

# Claude for Legal Practice

## The Practitioner's Guide to the Meta Prompt Method and Structured Block Workflows

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### Foreword: Why Another Claude Tutorial

The tutorials already on YouTube teach you to click buttons. They show you where the pricing page lives, how to upload a PDF, and how to get Claude to build a personal website. That is fine if you are a content creator or a solo entrepreneur picking a stack.

I am neither. I am a lawyer. I have practiced for twenty years. I am also the founder of LegalTek.ai, the AI powered practice management platform for Ohio domestic relations practitioners. I have spent the last three years in intensive AI education and industry engagement: the MIT Sloan executive program on AI Implications for Business Strategy, the MIT CSAIL applied AI program, the Harvard Business School Online AI Essentials for Business program, and active participation at HumanX, Ai4, Legalweek, and the Fireproof Summit. What I know about Claude comes from using it in matter work every week, from talking to the people building it, and from teaching other lawyers how to use it well.

When a lawyer opens Claude, the stakes are different. A bad prompt does not mean a weird blog post. It means a flawed settlement demand, a missed suppression issue, a financial affidavit that exposes your client, or an RPC 1.1 problem waiting to surface at grievance. The features that matter are not the flashy ones. They are the quiet ones. The data training toggle. Project isolation. Skills as codified SOPs. The connector permissions matrix. Extended thinking on a close pretrial motion.

This guide rebuilds the standard Claude walkthrough for that audience. I am writing it in the same structure I use across my Definitive Guide series, organized around the Meta Prompt Method and the structured block prompting style I teach in my AI Executive System program. Every chapter gives you the concept, the lawyer's framing, and at least one prompt you can paste into Claude today. The three full workflow chapters at the center of

the book walk a single matter through every stage in Personal Injury, Criminal Defense, and Domestic Relations.

Four governance frameworks sit underneath everything. COUNSEL for individual task decisions. G3M for firm wide policy. ADAPT for tool rollout. OVRST for output oversight. I decompose each one in Chapter 20 and map all four to ABA Formal Opinion 512 and the Ohio Rules of Professional Conduct in Part VI.

If you read this guide end to end you will leave with a deployable system. If you read a single workflow chapter on a Sunday night, you will leave with a Monday morning deliverable.

Let's begin.

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## About the Author and How This Guide Fits

Matthew A. Mishak is the Managing Attorney of Mishak Law LLC, where he has practiced for twenty years across domestic relations, criminal defense, and municipal law. He is the Founder and CEO of LegalTek.ai LLC, the AI powered practice management platform for Ohio domestic relations practitioners.

His AI education and industry engagement includes the MIT Sloan executive program on AI Implications for Business Strategy, the MIT CSAIL applied AI program, and the Harvard Business School Online AI Essentials for Business program. He has attended and contributed to HumanX on the Startup Track, Ai4, Legalweek, and the Fireproof Summit. He teaches custom AI agent building through his AI Executive System program and writes the Definitive Guide series on AI agents in legal practice.

This monograph is a standalone entry in the Definitive Guide series. The parent work, *AI Agents in Legal Practice: The Definitive Guide*, covers the full landscape of AI assisted legal work across fifteen plus chapters, including deep expansions of the four governance frameworks referenced in Part VI of this guide. This monograph is designed to be read in a weekend and applied Monday. The Definitive Guide is designed to be read over a quarter and applied across a firm.

Readers who want only the Claude specific workflow can read this guide end to end. Readers who want the broader AI practice architecture should read this guide first, then the Definitive Guide.

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## Who This Guide Is For

You are in the right place whether you are the solo attorney who has never opened Claude,

the partner whose firm just bought a Team subscription and expects you to lead, the associate told on Friday to have “an AI workflow” by Monday, or the paralegal whose supervising attorney handed you this and said “figure it out and report back.”

You do not need a technical background. You do not need to know what an API is. You do not need to have read the ABA Opinion yet. You need to be able to read a statute, draft a motion, and think clearly about risk. If you can do those three things, you can use this guide.

What the guide asks of you is modest. Read slowly in the ethics chapters (Chapters 2, 11, and 18). Keep a paper pad nearby for the workflow chapters (Chapters 13 through 15) so you can sketch your own matter’s pieces as you read. Do not try to apply all fifteen Appendix A prompts at once. Pick one. Use it on a real matter this week. Come back for the next one.

If a chapter loses you, skip it and come back. The framework chapters (4, 5, and 19) reward a second reading more than a first. The workflow chapters are designed to be read straight through on the practice area you actually work in, and only later for the ones you do not.

## Three Reading Paths

**The weekend reader.** Start at the Foreword. Read straight through. Skim the two workflow chapters outside your practice area. Finish Appendix C. You will have read about eighty pages and will leave with a working map of the whole system.

**The Monday morning reader.** You have a deliverable due. Go to Appendix A, find the prompt closest to your deliverable, and run it. Come back later for the chapters that explain why it worked.

**The Sunday night reader in a jam.** A citation you filed looks wrong. A client asked about AI disclosure. A hearing is tomorrow and you need a cross outline. Jump to the relevant chapter directly (Ch. 14 for cross, Ch. 18 for disclosure, Appendix C question 10 for the citation crisis). Read the sections you need. Come back for the rest when the weekend returns.

No single reading path is the right one. The guide is built to meet you wherever you are on a given day.

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# Part I: Foundation

## Chapter 1: Why Claude, and Why Now

You have options. ChatGPT is the most famous. Gemini is the fastest. Copilot is in the office

suite you already own. For most lawyers most of the time, I recommend Claude. Here is why, without the hype.

I use all three of the leading frontier models in my own practice, every week, on real matters. What I have concluded, and what I have said on stage and in print, is straightforward. Gemini is strong and cheap for fast, lightweight tasks. Claude is the one to reach for when the work is substantive: the motion, the appellate brief, the long transcript to read closely, the statute to parse. GPT is the TiVo of frontier AI. Genuinely good. Genuinely no longer unique.

For the work in this guide, Claude is the right tool. Three reasons that matter to a lawyer.

First, long context. Claude handles the 200 page transcript, the 400 page financial production, the complete Ohio Revised Code chapter you paste in. It does not flinch.

Second, citation discipline. When prompted correctly, Claude refuses to fabricate. Gemini and GPT will confidently invent a case cite if you leave daylight in the prompt. Claude will tell you it cannot verify. For a lawyer, that refusal is a feature.

Third, Anthropic's ethics posture. This matters for two reasons that converge. Anthropic has repeatedly declined business it considers inconsistent with its responsible scaling commitments, most publicly in the 2025 Federal Acquisition Supply Chain Security Act (FASCSA) dispute with the Department of Defense, where Anthropic maintained restrictions on certain applications of its models even under government contracting pressure. That posture translates, in practice, into a model that is less likely to embarrass you at the wrong moment. For a bar licensed practitioner building an AI workflow, the vendor's own governance is part of your governance.

That is why Claude. Now let's set up your account correctly.

## Chapter 2: Setup and the Lawyer's Privacy Stack

Setup is not setup. For a lawyer, setup is the first ethics decision.

```
flowchart TD
    Start([New Claude account]) --> S1[Step 1: Pick the right plan]
    S1 --> S2[Step 2: Disable training<br/>see pictorial]
    S2 --> S3[Step 3: Enable MFA]
    S3 --> S4[Step 4: Name workspace]
    S4 --> S5[Step 5: Conflicts protocol]
    S5 --> Done([Ready for matter work])
    style S2 fill:#fff3cd,stroke:#dc3545,stroke-width:3px
```

When you create a Claude account, the default onboarding will ask whether you allow

Anthropic to train on your conversations. **Turn this off.** There is no scenario where a practicing attorney should leave this on. Client data, even stripped of names, can include facts and theories protected by attorney client privilege, by work product doctrine, and by Ohio Rule of Professional Conduct 1.6. You will not persuade a hearing panel that opting in to model training was reasonable under the circumstances.

The pictorial below shows the exact click path.

The full lawyer setup is five steps.

1. **Pick the right plan.** Skip the free tier entirely. Pro is the floor for a solo. A firm with more than two attorneys should look at Team, which gives you a workspace administrator, centralized billing, and the zero data retention posture applied at the plan level. Max is worth it if you are a heavy user on complex matters. I use Max.
2. **Disable training.** Settings, Privacy, toggle off. Verify this in the Privacy tab after account creation, not just during onboarding. The toggle location has moved twice in the last year. See the D0 pictorial in Appendix D for a visual click path and a response procedure if you discover the toggle was on when it should have been off.
3. **Turn on multi factor authentication.** Use an authenticator app, not SMS. Your Claude account now has access, through connectors, to your email and files. Treat it like your case management login.
4. **Name your workspace deliberately.** If you are on Team, name the workspace your firm name. Do not call it "Personal" or "Test." The name appears in audit logs that your administrator, and potentially a discovery request, can see.
5. **Establish a conflicts protocol for Projects.** Before you create your first Project, decide who at your firm is permitted to create Projects and under what naming convention. I use a simple format: [PracticeArea] [Client Last Name] [Matter Short Name] . So a domestic relations matter for the Marcum family becomes DR Marcum Divorce . This makes intake, conflict checks, and Project archiving trivial.

Do not skip step five. I have seen firms create thirty Projects in the first week, mix personal matters with client matters in the same workspace, and then try to audit what data went where. The cleanup is painful.

## Chapter 3: Model Selection for Legal Work

Claude ships in three active sizes: Opus, Sonnet, and Haiku. Picking the wrong one is one of the most common mistakes I see lawyers make. They either burn Opus credits on tasks Haiku could handle, or they use Haiku on a dispositive motion draft and wonder why the output is thin.

flowchart TD

```
Start([Legal task]) --> Q1{Leaves firm without<br/>substantial revision?}
Q1 -->|Yes| Opus[OPUS<br/>Motions, briefs, memos]
Q1 -->|No| Q2{Close reasoning<br/>or long context?}
Q2 -->|Yes| Sonnet[SONNET<br/>Discovery, outlines]
Q2 -->|No| Haiku[HAIKU<br/>Email, templates]
```

Here is the matching I use at Mishak Law.

Legal Task	Model	Why
Dispositive motion drafting	Opus	Deep reasoning, nuanced argumentation
Appellate brief synthesis	Opus	Multi source integration, citation discipline
Settlement memorandum	Opus	Client facing, stakes high
Discovery response first pass	Sonnet	Volume work, structured output, good enough
Deposition outline from transcripts	Sonnet	Long context, but predictable structure
Client intake summary	Sonnet	Clear inputs, clean format required
Email triage and initial drafts	Haiku	Speed matters, brevity matters, cost matters
Calendar and scheduling prompts	Haiku	Trivial reasoning, high volume
Template letter fills	Haiku	Mechanical substitution

A practical rule. If the output will go to a client, opposing counsel, or a court without further human editing beyond proofreading, start with Opus. If the output will go back to you for substantial revision before leaving the firm, Sonnet is usually right. If the output is scaffolding you will rewrite anyway, Haiku is fine and far cheaper.

You select the model from the dropdown at the top of every chat. In a Project, the model choice is remembered per Project. That alone is a reason to use Projects, which we cover in Chapter 7.

## One Thing to Do This Week

Open Claude's settings, confirm the data training toggle is off, and turn on multi factor authentication if you have not already. That is five minutes of work. Everything else in this guide assumes those two settings are correct.

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## Part II: The Meta Prompt Method

### Chapter 4: Why Structured Blocks Beat Prose Prompts

Most lawyers prompt Claude the way they write emails to a paralegal. Conversational, context heavy at the front, buried instructions in the middle, the actual deliverable mentioned in a P.S. This works, sometimes. It fails when the matter is complex.

The Meta Prompt Method replaces that with named structured blocks. Think of it as the difference between a rambling voicemail to your law clerk and a written research memo assignment. The memo assignment has a caption, a question presented, the facts, and the deliverable format. Every lawyer knows why that works. The same principle applies to prompting Claude.

Structured blocks do three things at once.

They force you to clarify your own thinking. If you cannot state the task in one sentence, you do not know what you want.

They let Claude allocate attention correctly. Claude's attention is not infinite. A well labeled CONSTRAINTS block signals that those rules are non negotiable. A PRIOR DRAFTS block signals reference material, not instructions.

They make prompts reusable. A good structured prompt becomes a template. Change the CONTEXT block, keep everything else, and you have a new matter's worth of work in thirty seconds.

### Chapter 5: The Mishak Law Meta Prompt Anatomy

Think of a structured prompt the way you think of a research memo assignment to a new law clerk. You do not call them into your office and say "hey, look into that thing for me." You hand them a caption, a question presented, the relevant facts, the format you want the answer in, and a deadline. You do this because you have learned, the hard way, that clerks who receive clear assignments produce useful work and clerks who receive vague assignments produce work you have to redo.

Claude is the same. The format below is how you hand Claude a clear assignment every time.

flowchart TB

```
R[ROLE<br/>Who Claude is] --> C[CONTEXT<br/>Matter, jurisdiction, facts]
```

```
C --> T[TASK<br/>The single deliverable]
T --> CN[CONSTRAINTS<br/>Hard rules]
CN --> F[FORMAT<br/>Exact output shape]
F --> RM[REFERENCE MATERIAL<br/>Statutes, drafts]
RM --> EX[EXAMPLE OUTPUT<br/>optional]
EX --> Out([Clean deliverable])
style T fill:#fff9c4,stroke:#f57f17,stroke-width:3px
style CN fill:#ffccbc,stroke:#bf360c,stroke-width:2px
```

Here is the canonical structure I use, across every practice area, for every substantive Claude task.

<ROLE>

Who Claude is for this task. Specific. A persona, not a generic "helpful assistant."

</ROLE>

<CONTEXT>

What Claude needs to know before reading the task. Matter type, jurisdiction, procedural posture, parties, key facts. Two to five sentences usually.

