

# Guide to Effective Prompting

This guide shares strategies and tactics to achieve better results with LexisNexis Protégé™, the personalized AI assistant. Even if you have experimented with general purpose AI tools like ChatGPT or Claude, it is worth familiarizing yourself with the best practices unique to Protégé so that you get the most out of the experience.

This guide will cover:

- What prompting is and how it works
- Best practices and prompting techniques

## I. OVERVIEW: WHAT IS AI PROMPTING

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Generative AI relies on user instructions and requests, known as "prompts," to generate responses. These prompts can be simple and straightforward or complex and multi-step, depending on the desired outcome.

When a prompt is received, the AI evaluates the objective instruction, the context provided, and any implicit instructions within the prompt. AI then predicts the most relevant response based on the patterns of information it has been trained on. It's important to note that while AI can process vast amounts of data, it does not possess human reasoning or the ability to reference experience.

In Protégé, our technologists have mitigated the limitations of AI through grounding in trusted LexisNexis resources, meaning that Protégé responses are based on specific legal references or your organization's documents. It also means that Protégé is not designed to address prompts that are outside the legal use case.

### Key Considerations

Generative AI is a new tool for all of us. It is also constantly changing, so be sure to keep these key considerations top of mind:

- **Always review for accuracy:** All AI-generated content must be reviewed for accuracy. Unlinked citations in a Protégé response indicate that the sources could not be verified in the LexisNexis database.
- **Not a substitute for judgement:** While effective prompting enhances AI's utility, it is not a substitute for your legal judgment and experience. The goal is to use Protégé as an accelerant, not a substitute for critical thinking.
- **Time-efficiency trade-off:** Spending significant time crafting the perfect input prompt has diminishing returns. It can be more effective to refine the answer by engaging in conversation than to include everything in a complex initial query.
- **Protégé is not like other AI tools:** Protégé is built specifically for legal work and is not designed to address other use cases. General purpose AI tools can write haikus but cannot reliably draft a legal argument with valid citations.

- **Practice makes perfect:** Effective use of generative AI requires practice. You should experiment with different prompts to refine the responses. Adjusting the wording, adding context, or rephrasing questions can improve AI-generated outputs.

## II. BEST PRACTICES FOR PROMPTING

To optimize the use of Protégé, consider the following the best practices for effective prompting:

> **Be specific in your objective.** State what you need, leaving minimal room for ambiguity.

Little to no specificity	Better prompt
Draft corporate bylaws for a company in Ontario.	Create corporate bylaws for a newly incorporated private Ontario company. Include provisions on director responsibilities, shareholder meetings, quorum requirements, and electronic voting in compliance with the Ontario Business Corporations Act.

*Note: Sample prompts are designed for illustrative purposes.*

> **Provide background information and context.** Protégé performs better with background information. Context that is particularly helpful in creating the best response includes:

- A clear jurisdiction
- Any parties, key terms, or points of law surrounding the matter
- The material facts to consider
- Goal and purpose

Little to no background	Better prompt
Draft a motion in which Company A claims that Company B has breached their contract.	Draft a motion for summary judgment in which Company A claims that Company B has breached their contract by not fulfilling the services agreed upon in the contract. The breach of contract has caused \$2 million in damages to Company A. Company A has the signed contract outlining the agreed upon services, the email correspondence and documents that clearly demonstrate Company B's failure to deliver the services, and financial records showing direct losses that incurred because of the breach.

*Note: Sample prompts are designed for illustrative purposes.*

> **Define the desired format.** If needed, indicate if you want a summary, a legal memo, an email to a client, or a specific legal document. Protégé relies on many proven legal formats and templates, but that is not a substitute for your preferences and organizational best-practices.

Little to no format	Better prompt
How does Alberta define residency for tax purposes?	Write an email to my client, Mr. John Smith, explaining how Alberta defines residency for tax purposes.

*Note: Sample prompts are designed for illustrative purposes.*

> **Define the audience.** If needed, indicate who is the reader of your document, such as opposing counsel, a judge, or your client.

