

AI Walk-Through Checklist

1. Platform?
2. What is the purpose of this platform?? What can it do?
3. Check Data Use: Is client data re-used or used to train on? Remember: these products view YOU as the client- not your client.
4. Review Security: Look for encryption and access controls.

Best Practices Checklist (Review this and add to it regularly)

1. Perform your walk-through
2. Neutralize data by removing any identifiable data.
3. Never include confidential information or proprietary information.
4. Create a Retrieval Automated Generation (RAG) to create a “closed data set” for LLMs training a client facing tool.
5. Stop, Look & Listen

PCRO Model

1. Persona: Personality, Tone, Expertise
2. Context: Background information, details of problem, and other specific factual information.
3. Request: Clear, specific, series of actions.
4. Outcome & Output

Tools Discussed in Class

- General Generative AI tools
 - ChatGPT by OpenAI
 - CoPilot by Microsoft
 - Claude by Anthropic
 - Gemini by Google
 - Grok by X (formerly known as Twitter)
 - Perplexity
- Lease Review, Summarization, Drafting (Remember unauthorized practice of law warning)
 - Juro
 - Kira
 - LegalOn
- Search Engine
 - Perplexity (Browser name is Comet)
- Translation
 - MaestraAI
 - Wordly
 - XL8
- Chatbot
 - Zendesk