether the change favors our client or the counterparty.

8. Auto-renewal and notice period audit

Scan the attached contract for auto-renewal clauses and notice-of-non-renewal deadlines. List every such deadline with the exact date or trigger, so we can calendar it.

9. Assignment clause review

Review the assignment clause in the attached agreement. State whether assignment requires consent, whether consent can be unreasonably withheld, and whether there are carve-outs for M&A/change of control.

10. Governing law and venue check

Identify the governing law and venue/forum selection clauses in the attached contract. Flag if the chosen jurisdiction is unusual for a [contract type] between parties based in [state/country].

11. Force majeure sufficiency

Review the force majeure clause below against the current market standard, which typically includes: [list your firm's standard triggers]. Identify any gaps, such as missing pandemic, labor dispute, or supply chain triggers.

12. Payment terms extraction

Extract every payment obligation from the attached contract: amounts, due dates, late fees/interest, and conditions precedent to payment. Present as a table.

13. Non-compete / non-solicit reasonableness

Assess the non-compete and non-solicit clauses below for reasonableness under [state] law, considering duration, geographic scope, and scope of restricted activity. Flag anything likely to be unenforceable as written.

14. Draft an NDA from scratch

Draft a mutual non-disclosure agreement between [Party A] and [Party B] for the purpose of [purpose, e.g. evaluating a potential partnership]. Include a 2-year confidentiality term, standard exclusions (already public, independently developed, etc.), and a [state] governing law clause.

15. Draft a services agreement outline

Draft an outline (section headings plus one-sentence description of each) for a professional services agreement between [Client] and [Service Provider] covering scope of services, fees, IP ownership of deliverables, and termination.

16. First-draft engagement letter

Draft an engagement letter for a new client, [Client Name], retaining our firm for [matter type]. Include scope of representation, fee structure ([hourly/flat/contingency] at [rate]), billing frequency, and a standard conflicts waiver paragraph.

17. Amendment drafting

Draft a short amendment to the attached agreement that changes [specific term, e.g. the renewal date from March 1 to June 1] without altering any other provision. Use standard amendment language that references the original agreement by title and date.

18. Exhibit/schedule cross-reference check

Check the attached contract for every reference to an Exhibit or Schedule (e.g. 'as set forth in Exhibit A') and confirm each referenced exhibit is actually attached and correctly labeled. List any broken references.

19. Definitions consistency check

Review the Definitions section against the body of the contract. Flag any defined term that is used inconsistently, any term used in the body but never defined, and any term defined but never used.

20. Battle-of-the-forms flag

This transaction involved a purchase order from the buyer and a sales acknowledgment from the seller with conflicting terms. Summarize the material conflicts between the two documents and note which document likely governs under [state]'s UCC Article 2 rules.

21. IP ownership clarity check

Review the intellectual property ownership clause in the attached work-for-hire/services agreement. State clearly who owns deliverables created during the engagement, and flag any ambiguity about pre-existing IP versus newly created IP.

22. Warranty and disclaimer review

Extract all warranties made in the attached contract and all warranty disclaimers. Note whether the disclaimers are conspicuous (capitalized/bolded) as typically required for enforceability under [state] law.

23. Change-of-control trigger check

Scan the attached agreement for any change-of-control provisions (e.g. termination rights, consent requirements, acceleration clauses) that would be triggered by a merger or acquisition of either party.

24. Side letter drafting

Draft a side letter to accompany the attached main agreement that adds one additional commitment: [describe the commitment]. The side letter should state that it is incorporated by reference into and governed by the same terms as the main agreement.

25. Redact and produce a client-safe summary

Summarize the attached contract for internal circulation, omitting the specific dollar figures and party names, so it can be used as a template reference for future negotiations.

26. Escalating dispute-resolution ladder review

Review the dispute resolution clause below. Identify each step of the escalation ladder (negotiation, mediation, arbitration/litigation), the deadlines between steps, and whether arbitration is binding or non-binding.

