



Introduction to CoCounsel

CoCounsel is an AI platform that accelerates critical, time-intensive tasks and produces top-quality work with increased precision, accuracy, and speed, empowering attorneys to provide better representation to clients.

- Enhance thoroughness, accuracy, and effectiveness.
- Expedite an array of legal work from a single, integrated platform. Optimizing workflows and automating tasks drives efficiency and productivity, allowing you to do more with less.
- Perform laborious, time-consuming, and expensive tasks faster than humanly possible. Significantly decrease turnaround times—for example, reviewing 500K documents overnight, rather than in days or weeks—to increase client satisfaction.



Introduction to CoCounsel

Presenter Name, Customer Education Manager



Course Description

This course will cover how to use CoCounsel and the key features, including:

- **Summarize:** Transform lengthy, intricate documents into concise, pertinent summaries.
- **Timeline:** Develop an annotated chronology pinpointing crucial dates and events described in your documents.
- **Document Review:** Conduct meticulous, question-specific inspections of document sets.
- **Contract Policy Compliance:** Quickly identify non-compliant contract language and receive automated redlines to bring the contracts into compliance.
- **Compare Documents:** Pinpoint similarities, differences, and favorability across multiple documents.
- **Search a Database:** Find relevant documents within a large database of your files.
- **Deposition Preparation:** Quickly formulate a structured outline of key topics and questions for depositions or investigative questions of all sorts.
- **Draft:** Draft tailored letters, memos, clauses, statements of facts and other content with speed.

Course Agenda

Agenda

- What is CoCounsel?
- Getting Started
- CoCounsel Skills
- The Library
- Use Cases
- Prompting Tips
- Live Demo
- Questions

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- Getting Started
- CoCounsel Skills
- The Library
- Use Cases
- Prompting Tips
- CoCounsel's Limitations and Biases
- Live Demo
- Questions

Slide 4: What is CoCounsel Core?

CoCounsel Core is the world's first AI legal assistant. It is built using the latest in large language model technology. CoCounsel can read and write at a post-graduate level in every language.

What this means for you is that with CoCounsel, for the first time, you can delegate substantive tasks to A.I. such as searching through large databases of information, summarizing documents, analyzing contracts, and a lot more.



What is CoCounsel?

CoCounsel is a professional-grade AI legal assistant.

- CoCounsel was specifically developed to do legal tasks for attorneys
- CoCounsel is continuously and rigorously tested on common legal use cases.
- New skills are always in development!

CoCounsel is a suite of skills, along with a chat interface.

- To begin, simply start chatting with CoCounsel.

Prompting Best Practices:

- Use *full sentences* that are *specific, precise, and concise*.
- Explore the library that contains pre-set prompts.

A lawyer still must verify and validate all information provided by CoCounsel.

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Slide 5: How is CoCounsel Core different from other generative AI?

By now, everyone has heard the stories about attorneys using ChatGPT to write motions or do legal research, only to discover the cases cited are not real. What makes CoCounsel different from other gen AI tools are the built-in guardrails to prevent those types of hallucinations.

CoCounsel utilizes neural net AI technology to search a dataset of real information (primary law, your documents) to find relevant results, and then the LLM references these retrieved results to answer the question. CoCounsel is not allowed to search the web or make things up from its memory.

All the data you provide when using CoCounsel is encrypted and protected in accordance with Thomson Reuter's comprehensive security program and none of your information or documents are used to train the CoCounsel platform or the underlying large language models. These security measures do not exist with public large language models, where your data enters the pool of information the LLM is able to reference.

How does CoCounsel differ from other AI?



Guardrails for Reliability

Through various, complex, engineering techniques including retrieval augmented generation (RAG), CoCounsel bases its answers on legal authorities, documents, and other verified datasets to prevent “hallucinations” and similar errors.



Trained for the Law

Large language models are powerful, but not dependable on their own for the law. Our attorneys and AI specialists spent months developing and testing a reliable solution.



Private and Secure

CoCounsel accesses multiple large language models through dedicated servers, and user data is never used to train the AI model and is never stored by the underlying large language models.



