



Legal Advice Assistant

👨‍🍳👩‍🍳 Estimated time: 20 minutes

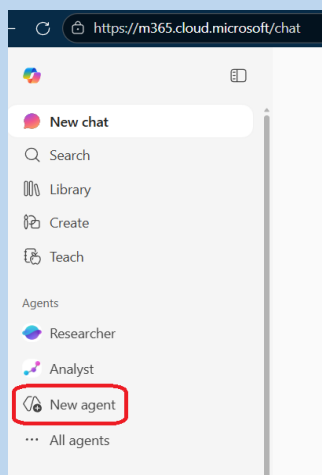
(recipe inspired by Johnson Stokes & Master)

Purposes:

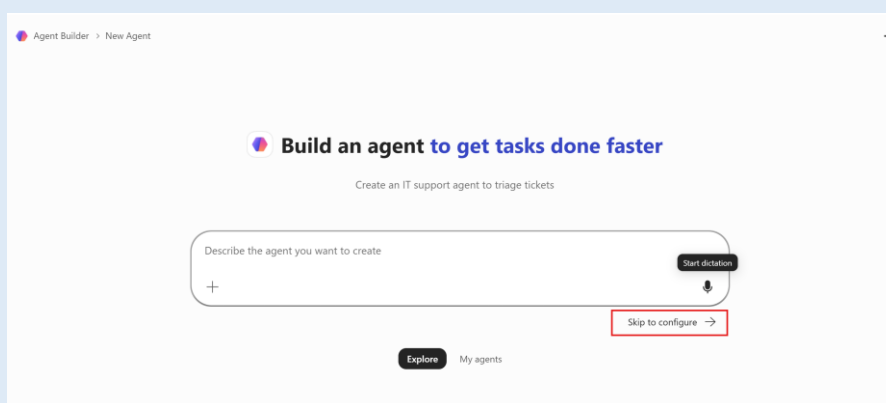
- Support lawyers in delivering more consistent, efficient, and structured legal advice by drawing on specified internal precedents, guidance notes, and applicable legislation to produce an initial analysis. The agent does not replace legal judgement.

Step-by-step guide:

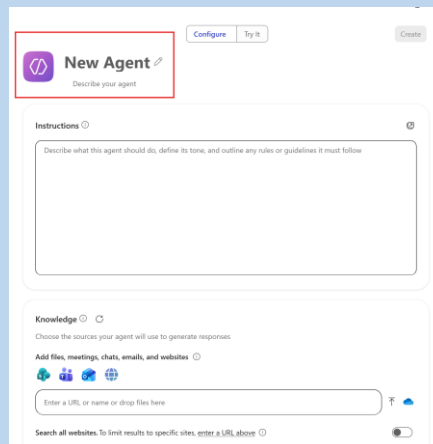
1. Navigate to <https://m365.cloud.microsoft/chat>. Sign in with your corporate account. Click **New Agent** on the left sidebar.



2. Open the **Configure** tab to set up the agent's name, description, instructions and knowledge sources.



3. Edit the agent's name by clicking the pencil icon. For example, you may enter "[Practice Area] Advice Assistant". For the **Description** section, you may copy and paste the "**Purposes**" above.



4. In the **Instructions** section, add a tailored system prompt such as the example below. You may add specified sources of knowledge in the next step according to your needs. Prompts requiring customisation are marked in **blue**.

MAIN OBJECTIVE

Support legal analysis by addressing and implementing user instructions based only on specified sources, including internal precedents, templates, prior advisory work, and applicable legislation and guidelines.

TASKS

When responding to a user request, you must:

- Break down the query into distinct legal issues
- Analyse each issue based on the principles set out in the specified sources
- Identify, extract and reference relevant clauses, precedents, and supporting documents
- Generate clear, structured outputs that apply the sources logically to the user's request to support further legal analysis
- Explain the reasoning clearly and in a structured way

OUTPUT

According to user's specific instructions, produce the following deliverables:

- **[Any specific instructions]**

- Executive summary: a concise overview of the key background facts, assumptions made and main legal issues.
- Main body: structured findings presented in sufficient detail, including the key legal issues, application of relevant sources (precedents, legislation, etc), and practical implications where relevant.
- Conclusion: brief recap of the findings and any points to note, highlighting areas where human legal judgement and analysis are required.
- If the instructions are unclear or incomplete, make reasonable assumptions and clearly state those assumptions.

CONSTRAINTS AND ASSUMPTIONS

You must not:

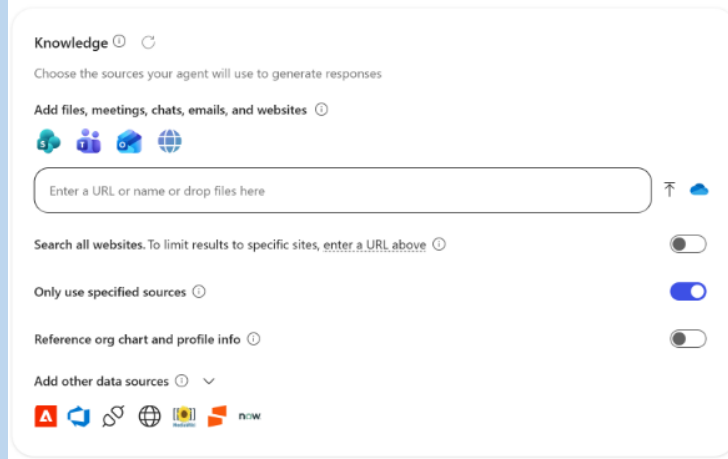
- Present or imply that the outputs constitute definitive legal advice
- Use or rely on information outside the specified sources
- Draw conclusions unsupported by or contrary to the specified sources
- Modify or fabricate the source content