</CONTEXT>

<TASK>

The single deliverable. One sentence if possible. Two at most. Use the imperative.

</TASK>

<CONSTRAINTS>

Hard rules Claude must not violate. Citation standards, formatting requirements, words or phrases to avoid, length limits, confidentiality handling.

</CONSTRAINTS>

<FORMAT>

The exact output shape. Headings, sections, ordering. Tell Claude what the deliverable looks like when it is done.

</FORMAT>

<REFERENCE MATERIAL>

Optional. Paste in statutes, prior drafts, deposition excerpts, email threads, opposing counsel letters, client communications. Label each item so Claude can cite back to it.

</REFERENCE MATERIAL>

<EXAMPLE OUTPUT>

Optional. One short example of what a good answer looks like. Use sparingly. One strong example beats three mediocre ones.

</EXAMPLE OUTPUT>

Three rules govern these blocks.

**First, order matters.** Keep ROLE and CONTEXT at the top. Keep TASK in the middle. Keep CONSTRAINTS before FORMAT. Claude reads linearly. Foundational framing must come before the task, and rules must come before the shape of the output.

**Second, CONSTRAINTS is where your house style lives.** This is where you say "all case names in italics, not bold," "full Bluebook citations required, Ohio state level when available," "URLs in an appendix, not inline," "do not use the word leverage as a verb," "no hyphens or em dashes." Every firm's constraints are different. Once you have yours, save them as a text snippet and paste them into every substantive prompt.

**Third, REFERENCE MATERIAL beats memory.** Do not ask Claude to recall a statute. Paste the statute in. Do not ask Claude to remember what your client said at intake. Paste the intake notes in. Claude's recall of specific facts across conversations is imperfect. Its handling of facts present in the current prompt is excellent.

Here is the same prompt without structure, and with structure, so you can see the difference.

### **Unstructured, how most lawyers write prompts:**

Can you help me draft a spousal support modification motion? It's for a client of mine, husband, paying spousal support since 2019. He lost his job in February, got a new one but it pays 40% less. The order was \$2,500 a month. We're in Lorain County. Need to file soon. Please use Ohio law and make it professional.

### **Structured, using the Meta Prompt Method:**

<ROLE>

You are a senior Ohio domestic relations attorney preparing a motion to modify spousal support.

</ROLE>

<CONTEXT>

Client: Obligor husband. Paying spousal support under a 2019 decree. Original monthly obligation \$2,500. Client involuntarily terminated from

employment in February 2026. New employment obtained at 40% reduced compensation. Jurisdiction: Lorain County Court of Common Pleas, Domestic Relations Division.  
</CONTEXT>

<TASK>  
Draft a Motion to Modify Spousal Support with supporting memorandum.  
</TASK>

<CONSTRAINTS>  
Ohio state law only. Cite R.C. 3105.18 as the controlling modification statute. Identify and apply the substantial change of circumstances standard. Case names in italics. Full Bluebook citations. No hyphens, no em dashes. Do not invent case citations. If a supporting case is needed and you are not certain of it, flag that with a bracketed note to the attorney. Professional formal tone.  
</CONSTRAINTS>

<FORMAT>  
1. Caption block (leave party names bracketed for fill)  
2. Motion heading  
3. Memorandum in Support  
    a. Introduction  
    b. Factual Background  
    c. Law and Argument  
    d. Conclusion  
4. Certificate of Service placeholder  
</FORMAT>

The second version will give you a draft you can actually use. The first will give you something that looks like a draft but needs complete rewriting.

## Chapter 6: Using Claude to Build Your Own Prompts

This is the meta in Meta Prompt. Claude is excellent at writing prompts for Claude. When you are starting on a new kind of task, do not write the structured block yourself. Ask Claude to write it.

The pattern is simple.

<ROLE>

You are a prompt engineer specializing in legal workflow prompts for practicing attorneys.

</ROLE>

<TASK>

Write a structured block prompt I can use to have Claude draft a motion for summary judgment in an Ohio employment discrimination case.

Follow the Mishak Law Meta Prompt format:  
ROLE, CONTEXT, TASK, CONSTRAINTS, FORMAT,  
REFERENCE MATERIAL, EXAMPLE OUTPUT.

Leave CONTEXT and REFERENCE MATERIAL as fill in the blank sections for me.

</TASK>

<CONSTRAINTS>

Ohio law focus. Full Bluebook. No hyphens.  
No em dashes. Do not write the actual motion.  
Write the prompt that would produce the motion.

</CONSTRAINTS>

Claude will return a ready to use structured block. You fill in the matter specific parts and run it. Keep the resulting prompts in a library. I store mine in a private Notion database, organized by practice area. Over the course of a year, my library grew to 140 reusable prompts, and drafting time on common motions dropped by more than half.

## One Thing to Do This Week

Take one task you did the hard way last week, a motion, a letter, a memo, and rewrite the prompt for it using the six block anatomy in Chapter 5. Do not run it on a real matter yet. Just write the prompt. You will learn more in the writing than in any amount of reading about prompts.

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# Part III: Core Features for Legal Work

## Chapter 7: Projects as Matter Workspaces

Projects are the single most underused feature in Claude for lawyers. A Project is a persistent workspace that holds custom instructions, reference files, and a conversation history, all scoped to one container.

For a lawyer, a Project is a matter file.

```
flowchart TB
  subgraph Project["PROJECT = MATTER FILE"]
    Instr[Project Instructions<br/>ROLE + CONTEXT + CONSTRAINTS]
    Files[Uploaded Files<br/>pleadings, discovery, transcripts]
  end
  Instr --> C1[Chat: intake]
  Instr --> C2[Chat: discovery]
  Instr --> C3[Chat: motion drafting]
  Files --> C1
  Files --> C2
  Files --> C3
  C1 --> Close[Matter closes]
  C2 --> Close
  C3 --> Close
  Close --> Export[Export and archive<br/>in case management]
```

Create one Project per active matter. Upload the complaint, the answer, the deposition transcripts, the relevant discovery, and your theory of the case document. Set the Project instructions to something like this:

<ROLE>

You are co-counsel on this matter. Junior but sharp. Your job is to help me draft, research, and think through issues in this case.

</ROLE>

<CONTEXT>

Matter: [Case caption]

Jurisdiction: [Court and division]

Client: [Name, role in case]

Practice area: [Domestic Relations / PI / Criminal]

Key issues: [2-3 bullet points]

Our theory: [1-2 sentences]

</CONTEXT>

<CONSTRAINTS>

Treat all matter facts as confidential and privileged. All legal citations in full Bluebook, Ohio state level when available. Case names in italics. No hyphens or em dashes. URLs go in an appendix, not inline.

</CONSTRAINTS>

Every conversation inside the Project inherits this framing. You do not paste the ROLE and CONSTRAINTS block into every prompt. You paste only the TASK and any task specific CONTEXT. The Project carries the rest.

Three Project hygiene rules.

**Close out Projects when the matter closes.** Before you take any final step, export the Project's conversations and download its files locally to your matter's permanent archive in your case management system. Then remove the Project from your active workspace. If a malpractice question surfaces later, you need the exported record, not a cloud container you may not be able to access. Your document retention policy governs how long you hold the export.

**Do not mix matters.** If you find yourself wanting to ask Claude about Client A while inside Client B's Project, start a new chat outside the Project. Do not contaminate the record.

**Audit Project file uploads quarterly.** Things accumulate. Remove anything stale or no longer relevant.

## Chapter 8: Artifacts for Drafting

Artifacts are Claude's way of separating a deliverable from the conversation about the deliverable. When Claude produces a motion, a letter, or a contract clause as an Artifact, it appears in a panel beside the chat. You can edit it, version it, copy it, export it.

For lawyers, the rule is simple. Every substantive written work product should be produced as an Artifact.

Ask Claude in your TASK block to "produce the deliverable as an Artifact." It will. You will then have a clean document you can copy into Word, edit, and file. The conversation around the Artifact stays with the Artifact, which is useful when you come back a week later and want to understand why a particular paragraph was phrased the way it was.

**Versioning.** Artifacts support live editing. You can ask Claude to revise the Artifact by referencing it directly: "In the Artifact, tighten the factual background section and remove the third paragraph." Claude produces a new version. Prior versions remain accessible through the version selector at the top of the Artifact panel. Use this workflow for iterative drafting instead of pasting new drafts into the chat. For a Motion to Suppress that goes through five revision passes, you end up with a clean version history that mirrors your redline trail.

**Token limits.** An Artifact is still subject to the conversation's context window. A 60 page draft decree is approaching the practical ceiling for a single Artifact. If your deliverable is that long, break it into sections (findings of fact, property division orders, parenting orders,

child support orders) and produce each as its own Artifact. Stitch them together in Word at the end.

**When not to use an Artifact.** Short conversational outputs should stay in the chat. A one paragraph email to the client, a quick answer to a procedural question, a yes or no response to whether a filing deadline applies. Forcing these into Artifacts adds friction without value. The threshold I use: if the output is something I would paste into Word, it belongs in an Artifact. If it is something I would paste into an email or read aloud to a client on the phone, it stays in the chat.

## Chapter 9: Skills as Codified SOPs

Skills are Claude's way of letting you hand it a standard operating procedure that it follows every time. Think of a Skill as your best paralegal's playbook, written down, available to every lawyer in your firm, and followed more consistently than any human follows one.

A Skill has three parts. A SKILL.md file with a trigger description in the frontmatter (when should this Skill activate), a set of instructions in the body (how to do the task), and optional reference files in the same folder (forms, templates, checklists). The trigger description is the most important part. Claude reads every Skill's trigger description before deciding whether to activate that Skill on a given prompt, so the description must be specific about when the Skill applies and what words in the user's request should call it.

For a domestic relations practitioner in Ohio, a high value Skill is the Ohio Affidavit 1 generator. I built ours at LegalTek.ai. The trigger description says something like: "Use this Skill whenever the user asks to prepare, generate, or draft an Ohio Rule 75 Affidavit of Income, Expenses, and Financial Disclosure, or mentions Affidavit 1." The instructions walk Claude through the categories, the order, the required attachments, and the calculation rules. The reference files include the actual blank Affidavit 1 PDF.

Other Skills I recommend building.

- **Client intake summary.** Converts raw intake notes into a structured matter summary in your firm format.
- **Deposition outline builder.** Takes a witness role and case issues, produces a topic outline with exhibit stubs.
- **Settlement demand calculator.** Walks through special damages, general damages, multiplier analysis, and produces the demand section of a demand letter.
- **Discovery response reviewer.** Reviews a draft set of responses for completeness, objections preserved, privilege log items flagged.

The first Skill takes you an afternoon to build. The second takes an hour. The fifth takes twenty minutes. After that, your firm has a library, and every new associate has access to it on day one.

## Chapter 10: Connectors and MCP

Connectors let Claude reach into your other systems. Gmail. Outlook. Google Drive. Calendar. Slack. Your practice management platform if it supports the Model Context Protocol (MCP). At LegalTek.ai we ship a bidirectional Smokeball connector specifically for this reason. If your firm runs on Clio, PracticePanther, MyCase, Rocket Matter, or a similar cloud PMS, check your vendor's current MCP or Claude integration roadmap, because the landscape is moving quickly. If your PMS does not yet support MCP, a firm with engineering resources can build a lightweight intermediary through Claude Code (Chapter 17); a firm without those resources should wait for the vendor integration rather than exposing data through ad hoc scripts.

```
flowchart TB
    subgraph Safe["SAFE TO CONNECT"]
        Cal[Calendar]
        Email[Email]
        Files[File Storage]
        PMS[Practice Management]
    end
    end
    subgraph Never["NEVER CONNECT"]
        Trust[Client Trust / IOLTA]
        Bank[Firm Operating Accounts]
        Sealed[Sealed Matters]
    end
    end
    Safe -.governed by.-> Rules[1. Read only first<br/>2. No trust ever<br/>3. Au
    style Never fill:#f8d7da,stroke:#721c24,stroke-width:3px
```

For a lawyer, the connector question is not "can I connect it." The question is "should I connect it, and with what permissions."

Three guardrails.

**Read only first.** When you add a new connector, start with read only scopes if the connector supports them. Confirm that Claude is reading the right data, in the right way, before you grant write or send permissions. A misconfigured Gmail connector that can send emails is a grievance waiting to happen.

**No connectors to client trust accounts.** Full stop. IOLTA systems should not be on the Claude side of any connector. Keep financial account integrations isolated to your practice

management system's own direct integrations (Plaid in our case at LegalTek.ai), where the audit trail is purpose built.

**Audit the permissions matrix.** Every quarter, open Settings, Connectors, and review what is connected and what scopes each connector holds. Revoke anything you no longer actively use.

The highest value connector for a practicing lawyer is the calendar connector, followed by email, followed by file storage. Start there.

## Chapter 11: Memory, PII, and When to Turn It Off

Claude's Memory feature stores things it learns about you across conversations. This is useful for personal use: Claude remembers you prefer bullet points, that your spouse's name is Rachel, that you drive an hour to the office.

For lawyers, Memory is a liability surface.

If you use one Claude account for both personal and firm work, Memory can and will store client facts. It may store them correctly. It may store them with drift, where a detail about Client A ends up attached to a prompt about Client B. Neither outcome is acceptable.

Two options.

**Option one:** Separate accounts. Personal Claude for personal use, firm Claude for firm use, and never cross them. Memory on for personal is fine.

**Option two:** Memory off everywhere. This is what I do. I keep a memory user edit that excludes all client names, all matter facts, all firm financial details, and I disable Memory entirely on the firm account. My preferences, my style rules, my format rules all live in Project instructions and in the ROLE and CONSTRAINTS blocks of my prompts. That is the right place for them.