27. SaaS/subscription agreement SLA check

Review the Service Level Agreement (SLA) attached to this SaaS contract. Extract the uptime commitment, the remedy for a missed SLA (service credits, termination right, etc.), and whether the remedy is the customer's sole and exclusive remedy.

28. Data privacy/DPA gap check

This contract involves processing of personal data. Check whether a Data Processing Addendum (DPA) is referenced or attached, and if so, whether it addresses [applicable regime, e.g. GDPR/CCPA] required terms: purpose limitation, subprocessor consent, breach notification timeline, and data return/deletion on termination.

29. Most-favored-nation / pricing parity check

Check the attached contract for a most-favored-customer or pricing-parity clause. Summarize the trigger conditions and the mechanism by which pricing would need to be adjusted.

30. Convert redlines into a client explanation memo

Using the attached redlined contract, write a short memo to the client explaining, in plain English, what changed between the original draft and the redlined version, and why each change matters to them.

2. Discovery & Litigation Support

Prompts for document review, deposition digests, and organizing case materials during active litigation.

⚠️ **Guardrail:** Never paste privileged or confidential material into a non-firm-approved AI tool. Confirm your platform's data-handling terms before using these prompts with real case files.

1. First-pass document relevance triage

I'm reviewing documents for [case name/matter]. The key issues are: [list issues, e.g. breach of contract, notice, damages]. Read the attached document and state whether it is likely relevant to any of these issues, which one(s), and a one-sentence reason why.

2. Privilege log entry drafting

Draft a privilege log entry for the attached document. Include: date, author, recipients, document type, and a description sufficient to support the privilege claim without revealing privileged content. Privilege basis: [attorney-client / work product].

3. Chronology building from documents

Extract every date mentioned in the attached document along with the event associated with that date. Format as: Date | Event | Source document. This will feed into a master case chronology.

4. Key document summary for partner review

Summarize the attached document in under 150 words for a partner who has not seen it, focused on why it matters to [issue]. Include the bates number and date at the top.

5. Interrogatory drafting

Draft 10 interrogatories to serve on [opposing party] in a [case type] case, focused on establishing [element you need to prove, e.g. the defendant's knowledge of the defect]. Use standard, non-objectionable phrasing under [jurisdiction]'s discovery rules.

6. Request for production drafting

Draft requests for production of documents seeking all communications between [Party A] and [Party B] regarding [subject] from [date range]. Include a standard definitions and instructions section.

7. Meet-and-confer letter on discovery deficiencies

Draft a meet-and-confer letter to opposing counsel identifying deficiencies in their document production: [list *deficiencies, e.g. missing attachments, unredacted privilege claims, non-responsive documents]. Request a call within 7 days to resolve.*

8. Deposition topic outline from case theory

Based on our case theory that [state theory], draft a deposition outline of topic areas (not verbatim questions) to cover when deposing [witness role, e.g. the plaintiff's former supervisor].

9. Deposition transcript digest

Digest the attached deposition transcript excerpt. For each answer that is favorable, unfavorable, or an admission relevant to [issue], note the page:line citation and a one-sentence summary.

10. Impeachment material spotting

Compare the attached deposition testimony to the witness's prior statement in [document, e.g. an affidavit or interrogatory response]. Flag any inconsistency that could be used for impeachment, with exact quotes and citations to both sources.

11. Motion to compel — factual background section

Draft the factual background section of a motion to compel, describing the discovery requests served on [date], the deficient response received on [date], and the meet-and-confer efforts undertaken on [date]. Keep it neutral and factual, no argument.

12. Exhibit list organization

Organize the attached list of trial exhibits into a formatted exhibit list with columns for exhibit number, description, bates range, and the witness through whom it will be introduced.

13. Expert witness CV summary

Summarize the attached expert CV, highlighting qualifications directly relevant to opining on [subject matter], and flag any gaps or potential Daubert/Frye vulnerabilities (e.g. lack of peer-reviewed publication in the relevant field).

