COURSE SYLLABUS

AI for Legal Professionals

Create a personalized Claude workflow that helps you draft, analyze, summarize, and manage legal work with greater efficiency, without ever losing sight of attorney review and professional responsibility.

For more information, visit
https://www.creativelive.com/classes/ai-for-legal-professionals



Course Outline

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Module 1: Getting Started with Claude AI

- Explain how Claude works in plain language and identify the model tiers, plans, and interface
- Understand the context window, how Claude processes information, and when to start new conversations
- Practice your first Claude conversation using a legal-specific prompt
- Identify what Claude does well, what it doesn't, and when human judgment is essential

Module 2: Prompting Fundamentals

- Apply the five-part prompt framework: context, task, format, constraints, and examples
- Write effective prompts across five use cases: writing, summarization, analysis, research, and creative problem-solving
- Recognize and fix common prompting mistakes that produce vague or unusable output
- Practice prompting with legal scenarios: drafting a contract clause, summarizing a court opinion, and writing a client status update

Module 3: Working with Files & Documents

- Upload and analyze images, PDFs, spreadsheets, and documents directly in Claude
- Use Claude to extract, compare, and summarize information from uploaded files
- Work with legal-specific file types: contracts, court opinions, pleadings, discovery documents, and compliance reports
- Complete a hands-on document analysis exercise using provided legal sample files

Module 4: Projects & Knowledge Bases

- Explain how Projects use custom instructions and knowledge bases to organize ongoing work
- Write effective Project instructions that encode your role, audience, format preferences, and rules
- Upload reference documents and understand how RAG retrieves relevant content
- Create a legal Project for a transaction or litigation matter using provided sample contracts, case summaries, and templates

Module 5: Artifacts, Styles, Memory & Usage Management

- Create reusable deliverables with Artifacts and edit them directly or through conversation
- Build custom Styles that match your professional communication voice
- Configure Memory to retain key context about you and your work across conversations

- Apply usage management techniques to extend your plan value

Module 6: Introduction to Claude Cowork

- Explain what Cowork is and how it differs from the claude.ai chat interface
- Read, write, and manage files from your desktop environment
- Configure guardrails, file permissions, and network settings for safe use
- Understand prompt injection risks and how to protect against them

Module 7: Advanced Prompting & AI Tool Selection

- Use role-based prompting, chain-of-thought reasoning, and multi-step workflows
- Apply Extended Thinking, web search, and the You Ask Me technique for complex tasks
- Compare Claude with ChatGPT, Copilot, and Gemini to choose the right tool for each task
- Practice advanced prompting with legal scenarios: identifying risks in a contract, building a legal research memorandum step by step, and preparing deposition questions from witness statements

Module 8: Context System, Connectors & Integrations

- Build foundational context files and set Global Instructions that apply to every Cowork session
- Connect Claude to Slack, Google Drive, Gmail, and other workplace tools
- Use Claude natively in Excel and PowerPoint with the Office add-ins
- Configure your context system and connections for legal workflows, including document comparison in Excel and case presentations in PowerPoint

Module 9: AI for Legal — Core Workflows

- Use Claude to draft, review, and redline contracts with clause-level analysis and risk identification
- Summarize case law, statutes, and regulatory guidance into structured research memoranda
- Prepare brief outlines, motion drafts, and argument frameworks from case materials
- Extract key terms, dates, obligations, and parties from large document sets for review and analysis
- Complete a hands-on lab producing a multi-document legal work product package

Module 10: Capstone — Build Your Legal Claude System

- Audit your legal tasks and identify the highest-value opportunities for Claude assistance
- Configure a personalized legal Claude system: Projects, context files, Styles, and connected tools
- Run a complete end-to-end matter preparation workflow: contract review summary, research memo, client communication, and matter status brief
- Create a Week 1 action plan for applying what you've learned to your legal practice