Slide 6: Thomson Reuters Security & Privacy

Thomson Reuters understands that the security and privacy of your confidential documents is your top priority. With this in mind, TR has implemented a comprehensive information security management framework and a wide range of security policies, standards, and practices. You will access CoCounsel through dedicated servers. If you would like to read the specific details of our security plan, I recommend you access the link to our trust center noted on this slide.

Thomson Reuters Security & Privacy



- **Protecting our customers' information** is at the core of our Information Security strategy. Thomson Reuters maintains its reputation for providing **reliable and trustworthy information** through a comprehensive information security management framework and a wide range of security policies, standards, and practices.
- TR's use of Generative AI is via dedicated API access through Microsoft Azure, Amazon Web Services, and other trusted CSP's
- **Thomson Reuters expressly prohibits any vendor from retaining or using Westlaw or Practical Law customer data to train their Generative AI models.**
- Thomson Reuters policies are closely aligned with **ISO** and **NIST** standards and benchmarked regularly.
- **Overall, Thomson Reuters uses a risk-based approach to assess key applications, technologies, and vendors by performing:**
 - Annual self-assessments
 - ISO audits and risk assessments
 - Internal assessments
 - Application security and vulnerability testing
 - Penetration testing
 - Encryption of data in transit and at rest
- Many of our products also obtain a **SOC 2 Type 2 report annually** which evaluates all TR and application specific security and organizational processes against 3rd party controls for privacy, security, integrity, confidentiality, and availability.
- Additional information is available at <https://www.thomsonreuters.com/en/trust-center.html>

Slide 7: CoCounsel Core 2.0 Foundational Skills

CoCounsel has 8 core skills, tools designed to complete specific discrete legal tasks. These skills assist attorneys with drafting, document analysis, and redlining contracts.

New skills are always in development, and we strive to improve our existing skills based on the customer feedback we receive.

Each of our skills can be prompted.

Additionally, through skill stacking, an attorney has the ability to use the output from one of more skills (like summarize or review documents) as the input for another skill (like the draft skill). Skill stacking allows you to provide CoCounsel with greater context for your prompt.

CoCounsel Core 2.0: Foundational Skills

Drafting Skills	
Prepare for a Deposition	Quickly draft a preliminary outline of topics and questions to use in a witness interview or during cross-examination. Accepts document uploads.
Draft	Create professionally crafted emails or letters based on explicit instructions through natural language. Or draft short documents and outlines. Has the ability to accept document uploads. Note: this skill should not be used to draft legal documents.
Document-Analysis Skills	
Summarize	Summarize long and complicated documents to surface relevant information, includes the ability to request a focused summary on a particular topic through follow up questions.
Timeline	Upload documents and receive an annotated chronology of key dates and events. Ability to focus on specific aspects of a narrative.
Search a Database	Synthesize information in database that addresses a particular topic or answers a particular question. This skill does not provide an exhaustive <u>list</u> , <u>but</u> rather provides you with the most relevant documents.
Review Documents	Perform a thorough, word-by-word review of a set of documents to answer a set of questions, output includes footnoted responses and highlights the relevant text. Use this skill when you want an exhaustive list.
Compare Documents	Find the differences and similarities between two or more documents. Includes the ability to focus on <u>particular topics</u> to identify and extract information you need.
Transactional Skill	
Contract Policy Compliance	Determine whether a set of contracts comply with specific policies or guidelines.

Slide 8: CoCounsel Core 2.0 Parameters for the Skills

On this slide, you can find the input and/or output parameters for each of our 8 core skills.