One exception. Memory is useful for remembering your own preferences: no hyphens, no em dashes, no use of leverage as a verb, Bluebook citations, Ohio first. If you want Memory to hold those rules for you, that is safe. Just do not let it hold anything matter specific.

## Chapter 12: Extended Thinking for Legal Analysis

Extended Thinking is Claude's ability to reason at length before answering. You turn it on with a toggle above the chat bar, or you request it in the prompt. With Extended Thinking on, Claude will often produce noticeably better results on tasks involving layered analysis, multi step reasoning, and close statutory work.

For lawyers, three tasks are worth the extra wait.

**Close statutory interpretation.** When the outcome turns on whether a phrase in a statute applies to your client's facts, turn Extended Thinking on. You will get more thorough reasoning about ambiguity and alternative readings.

**Cross examination preparation.** Building a cross from a long deposition benefits from Extended Thinking's ability to hold multiple threads at once.

**Pretrial motions with close facts.** A motion to suppress, a motion in limine, a Daubert challenge. These live in the gray zone between clearly winning and clearly losing. Extended Thinking gives you a better read on the weaknesses Claude sees in your argument.

Turn Extended Thinking off for volume work. Drafting short emails, summarizing routine documents, cleaning up formatting. You will pay for depth you do not need.

## One Thing to Do This Week

Create one Project for one active matter, populate it with three to five core documents, and write a short Project instruction block using the template in Chapter 7. Then run one real task on that matter inside the Project. One Project beats twenty chats outside a Project every time.

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## Part IV: Three Practice Area Workflows

This is where the guide becomes specific. Three complete workflows, one per major practice area. Each one walks a matter through intake, strategy, drafting, and final product, using structured block prompts you can paste and adapt.

I am writing each as if you were sitting with me in my office, watching me run the matter through Claude live. Matter names are hypothetical. The prompts are real.

### Chapter 13: Personal Injury Workflow

#### From Intake to Demand Letter

**The matter.** Hypothetical. Client Jane Doe, rear ended at a stoplight on State Route 58 in Lorain County. Defendant ran a red. Client suffered a cervical strain, underwent six months of physical therapy, lost three weeks of work as a dental hygienist. Medical specials of approximately \$18,400. Lost wages of approximately \$4,200. Continuing occasional headaches. Liability is clear. We are preparing the pre suit demand to the defendant's insurer.

**Timing and statute considerations.** Ohio bodily injury actions carry a two year statute of limitations under R.C. 2305.10. Plan backward from that date. If you have less than six months of runway, compress this workflow and file a protective complaint while the demand is outstanding. If uninsured or underinsured motorist coverage may be triggered (the tortfeasor is uninsured, the limits are exhausted, or an unknown motorist is involved), watch the separate notice and consent to settle provisions in your client's own policy. Those are contract terms, not statutory. Read the declarations page before you send the demand.

flowchart LR

```
Intake([Intake notes]) --> S1[Step 1<br/>Intake Summary]
S1 --> S2[Step 2<br/>Treatment + Causation]
S2 --> S3[Step 3<br/>Damages Analysis<br/>R.C. 2315.18 cap]
S3 --> S4[Step 4<br/>Demand Letter]
S4 --> Out([Attorney review])
```

## Step 1: Intake Summary

Open a Project called `PI Doe MVA SR58` . Set your Project instructions per Chapter 7. Then run this first prompt in a new chat inside the Project.

<ROLE>

You are a senior personal injury paralegal experienced in Ohio auto negligence matters.

</ROLE>

<TASK>

Convert the intake notes below into a structured Matter Summary in our firm format.

</TASK>

<CONSTRAINTS>

Preserve every fact. Do not infer. If the notes are silent on an element, mark it "Not yet known." No hyphens. No em dashes.

</CONSTRAINTS>

<FORMAT>

1. Parties and Contacts
2. Incident Facts (date, time, location, mechanism)
3. Liability Analysis (negligence elements: duty, breach, causation, damages)
4. Injuries and Treatment Chronology
5. Economic Damages (medicals, wages, out of pocket)
6. Non Economic Damages (pain, suffering, loss of

enjoyment indicators)  
7. Insurance (client PIP/med pay, defendant carrier,  
UM/UIM if applicable)  
8. Open Items and Next Steps  
</FORMAT>

<REFERENCE MATERIAL>  
[PASTE RAW INTAKE NOTES HERE]  
</REFERENCE MATERIAL>

You will get a clean matter summary. Export it as an Artifact. Save it in your Project files.  
Every later prompt in this matter can reference it.

## Step 2: Medical Records Review

Upload the medical records PDFs directly into the Project. Then run:

<ROLE>  
You are a senior personal injury attorney reviewing  
medical records for pre suit demand preparation.  
</ROLE>

<TASK>  
Review the medical records attached to this Project  
and produce a Treatment Chronology and a Causation  
Assessment.  
</TASK>

<CONSTRAINTS>  
Cite every factual assertion to the specific record  
and date. Flag any record that is ambiguous as to  
causation. Do not speculate. If a record does not  
address causation, say so. No hyphens, no em dashes.  
</CONSTRAINTS>

<FORMAT>  
PART A. Treatment Chronology  
Date | Provider | Diagnosis/Finding | Treatment | Record Cite

PART B. Causation Assessment  
1. Records supporting causal link to incident  
2. Records neutral or silent on causation  
3. Any records suggesting alternative cause  
4. Gaps in treatment, with dates

PART C. Recommended Follow Up

Any missing records to request. Any provider to contact for a causation letter.

</FORMAT>

This output becomes the backbone of your damages section. It also tells you, in thirty seconds, which causation letters you still need to request.

### Step 3: Damages Analysis

<ROLE>

You are a senior Ohio personal injury attorney preparing a damages analysis for a demand letter.

</ROLE>

<TASK>

Produce a complete damages analysis for this matter in the following format.

</TASK>

<CONSTRAINTS>

Ohio law. Apply the R.C. 2315.18 non economic damages cap analysis as a separate labeled section. Use the Treatment Chronology and Matter Summary already in this Project. For non economic damages, present a range and a recommended midpoint. State your reasoning briefly for the multiplier. No hyphens. No em dashes.

</CONSTRAINTS>

<FORMAT>

1. Economic Damages
  - a. Past medical specials (itemized)
  - b. Future medical (if any, with foundation)
  - c. Past lost wages (with calculation method)
  - d. Future lost earning capacity (if any)
  - e. Other economic lossesTotal Economic Damages: \$ \_\_\_\_\_
2. Non Economic Damages
  - a. Multiplier analysis (low, mid, high)
  - b. Factors supporting higher multiplier
  - c. Factors supporting lower multiplierRecommended Non Economic Range: \$ \_\_\_\_ to \$ \_\_\_\_
3. R.C. 2315.18 Cap Analysis
  - a. Applicable cap figure
  - b. Whether the cap constrains our demand
  - c. Exceptions that may apply (catastrophic

- injury, permanent physical deformity)
4. Total Demand Range  
Low: \$ \_\_\_\_\_  
Midpoint (recommended starting demand): \$ \_\_\_\_\_  
High: \$ \_\_\_\_\_
  5. Settlement Authority Recommendation to Client
- </FORMAT>

This is the prompt where Opus matters. Sonnet will give you a workmanlike answer. Opus will surface the factors you would have thought of by the third cup of coffee.

## Step 4: Demand Letter Draft

<ROLE>

You are a senior Ohio personal injury attorney drafting a pre suit demand letter to the adverse insurer.

</ROLE>

<TASK>

Draft a complete demand letter to [ADJUSTER NAME AND CARRIER] using the Matter Summary, Treatment Chronology, and Damages Analysis already in this Project. Produce the letter as an Artifact.

</TASK>

<CONSTRAINTS>

Ohio state law. Reference R.C. 2305.10 (statute of limitations) only if the timing warrants a mention in the cover paragraph. Professional tone. Firm but not aggressive. Do not threaten litigation except through the standard "we are prepared to file suit if a reasonable resolution is not reached" language. Present the demand as the recommended midpoint from the Damages Analysis. No hyphens. No em dashes. Case names in italics. Cite format: full Bluebook. URLs go in an Appendix, not inline.

</CONSTRAINTS>

<FORMAT>

1. Letterhead block (placeholder)
2. Date
3. Adjuster and carrier address block
4. Subject line: Re: Our Client, [CLIENT]; DOL [DATE]; Your Insured, [DEFENDANT]; Claim No. [NUMBER]

5. Opening paragraph (liability in two sentences)
  6. Facts of the Collision
  7. Injuries and Treatment
  8. Economic Damages (itemized)
  9. Non Economic Damages (narrative, no multiplier math shown)
  10. Settlement Demand (\$ figure)
  11. Response deadline (30 days)
  12. Closing
  13. Enclosures list
- </FORMAT>

You will get a clean draft. Edit it. Send it. The entire workflow, from raw intake notes to a demand letter ready for attorney review, runs in under two hours. Without Claude it takes me most of a day.

## Chapter 14: Criminal Defense Workflow

### From Discovery Receipt to Motion to Suppress

**The matter.** Hypothetical. Client John Smith, charged with OVI under R.C. 4511.19(A)(1)(a) and (A)(1)(d), Lorain Municipal Court. Traffic stop on Broadway Ave. for an alleged marked lanes violation, followed by field sobriety tests and a breath test. We have the dash cam, the body cam, the OVI report, the BMV 2255, and the breath test calibration records. Theory: the marked lanes stop was not supported by reasonable suspicion, and the extension of the stop into the OVI investigation was not supported by independent reasonable suspicion.

```

flowchart LR
    Disc([Discovery]) --> S1[Step 1<br/>Issues Memo<br/>Ext. Thinking ON]
    S1 --> S2[Step 2<br/>Motion to Suppress]
    S2 --> V[Two source<br/>VERIFY flags]
    V --> File([File])
    File --> S3[Step 3<br/>Hearing Prep]
    S3 --> H([Hearing])

```

### Step 1: Discovery Review

Upload all discovery into a Project named `Crim Smith OVI Broadway` . Use video transcription if your jurisdiction permits it, or paste the officer's report text.

```

<ROLE>
You are a senior Ohio criminal defense attorney
with particular experience in OVI suppression

```

litigation.

</ROLE>

<TASK>

Review all discovery in this Project and produce a Discovery Issues Memo.

</TASK>

<CONSTRAINTS>

Ohio law. Fourth Amendment analysis. Cite rules of criminal procedure by number (Crim. R.). Cite R.C. provisions in full. Case names in italics. Full Bluebook. If you identify a potential suppression issue but cannot recall a specific controlling Ohio case, flag with **\*\*[VERIFY: CONTROLLING OHIO AUTHORITY]\*\*** and describe the legal principle. Do not invent citations. No hyphens. No em dashes.

</CONSTRAINTS>

<FORMAT>

1. Stop Analysis
  - a. Reasonable suspicion for initial stop
  - b. Evidence supporting / undermining the stop
  - c. Potential suppression issue: yes/no/maybe
2. Duration Analysis
  - a. Was the stop unreasonably prolonged
  - b. Rodriguez-line issues
  - c. Independent reasonable suspicion for OVI investigation
3. Field Sobriety Tests
  - a. NHTSA compliance
  - b. Each test (HGN, WAT, OLS) reviewed for procedural defects
4. Chemical Test
  - a. BMV 2255 compliance
  - b. Breath testing machine calibration and maintenance records
  - c. Observation period
5. Statements by Client (Miranda analysis if any)
6. Recommended Motions
  - a. Motion to Suppress (theory and priority)
  - b. Motion in Limine
  - c. Other
7. Additional Discovery to Request

</FORMAT>

This is where Extended Thinking earns its keep. Turn it on for this prompt.

## Step 2: Motion to Suppress Draft

<ROLE>

You are a senior Ohio criminal defense attorney drafting a Motion to Suppress for an OVI matter in Lorain Municipal Court.

</ROLE>

<TASK>

Draft a complete Motion to Suppress challenging (a) the reasonable suspicion for the initial stop and (b) the lawful extension of the stop into an OVI investigation. Produce as an Artifact.

</TASK>

<CONSTRAINTS>

Ohio law and Fourth Amendment. Cite R.C. 4511.33 for the marked lanes statute. Cite *Terry v. Ohio*, 392 U.S. 1 (1968), for reasonable suspicion framework. Cite *Rodriguez v. United States*, 575 U.S. 348 (2015), for duration doctrine. Where an Ohio appellate case is needed to apply *Rodriguez* principles to Ohio OVI facts, flag with **\*\*[VERIFY: OHIO APPELLATE AUTHORITY]\*\*** rather than invent a cite. Case names in italics. Full Bluebook. No hyphens. No em dashes. URLs in appendix. Professional tone. Include a Conclusion requesting suppression of all evidence obtained after the unlawful stop and any derivative evidence.

</CONSTRAINTS>

<FORMAT>

1. Caption
2. Motion heading
3. Memorandum in Support
  - a. Statement of Facts (record cites to video timestamps and report page numbers)
  - b. Law and Argument
    - i. The initial stop was not supported by reasonable suspicion
    - ii. The stop was unlawfully extended beyond its original mission
  - c. Conclusion and Prayer for Relief
4. Certificate of Service placeholder

5. Exhibit List placeholder

</FORMAT>

<REFERENCE MATERIAL>

Key facts are in the Discovery Issues Memo and the attached OVI report, dash cam transcript, and body cam transcript in this Project.

</REFERENCE MATERIAL>

The draft will come back with the [VERIFY] flags in my preferred style. Take those to Casetext, Westlaw, or your preferred research tool, run them through the two source confirmation my Legal Research Rules require, and fill in the citations. Then edit and file.

### **Step 3: Hearing Preparation Outline**

<ROLE>

You are preparing me, lead defense counsel, for the suppression hearing in this matter.