14. Draft a case status update for the client

Draft a plain-English status update for the client covering: what's happened in the case since the last update, what's coming up next, and any decision we need from them, based on the attached internal case notes.

15. Legal hold notice drafting

Draft a litigation hold notice to send to [custodians/departments] regarding [matter]. Cover the duty to preserve, categories of documents/data covered, and the point of contact for questions.

16. Summary judgment fact statement extraction

From the attached deposition and document excerpts, extract undisputed facts that would support a statement of undisputed material facts for a summary judgment motion on [issue]. Cite the source for each fact.

17. Discovery request objection review

Review the attached objections to our discovery requests. For each objection, state whether it appears to be a valid, proportionality-based objection or a boilerplate objection likely to be overruled, and why.

18. Draft a subpoena for records

Draft a subpoena duces tecum to [third-party custodian, e.g. a bank or employer] requesting [categories of documents] related to [subject] for the period [date range], compliant with [jurisdiction]'s subpoena rules.

19. Draft deposition prep memo for the witness

Draft a plain-English prep memo for [witness name] ahead of their deposition, covering: the topics likely to be covered, general deposition guidance (answer only what's asked, take your time, it's okay to say 'I don't know'), and any documents they should review beforehand.

20. ESI search term proposal

Given the key issues in this case are [list issues], propose a set of Boolean search terms to run across the document collection to identify potentially responsive ESI, along with the reasoning behind each term.

21. Trial exhibit objection worksheet

For the attached list of the opposing party's proposed trial exhibits, draft a worksheet noting a likely evidentiary objection (relevance, hearsay, authentication, etc.) for any exhibit that appears objectionable, with a one-line basis for each.

22. Post-mediation summary for the client

Summarize the attached mediation notes into a plain-English update for the client: where the numbers landed, what issues remain unresolved, and our recommendation for next steps.

23. Draft a Rule 26 initial disclosure

Draft the individuals-with-knowledge and document-categories sections of an initial disclosure under Rule 26(a)(1), based on the attached case facts and witness list.

3. Client Communications & Correspondence

Prompts to speed up everyday client-facing writing while keeping the firm's voice and appropriate hedging language.

1. **Plain-English explainer of a legal concept**

   Explain [legal concept, e.g. 'what a UCC lien means for my business'] to a client with no legal background, in under 200 words, using a concrete example relevant to [client's industry].

2. **Status update email**

   Draft a status update email to [client name] covering what's happened on their matter since [date], what's next, and any action needed from them. Tone: warm but professional, no legalese.

3. **Fee estimate explanation**

   Draft an email to a client explaining a fee estimate of $[amount] for [scope of work], breaking down what's included, what could cause the estimate to change, and our billing cadence.

4. **Difficult news delivery**

   Draft an email to the client explaining that [unfavorable development, e.g. the motion was denied]. Be direct and honest, explain what it means practically, and immediately pivot to our recommended next steps so the message doesn't read as purely bad news.

5. **Meeting follow-up summary**

   Based on the attached meeting notes, draft a follow-up email to the client summarizing what we discussed, the decisions made, and action items with owners and deadlines.

6. **Requesting missing documents from a client**

   Draft a friendly but clear email to the client requesting the following missing documents: [list]. Explain briefly why each is needed and give a deadline of [date].

7. **Explaining a retainer replenishment**

   Draft an email to the client explaining that their retainer balance is low and needs to be replenished by $[amount], including a brief, non-defensive summary of recent work performed.

8. **New client welcome email**

   Draft a welcome email for a new client after signing the engagement letter, covering: how to reach us, what to expect in the first two weeks, and how billing/invoicing works.

9. Referral thank-you note

Draft a thank-you note to [referral source] for referring [client name] to our firm, warm and specific, without disclosing any confidential details about the matter.

10. Explaining why we can't guarantee an outcome

Draft language for a client email that clearly explains we cannot guarantee the outcome of [matter type], while still conveying confidence in our approach and strategy.

