YOUR PRACTICAL 2027 GUIDE

Claude for lawyers

Useful work with Claude, one task at a time.

10	8	3
toolkit picks	copy-ready prompts	starter Skills

Draft a clear client update. Prepare a meeting brief. Build a chronology you can trace to the record. Choose the part of the toolkit that fits the job.

Start with one useful result

- Choose one job from the matrix.
- Open the supplied sample or approved materials.
- Copy the corresponding prompt and replace its bracketed fields.
- Ask for the named finished draft or file.
- Edit the output for its intended use; keep decisions and external use with the responsible person.

Draft a client-status email
Prompt 01 + supplied sample

Prepare a one-page meeting brief
Prompt 02 + supplied sample

Build a source-linked chronology
Prompt 03 + supplied sample

Create an asset or document inventory
Prompt 04 + supplied sample

Prepare a focused draft-review brief
Prompt 05 + supplied sample

Compare two document versions
Prompt 06 + supplied sample

Preparing for 2027. Documentation checked November 27, 2026. Features and access can vary by plan and firm setup.

All practice material and example outputs are human-authored illustrations using synthetic data, not captured Claude results. Skills are original starting templates, not installed or tested in Claude.

CHOOSE THE CAPABILITY FOR THE JOB

Six ways to put Claude to work

NATIVE CAPABILITIES 01

Claude Docs and uploaded files

Turn approved notes into an editable client update or a referenced document comparison.

Make: Client-status email

Official guide >

NATIVE CONTEXT WORKSPACE 02

Claude Projects

Keep the practice guide, writing preferences and relevant sample packet together.

Make: Matter-specific draft using supplied context

Official guide >

BUILT-IN/CUSTOM INSTRUCTIONS 03

Claude Skills + three AlphaForge Skills

Repeat a client update, chronology or passage-specific review without rebuilding the procedure.

Make: Reusable draft method and consistent output shape

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MULTISTEP WORK SURFACE 04

Claude Cowork

Build a chronology, document list and briefing from a selected sample packet.

Make: Separate review files and concise briefing

Official guide >

NATIVE SOURCE FINDING 05

Claude Research and web search

Find current official sources and assemble a dated source table for lawyer review.

Make: Linked source brief

Official guide >

PACKAGED SKILLS/COMMANDS/INTEGRATIONS 06

Anthropic Legal plugin

Apply a configured firm playbook to contract or NDA review.

Make: Issue flags and proposed changes for counsel

Official guide >

These are features, reusable instructions and packaged tools - not six separate software subscriptions.

USE THE SOFTWARE YOUR FIRM ALREADY KNOWS

Four named connection options

Skills give Claude a method. Connectors bring in tools and sources. MCP is one standard these connections use. Microsoft and Google are alternatives; a firm does not need every item.

DIRECT CLAUDE INTEGRATION 07

Microsoft 365 connector

Find the relevant Outlook thread and SharePoint/OneDrive draft for meeting preparation.

Make: One-page meeting brief or draft reply

Microsoft account/license; work accounts need Entra administrator consent, and organization owner enablement applies. Distinct from Word/Excel add-ins.

Official setup > / More details >

DIRECT CLAUDE INTEGRATIONS 08

Google Drive and Gmail connectors

Bring an approved Drive template and relevant Gmail thread into an update draft.

Make: Context-grounded draft update

Connect intended account; organization owner enablement can apply. Drive retrieval is distinct from live Docs/Sheets/Slides editing connectors.

Official setup >

PARTNER REMOTE MCP ROUTE 09

Clio Work connector

Use licensed Clio Work research or document review in a Claude drafting task.

Make: Cited review result for a memo

Requires licensed Clio Work account and Clio Identity sign-in. Manage/Grow records need those products/connections. Endpoint https://mcp.api.clio.com/mcp.

Official setup > / More details >

PARTNER REMOTE MCP ROUTE 10

NetDocuments connector

Find a prior precedent and retrieve its text for a first-pass memo or comparison.

Make: Referenced precedent-based draft

Existing repository/account, sign-in and organizational permission. Choose correct region. US endpoint https://web-api.us.netdocuments.app/connect/mcp; documented search/fetch, not universal write access.