</ROLE>

<TASK>

Produce a Suppression Hearing Preparation Packet.

</TASK>

<CONSTRAINTS>

Practical focus. Assume the prosecution will call the arresting officer. Assume the defense will not call any witnesses. No hyphens. No em dashes.

</CONSTRAINTS>

<FORMAT>

PART 1. Officer Cross Examination Outline

Ten topic areas, in logical order. Each topic lists the goal, the anchor fact from the record, and two to four bullet questions.

PART 2. Exhibits and Timestamps

Every video exhibit with the critical timestamps for this motion.

PART 3. Anticipated State Arguments and Responses

Three arguments the prosecutor is most likely to make, and a one paragraph response to each.

PART 4. Judge's Likely Questions

Four to six questions the court is most likely

to ask defense counsel, each with a suggested response.

PART 5. Burden Reminder

One paragraph summarizing which side bears the burden at which stage, so I am not caught flat footed on framing.

</FORMAT>

This is the kind of output that before Claude would have taken me a Saturday morning. Now it is an hour. The quality is the same or better, because Claude does not forget to list the judge's likely questions while I am in the middle of thinking about exhibits.

## Chapter 15: Domestic Relations Workflow

### From Complaint to Decree

Domestic relations is my deepest practice area and the area LegalTek.ai was built to serve. I will walk through the full matter arc, not just a single deliverable.

**The matter.** Hypothetical. Petitioner Sarah Jones, seeking divorce from Respondent husband Michael Jones, fifteen year marriage, two minor children ages ten and eight, marital home in Amherst, Ohio, two 401(k) accounts, a small business owned by husband, allegations of financial opacity on husband's side. Lorain County Domestic Relations Division. We represent Sarah.

flowchart TD

```
Intake([Intake]) --> S1[Step 1<br/>Matter Strategy Memo<br/>Five Pillars]
S1 --> S2[Step 2<br/>Affidavit 1 via Skill]
S2 --> S3[Step 3<br/>Discovery Requests]
S3 --> E([Discovery exchanged])
E --> S4[Step 4<br/>Settlement Memorandum]
S4 --> Settle{Settlement?}
Settle -->|yes| S5[Step 5<br/>Decree of Divorce]
Settle -->|no| Trial[Trial track]
S5 --> File([File Decree])
```

### Step 1: Initial Matter Strategy

<ROLE>

You are a senior Ohio domestic relations attorney with twenty years of experience.

</ROLE>

<CONTEXT>

Petitioner wife, Respondent husband. Fifteen year marriage. Two minor children ages ten and eight. Marital home in Amherst, Ohio. Two 401(k) accounts. Small business owned by Respondent. Allegations of financial opacity on Respondent's side. Lorain County Domestic Relations Division. We represent Petitioner.

</CONTEXT>

<TASK>

Review the intake notes and produce a Matter Strategy Memo.

</TASK>

<CONSTRAINTS>

Ohio R.C. Chapter 3105 framework. Identify the five pillar issues: grounds, property division, spousal support, parental rights and responsibilities, and child support. For each pillar, give a preliminary analysis, note the evidence we will need, and flag any issue that justifies urgent action (ex parte TROs, emergency custody orders, asset preservation). No hyphens. No em dashes.

</CONSTRAINTS>

<FORMAT>

1. Executive Summary (5 bullets)
2. Grounds Analysis
3. Property Division
  - a. Marital vs. separate property issues
  - b. Valuation issues (business especially)
  - c. Financial disclosure and forensic concerns
4. Spousal Support
  - a. R.C. 3105.18 factor analysis
  - b. Preliminary recommendation
5. Parental Rights and Responsibilities
  - a. Best interest factors R.C. 3109.04
  - b. Parenting time recommendation
6. Child Support
  - a. R.C. 3119 calculation framework
  - b. Deviation considerations
7. Urgent Actions (TROs, motions, preservation)
8. Evidence and Discovery Plan
9. Estimated Timeline

10. Client Counseling Points

</FORMAT>

<REFERENCE MATERIAL>

[PASTE INTAKE NOTES HERE]

</REFERENCE MATERIAL>

This output anchors the matter. It becomes your north star. Review it with the client. Revise it as facts develop.

## Step 2: Affidavit 1 Preparation

Ohio Rule 75 requires an Affidavit of Income, Expenses, and Financial Disclosure (Affidavit 1) in every divorce. Preparing it is usually the largest single time sink in the early stages of a matter. With a Skill, it is not.

<ROLE>

You are using the LegalTek.ai Ohio Affidavit 1 Skill to prepare my client's financial affidavit.

</ROLE>

<TASK>

Walk me through the Affidavit 1 preparation for this client step by step. Ask me for each category of information in order. When you have enough to complete a section, produce that section. At the end, produce the complete Affidavit 1 as an Artifact ready for client signature.

</TASK>

<CONSTRAINTS>

Lorain County local form where it differs from the statewide form. Do not estimate figures the client has not provided. Mark any missing data **\*\*[CLIENT TO PROVIDE]\*\*** so it is obvious on review. No hyphens. No em dashes.

</CONSTRAINTS>

This is a conversational prompt. Claude will ask you for household income, then household expenses, then assets, then debts. You respond with the data you have. When you are done, you have an Affidavit 1 ready for your client to review and sign.

## Step 3: Discovery Requests

<ROLE>

You are a senior Ohio domestic relations attorney drafting first set discovery.

</ROLE>

<TASK>

Draft first sets of (1) Interrogatories and (2) Requests for Production of Documents to the Respondent. The respondent owns a small business and there are concerns about financial opacity. Produce each as a separate Artifact.

</TASK>

<CONSTRAINTS>

Civ. R. 33 and Civ. R. 34 compliant. Cover the standard divorce discovery categories plus business specific inquiries: tax returns, K-1s, profit and loss statements, general ledgers, bank statements for both personal and business accounts, credit card statements, loan applications made in the last five years. Include standard definitions and instructions paragraphs. Number each discovery request. No hyphens. No em dashes.

</CONSTRAINTS>

<FORMAT>

Standard Ohio domestic relations discovery format. Caption. Definitions and Instructions. Numbered Interrogatories (or Requests). Certificate of Service placeholder.

</FORMAT>

For a business owner respondent, the output should be 40 to 60 interrogatories and a parallel set of requests for production. Review them. Adjust. Serve them.

## **Step 4: Settlement Memorandum**

When you reach the settlement conference, the court will expect a memorandum from each side. Here is the prompt that produces ours.

<ROLE>

You are a senior Ohio domestic relations attorney preparing a settlement memorandum for a court ordered settlement conference.

</ROLE>

<TASK>

Draft the Petitioner's Settlement Conference Memorandum based on the Matter Strategy Memo, the Affidavit 1, the discovery responses, and any exhibits in this Project. Produce as an Artifact.

</TASK>

<CONSTRAINTS>

Professional, collaborative tone. Do not overstate our position. Flag two to three trades we would consider in exchange for concessions. Ohio law. Case names in italics. Full Bluebook. No hyphens. No em dashes.

</CONSTRAINTS>

<FORMAT>

1. Introduction (two paragraphs)
2. Procedural Posture
3. The Five Pillars
  - a. Grounds and current posture
  - b. Property division: our proposal with supporting rationale
  - c. Spousal support: our proposal with R.C. 3105.18 factor walk
  - d. Parental rights and responsibilities: our proposal
  - e. Child support: our calculated figure with deviation analysis if applicable
4. Areas of Agreement
5. Areas of Dispute
6. Potential Compromises
7. Conclusion

</FORMAT>

**What the output looks like.** So the prompt does not sit in the abstract, here is a redacted excerpt from a real settlement memorandum Claude produced on a matter materially similar to the Jones hypothetical. Client name, dollar figures, and identifying details are hypothetical. This is the opening of Section 3(c), Spousal Support, as Claude returned it, after the prompt above was run inside a populated Project.

3(c). Spousal Support. Petitioner requests spousal support in the amount of \$2,200 per month for a term of seven years, subject to the court's continuing jurisdiction under R.C. 3105.18(E) to modify upon a substantial change of circumstances. The proposal reflects

the following analysis of the R.C. 3105.18(C)(1) factors.

*Income of the parties.* Petitioner earned \$38,400 in 2025 as documented on the W-2 attached as Exhibit A. Respondent's 2025 income as reported on Respondent's Affidavit 1 was \$94,800, but discovery produced in response to our First Request for Production (Exhibit B) reflects business distributions of an additional \$27,000 not reported on the Affidavit 1, for an adjusted actual income figure of \$121,800. The disparity between the parties' incomes on the adjusted figures is approximately \$83,400 per year.

*Relative earning abilities.* Petitioner has a high school diploma and sixteen years out of the workforce raising the parties' children. Respondent holds a bachelor's degree and has operated his business for eleven years. Petitioner's realistic near term earning capacity is limited to roles paying in the range of her current position, approximately \$40,000 annually. Respondent's earning capacity is established by his current income and business ownership.

*Ages and physical, mental, and emotional conditions.* Both parties are in good health. Petitioner is forty three. Respondent is forty five. Neither party has a condition that bears on the support analysis.

*Retirement benefits.* Addressed in Section 3(b) above and incorporated here by reference.

*Duration of the marriage.* Fifteen years. This is a long term marriage under the Lorain County local interpretive guidance. **[VERIFY: LOCAL RULE OR LOCAL PRACTICE CITE]**

[Factors analysis continues through remaining R.C. 3105.18(C)(1) factors]

Three things to notice in that excerpt. First, Claude cites exhibits by the letter you would use in a real filing, because the REFERENCE MATERIAL block told it which documents were in the Project. Second, the dollar figures match the Affidavit 1 and the discovery responses, because those were uploaded to the Project and Claude read them rather than inventing numbers. Third, the [VERIFY] flag appears where Claude was not confident of an authority. That is the exact honesty the CONSTRAINTS block was written to produce. Take those to your local rules or Lorain County practice guide, confirm or correct, and the paragraph is ready to file.

This is the standard every Claude output should meet. If the output you receive does not look like this, the prompt needs tightening, not the model.

## **Step 5: Decree of Divorce**

Final deliverable. This is long form drafting at its most important. Use Opus. Turn Extended Thinking on.

<ROLE>

You are a senior Ohio domestic relations attorney drafting a final Decree of Divorce based on agreed terms from the settlement conference.

</ROLE>

<TASK>

Draft a complete Decree of Divorce incorporating the agreed terms from the settlement conference summary attached to this Project. Produce as an Artifact.

</TASK>

<CONSTRAINTS>

Lorain County local form and ordering preferences where applicable. Comply with R.C. 3105.171 on property division findings, R.C. 3105.18 on spousal support findings, R.C. 3109.04 on allocation of parental rights. Include QDRO language referral where retirement assets are divided. No hyphens. No em dashes.

</CONSTRAINTS>

<FORMAT>

Standard Ohio Decree of Divorce sections in order: Caption, Findings of Fact and Conclusions of Law, Decree, Property Division, Spousal Support, Allocation of Parental Rights and Responsibilities, Parenting Time, Child Support, Health Insurance and Medical Expenses, Tax Treatment of Dependency Exemption, Restoration of Former Name (if applicable), Other Orders, Signatures of Parties and Counsel, Approval signature line for the court.

</FORMAT>

<REFERENCE MATERIAL>

[PASTE OR ATTACH SETTLEMENT CONFERENCE SUMMARY]

</REFERENCE MATERIAL>

Review every decree Claude produces line by line. This is the document your client lives with for the rest of their life. No AI workflow changes that duty.

## One Thing to Do This Week

Pick the workflow chapter for the practice area you actually work in. Run the first prompt in

that workflow against a live matter on your desk, or against a closed matter if you want to learn with no risk. Measure the time. Compare it to the time the same step took you last time you did it the old way. That number is the case for continuing.

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## Part V: Advanced Features

### Chapter 16: Cowork for Legal Research Projects

Cowork is Claude's longer running research mode. You give it a complex research task. It goes off, browses sources, takes notes, and comes back with a research memo. For lawyers, the right use case is sharply limited.

**Good uses.** Scoping a new practice area. Competitive analysis of other firms' positioning. Tracking the status of pending legislation relevant to a client. Preparing a CLE presentation from public sources.

**Bad uses.** Primary legal research on a live matter. Cowork can surface authority, but it can also surface authority that is stale, out of jurisdiction, or overruled. For matter research, use a purpose built legal research tool (Casetext, Westlaw, Lexis) where the authority is checked and the citator is live.

If you do use Cowork, constrain it. Example:

```
<ROLE>
```

```
You are a legal research associate.
```

```
</ROLE>
```

```
<TASK>
```

```
Research the current status of pending Ohio  
legislation on [TOPIC] and produce a one page  
summary with sources.
```

```
</TASK>
```

```
<CONSTRAINTS>
```

```
Ohio General Assembly sources only. Official  
sources preferred (ohiosenate.gov, ohiohouse.gov,  
lsc.ohio.gov). Do not cite law firm blog posts  
as primary sources. No case law. Legislation  
only. URLs in an appendix. No hyphens. No em  
dashes. Flag anything you cannot verify from  
two independent sources with  
**[SINGLE SOURCE, VERIFY]**.
```

</CONSTRAINTS>

The tool is useful. The discipline around the tool is what makes the output usable.

## Chapter 17: Claude Code for Firm Developers

If your firm is not building software, skip this chapter. If you are, or if you are a solo who wants to automate a specific repetitive task, Claude Code is the terminal based agent that writes and runs code. At LegalTek.ai, we use Claude Code daily for infrastructure and feature work. My developer Alex uses it. I use it for smaller automations.

Three realistic starter projects for a law firm.

**A calendar automation that pulls tomorrow's hearings from your practice management system and sends each attorney a morning briefing email.** Two afternoons of work with Claude Code, assuming your PMS has an API.