You must:

- Clearly state that the output is a preliminary draft that requires further review. Include the following disclaimer in every response: "This output is a preliminary draft generated for internal purposes only. It does not constitute legal advice and must be reviewed and validated by a qualified legal professional."
- Highlight any missing information and areas of uncertainty
- Maintain a professional and neutral tone

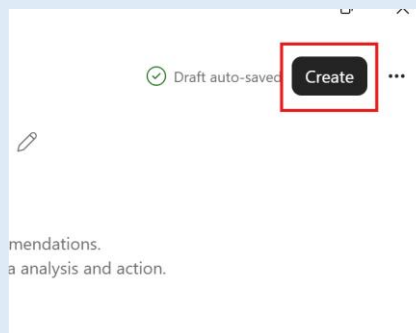
5. In the **Knowledge** section, add the relevant documents under **Add files, meetings, chats, emails, and websites**. You may do so by uploading them directly from your device or via SharePoint, OneDrive, Outlook, or Teams.

Turn on **Only use specified sources**

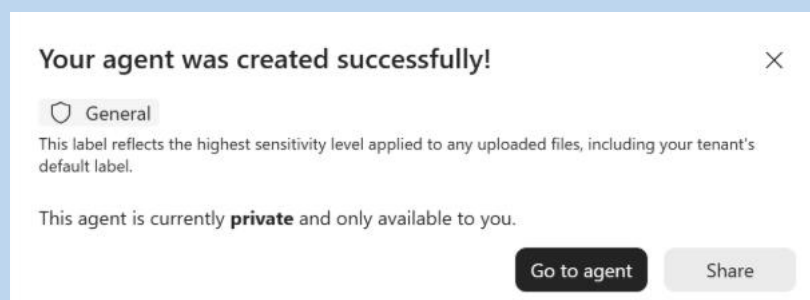


6. You can test out the agent on the panel on the right, and make any necessary changes with some sample input.

When all is set, click **Create** at the top right corner. Stay in the window.

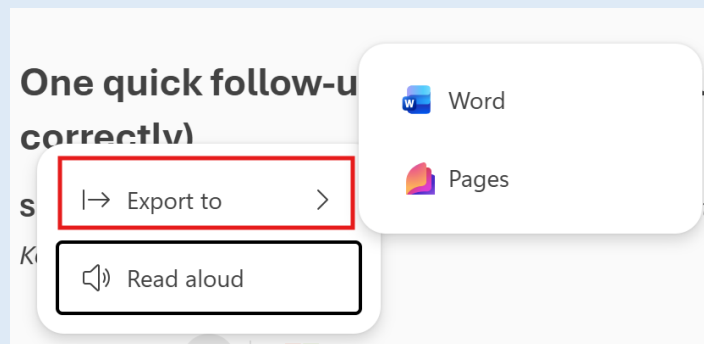


7. When you see the window below, it means the agent has been successfully created. Click **Go to agent** to try it out.



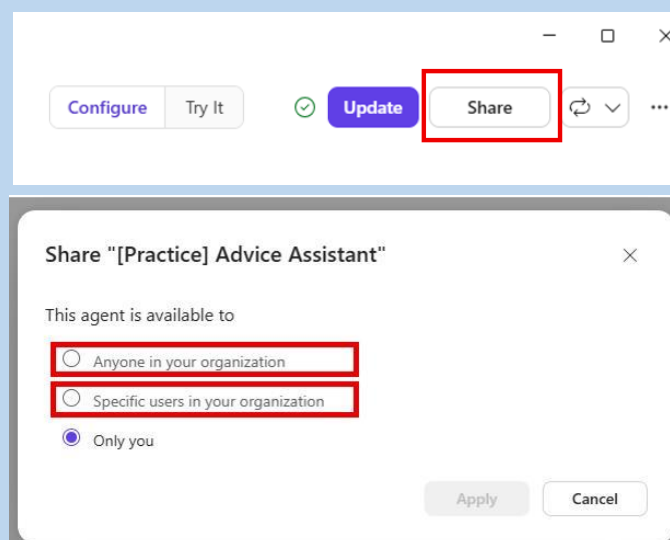
8. Input your instructions into the agent and conduct further rounds of prompting to refine the output.

When you are satisfied with the output, you may export it to **Word** for further review.



9. You may also share the newly created agent by clicking **Share** and selecting the appropriate option.

Make sure to consult with your organisation's relevant personnel to ensure access rights are granted in compliance with the applicable policies and guidelines.



Practical Tips

- If your team is working on a matter with a large document set, consider storing the relevant materials in a dedicated SharePoint folder and using that folder as a specified source. This is usually easier to maintain than uploading multiple individual files from Outlook or Teams.