11. Responding to an upset client

The client is frustrated about [issue, e.g. the pace of the case]. Draft a response that acknowledges their frustration without admitting fault, explains the reason for the pace, and offers a concrete next step or check-in date.

12. Simplify a court order for the client

Summarize the attached court order for the client in plain English: what the court decided, what it means for their case practically, and whether any deadline or action is now triggered.

13. Draft an intake follow-up after a missed call

Draft a short, warm follow-up message to a prospective client who missed our scheduled intake call, offering two or three alternate times and reiterating that we're glad to help with [matter type].

14. Post-matter closing letter

Draft a closing letter to the client now that [matter] has concluded, thanking them, summarizing the outcome in one paragraph, explaining our file retention policy, and inviting future business.

15. Explaining a conflict check delay

Draft an email to a prospective client explaining that we need a short additional time to complete a conflicts check before we can confirm we're able to take on their matter.

16. Translate outside counsel's legalese for the client

Rewrite the attached email from opposing counsel in plain English for the client, and add one sentence of context on what our likely response will be.

17. Settlement offer explanation

Draft an email to the client explaining a settlement offer of $[amount] with terms [terms]. Present the pros and cons neutrally, and end with our recommendation and reasoning.

18. Client check-in cadence email

Draft a brief 'nothing new to report but still on it' check-in email for a client whose matter is currently waiting on [external factor, e.g. a court ruling], so they don't feel forgotten.

4. Legal Research & Memo Drafting

Prompts for structuring research, drafting memos, and stress-testing arguments — always intended as a starting point that a licensed attorney verifies against primary sources.

⚠️ **Guardrail:** AI-generated case citations and holdings must always be independently verified in a primary legal database before being relied upon or filed. Never cite a case you have not personally confirmed exists and says what it's claimed to say.

1. Issue-spotting from client facts

Given the following facts: [paste facts], identify the legal issues that would need to be researched to advise this client, organized by area of law.

2. IRAC memo skeleton

Draft an IRAC-structured memo skeleton (Issue, Rule, Application, Conclusion — headers and one-sentence placeholders only) for the question: [legal question]. I will fill in the substance after verifying research.

3. Research question refinement

I want to research [broad topic]. Help me narrow this into 3-5 specific, answerable research questions, each phrased the way I'd search it in a legal database.

4. Counter-argument stress test

Here is our argument: [paste argument]. Play devil's advocate and identify the three strongest counter-arguments opposing counsel could raise, and suggest how we might preemptively address each.

5. Plain-English rule summary from a statute

Summarize the attached statute section in plain English: who it applies to, what it requires or prohibits, and any exceptions. Flag any term that is defined elsewhere and may need cross-referencing.

6. Draft a client-facing legal update

Based on the attached case summary/holding I've verified, draft a client-facing article or alert (under 400 words) explaining what changed and how it might affect clients in [industry].

7. Multi-jurisdiction comparison table

Create a comparison table of how [legal issue, e.g. non-compete enforceability] is treated in [list states], based on the verified summaries I provide for each state. Include columns for key requirements and notable limitations.

8. Turn research notes into a coherent memo

I've pasted my raw, verified research notes below. Organize them into a coherent memo with headers, in the order: background, applicable law, analysis, conclusion/recommendation.

9. Elements checklist for a claim

List the elements a plaintiff must prove to establish a claim for [cause of action] under [jurisdiction] law, based on the case law I've provided below, and note which element is likely to be most contested on these facts.

10. Statute of limitations tracker

Given the following case facts and dates [paste facts], and the statute of limitations periods I've verified for each potential claim [list periods], calculate the filing deadline for each claim and flag which is most time-sensitive.

11. Executive summary of a long memo

Write a one-paragraph executive summary of the attached research memo suitable for a partner who needs the bottom line before reading the full analysis.

12. Identify open questions after initial research

Based on the research summarized below, what open questions remain that would need additional research or a call with local counsel before we can give the client a confident answer?