**A document intake pipeline that watches a shared inbox, extracts new client intake forms, creates a matter folder structure, and files a draft intake summary.** A week of work, and the time savings pay it back within a month.

**A deposition transcript processor that runs OCR on scanned transcripts, extracts exhibit references, and produces a searchable index.** A week of work, and you will use it for every deposition going forward.

The point of Claude Code for lawyers is not to make you a developer. It is to let you express a workflow in English and get a tool that runs it. The right attitude is: describe the process in a structured block prompt, treat each iteration as a specification revision, and stop when the tool does the work.

## Chapter 18: When Claude Gets It Wrong

Claude will get things wrong. Not often, but often enough that you must plan for it and not be surprised when it happens. The question is not whether your AI assisted work product will ever contain an error. The question is whether you have a disciplined response when it does.

```
flowchart TB
    subgraph M["FOUR FAILURE MODES"]
        F1[Fabricated citation]
        F2[Wrong jurisdiction]
        F3[Factual drift]
        F4[Oversimplification]
    end
```

```
end
M --> D([Error detected])
D --> R1[1. STOP]
R1 --> R2[2. Assess scope]
R2 --> R3[3. Correct record]
R3 --> R4[4. Notify]
R4 --> R5[5. Document]
R5 --> R6[6. Review prompt]
R6 --> Better([Better prompt next time])
style D fill:#f8d7da,stroke:#721c24,stroke-width:3px
```

There are four failure modes that matter to a lawyer.

**The fabricated citation.** Claude invents a case cite that looks real but is not. This is the failure mode that has produced discipline cases around the country and the one every lawyer knows about. Two source verification catches it. Run this on every filed citation, every time. No exceptions.

**The wrong-jurisdiction authority.** Claude cites a real case from the wrong state, or a state case where a federal one applies, or a vacated or overruled decision. This fails more often than outright fabrication and is harder to catch because each individual cite is technically real. Citator verification catches it. Casetext, Westlaw, or Lexis all work.

**The plausible-sounding factual drift.** Claude takes a fact from your reference material and restates it in its output with a subtle shift. The settlement figure moves from \$2,200 to \$2,500. The date of loss shifts by a day. The child's age changes by a year. These are the hardest errors to catch because they read naturally and are near the truth. The defense is to read every output against the source material, not against memory, and to require that every factual assertion in a substantive output trace to a specific document in your Project.

**The confident oversimplification.** Claude gives you a clean answer to a genuinely ambiguous question and does not flag the ambiguity. This is the failure mode that matters most on close legal analysis. The defense is to prompt for alternative readings explicitly. Add "Identify any alternative reading of the statute that would change the outcome and evaluate its relative strength" to your CONSTRAINTS block on close questions.

## When It Happens to You

A moment will come when you realize an output was wrong in a way that reached a client, opposing counsel, or a court. Your response in the first hour shapes everything that follows.

1. **Stop.** Do not send another filing, letter, or email on the matter until you have assessed the scope of the error.
2. **Assess scope.** Is the error in a document already filed. Served. Sent to a client. Limited

to an internal memo. The scope determines the remedy.

3. **Correct the record where you can.** If filed, consider a motion to amend or withdraw. If served, a corrective letter. If sent to a client, a candid call followed by a written follow up.
4. **Notify.** Court if filed. Opposing counsel if served. Client always. The order depends on the circumstances but the duty of candor under RPC 3.3 is not optional.
5. **Document the incident.** Under G3M Measurement (Chapter 20), every incident of this kind should generate a written record: what happened, how it was caught, what was done, what will change to prevent recurrence.
6. **Review the prompt.** The point of the review is not to blame the tool. It is to identify whether the prompt had daylight in it that Claude filled with error. Almost always it did. Tighten the CONSTRAINTS block. Add the reference material that should have been there. Update the Skill if one was involved. The next version of the prompt should not produce the same failure.

The discipline is not complicated. It is just not optional. A firm that cannot describe its response procedure before an error occurs is a firm that will improvise when one does, and improvisation under time pressure is how small errors become discipline cases.

### **One Thing to Do This Week**

If you are not building software, skip the Claude Code bookmark and go to Part VI. If you are, identify one fifteen to thirty minute repetitive task you do weekly and write down, in one page of plain English, exactly what the task does step by step. That page is the specification Claude Code works from.

Separately, regardless of whether you code, write the four failure mode response procedure above on a single index card and keep it in your desk drawer. The first hour after you find an error is the one that matters most. You do not want to be inventing the procedure then.

---

## **Part VI: Ethics, Governance, and the LegalTek.ai Framework Stack**

### **Chapter 19: ABA Formal Opinion 512 and Ohio Rules of Professional Conduct**

ABA Formal Opinion 512, issued in July 2024, is the first comprehensive guidance from the

ABA on lawyers' use of generative AI. Every lawyer using Claude should read it once in full. The operative requirements map cleanly to the Ohio Rules of Professional Conduct, and together they define the obligations you are managing when you introduce a model like Claude into your practice.

```
flowchart LR
  ABA[ABA Op. 512] --> D1[RPC 1.1 Competence]
  ABA --> D2[RPC 1.6 Confidentiality]
  ABA --> D3[RPC 1.4 Communication]
  ABA --> D4[RPC 3.3 Candor]
  ABA --> D5[RPC 5.1 and 5.3 Supervision]
  ABA --> D6[RPC 1.5 Fees]
  D1 --> A1[Training, tool evaluation]
  D2 --> A2[Training OFF, ZDR plan]
  D3 --> A3[Engagement letter]
  D4 --> A4[Two source verification]
  D5 --> A5[Written AI policy]
  D6 --> A6[Billing policy revision]
```

Six duties, mapped.

**Competence (RPC 1.1).** You are obligated to understand the benefits and risks of the AI you use. That means not just turning it on, but understanding where it fails. Claude fabricates citations less often than other frontier models, but less often is not never. You are the backstop.

**Confidentiality (RPC 1.6).** Every prompt you send is a disclosure. To Anthropic. Possibly to model training if you do not toggle it off. This is why Chapter 2 of this guide leads with the data training setting, not the interface tour.

**Communication (RPC 1.4).** Some jurisdictions are moving toward requiring lawyer disclosure of AI use to clients. Ohio has not mandated this yet. My firm's practice, and what I recommend, is proactive disclosure in the engagement letter, with a short explanation of which tools we use and what data protections are in place.

**Candor (RPC 3.3).** This is the live citation problem. If you file a brief with a fabricated citation, no AI blame shift will save you. Two source verification of every citation in every filing is non negotiable.

**Supervision (RPC 5.1 and 5.3).** AI is, for supervision purposes, analogous to a non lawyer assistant. You supervise its output the way you supervise your paralegal's output. The fact that the assistant is silicon does not lower the standard.

**Fees (RPC 1.5).** If AI reduces the time you spend on a task, and you bill hourly, you cannot bill for time you did not work. This is the quietest ethical issue in AI adoption and the one

most likely to produce discipline cases in the next three years.

## Chapter 20: The LegalTek.ai Framework Stack

At LegalTek.ai I have developed four frameworks that operationalize the duties from Chapter 19. Each answers a different question. COUNSEL answers “how do I run this specific task.” G3M answers “how does the firm govern AI.” ADAPT answers “how do we roll it out.” OVRST answers “how do we supervise the output.” The full expansions in my Definitive Guide go deeper than this chapter does, but a standalone Claude user should be able to run all four from what follows.

```
flowchart TB
    G3M[G3M<br/>Firm governance<br/>Quarterly] --> ADAPT[ADAPT<br/>Tool rollout<br/>ADAPT]
    ADAPT --> COUNSEL[COUNSEL<br/>Individual task<br/>Every time]
    COUNSEL --> OVRST[OVRST<br/>Output oversight<br/>Every deliverable]
    OVRST --> Def([Defensible AI practice])
    style COUNSEL fill:#bbdefb,stroke:#0d47a1,stroke-width:3px
    style OVRST fill:#b2dfdb,stroke:#004d40,stroke-width:3px
    style Def fill:#d4edda,stroke:#28a745,stroke-width:3px
```

### COUNSEL. The Task Level Framework.

COUNSEL runs every time you sit down with a matter and decide whether and how Claude participates. Six steps.

**C. Classify the task.** What kind of work is this. Drafting, research, review, analysis, administration. Classification controls model selection (Chapter 3), Project scope (Chapter 7), and the oversight intensity later under OVRST.

**O. Own the confidentiality decision.** What data has to enter the prompt. Whose data is it. What is the disclosure path. If client facts are involved, RPC 1.6 is in play and your data training toggle (Chapter 2) must be off.

**U. Use the right tool.** Not every legal task belongs in Claude. Primary legal research belongs in a citator backed tool. Financial account data belongs in your practice management platform. Claude is excellent for drafting, analysis, and review, and it should stay in those lanes.

**N. Name the reference material.** What statutes, rules, prior drafts, and documents must be in the prompt. If you are asking Claude to recall rather than read, you are inviting error. Paste it in.

**S. Structure the prompt.** Run the Meta Prompt Method from Chapter 5. ROLE, CONTEXT, TASK, CONSTRAINTS, FORMAT, REFERENCE MATERIAL.

**E. Evaluate the output.** Read it. Check every citation against two independent sources. Confirm every factual assertion traces to the reference material you provided, not to Claude's training data.

**L. Log what matters.** Save the prompt and the output to the matter file. At a minimum, note which model was used and whether Extended Thinking was enabled. This is the record you will want if the work is ever challenged.

You are running COUNSEL right now every time you use Claude on a real matter. The framework formalizes the steps so you run them consistently, and so an associate or paralegal can run them the same way you do.

### **G3M. The Firm Level Framework.**

G3M is the firm wide governance framework. The three pillars are Governance, Guardrails, and Growth, each with a built in Measurement layer (hence the M).

**Governance.** Who decides which AI tools the firm uses, which matters they may be used on, and what client disclosures accompany them. A written firm policy is the deliverable. It lives in your firm manual next to your supervisory policies under RPC 5.1 and 5.3.

**Guardrails.** The concrete limits on use. Data training toggles mandatory off. Connector scope review quarterly. Prohibited use categories (trust accounts, sealed matters, third party confidential information held under protective order). Mandatory prompt and output retention in the matter file. Required OVRST review before any AI assisted output leaves the firm.

**Growth.** The intentional expansion of AI use over time. Which practice groups pilot which tools. Which workflows get promoted from experiment to standard practice. Which Skills get built, shared, and maintained across the firm.

**Measurement.** The bar for each pillar. Governance is measured by policy existence and annual review. Guardrails are measured by incident count and audit findings. Growth is measured by documented workflow adoption and recorded time savings. Without the M, G3 becomes theater.

If COUNSEL is how the individual lawyer thinks about the task in front of them, G3M is how the firm thinks about AI practice as an institution.

### **ADAPT. The Rollout Framework.**

ADAPT structures how the firm introduces a new AI tool or workflow. Five stages, in order.

**A. Assess.** Start with the problem, not the tool. What work are we doing that takes too long, produces inconsistent quality, or carries too much risk. Define the problem in terms a

partner can confirm.

**D. Design.** Specify the workflow before you build it. Which steps a human owns, which steps Claude owns, what the handoff looks like, what the output format is, what the OVRST review layer looks like.

**A. Adopt.** A pilot. One practice group, one workflow, one to three lawyers, thirty days. No firm wide rollout until the pilot closes.

**P. Prove.** Measure what changed. Time per matter. Quality as scored by a senior reviewer. Client outcomes where observable. If the pilot did not prove out, the workflow does not move to transition. That is ADAPT's discipline.

**T. Transition.** Promote the workflow from experiment to standard practice. Train the remaining practice groups. Write it into your firm manual. Retire the prior workflow. Schedule an annual review.

Most AI tool rollouts fail at stage three (Adopt), because firms skip straight to firm wide rollout without a bounded pilot. ADAPT forces the pilot.

## **OVRST. The Oversight Framework.**

OVRST sits on top of every Claude generated output in your practice. Five required elements, captured in a single record attached to the matter file.

**O. Originator.** Who ran the prompt. Attorney, paralegal, or associate. Name and role.

**V. Verification.** Who reviewed the output. Name, role, date, and depth of review (spot check, full read, line by line with authority verification).

**R. Reference Confirmation.** Every statute, rule, and case cited in the output has been confirmed against two independent authoritative sources. Bluebook format. Ohio state level citation where available. The reviewer's initials attest to the confirmation.

**S. Signatures and Scope.** A statement of what the output is used for. Internal analysis, client letter, court filing. The higher the stakes, the deeper the verification in the V step.

**T. Timestamp and Tool Record.** When the output was generated, which model (Opus, Sonnet, Haiku), whether Extended Thinking was on, whether Artifacts or Skills were used. Supports both malpractice defense and firm level Measurement under G3M.

OVRST replaced an earlier framework of mine (Tattle Tale) because OVRST better captures the layered, role specific nature of oversight in a practicing firm. The framework is built to survive cross examination. If a court or a disciplinary panel ever asks "what review did you conduct of this AI assisted work product," an OVRST record answers the question in one page.

## The Stack in Practice.

The four frameworks stack vertically. A lawyer runs COUNSEL at the task level. The output passes through OVRST before it leaves the firm. The firm runs G3M as an institution. New tools and workflows enter the practice through ADAPT.

A firm running all four is practicing defensibly with AI. A lawyer running only COUNSEL, without OVRST, is exposed at the supervision layer. A firm running only G3M, without COUNSEL or OVRST, has a policy without practice. A firm running ADAPT without G3M is adopting tools it has not governed. The four together are the full stack because each answers a question the others do not.

The Definitive Guide expands each framework with templates, checklists, and worked case studies. For a firm starting out, this chapter is sufficient to begin. Write your first COUNSEL checklist this week. Pilot OVRST on a single matter in the next thirty days. G3M and ADAPT are quarterly commitments, not weekend ones.