CoCounsel Core 2.0: Parameters for the Skills

General	File Limits: 500 MB PDFs, 20 MB text files	
Drafting Skills		
Prepare for a Deposition	Input: up to 200 pages	
Draft	Input: up to 100 pages	
Document-Analysis Skills		
Summarize	Input: up to 200 files	
Timeline	Input: up to 200 files	
Search a Database	Total DB storage: 100 GBs Input: 200 files per upload	Output: Up to 225 documents ranked by relevance
Review Documents	Input: up to 200 files	Prompts: up to 30 questions
Compare Documents	Input: 200 files	
Transactional Skill		
Contract Policy Compliance	Input: 200 documents	Prompts: unlimited policies but we recommend 30 or fewer

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Slide 9: The Library

Thomson Reuters™

The Library

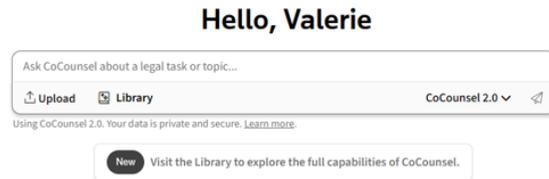
- Prompts
- Skills
- Workflows

Slide 10: Overview of the Library

The library consists of skills, prompts, and workflows. You can find the library tab directly in the chat box.

Overview of the Library

- The Library presents a new way of interacting with [CoCounsel](#), allowing users to launch **skills**, **pre-set prompts**, and **workflows**.
- It will be accessible from the "Library" tab on the [CoCounsel Core](#) home screen.



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Slide 11: Accessing the Library

There are multiple ways that you can leverage the tool bar and the filters to have the best user experience with the library. Use the tool bar to type in a word or words to find prompts, skills, or workflows that contain those words in the library. Additionally, you can filter by (1) type (prompt, skill, or workflow), (2) broad practice area, (3) narrow practice areas, (4) category of skills, and (5) favorites.

Tip: If you are looking for a list of the skills, filter by the category of skills and select all skills, but research. This will give you a complete list of our non-research skills.

Accessing the Library

-Search by keyword in the search bar.

-Filter by:

- Type (Prompt, skill, or workflow)
- Practice area
- Category of skills (Draft, Research, Review, Summarize)
- Tags (Prompts by Practice Area)
- Favorites (Starred prompts)

Library

Search library Showing 214 results Sort by: Alphabetical

Filters Favorites

Practice Area

Litigation

Transactional

General

Tags

Select

Category

Select

Type

Select

Accident event timeline
Create a timeline of accident-related events to establish sequence and causation

Acquisition agreement term summary
Summarize material terms of an acquisition agreement relevant to the buyer

Adverse possession deposition questions
Draft 20 deposition questions for a neighbor claiming adverse possession in a property boundary dispute

Affirmative defense brainstorming
Identify potential affirmative defenses based on the allegations in the complaint

AI Jurisdictional Surveys
Get a survey of the law across jurisdictions based on a legal research question

AI-Assisted Research AU
Get relevant answers to legal research questions with links to Westlaw Precision Australia authority

-Sort the results by date or alphabetical order.

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Slide 12: CoCounsel- Created Prompts

You can think about CoCounsel-created prompts as a point and click /fill in the blank method of prompting. Use either the tool bar or the filters to access the prompts related to legal task. Once you click on the box, you will have the ability to fill in necessary facts/and or context and upload the related document(s) for the prompt.

CoCounsel-Created Prompts

- Once a CoCounsel-Created prompt is selected, it auto-populates the CoCounsel chat box.
- From there, the user is able to fill in (or delete) any variables, edit or modify the prompt, and simply plug-and-play. Users are given instructions in the chat box to assist with using the prompt:

Hello, Valerie

Draft a clause for

addressing

Fill out all variables and upload relevant files to continue. Clear Submit

Using CoCounsel 2.0. Your data is private and secure. [Learn more.](#)

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Slide 13: Understanding Feature Types

There are three feature types in the library: skills, prompts, and workflows. A skill is a tool designed to perform a discrete legal task. Behind each skill is a hard-wired algorithm. A prompt is a set of specific instructions to run a specific skill to generate a specific output. A workflow combines the best of both worlds—skills and prompts. A workflow is a multilayered prompt that uses a chain of skills to complete more advanced tasks.