Official setup >

CLIENT COMMUNICATION

A clear update and a useful meeting brief

PROMPT 01

Draft a client-status email

> Turn the notes below into a concise client-status email. Use only the supplied facts. Give a subject line and a warm, plain-English draft under 180 words. Explain what happened, what happens next and whether the client needs to do anything. Preserve dates and uncertainty. Don't add legal advice, promises, deadlines or facts that aren't in the notes. Put missing details in a separate internal note after the email. Do not send it.
>
> Audience: [client type]
> Tone: [our preferred tone]
> Notes: [approved notes or the fictional sample]

Practice input: fixtures/CLIENT-STATUS-NOTES.txt

ILLUSTRATIVE EXCERPT

Subject: Update on your draft inventory

We have prepared the draft inventory for attorney review. Please send the current bank statement so we can check that entry. We will contact you about scheduling once the review is complete.

Internal note: Confirm approved document-delivery instructions before sending.

PROMPT 02

Prepare a one-page meeting brief

> Use the attached agenda and approved notes to prepare a one-page meeting brief. Include: purpose, facts we already know with file references, decisions to discuss, five prioritized questions, and missing materials. Tailor it to [meeting purpose]. Separate supplied facts from your suggested questions. Don't invent what another person thinks or agreed to. Finish with a simple notes area for the meeting.

Practice input: fixtures/MEETING-PACKET.txt

ILLUSTRATIVE EXCERPT

Purpose: clarify what document arrived.
Known: incoming note says original; staff log says copy.
Discussion: what did the office physically receive?
Materials: incoming note, staff log, physical file.
Meeting notes: [blank].

MAKE THE RECORD EASIER TO INSPECT

Chronologies and document inventories

PROMPT 03

Build a source-linked chronology

> Build a chronology from these files. Use columns: date exactly as stated, event, source filename, page or section, short supporting quote, and uncertainty. Keep undated events separate. If sources conflict, retain both accounts and flag the conflict. Don't infer missing dates or resolve facts by guessing. Then list the three most important questions the chronology leaves open. Create an editable table; if file creation is available, also provide an XLSX copy.

Practice input: fixtures/PROBATE-RECORDS.txt

ILLUSTRATIVE EXCERPT

April 4, year not stated | form of document disputed | PROBATE-RECORDS p1/p2 | original versus copy | unresolved; confirm physical document.

PROMPT 04

Create an asset or document inventory

> Extract the requested fields from the supplied synthetic packet into an editable spreadsheet. Fields: item description, document type, date as printed, institution or issuer if stated, source filename, source page, and missing or conflicting information. Use 'not stated' rather than filling gaps. Keep an ambiguous item separate instead of merging it with another entry. Preserve the original wording in a source-text column. Don't determine ownership, legal status or asset value.

Practice input: fixtures/ASSET-DOCUMENT-PACKET.txt

ILLUSTRATIVE EXCERPT

Bank statement | October 31, 2026 | Example Bank | source p. 1 | ownership not stated
Tax notice | date not stated | Example County | source p. 2 | ownership not stated

GIVE THE REVIEWER SOMETHING CONCRETE

Review a draft. Compare its versions.

PROMPT 05

Prepare a focused draft-review brief

> Review this draft against the attached firm checklist and instructions.
> Return a table with the exact passage, its location, the relevant checklist item,
> the issue or question, and a proposed revision where useful. Separate clear
> checklist mismatches from questions requiring judgment. Keep the original draft
> unchanged. Finish with a short list of decisions for the reviewer.

Practice input: fixtures/NDA-v2.txt

ILLUSTRATIVE EXCERPT

NDA-v2 §4 | five years | playbook flags duration changes | discuss operating burden with counsel/client | decision blank.

PROMPT 06

Compare two document versions

> Compare these two versions. Show the old text, new text, exact clause/page references
> and neutral description of each substantive change. Put formatting-only changes
> separately. Then draft a short list of client questions using our supplied
> instructions. Don't accept terms or invent a recommended legal position.

Practice input: fixtures/NDA-v1.txt + NDA-v2.txt

ILLUSTRATIVE EXCERPT

§4 | two years to five years
§7 | employees to employees, affiliates, advisers
§9 | return/destroy to routine backup exception
See source excerpts and references in EXPECTED-CHANGE-TABLE.md.