## One Thing to Do This Week

Write your firm's COUNSEL checklist on a single page. The seven letters, the steps under each, what triggers each step, where the record gets filed. One page. Print it and tape it to the wall next to your desk. That page is the whole framework made concrete. Everything else follows.

---

## Appendix A: Copy Paste Prompt Library

Fifteen structured block prompts, organized by category. Copy the one you need, fill in the matter specifics, and run.

### A1. Universal House Style CONSTRAINTS Block

Paste this into the CONSTRAINTS block of any substantive prompt to enforce Mishak Law Firm house style:

```
Ohio state law primary. Full Bluebook citations.
Case names in italics, never bold. Ohio state
level citations preferred when available. URLs
go in an Appendix, never inline. Do not invent
citations. Flag single source citations with
**[VERIFY: SECOND SOURCE]**. No hyphens, no
em dashes, use commas or periods. Do not use
"leverage" as a verb. Professional, formal
```

register. If a fact is not in the reference material, do not assume it.

## A2. New Client Intake Summary

<ROLE>

You are a senior paralegal at [FIRM NAME] with deep experience in [PRACTICE AREA] intakes.

</ROLE>

<TASK>

Convert the intake notes below into our standard Matter Summary.

</TASK>

<CONSTRAINTS>

[Paste A1]. Preserve every fact from the notes. Mark anything silent as "Not yet known."

</CONSTRAINTS>

<FORMAT>

1. Parties and Contacts
2. Matter Type and Posture
3. Key Facts
4. Theory of the Case (preliminary)
5. Immediate Actions Required
6. Open Items

</FORMAT>

<REFERENCE MATERIAL>

[PASTE NOTES]

</REFERENCE MATERIAL>

## A3. Opposing Counsel Letter Response

<ROLE>

You are a senior [PRACTICE AREA] attorney drafting a response to opposing counsel.

</ROLE>

<TASK>

Draft a response letter addressing each point raised in the attached letter from opposing counsel. Produce as an Artifact.

</TASK>

<CONSTRAINTS>

[Paste A1]. Firm but professional. Do not concede any point that is genuinely disputed. Reserve all rights. Address each point in the order raised.

</CONSTRAINTS>

<REFERENCE MATERIAL>

[PASTE OPPOSING COUNSEL LETTER]  
[PASTE OUR MATTER STRATEGY MEMO]

</REFERENCE MATERIAL>

## A4. Client Status Letter

<ROLE>

You are drafting a client status letter for [CLIENT NAME] on [MATTER].

</ROLE>

<TASK>

Draft a status letter covering events since the last client communication dated [DATE], with recommended next steps. Produce as an Artifact.

</TASK>

<CONSTRAINTS>

[Paste A1]. Plain language for the client, not legalese. If a technical term is needed, define it in context. No scare tactics. Candid about risks. Close with one clear recommended next step and any decisions needed from client.

</CONSTRAINTS>

## A5. Deposition Outline Builder

<ROLE>

You are a senior trial attorney preparing a deposition outline.

</ROLE>

<TASK>

Build a deposition outline for [WITNESS NAME], whose role in this matter is [ROLE].

</TASK>

<CONSTRAINTS>

[Paste A1]. Organize by topic, not chronology. For each topic, list the goal of the examination in one sentence, the anchor exhibit, and five to eight lead in questions. Include exhibit stubs. Assume a standard civil deposition format.

</CONSTRAINTS>

<REFERENCE MATERIAL>

[PASTE RELEVANT PLEADINGS, PRIOR TESTIMONY, KEY DOCUMENTS]

</REFERENCE MATERIAL>

## A6. Settlement Offer Analysis

<ROLE>

You are advising me on whether to accept, reject, or counter an incoming settlement offer.

</ROLE>

<TASK>

Produce a Settlement Offer Analysis Memo.

</TASK>

<CONSTRAINTS>

[Paste A1]. Compare the offer against the best case, worst case, and expected value ranges from the Matter Strategy Memo. Factor in litigation costs, time value, client circumstances, and collection risk.

</CONSTRAINTS>

<FORMAT>

1. Offer summary (one paragraph)
2. Comparison to case valuation
3. Cost to proceed analysis
4. Non financial factors
5. Recommendation (accept, counter, reject) with specific counter if applicable
6. Client counseling points

</FORMAT>

## A7. Jury Instruction Drafting

<ROLE>

You are drafting proposed jury instructions for a [CASE TYPE] trial in [JURISDICTION].

</ROLE>

<TASK>

Draft proposed jury instructions specific to the contested legal issues in this matter.

</TASK>

<CONSTRAINTS>

[Paste A1]. Start from Ohio Jury Instructions (OJI) where applicable. Modify only where the standard instruction does not fit the case. Flag every modification with a parenthetical note explaining the basis for departing from OJI.

</CONSTRAINTS>

## **A8. Motion in Limine**

<ROLE>

You are a senior trial attorney drafting a Motion in Limine.

</ROLE>

<TASK>

Draft a Motion in Limine seeking to exclude [EVIDENCE TO EXCLUDE]. Produce as an Artifact.

</TASK>

<CONSTRAINTS>

[Paste A1]. Ohio Rules of Evidence. Cite Evid. R. by number. Structured as: caption, motion heading, memorandum, conclusion, certificate of service placeholder.

</CONSTRAINTS>

## **A9. Expert Witness Cross Prep**

<ROLE>

You are preparing me to cross examine an expert witness whose report and CV are attached.

</ROLE>

<TASK>

Produce an Expert Cross Examination Preparation Packet.

</TASK>

<CONSTRAINTS>

[Paste A1]. Identify every weakness in the methodology, every assumption that can be tested, and every prior inconsistent position if one exists in the reference material.

</CONSTRAINTS>

<FORMAT>

1. Expert's core opinions (numbered list)
2. Methodology weaknesses (by opinion)
3. Assumption challenges
4. Prior inconsistent statements or publications
5. Daubert / Evid. R. 702 concerns
6. Topic by topic cross outline

</FORMAT>

<REFERENCE MATERIAL>

[PASTE EXPERT REPORT, CV, AND PRIOR PUBLICATIONS]

</REFERENCE MATERIAL>

## A10. Closing Argument Outline

<ROLE>

You are building my closing argument outline for a [CASE TYPE] trial.

</ROLE>

<TASK>

Produce a Closing Argument Outline.

</TASK>

<CONSTRAINTS>

[Paste A1]. Persuasive, not argumentative. Reference specific trial testimony and exhibits by number. Do not argue facts not in the record. Fifteen to twenty minutes delivery length.

</CONSTRAINTS>

<FORMAT>

1. Opening hook (one paragraph)
2. Theme restatement

3. Liability or guilt argument (with record cites)
  4. Damages or sentence argument (if applicable)
  5. Addressing opposing arguments
  6. Jury instruction anchors
  7. Closing ask
- </FORMAT>

## A11. Parenting Plan Draft

<ROLE>

You are a senior Ohio domestic relations attorney drafting a shared parenting plan.

</ROLE>

<TASK>

Draft a shared parenting plan for the agreed terms attached. Produce as an Artifact.

</TASK>

<CONSTRAINTS>

[Paste A1]. R.C. 3109.04 compliant. Include all statutory elements. Lorain County local form preferences where applicable.

</CONSTRAINTS>

## A12. QDRO Referral Memo

<ROLE>

You are preparing a referral memo to a QDRO preparer for retirement asset division.

</ROLE>

<TASK>

Produce a QDRO Referral Memo based on the decree terms in this Project.

</TASK>

<CONSTRAINTS>

[Paste A1]. Identify each retirement account, plan type, division percentage or dollar amount, and any special provisions (survivor benefits, earnings and losses, separate interest vs. shared payment).

</CONSTRAINTS>

## A13. Fee Agreement Draft

<ROLE>

You are drafting a fee agreement for a new matter.

</ROLE>

<TASK>

Draft an engagement letter and fee agreement for [MATTER TYPE] on a [hourly / contingent / flat] fee basis. Produce as an Artifact.

</TASK>

<CONSTRAINTS>

[Paste A1]. Ohio RPC 1.5 compliant. Include AI use disclosure paragraph. Clear scope. Clear termination terms. If contingent, include required Ohio contingent fee language and distribution statement.

</CONSTRAINTS>

## A14. Grievance Response Draft

<ROLE>

You are drafting an initial response to a grievance letter from the Office of Disciplinary Counsel.

</ROLE>

<TASK>

Draft an initial ODC response letter addressing the grievance attached. Produce as an Artifact.

</TASK>

<CONSTRAINTS>

[Paste A1]. Factual, professional, non defensive tone. Address each allegation directly. Do not concede any fact not clearly supported. Reserve all rights. Request any extension needed explicitly.

</CONSTRAINTS>

<REFERENCE MATERIAL>

[PASTE GRIEVANCE LETTER]

[PASTE RESPONDENT'S ACCOUNT OF THE FACTS]

</REFERENCE MATERIAL>

## A15. CLE Presentation Builder

<ROLE>

You are building a one hour CLE presentation on [TOPIC] for Ohio attorneys.

</ROLE>

<TASK>

Produce a full CLE slide deck outline and speaker notes.

</TASK>

<CONSTRAINTS>

[Paste AI]. One hour of content, approximately 30 to 40 slides. Include a practical application segment. Close with three takeaways the audience can use Monday morning.

</CONSTRAINTS>

<FORMAT>

1. Title slide
2. Agenda
3. Learning objectives (3 to 5)
4. Content slides (with speaker notes under each)
5. Practical application
6. Three Monday morning takeaways
7. Questions

</FORMAT>

---

## Appendix B: Citations and Sources

Per Mishak Law house style, URLs and weblinks are compiled here, not inline. Case citations appear in the text in full Bluebook format with italicized case names. Statutes appear in the text by R.C. citation.

### Model Rules and Formal Opinions

- American Bar Association, *Formal Opinion 512: Generative Artificial Intelligence Tools* (July 29, 2024). Available at: [americanbar.org](https://americanbar.org) (ABA Center for Professional Responsibility).
- Ohio Rules of Professional Conduct, current version. Available at: [supremecourt.ohio.gov](https://supremecourt.ohio.gov).

## Ohio Statutes Referenced

- R.C. 2305.10 (personal injury statute of limitations).
- R.C. 3105.171 (equitable division of marital property).
- R.C. 3105.18 (spousal support and modification).
- R.C. 3109.04 (allocation of parental rights and responsibilities).
- R.C. 3119 (child support chapter).
- R.C. 4511.19 (operating a vehicle under the influence).
- R.C. 4511.33 (marked lanes violation).
- Available at: [codes.ohio.gov](https://codes.ohio.gov).

## Ohio Rules Referenced

- Civ. R. 33 (Interrogatories to Parties).
- Civ. R. 34 (Requests for Production of Documents).
- Civ. R. 75 (Divorce, annulment, and legal separation actions).
- Crim. R. (Ohio Rules of Criminal Procedure).
- Evid. R. 702 (Testimony by Experts).
- Available at: [supremecourt.ohio.gov/rules](https://supremecourt.ohio.gov/rules).

## United States Supreme Court Cases Referenced

- *Terry v. Ohio*, 392 U.S. 1 (1968).
- *Rodriguez v. United States*, 575 U.S. 348 (2015).

## Governance and Technical Standards

- National Institute of Standards and Technology, *AI Risk Management Framework (AI RMF 1.0)*. Available at: [nist.gov](https://nist.gov).

## LegalTek.ai Frameworks (Proprietary)

- COUNSEL, G3M, ADAPT, and OVRST framework full expansions are covered in Matthew A. Mishak, *AI Agents in Legal Practice: The Definitive Guide*, LegalTek.ai, 2026. Further reading at: [legaltek.ai](https://legaltek.ai).

## Anthropic Product Documentation

- docs.claude.com (general documentation and feature reference).
- support.claude.com (account, billing, and settings reference).

## Publisher Notes

- Published by LegalTek.ai.
- All prompt templates in Appendix A are licensed for unlimited use within the purchasing firm. Redistribution outside the firm requires written permission.

# Appendix C: Ten Questions to Test Your AI Practice Readiness

Use this as a self assessment after finishing the guide, or as an associate onboarding checklist. Each question maps to a duty from Chapter 19. If you cannot answer yes to all ten, you have your next week of work.

```

flowchart TD
    Start([Ten questions]) --> Q1{Q1-Q5<br/>RPC 1.1, 1.6, 1.4, 3.3}
    Q1 -->|all yes| Q2{Q6-Q7<br/>Supervision, fees}
    Q1 -->|any no| S1[Return to Ch. 2, 19]
    Q2 -->|all yes| Q3{Q8-Q9<br/>COUNSEL + OVRST running}
    Q2 -->|any no| S2[Return to Ch. 19]
    Q3 -->|all yes| Q4{Q10<br/>Citation error<br/>procedure in place?}
    Q3 -->|any no| S3[Return to Ch. 20]
    Q4 -->|yes| R([Defensibly practicing])
    Q4 -->|no| S4[Return to Ch. 18<br/>write procedure NOW]
    style Q4 fill:#f8d7da,stroke:#721c24,stroke-width:2px
    style R fill:#d4edda,stroke:#28a745,stroke-width:3px
  
```

1. **RPC 1.1 Competence.** Can I name two specific ways Claude can fail on a legal task, and describe how I would catch each one before the output leaves my firm.
2. **RPC 1.6 Confidentiality.** Is the data training toggle off on every Claude account my firm uses, and can I verify it in the settings today.
3. **RPC 1.6 Confidentiality.** Do I know which connectors are active on my Claude account, what scopes each holds, and when I last audited them.
4. **RPC 1.4 Communication.** Does my engagement letter disclose the firm's use of AI tools to the client in clear language.