Understanding Feature Types

The Library enables you to filter by skill, prompt, or workflow. Here are the differences between these types of features:

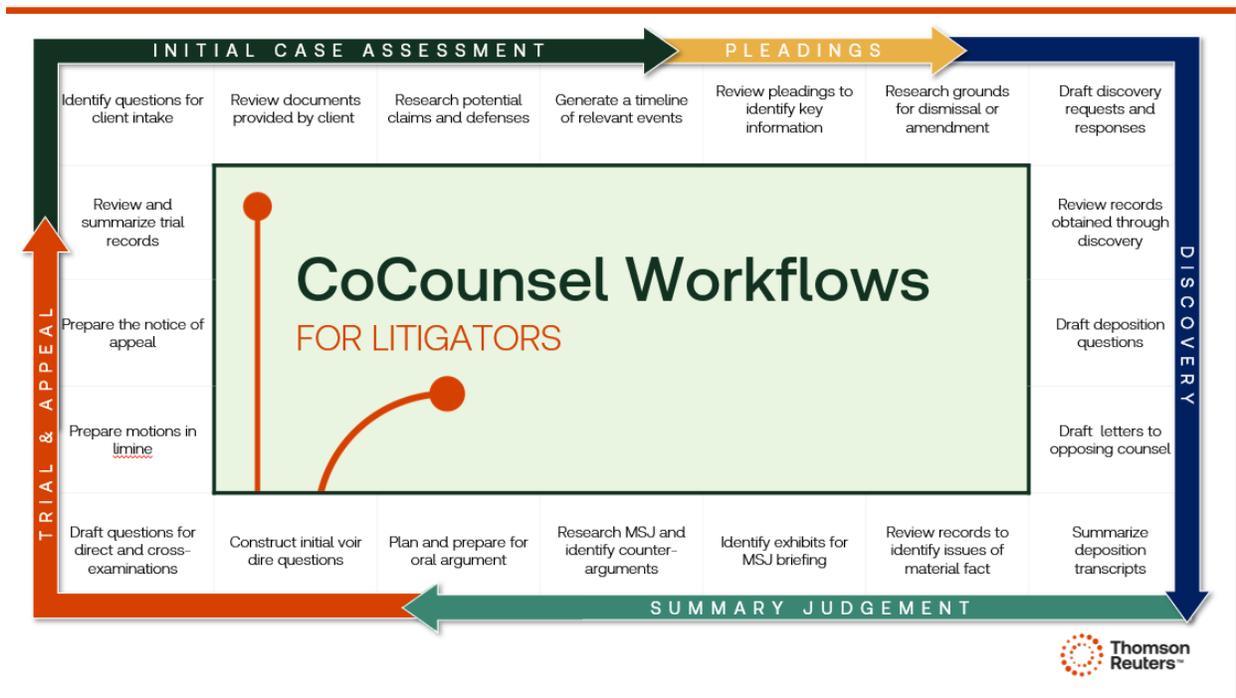


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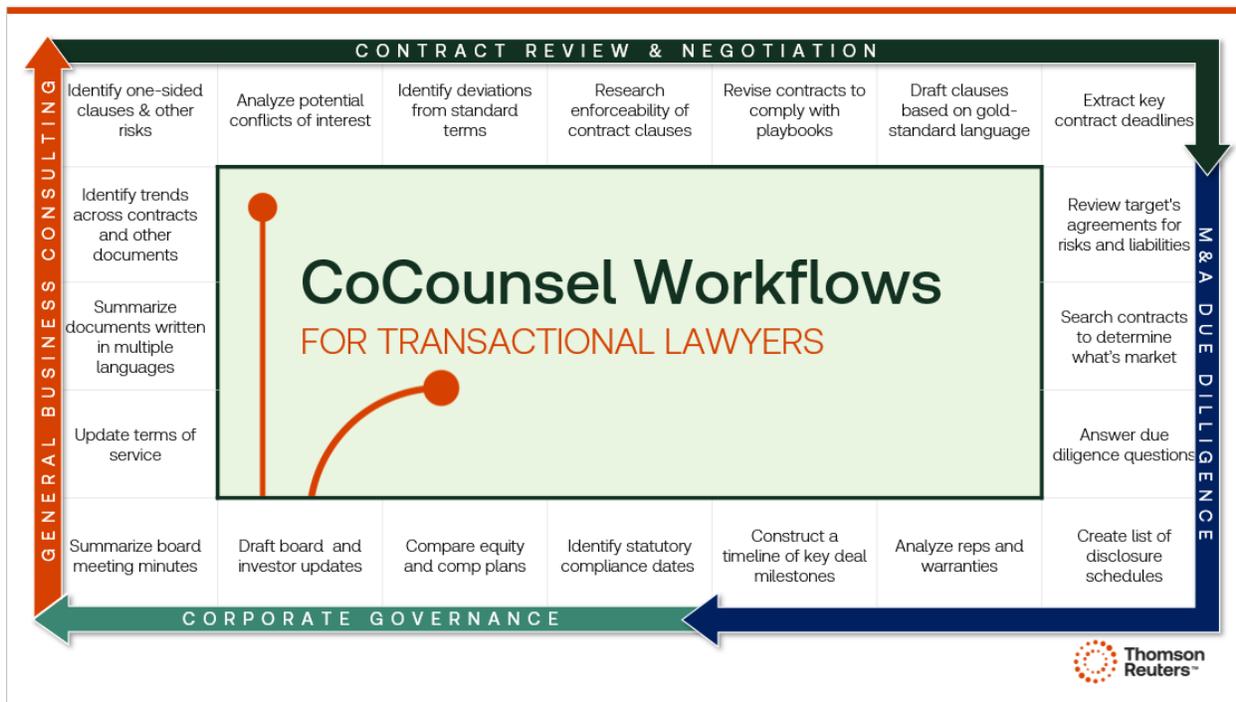
Slide 14: CoCounsel Workflows for Litigators

This monopoly looking board depicts how litigators can leverage CoCounsel throughout the legal process from initial assessment all the way through trial and appeal. There are a variety of use cases that can help litigators become more efficient in their day-to-day practice. During initial assessment, search a database allows you to review large volumes of documents to find a needle in a haystack. Additionally, CoCounsel makes creating and responding to discovery requests a breeze. CoCounsel reduces the amount of time it takes to summarize dense or complex documents and to create general or focused timelines.



Slide 15: CoCounsel Workflows for Transactional Lawyers

This monopoly looking board depicts how transactional lawyers can leverage CoCounsel for contract review & negotiation, and also for M&A due diligence, corporate governance, and business consulting. There are a variety of use cases that can help transactional lawyers become more efficient in their day-to-day practice. Many of our use cases allow attorneys to review large volumes of contracts or agreements to find specific clauses or provisions. Additionally, CoCounsel can compare contracts and amended contracts. Many attorneys use CoCounsel to summarize dense or complex contracts and to obtain timelines of critical dates and deadlines in contracts.



Slide 16: Successful Prompting

When prompting, we encourage you to be specific, precise, and concise. It's best to avoid using vague or ambiguous language, make every word count. If you include vague or ambiguous language, CoCounsel could misinterpret your intent and make assumptions. In addition to making your prompt, specific, precise and concise, it is critically important that you provide sufficient context in your prompt. Context can include providing a persona, a description of uploaded document(s), or a factual background for your case, etc.