13. Draft talking points for a client call explaining research findings

Turn the attached verified research memo into 5-7 plain-English talking points I can use on a call with the client to explain our findings and recommendation.

14. Compare two competing legal theories

We're considering pursuing this matter under either [Theory A] or [Theory B]. Based on the elements and case law I've verified for each below, compare the strength of each theory on our facts and the practical tradeoffs (e.g. burden of proof, available remedies, statute of limitations).

5. Demand Letters & Formal Correspondence

Prompts for drafting outbound formal letters that carry legal weight.

1. **Standard demand letter**

Draft a demand letter to [recipient] on behalf of [client] demanding [remedy, e.g. payment of $X] within [X] days based on the following facts: [paste facts]. Tone: firm and professional, reserve all rights, no explicit threat of specific legal action beyond 'all available remedies.'

2. **Cease and desist letter**

Draft a cease and desist letter to [recipient] regarding [conduct, e.g. trademark infringement / breach of restrictive covenant], demanding they stop the conduct within [X] days and describing the basis for our claim.

3. **Notice of breach / cure letter**

Draft a formal notice of breach letter citing Section [X] of the [contract name] dated [date], describing the specific breach, and providing the [X]-day cure period required under the contract before we may pursue remedies including termination.

4. **Response to a demand letter**

Draft a response to the attached demand letter that: (1) does not admit liability, (2) addresses their factual claims where appropriate, and (3) [either offers to resolve / firmly disputes the claim, per instruction].

5. **Collections letter — first notice**

Draft a first-notice collections letter for an invoice of $[amount] that is [X] days past due, professional in tone, referencing the original invoice date and payment terms, with a clear payment deadline.

6. **Collections letter — final notice**

Draft a final-notice collections letter for the same invoice, now [X] days overdue, referencing our prior letter of [date], and stating that we will refer the matter to [collections/legal action] if payment is not received within [X] days.

7. **Reservation of rights letter**

Draft a reservation of rights letter to [recipient] acknowledging [situation] while expressly reserving all of our client's rights and remedies, including under [contract/statute], without waiving any defense.

8. **Formal notice of termination**

Draft a formal notice of termination of the [agreement name] dated [date], citing Section [X] as the basis for *termination, the effective date of termination, and any post-termination obligations that survive.*

9. Litigation hold / preservation demand to opposing party

Draft a letter to [opposing party/counsel] demanding preservation of documents and ESI related to [subject matter], warning of potential spoliation consequences, in advance of anticipated litigation.

10. Formal apology/goodwill letter (non-admission)

Draft a goodwill letter on behalf of the client expressing regret about [situation] without making any admission of fault or liability, intended to preserve the business relationship.

6. Compliance & Risk Management

Prompts for spotting regulatory issues and drafting internal-facing compliance material.

> ⚠️ **Guardrail:** These prompts help identify areas to investigate — they are not a substitute for a formal compliance opinion or risk assessment from qualified counsel familiar with the client's full regulatory picture.

1. New regulation impact scan

Summarize the attached new regulation/rule and identify which of the following business activities of our client it likely affects: [list activities]. Flag which provisions require immediate action versus longer-term compliance planning.

2. Policy gap analysis

Compare our client's attached internal policy against the requirements described in [regulation/standard]. List any requirement not addressed by the current policy.

3. Draft an internal compliance memo

Draft an internal memo to [client's compliance/legal team] explaining the new requirement under [regulation], the deadline for compliance, and a recommended action checklist.

4. Vendor risk questionnaire

Draft a due diligence questionnaire to send to a prospective vendor who will handle [type of data/activity], covering security practices, subcontracting, breach notification, and compliance certifications relevant to [regulation].

5. Employee training talking points

Draft talking points for a 15-minute employee training session on [compliance topic, e.g. data privacy basics], written for a non-legal audience with 2-3 concrete do's and don'ts.

6. Incident response checklist draft

Draft a first-24-hours incident response checklist for a [type of incident, e.g. data breach] affecting a company subject to [applicable regulation], covering notification deadlines and key internal/external contacts to loop in.