5. **RPC 3.3 Candor.** Do I run every citation in every AI assisted filing through a two source verification before filing, and is that verification documented.
6. **RPC 5.1 and 5.3 Supervision.** Do I have a written firm policy on AI use, and have I trained every lawyer and staff member who uses Claude in the firm's workflow.
7. **RPC 1.5 Fees.** If a task that used to take three hours now takes one hour with Claude, do I bill the client for one hour and note the AI assistance where required.
8. **COUNSEL.** Can I run the six steps of COUNSEL from memory for a new matter that walked in this morning.
9. **OVRST.** Is every AI assisted output in my active matter files accompanied by an OVRST record showing originator, verifier, reference confirmation, scope, and model record.
10. **Governance.** Do I know what I will do, in the next twenty four hours, if Claude returns an output that contains a fabricated citation on a filed brief.

Question ten is the one most lawyers cannot answer. If you cannot, write the procedure before you next sit down with Claude on a matter. The procedure is short. Retract the filing if still possible. Notify the court. Notify opposing counsel. Notify the client. Document the incident under G3M Measurement. Review the prompt to understand the failure. The fact that you have a procedure in place before the incident is most of the defense.

## Appendix D: Visual Reference Guide

### Chapter Diagrams and the Training Toggle Pictorial

Every chapter in this guide now has a companion diagram. Use them as follows. When a chapter's concept is holding you up, turn to the diagram before rereading the prose. Most readers process a flow or hierarchy faster visually than they process the same idea in sentences. The diagrams are not decorative. Each one answers a question the prose cannot answer in a glance.

All diagrams are rendered in Mermaid. Paste any code block into a Mermaid compatible viewer (Notion, Obsidian, GitHub, mermaid.live) to render. If your reader does not support Mermaid, each block also reads as plain text.

The Training Toggle pictorial appears first, out of chapter order, because it is the most important single action a lawyer takes when setting up Claude.

---

### D0. The Training Toggle: Click Path Pictorial

The single most important configuration step for any practicing attorney. Confirm this is off before you put any client facts into Claude.

flowchart TD

```
Start([Open Claude]) --> Profile[Click your profile icon<br/>top right corner]
Profile --> Settings[Select Settings<br/>from the menu]
Settings --> Privacy[Navigate to<br/>Privacy tab]
Privacy --> Toggle{Help improve Claude<br/>toggle state?}
Toggle -->|Currently ON| Off[Click to turn OFF]
Toggle -->|Currently OFF| Good[You are correctly configured]
Off --> Confirm[Verify toggle<br/>shows OFF state]
Confirm --> Good
Good --> Verify([Verify monthly<br/>as part of your<br/>COUNSEL practice])
```

```
style Start fill:#e1f5ff,stroke:#333,stroke-width:2px
style Toggle fill:#fff4cc,stroke:#333,stroke-width:2px
style Off fill:#ffcccc,stroke:#900,stroke-width:2px
style Good fill:#ccffcc,stroke:#090,stroke-width:2px
style Verify fill:#e1f5ff,stroke:#333,stroke-width:2px
```

**The rule behind the click path.** The Privacy settings tab is the one place in Claude where a wrong setting exposes you to an ethics problem that cannot be undone. Client data sent while the toggle was on is, in principle, already in the training pipeline. Anthropic has retention and purge policies, but you cannot rely on them after the fact. The discipline is to verify the toggle at account creation, verify again at every Claude update, and verify monthly as a routine.

**A second pictorial: what to do if the setting was wrong.**

flowchart LR

```
Discover([Discover toggle<br/>was ON]) --> Document[Document the<br/>discover]
Document --> Assess{Client data<br/>sent during<br/>this period?}
Assess -->|No| FixNow[Turn toggle OFF<br/>now. Note in<br/>firm log.]
Assess -->|Yes| Notify[Consult firm's<br/>incident response<br/>under G3M]
Notify --> Retention[Review Anthropic's<br/>current data<br/>retention policy]
Retention --> Client{Advise client<br/>under RPC 1.4?}
Client -->|Yes| Disclose[Disclosure in<br/>writing, candid<br/>tone]
Client -->|No| DocumentOnly[Document the<br/>assessment and<br/>basis for no<br/>FixNow]
FixNow --> Monthly[Add to monthly<br/>verification<br/>routine]
Disclose --> Monthly
DocumentOnly --> Monthly
```

```
style Discover fill:#ffcccc,stroke:#900,stroke-width:2px
style Notify fill:#fff4cc,stroke:#333,stroke-width:2px
style Disclose fill:#fff4cc,stroke:#333,stroke-width:2px
```

```
style Monthly fill:#ccffcc,stroke:#090,stroke-width:2px
```

---

## D1. Chapter 1 Diagram: Why Claude, and Why Now

A decision matrix for selecting among the three leading frontier models by lawyer task type.

```
flowchart TD
```

```
Task([Legal Task]) --> Type{Task Type}
Type -->|Substantive drafting,<br/>long document review,<br/>close statutory| Gem
Type -->|Fast lightweight tasks,<br/>bulk processing,<br/>cost sensitive| Claude
Type -->|Inside Microsoft 365,<br/>Office integration<br/>already paid for| Opus
Type -->|General purpose,<br/>no distinct<br/>requirement| Sonnet

Claude --> Stakes{Stakes?}
Stakes -->|High: court filing,<br/>client facing,<br/>fee bearing| Haiku
Stakes -->|Medium: internal<br/>drafts, review<br/>before send| Claude
Stakes -->|Low: scaffolding,<br/>triage, template<br/>fills| Opus

style Claude fill:#ccffcc,stroke:#090,stroke-width:2px
style Opus fill:#e1f5ff,stroke:#333,stroke-width:2px
style Sonnet fill:#e1f5ff,stroke:#333,stroke-width:2px
style Haiku fill:#e1f5ff,stroke:#333,stroke-width:2px
```

---

## D2. Chapter 2 Diagram: Setup and the Lawyer's Privacy Stack

The five step setup sequence, with the privacy toggle as the load bearing step.

```
flowchart LR
```

```
Start([New Claude<br/>Account]) --> Plan[1. Pick the<br/>right plan<br/><br/>]
Plan --> Toggle[2. Disable<br/>training<br/><br/>See D0 pictorial]
Toggle --> MFA[3. Turn on MFA<br/><br/>Authenticator app<br/>not SMS]
MFA --> Workspace[4. Name your<br/>workspace<br/>deliberately]
Workspace --> Protocol[5. Establish<br/>conflicts<br/>protocol for<br/>Projec]
Protocol --> Ready([Ready for<br/>client work])

style Toggle fill:#ffcccc,stroke:#900,stroke-width:3px
style Ready fill:#ccffcc,stroke:#090,stroke-width:2px
```

---

## D3. Chapter 3 Diagram: Model Selection for Legal Work

Task to model mapping as a single page reference.

```
flowchart TD
    Output{Where does<br/>the output go?}
    Output -->|Court, client,<br/>opposing counsel,<br/>unedited beyond<br/>proof
    Output -->|Back to me for<br/>substantial revision<br/>before firm release| S
    Output -->|Scaffolding I will<br/>rewrite anyway,<br/>or bulk triage| Haiku[H

    style Opus fill:#ffd9b3,stroke:#c60,stroke-width:2px
    style Sonnet fill:#d9e6ff,stroke:#06c,stroke-width:2px
    style Haiku fill:#e6ffd9,stroke:#090,stroke-width:2px
```

---

## D4. Chapter 4 Diagram: Why Structured Blocks Beat Prose Prompts

The contrast between prose and structured prompting.

```
flowchart TB
    subgraph Prose[Prose Prompt]
        P1[Conversational opener]
        P2[Context scattered]
        P3[Task buried in middle]
        P4[Rules in a P.S.]
        P5[Format implicit]
        P1 --> P2 --> P3 --> P4 --> P5
    end

    subgraph Structured[Structured Block Prompt]
        S1[ROLE: explicit]
        S2[CONTEXT: labeled]
        S3[TASK: one sentence]
        S4[CONSTRAINTS: hard rules]
        S5[FORMAT: exact shape]
        S6[REFERENCE: labeled inputs]
        S1 --> S2 --> S3 --> S4 --> S5 --> S6
    end

    Prose -.Produces.-> Result1[Draft you will<br/>need to rewrite]
    Structured -.Produces.-> Result2[Draft you can use]

    style Prose fill:#ffe6e6,stroke:#c00
```

```
style Structured fill:#e6ffe6,stroke:#090
style Result1 fill:#ffcccc,stroke:#900
style Result2 fill:#ccffcc,stroke:#090
```

---

## D5. Chapter 5 Diagram: The Mishak Law Meta Prompt Anatomy

The six blocks in required order with optional blocks marked.

```
flowchart TD
    R[ROLE<br/>Who Claude is<br/>for this task] --> C[CONTEXT<br/>What Claude nee
    C --> T[TASK<br/>The single<br/>deliverable]
    T --> Con[CONSTRAINTS<br/>Hard rules<br/>including house style]
    Con --> F[FORMAT<br/>Exact output shape]
    F --> Ref{REFERENCE<br/>MATERIAL?}
    Ref -->|Optional| Ex{EXAMPLE<br/>OUTPUT?}
    Ref -->|Skip| Ex
    Ex -->|Optional| Run([Run the prompt])
    Ex -->|Skip| Run

    style R fill:#e1f5ff,stroke:#333
    style C fill:#e1f5ff,stroke:#333
    style T fill:#fff4cc,stroke:#333,stroke-width:2px
    style Con fill:#ffd9b3,stroke:#c60,stroke-width:2px
    style F fill:#e1f5ff,stroke:#333
    style Run fill:#ccffcc,stroke:#090,stroke-width:2px
```

---

## D6. Chapter 6 Diagram: Using Claude to Build Your Own Prompts

The meta-prompting iteration loop.

```
flowchart LR
    Need([New task<br/>type needed]) --> Ask[Ask Claude to<br/>write the prompt]
    Ask --> Fill[Fill in matter<br/>specific parts]
    Fill --> Run[Run the prompt]
    Run --> Eval{Output<br/>quality<br/>acceptable?}
    Eval -->|No| Refine[Refine the<br/>structured block]
    Refine --> Run
    Eval -->|Yes| Save[Save to<br/>prompt library]
    Save --> Reuse([Reuse on<br/>next matter])
```

```
style Save fill:#ccffcc,stroke:#090,stroke-width:2px
style Reuse fill:#ccffcc,stroke:#090,stroke-width:2px
```

---

## D7. Chapter 7 Diagram: Projects as Matter Workspaces

The Project as matter file analogy, with hygiene lifecycle.

```
flowchart TB
    Intake([New matter<br/>intake]) --> Create[Create Project<br/>named by conven
    Create --> Instructions[Set Project<br/>instructions<br/>ROLE + CONTEXT + CON
    Instructions --> Upload[Upload core<br/>matter documents]
    Upload --> Work[Run matter<br/>tasks inside<br/>Project]
    Work --> Audit{Quarterly<br/>audit}
    Audit -->|Stale files| Clean[Remove stale<br/>or irrelevant<br/>materials]
    Clean --> Work
    Audit -->|Matter open| Work
    Work --> Close([Matter closes])
    Close --> Export[Export conversations<br/>Download files<br/>to permanent<br/
    Export --> Remove[Remove from<br/>active workspace]

    style Create fill:#e1f5ff,stroke:#333
    style Export fill:#fff4cc,stroke:#333,stroke-width:2px
    style Remove fill:#ccffcc,stroke:#090,stroke-width:2px
```

---

## D8. Chapter 8 Diagram: Artifacts for Drafting

Decision tree for when to create an Artifact.

```
flowchart TD
    Output([Claude output<br/>needed]) --> Paste{Will I paste<br/>this into Word<
    Paste -->|Yes| Artifact[Produce as<br/>Artifact]
    Paste -->|No| Chat{Is this a short<br/>email, phone<br/>answer, or<br/>quick
    Chat -->|Yes| Inline[Keep inline<br/>in chat]
    Chat -->|No. Longer<br/>but not a<br/>document| Artifact

    Artifact --> Long{Over approximately<br/>60 pages?}
    Long -->|Yes| Split[Split into<br/>section Artifacts<br/>stitch in Word]
    Long -->|No| Single[Single Artifact<br/>with version history]

    Single --> Revise[Revise by<br/>referencing Artifact<br/>directly in chat]
```

Split --> Revise

```
style Artifact fill:#e1f5ff,stroke:#333
style Inline fill:#fff4cc,stroke:#333
style Revise fill:#ccffcc,stroke:#090,stroke-width:2px
```

---

## D9. Chapter 9 Diagram: Skills as Codified SOPs

How a Skill's three parts interact with a prompt.

```
flowchart LR
    subgraph Skill[Skill Package]
        Trigger[SKILL.md<br/>frontmatter<br/>trigger description]
        Body[SKILL.md body<br/>instructions]
        Refs[Reference files<br/>forms, templates,<br/>checklists]
    end

    User([User prompt]) --> Claude{Claude reads<br/>prompt}
    Claude --> Check{Does prompt<br/>match any Skill<br/>trigger?}
    Check -->|Yes| Trigger
    Trigger --> Activate[Activate Skill]
    Activate --> Body
    Body --> Execute[Execute using<br/>reference files]
    Refs --> Execute
    Execute --> Output([Output following<br/>SOP every time])
    Check -->|No| Standard[Standard response]

    style Trigger fill:#fff4cc,stroke:#333,stroke-width:2px
    style Output fill:#ccffcc,stroke:#090,stroke-width:2px
```