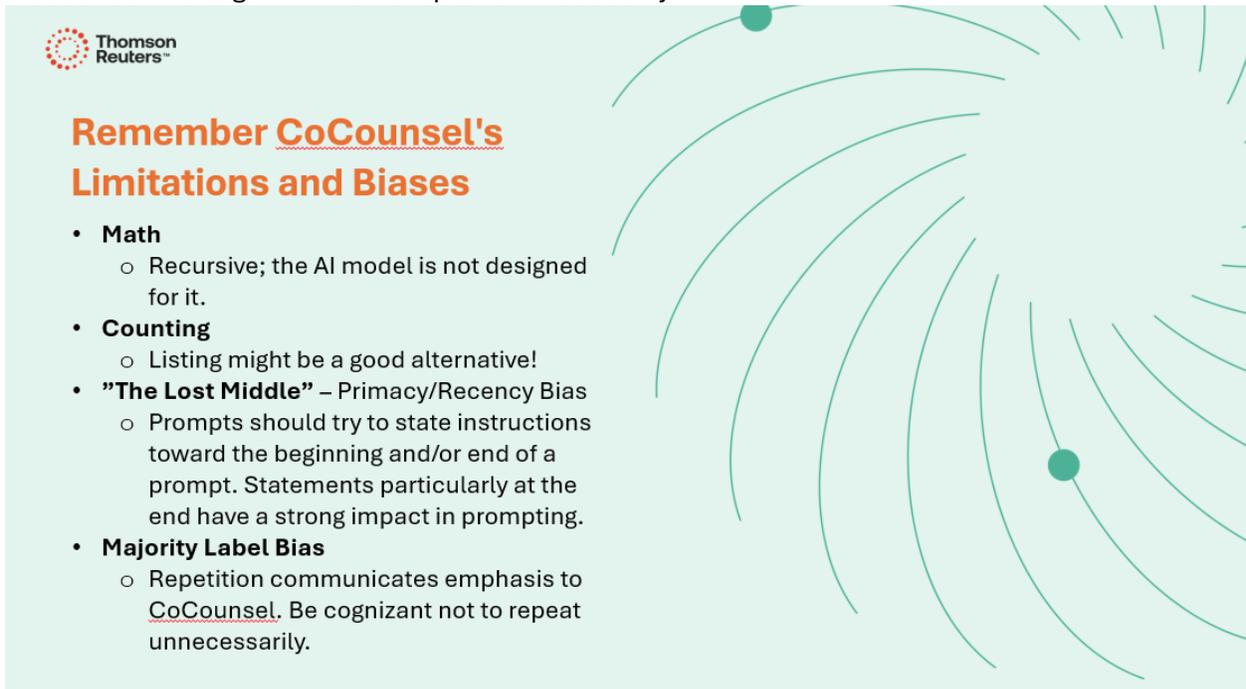
Successful Prompting

- **Be Specific**
 - Be direct and stick to simple, single-clause prompts
- **Be Precise**
 - Avoid ambiguous language, colloquial phrases, and passive voice
 - Avoid extraneous descriptors that can be confusing or misleading
 - Avoid abbreviations and acronyms
- **Be Concise**
 - Keep requests focused and to the point
- **Provide Context**
 - What kind of document(s) are you reviewing?
 - What is the case about?
 - What kind of output are you looking for?



Slide 17: Remember CoCounsel's Limitations and Biases

Math is not CoCounsel's strong suit. As an alternative, you could ask CoCounsel to identify amounts or totals or ask it to create a list. Prompts should try to state instructions toward the beginning and/or end of a prompt. Also, remember that repetition communicates emphasis to CoCounsel. Be cognizant not to repeat unnecessarily.



Remember CoCounsel's Limitations and Biases

- **Math**
 - Recursive; the AI model is not designed for it.
- **Counting**
 - Listing might be a good alternative!
- **"The Lost Middle"** – Primacy/Recency Bias
 - Prompts should try to state instructions toward the beginning and/or end of a prompt. Statements particularly at the end have a strong impact in prompting.
- **Majority Label Bias**
 - Repetition communicates emphasis to CoCounsel. Be cognizant not to repeat unnecessarily.

Live Demo:

Chats

When you start a new task, CoCounsel will organize your work into “chats.” Chats will automatically create a name as you work, but you can edit the name if desired. You can also delete the chat if desired.

Within each chat you can refine your previous output - just tell CoCounsel how!

Best practice - when starting a new task, start a new chat; everything you enter in each chat can affect the output that follows.

1. Summarize

CoCounsel can streamline dense language or legalese into a succinct summary. Summarize any complex document, including contracts, regulations, transcripts, litigation records, anything! Just upload the document or manually input text and CoCounsel will provide a summarized version for you. The Summarize skill can be prompted to provide you with a general summary or a focused summary on a particular topic.

2. Timeline:

CoCounsel can review files to identify events and provide a timeline with citations to the exact page of supporting documents. CoCounsel reads every word of a file to identify events and creates a dynamic list with date and time information, and a short event description.