7. Regulatory filing deadline tracker

Based on the attached description of our client's business activities, list the recurring regulatory filings/renewals they likely need to make under [regulatory regime], with typical frequency (annual, quarterly, etc.) so we can build a calendar.

8. Board memo on a compliance risk

Draft a one-page memo to the board summarizing a newly identified compliance risk: [describe risk], its potential exposure, and management's recommended mitigation steps.

9. Whistleblower policy review

Review the attached whistleblower/reporting policy against the requirements typically expected under [applicable law, e.g. Dodd-Frank/Sarbanes-Oxley] and flag any gaps in anonymity protections, anti-retaliation language, or reporting channels.

10. Records retention schedule draft

Draft a records retention schedule outline for a [industry] business, listing common document categories (contracts, tax records, employment files, etc.) and the typical minimum retention period for each under [jurisdiction].

7. Billing, Time Entries & Practice Management

Prompts to reduce the administrative drag of running a matter.

1. Turn rough notes into a proper time entry

Turn this rough note into a properly formatted billable time entry: [paste rough note, e.g. 'call w client re settlement, also reviewed their email and looked at the contract again']. Use professional billing language and avoid vague terms like 'worked on file.'

2. Pre-bill narrative cleanup

Clean up the attached batch of time entries for this month's invoice: fix vague language, ensure consistent tense, and flag any entry that appears to be block-billed so I can split it.

3. Draft a budget estimate for a new matter

Based on the scope described [describe matter], draft a phase-based fee budget estimate (e.g. investigation, pleadings, discovery, motion practice, trial) with a rough hours estimate for each phase, to share with the client.

4. Engagement scope-creep flag

Compare the work described in the attached time entries against the original scope of engagement: [paste scope]. Flag any work that appears to fall outside the original scope so we can consider a scope amendment.

5. Client invoice cover note

Draft a short, friendly cover note to accompany this month's invoice to [client], briefly summarizing the work performed without repeating every line item.

6. Matter opening checklist

Draft a matter-opening checklist for a new [matter type] engagement, covering conflicts check, engagement letter, matter number setup, calendar deadlines, and initial client document requests.

7. Conflicts check summary memo

Summarize the attached conflicts search results into a short memo stating whether a conflict exists, its nature if any, and whether it's waivable, for partner sign-off.

8. Standard operating procedure draft

Draft a one-page SOP for [recurring task, e.g. 'opening a new intake file'], written so a new paralegal could follow it without additional guidance.

8. Intake & Case Assessment

Prompts to speed up the earliest stage of a matter, from first contact to the decision to engage.

1. Intake call summary

Summarize the attached intake call notes into a structured case summary: client goals, key facts, potential claims/defenses, urgency/deadlines, and any red flags (e.g. potential conflicts, unrealistic expectations).

2. Case viability first-pass assessment

Based on the facts in the attached intake summary, provide a preliminary, non-binding assessment of whether this matter appears viable for our practice, key strengths, key weaknesses, and what additional information we'd need before deciding.

3. Intake questionnaire drafting

Draft an intake questionnaire for prospective [practice area, e.g. employment] clients, covering the key facts we typically need to do a first-pass assessment, organized in a logical order.

4. Fee structure recommendation memo

Based on the attached case summary, draft a short internal memo recommending whether this matter is better suited to hourly, flat-fee, or contingency billing, with reasoning.

5. Declining representation letter

Draft a professional, non-defamatory letter declining to represent a prospective client in [matter type], without stating a specific reason related to the merits, and recommending they seek other counsel promptly given any applicable deadlines.

6. Conflict-of-interest first screen

Given our client roster includes [list relevant existing clients/parties], and this new matter involves [describe parties/issue], identify any obvious potential conflicts that should be escalated for a formal conflicts check.

7. Urgency/deadline triage

Scan the attached intake notes for any mentioned deadline (statute of limitations, contractual notice period, court date, etc.) and flag which ones require action within the next 14 days.