MAKE APPROVED MATERIAL EASIER TO USE

Plain English and useful firm content

PROMPT 07

Explain approved material in plain English

> Rewrite the supplied firm-approved public-facing process handout for prospective clients in plain English. Preserve its conditions and qualifications. Use short paragraphs and clear next steps supported by the source. Do not add legal advice, prices, turnaround times or outcomes. After the public draft, list wording changes for firm review in a separate internal note.
>
> Source: [firm-approved public handout or the fictional practice sample]

Practice input: fixtures/APPROVED-EXPLANATION.txt

ILLUSTRATIVE EXCERPT

Illustration - fictional public handout:
The initial meeting helps the firm understand your goals and whether it can help. Staff send a preparation list. Bring the requested items and your questions. Document preparation and signing are arranged separately if the firm is engaged.

PROMPT 08

Create useful firm Q&A and social drafts

> Use only the supplied firm-approved public-facing process handout. Do not turn private client updates or matter notes into public content. Draft five questions prospective clients might reasonably ask, with concise answers supported by the handout. Label them proposed editorial questions, not measured search rankings. Then draft three short educational social posts from the same public source. Do not invent pricing, legal advice, laws, services, outcomes or policy details. Put any claim needing confirmation in a separate internal review note.
>
> Source: [firm-approved public handout or the fictional practice sample]

Practice input: fixtures/APPROVED-EXPLANATION.txt

ILLUSTRATIVE EXCERPT

Proposed FAQ - fictional public handout:
What is the initial consultation for? It helps the firm understand your goals and whether it can help.
What should I bring? Your questions and the items staff request.
Social draft: Staff send a preparation list before the consultation so you know what information to bring.

WRITE A USEFUL CLIENT UPDATE

From status notes to a draft email

Drafts clear client-status emails from supplied matter notes. Use when preparing a client update, progress email, or next-step message for review.

client-update-writer / SKILL.md

```
---
name: client-update-writer
description: Drafts clear client-status emails from supplied matter notes. Use when preparing a client
update, progress email, or next-step message for review.
---

# Client update writer

Turn supplied notes into a useful client email. Use the requested tone and audience;
otherwise write warmly, directly and in plain English.

Produce:
- A specific subject line.
- A draft normally under 180 words explaining what happened, what comes next,
  and any action requested of the client.
- A separate internal note listing missing facts or wording the reviewer must confirm.

Preserve the distinction between a draft and approved work, requested and confirmed
appointments, reported facts and verified facts. Use only supplied facts; don't add
legal advice, dates, promises or commitments. If essential details are missing,
leave a visible placeholder or ask one concise question. Keep internal notes out
of the client email. Produce a draft only; do not send messages.
```

Try this activation

Use client-update-writer on CLIENT-STATUS-NOTES.txt. Give me the client email and separate internal note.

The download contains a separate Skill ZIP and its editable source. Use the current custom-Skills uploader for your account; setup steps are on page 11.

MAKE THE SEQUENCE VISIBLE

A chronology with a route back to the source

Builds source-linked chronologies from supplied matter records. Use when arranging events from documents, correspondence, testimony, or notes into a timeline.

matter-chronology-builder / SKILL.md

```
---
name: matter-chronology-builder
description: Builds source-linked chronologies from supplied matter records. Use when arranging
events from documents, correspondence, testimony, or notes into a timeline.
---

# Matter chronology builder

Create a chronology the reviewer can trace back to the record.

Use columns: date as stated; event; source filename; page, paragraph or section;
short supporting quotation; uncertainty or conflict.

Order known dates chronologically and keep undated entries separate. Preserve
different accounts when records conflict. Do not infer a precise date from vague
language or silently choose one account. Identify unreadable or unavailable pages.

After the table, list the important unresolved questions and missing records.
Provide an editable table; create an XLSX only when the capability is available
and the user requests it. Do not calculate legal deadlines or decide legal rights.
```

Try this activation

Use matter-chronology-builder on PROBATE-RECORDS.txt. Produce the chronology and unresolved factual question.