Little to no audience definition	Better prompt
What is the difference between constructive dismissal and wrongful dismissal in British Columbia?	Can you explain in layman's terms what the difference is between constructive dismissal and wrongful dismissal in British Columbia? I am giving a presentation at an HR Conference to a room of non-lawyers.

*Note: Sample prompts are designed for illustrative purposes.*

## QUICK READ: INPUT PROMPT CHECKLIST

A strong prompt consists of key components that enhance clarity and improve AI-generated responses. If you construct a prompt using these components, you are more likely to get a high-quality response.

**Context:** Provide background information to guide the response (i.e. jurisdiction, facts, purpose, goal)

**Format:** Specify the desired structure (i.e. legal memo, argument, explanation, draft, summary)

**Constraints:** Set any limitations, such as length or scope (i.e. controlling law, layman's terms, focused or expansive drafting)

## Optimizing Your Output

Protégé is conversational and will polish its output with instructions. Ways to easily refine output through follow up prompts include:

- **Ask for clarifications.** If a response is unclear, prompt, "Explain this in simpler terms", select a relevant suggested action button, or start a new conversation with a new prompt.
- **Request refinements.** Modify outputs by requesting, "Make this more concise" or select a relevant suggested action button.
- **Request refinements to drafts.** Modify outputs by selecting a passage in the Drafting Mode window and use the Drafting Tools menu to modify sections.
- **Provide examples.** Prompt Protégé to reference a specific code, case, or case facts to modify a response.

**Take note:** Repeating the input prompt may yield different responses due to AI's probabilistic nature. Responses are not computed in advance and stored.

## Prompt Optimization Features

Protégé has many prompt optimization features to help you get to the highest quality, most comprehensive response as efficiently as possible, such as:

- **Drafting Tools:** If you are drafting a document, select the text you would like modified and use the Drafting Tools options to get automatic suggestions to refine your output.
- **Suggested action buttons:** After your initial prompt, you will often see purple buttons above prompt bar with options such as "Summarize case law", "Draft a memo based on this output", or "Ask the same question with a new jurisdiction." These are suggested action buttons; they are designed to help you comprehensively complete your goals and get the most out of Protégé. To apply a suggested action, click on the button to prompt Protégé.
- **Suggested follow up prompts:** Protégé will automatically suggest follow up prompts to help users accomplish their goals more completely. To select a follow up question, click on the question for the text to populate in the prompt bar. Then modify the prompt as you see fit before submitting.

We are always building on these capabilities based on customer feedback. Be sure to check in for updates and experiment with new prompt capabilities.

## QUICK READ: 5Ps OF PROMPTING FOR BETTER RESULTS

When constructing a prompt, consider the 5Ps to ensure the most comprehensive result.

Preparation	Prompting	Refinement
Before initiating a conversation, gather the information to correctly guide Protégé.	In the input prompt, ensure that the objective is clear and specific.	Add details to polish your prompt. Leverage Protégé's suggested action buttons.
<b>Prime:</b> Gather the context, background, and constraints, like jurisdiction, parties, or key facts. <b>Persona:</b> Ensure that the perspective is defined, such as client or addressee.	<b>Prompt:</b> Write the clear and specific instructions, referencing the <b>Prime</b> and <b>Persona</b> information as needed.	<b>Product:</b> Specify the details of the output, such as format or length. <b>Polish:</b> Refine the details of the output with more information or instructions.

*Inspired by [Mastering AI: The 5 P's of Prompting for Game-Changing Results](#) by Susan Guthrie, Esq.*

Sample prompts are designed for illustrative purposes. Modify any input into Protégé to align with your specific goals.

## III. MORE INFORMATION

For more information on Protégé and Lexis+ AI, please visit our Lexis+ AI with Protégé documentation and training resources [webpage](#). For more ideas on how to use Protégé and Lexis+ AI, please visit our Prompt Library [webpage](#).