You get a chronological list of events in the document that you can export.

The Timeline skill can be prompted to provide you with a general timeline or a focused timeline on a particular topic.

3. Review Documents

CoCounsel will perform a word-by-word, line-by-line review of a document or set of documents and answer questions about those documents. This skill is great for reviewing discovery production, litigation records, briefs, or contracts.

These are not keyword searches; instead, CoCounsel uses AI to read every word in your documents, including citations to the pages of your documents where it found the answers. Review documents will provide you with an exhaustive list of relevant information.

Limitations:

- When you ask CoCounsel to review documents, keep in mind it cannot answer questions that require legal research. CoCounsel is programmed to answer questions based on the information provided within the “four corners” of the document.
 - For example, it cannot answer a broad instruction like, “Does this contract comply with California law” because that question cannot be answered by simply reviewing the text of the contract.
- Avoid asking questions that require CoCounsel to perform a mathematical calculation.

4. Draft

Up to this point, everything we discussed involves pointing CoCounsel at documents. But, for drafting you are leveraging the more creative functions of the LLM. Drafting on CoCounsel is a function of the prompt you provide and the training CoCounsel has received.

CoCounsel can also create basic correspondence such as demand letters, engagement letters, deadline extension requests, and other everyday emails and letters. Simply tell CoCounsel what you are trying to accomplish!

Tip: The draft skill takes document uploads. Uploading one or more documents helps to provide a sufficient context for CoCounsel. CoCounsel can rely on these documents to extract relevant facts and details to include in your email, letter, outlines, or short documents.

5. Prepare for a Deposition:

Use CoCounsel to create an initial outline of topics and questions that you can ask a witness in a deposition. Just enter a sentence or two describing an upcoming deposition (or upload document(s)). Briefly describe the type of case and the type of witness at issue using natural language, as if you were describing the deposition to a colleague.

Tip: The Prepare for a Deposition skill takes document uploads. Uploading one or more documents helps to provide a sufficient context for CoCounsel. CoCounsel can rely on these documents to extract relevant facts and details to include in the outline of topics and questions.

6. Contract Policy Compliance:

CoCounsel can determine whether a contract or set of contracts comply with a specific policy.

CoCounsel summarizes its findings in a memo format, identifying the contract clauses that are relevant to the stated policy and explains whether there are any differences between the policy and the clauses. It also explains any risks presented by terms in the contract and proposes edits to the contract to comply with the policy.

Limitations:

- CoCounsel Core will not rewrite an entire contract - it identifies clauses that do not conform to the stated policies and will recommend edits to bring specific clauses into conformance with specific policies.
- Policies must be manually typed into the chat box – pro tip, if you have multiple policies, type a bulleted list in a Word doc, then copy & paste into the chat box.

7. Compare Documents

CoCounsel will also compare multiple documents side-by-side to identify similarities and differences and then will analyze its findings. This skill is great for finding non-compliant language, pinpointing contradictions between documents, and tracking changes in a document over time.

Limitation:

- While you can request a general comparison between or among documents, doing so may cause CoCounsel to focus on unimportant details. To generate more tailored, relevant results, make sure to include specific details in your prompts.
- A comparison will be less detailed if you choose to upload a particularly large number of documents (e.g., a comparison of 100 documents will be far less granular in detail than a comparison of five documents).
- CoCounsel produces Compare Documents results in a predefined table, even if you request another format.

8. Search a Database

CoCounsel will also search through hundreds or thousands of your own documents to find the relevant documents that answer a question or pertain to a specific topic. Search a Database utilizes our proprietary *Parallel* Search to conduct a high-level, conceptual search that searches for concepts, analogous terms, and synonyms. It's great for finding a needle in a haystack, surfacing highly relevant documents within or getting a high-level overview of what's in the database.

Limitation – Search a Database is not a comprehensive search and does not provide an exhaustive list. CoCounsel does not read every word of every document when searching a database.

Pick one or two samples – NOTE you can only ask one question at a time!