The download contains a separate Skill ZIP and its editable source. Use the current custom-Skills uploader for your account; setup steps are on page 11.

APPLY THE REVIEW METHOD YOU SUPPLY

A passage-specific brief for the reviewer

Produces passage-specific review briefs against a supplied checklist or playbook. Use for a draft review, document-quality review, or checklist comparison requiring a reviewer-ready issue table.

document-review-brief / SKILL.md

```
---
name: document-review-brief
description: Produces passage-specific review briefs against a supplied checklist or playbook. Use for
a draft review, document-quality review, or checklist comparison requiring a reviewer-ready issue table.
---

# Document review brief

Read the document and the supplied review standard. If no standard is supplied,
ask what the reviewer wants checked rather than inventing the firm's legal position.

Return a table with exact passage; location; applicable checklist item; observation
or question; suggested revision when appropriate; decision needed from reviewer.

Separate explicit checklist mismatches from judgment questions. Quote only the
text needed to locate the issue. Preserve source references and mark missing or
unreadable material. Finish with a concise prioritized reviewer summary.

Keep the source document unchanged unless editing is explicitly requested.
Do not describe the document as legally approved, error-free or ready to sign.
Use the supplied standards rather than adding unsupported legal conclusions.
```

Try this activation

Use document-review-brief on NDA-v2.txt against FIRM-REVIEW-PLAYBOOK.md. Give me a reviewer brief, not a rewritten agreement.

The download contains a separate Skill ZIP and its editable source. Use the current custom-Skills uploader for your account; setup steps are on page 11.

SET IT UP ONCE, THEN USE IT DELIBERATELY

Use the kit at your firm

Activate one starter Skill

- Each Skill has its own named folder containing SKILL.md.
- If your account permits custom Skills, enable the required code-execution/file capability and upload the separate Skill ZIP through the current Skills/Plugins surface. Menus vary by rollout.
- Use the activation sentence with the included sample files. Review whether the draft matches the source and requested format.
- These no-code Skills make no network calls and contain no credentials. Installation and actual behavior have not been tested here.

Use the practice packet

Each prompt has a sample input and an illustrative output in the bundle. Start with the sample, inspect the resulting draft, then adapt the prompt to a task your firm has approved.

prompts/
Eight ready-to-copy text files

skills/
Three editable Skill folders and separate import ZIPs

fixtures/
Synthetic notes, document versions and playbook

illustrative-outputs/
Human-written examples of the intended outputs

A COMPACT RESPONSIBLE-USE REFERENCE

Keep the firm in charge

Start with the synthetic practice packet, then use only information and workspaces your firm has approved. Check material facts, dates and source references before the result is used. The responsible lawyer controls legal advice, document approval and external use. A subscription, Skill or MCP listing is not permission to use a matter. Review third-party instructions and software before enabling them. Our three Skills are no-code starting templates; they have not been installed or validated in a firm workflow. Keep client details out of public comments and requests for help.

Choose your first task

Write down the job, the intended output and who will review it. Start with a client update, a meeting brief, a chronology or a document review. Expand after the team sees whether that task helps.

OFFICIAL LINKS AND VERSION NOTES

Keep the toolkit current

Use these official pages to check current capability, access and setup. The guide prepares for 2027 using documentation checked November 27, 2026; it does not promise unannounced releases.

1. Claude Docs and uploaded files >
2. Claude Projects >
3. Claude Skills + three AlphaForge Skills >
4. Claude Cowork >
5. Claude Research and web search >
6. Anthropic Legal plugin >
7. Microsoft 365 connector >
8. Google Drive and Gmail connectors >
9. Clio Work connector >
10. NetDocuments connector >
11. Custom Skill creation >
12. MCP custom connectors >
13. Official legal product overview >

Inside the download

This PDF and its readable HTML edition; eight prompt text files; three separate Skill ZIPs and editable Skill folders; synthetic practice materials; illustrative outputs; the CSV/JSON tool catalog; and the editable kit master.

PRACTICAL AI FROM ALPHAFORGE

Bring us one task your team wants to improve.

Find AlphaForge at alphaforgeusa.com. This kit supplies a practical starting point for discussing which tool to try and how it fits the way your firm works.