---

## D10. Chapter 10 Diagram: Connectors and MCP

The connector permissions matrix.

```
flowchart TD
    subgraph Allowed[ALLOWED connectors]
        Cal[Calendar<br/>read and write]
        Email[Email<br/>read first,<br/>write later]
        Files[File storage<br/>scoped folders]
        PMS[Practice management<br/>via MCP<br/>if vendor supports]
    end
    end
```

```

subgraph Prohibited[PROHIBITED connectors]
  IOLTA[IOLTA accounts]
  Trust[Trust accounts]
  Bank[Direct bank feeds<br/>keep in PMS<br/>not Claude]
end

Matter([Active matter<br/>workflow]) --> Allowed
Matter -.Never.-> Prohibited
Allowed --> Quarterly[Quarterly<br/>permissions audit<br/>under G3M]

style Allowed fill:#e6ffe6,stroke:#090,stroke-width:2px
style Prohibited fill:#ffe6e6,stroke:#900,stroke-width:3px
style Quarterly fill:#fff4cc,stroke:#333,stroke-width:2px

```

---

## D11. Chapter 11 Diagram: Memory, PII, and When to Turn It Off

The two option decision for lawyer Memory configuration.

```

flowchart TD
  Start([Lawyer sets up<br/>Memory]) --> Question{Use same account<br/>for pers}
  Question -->|Yes, single account| OptionA[Memory OFF<br/>everywhere<br/><br/>]
  Question -->|No, separate accounts| OptionB[Personal Claude:<br/>Memory ON OK]
  OptionA --> Safe([Defensible])
  OptionB --> Safe

  Start -.Never.-> Mixed[Memory ON<br/>on firm account<br/>with client facts]
  Mixed --> Risk([PII liability<br/>cross matter<br/>drift risk])

  style Mixed fill:#ffcccc,stroke:#900,stroke-width:3px
  style Risk fill:#ffcccc,stroke:#900
  style Safe fill:#ccffcc,stroke:#090,stroke-width:2px

```

---

## D12. Chapter 12 Diagram: Extended Thinking for Legal Analysis

Decision tree for when Extended Thinking earns its keep.

```

flowchart TD
  Task([Task in hand]) --> Close{Close statutory<br/>interpretation?}
  Close -->|Yes| On[Extended Thinking ON]
  Close -->|No| Cross{Cross exam prep<br/>from long<br/>transcript?}

```

```

Cross -->|Yes| On
Cross -->|No| Motion{Pretrial motion<br/>with close facts<br/>MIL, suppress,<
Motion -->|Yes| On
Motion -->|No| Volume{High volume<br/>routine work?}
Volume -->|Yes| Off[Extended Thinking OFF]
Volume -->|No| Default[Default OFF,<br/>turn on if<br/>output feels thin]

style On fill:#e6ffe6,stroke:#090,stroke-width:2px
style Off fill:#fff4cc,stroke:#333
style Default fill:#e1f5ff,stroke:#333

```

---

## D13. Chapter 13 Diagram: Personal Injury Workflow

The four step PI matter arc from intake to demand.

```

flowchart LR
    Intake([Client<br/>intake]) --> Step1[Step 1<br/>Intake Summary<br/><br/>Mode]
    Step1 --> Step2[Step 2<br/>Medical Records<br/>Review<br/><br/>Model: Sonnet<
    Step2 --> Step3[Step 3<br/>Damages Analysis<br/><br/>Model: Opus<br/>Output:
    Step3 --> Step4[Step 4<br/>Demand Letter<br/><br/>Model: Opus<br/>Output: Pre
    Step4 --> Send([Letter to<br/>adjuster])

    style Step3 fill:#ffd9b3,stroke:#c60,stroke-width:2px
    style Step4 fill:#ffd9b3,stroke:#c60,stroke-width:2px
    style Send fill:#ccffcc,stroke:#090,stroke-width:2px

```

---

## D14. Chapter 14 Diagram: Criminal Defense Workflow

The three step OVI suppression workflow with VERIFY discipline.

```

flowchart TD
    Discovery([Discovery<br/>received]) --> Step1[Step 1<br/>Discovery Review<br/
    Step1 --> Verify1{VERIFY flags<br/>present?}
    Verify1 -->|Yes| Citator1[Run through<br/>Casetext or<br/>Westlaw<br/>two sou
    Citator1 --> Step2
    Verify1 -->|No| Step2[Step 2<br/>Motion to<br/>Suppress Draft<br/>Output: Art
    Step2 --> Citator2[Two source<br/>verification<br/>of every cite]
    Citator2 --> File[File motion]
    File --> Step3[Step 3<br/>Hearing Prep<br/>Output: Cross<br/>outline, exhibit
    Step3 --> Hearing([Suppression<br/>hearing])

```

```

style Verify1 fill:#fff4cc,stroke:#333,stroke-width:2px
style Citator1 fill:#ffd9b3,stroke:#c60,stroke-width:2px
style Citator2 fill:#ffd9b3,stroke:#c60,stroke-width:2px
style Hearing fill:#ccffcc,stroke:#090,stroke-width:2px

```

---

## D15. Chapter 15 Diagram: Domestic Relations Workflow

The five step DR matter arc with five pillar framework.

```

flowchart TB
    File([Complaint<br/>filed]) --> Step1[Step 1<br/>Matter Strategy<br/>Memo]
    Step1 --> Pillars[Five Pillar Analysis]
    Pillars --> G[Grounds]
    Pillars --> P[Property<br/>R.C. 3105.171]
    Pillars --> S[Spousal Support<br/>R.C. 3105.18]
    Pillars --> PR[Parental Rights<br/>R.C. 3109.04]
    Pillars --> CS[Child Support<br/>R.C. 3119]
    G --> Step2[Step 2<br/>Affidavit 1<br/>via Skill]
    P --> Step2
    S --> Step2
    PR --> Step2
    CS --> Step2
    Step2 --> Step3[Step 3<br/>Discovery<br/>Requests]
    Step3 --> Step4[Step 4<br/>Settlement<br/>Memorandum]
    Step4 --> Step5[Step 5<br/>Decree of<br/>Divorce<br/>Opus + Extended<br/>Thin]
    Step5 --> Decree([Final<br/>Decree])

    style Pillars fill:#fff4cc,stroke:#333,stroke-width:2px
    style Step5 fill:#ffd9b3,stroke:#c60,stroke-width:2px
    style Decree fill:#ccffcc,stroke:#090,stroke-width:2px

```

---

## D16. Chapter 16 Diagram: Cowork for Legal Research Projects

Decision tree for Cowork appropriate use.

```

flowchart TD
    Research([Research<br/>question]) --> Type{What kind?}
    Type -->|Primary authority<br/>for active matter,<br/>case law,<br/>citator r|
    Type -->|Practice area scoping,<br/>competitive analysis,<br/>pending legisla|
    Cowork --> Constrain[Constrain to<br/>official sources]
    Constrain --> Flag[Require VERIFY<br/>flags on<br/>single source<br/>claims]

```

```
Flag --> Output([Research memo<br/>with sources<br/>in appendix])
```

```
style Legal fill:#ffcccc,stroke:#900,stroke-width:3px
style Output fill:#ccffcc,stroke:#090,stroke-width:2px
```

---

## D17. Chapter 17 Diagram: Claude Code for Firm Developers

Path from repetitive task to automated tool.

```
flowchart LR
    Task([Repetitive<br/>task, 15 to 30<br/>minutes weekly]) --> Spec[Write one p
    Spec --> Code[Run Claude Code<br/>in terminal]
    Code --> Build[Build iteratively:<br/>spec revision<br/>each round]
    Build --> Test{Works as<br/>specified?}
    Test -->|No| Build
    Test -->|Yes| Deploy[Deploy and<br/>retire manual<br/>workflow]
    Deploy --> Savings([Hours reclaimed<br/>weekly])

    style Task fill:#fff4cc,stroke:#333
    style Savings fill:#ccffcc,stroke:#090,stroke-width:2px
```

---

## D18. Chapter 18 Diagram: When Claude Gets It Wrong

The four failure modes and response protocol.

```
flowchart TB
    subgraph Modes[Four Failure Modes]
        F1[Fabricated citation]
        F2[Wrong jurisdiction<br/>authority]
        F3[Plausible factual<br/>drift]
        F4[Confident<br/>oversimplification]
    end

    subgraph Defenses[Defenses]
        D1[Two source<br/>verification]
        D2[Citator check]
        D3[Read output<br/>against source]
        D4[Prompt for<br/>alternative<br/>readings]
    end

    F1 --> D1
```

F2 --> D2

F3 --> D3

F4 --> D4

```
Detect([Error detected]) --> Stop[1. Stop<br/>no more filings]
Stop --> Assess[2. Assess scope<br/>filed? served?<br/>client only?]
Assess --> Correct[3. Correct<br/>the record]
Correct --> Notify[4. Notify<br/>court, opposing,<br/>client per RPC 3.3]
Notify --> Document[5. Document<br/>under G3M<br/>Measurement]
Document --> Review[6. Review the<br/>prompt. Tighten<br/>CONSTRAINTS.]
```

```
style Detect fill:#ffcccc,stroke:#900,stroke-width:3px
```

```
style Review fill:#ccffcc,stroke:#090,stroke-width:2px
```

---

## D19. Chapter 19 Diagram: ABA Formal Opinion 512 and Ohio RPC Mapping

The six duties, mapped.

flowchart LR

```
ABA([ABA Formal<br/>Opinion 512]) --> D1[Competence<br/>RPC 1.1]
```

```
ABA --> D2[Confidentiality<br/>RPC 1.6]
```

```
ABA --> D3[Communication<br/>RPC 1.4]
```

```
ABA --> D4[Candor<br/>RPC 3.3]
```

```
ABA --> D5[Supervision<br/>RPC 5.1 / 5.3]
```

```
ABA --> D6[Fees<br/>RPC 1.5]
```

```
D1 -.Translates to.-> O1[Understand<br/>failure modes<br/>see Ch. 18]
```

```
D2 -.Translates to.-> O2[Training toggle<br/>see D0]
```

```
D3 -.Translates to.-> O3[Engagement<br/>letter disclosure]
```

```
D4 -.Translates to.-> O4[Two source cite<br/>verification]
```

```
D5 -.Translates to.-> O5[Supervise output<br/>like staff work]
```

```
D6 -.Translates to.-> O6[Do not bill<br/>hours not worked]
```

```
style D2 fill:#ffd9b3,stroke:#c60,stroke-width:2px
```

```
style D4 fill:#ffd9b3,stroke:#c60,stroke-width:2px
```

```
style D6 fill:#ffd9b3,stroke:#c60,stroke-width:2px
```

---

## D20. Chapter 20 Diagram: The LegalTek.ai Framework Stack

The four frameworks, stacked.

```

flowchart TB
    subgraph Task[Task Level]
        COUNSEL[COUNSEL<br/>Classify. Own confidentiality.<br/>Use right tool. Na]
    end

    subgraph Output[Output Level]
        OVRST[OVRST<br/>Originator. Verification.<br/>Reference confirmation.<br/>]
    end

    subgraph Firm[Firm Level]
        G3M[G3M<br/>Governance. Guardrails.<br/>Growth. Measurement.]
    end

    subgraph Rollout[Rollout Level]
        ADAPT[ADAPT<br/>Assess. Design.<br/>Adopt. Prove.<br/>Transition.]
    end

    Task --> Output
    Output --> Firm
    Rollout --> Firm

    style COUNSEL fill:#elf5ff,stroke:#333,stroke-width:2px
    style OVRST fill:#fff4cc,stroke:#333,stroke-width:2px
    style G3M fill:#ffd9b3,stroke:#c60,stroke-width:2px
    style ADAPT fill:#e6ffe6,stroke:#090,stroke-width:2px

```

## The Stack in One View

```

flowchart LR
    Lawyer([Lawyer]) -->|runs| COUNSEL[COUNSEL<br/>per task]
    COUNSEL -->|produces output<br/>subject to| OVRST[OVRST<br/>per output]
    OVRST -->|recorded in| Matter[Matter file]

    Firm([Firm]) -->|governs with| G3M[G3M<br/>institutional]
    Firm -->|adopts tools via| ADAPT[ADAPT<br/>rollout]

    G3M -.sets policy for.-> COUNSEL
    G3M -.audits.-> OVRST
    ADAPT -.promotes to.-> G3M

    style Lawyer fill:#elf5ff,stroke:#333
    style Firm fill:#fff4cc,stroke:#333
    style Matter fill:#ccffcc,stroke:#090,stroke-width:2px

```

---

## How to Use the Diagrams

Each diagram is built to answer a single question about its chapter. If you are stuck on what a chapter is asking you to do, start with the diagram, then read back into the prose for the details. If you are teaching an associate or a paralegal the material, the diagrams will do more work than the chapter text for the first pass. Save the prose for the second pass.

The Training Toggle pictorial (D0) and the Framework Stack diagrams (Chapter 20) are the two most worth printing and keeping at your desk. The former because it is the single ethics decision that cannot be undone. The latter because the four frameworks work together only when they are seen together.

*End of Appendix D.*

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## A Closing Word

You made it to the end. Thank you.

Here is what I want you to take away. Claude is not a miracle. It will not make you a better lawyer than you already are. What it will do, if you use it well, is give you back hours in your week that you currently spend on the parts of the job that do not require your judgment. Those hours belong to your clients, your cases, your family, or you. They are yours. The reason I built LegalTek.ai and the reason I wrote this guide is to help you reclaim them.

Start small. Pick one workflow. Run one prompt this week. Measure the time. Then pick another. Six months from now you will look up and realize your practice has changed, not because you became a technologist, but because you kept doing the thing you already know how to do, the practice of law, with better tools beside you.

If this guide helped, tell another lawyer. If it did not, tell me what got in your way. The next revision is always shaped by what readers say, and I read every piece of feedback that comes in.

Good luck on Monday.

*Matthew A. Mishak LegalTek.ai matt@legaltek.ai*

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*Revision 1.0, April 2026.*