

Prompting vs. Delegating

Supervising AI without outsourcing lawyer
judgment

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AI

**ASSIST
≠
DECIDE**

AI is not your fifth-year associate

“
Treat it like a first-day associate—with unlimited confidence, no real-world judgment, and no reliable sense of what it does not know.

Speed and convenience make supervision more important, not less.

Prompting preserves judgment; delegating transfers it

PROMPTING

- Defines the task
- Supplies relevant context
- Sets express boundaries
- Preserves uncertainty
- Requires lawyer review

DELEGATING

- Allows AI to frame the problem
- Allows AI to choose material facts
- Asks AI to weigh credibility or risk
- Allows AI to select strategy
- Accepts polish without verification

A coherent narrative is not necessarily a correct one

THE FILE MAY CONTAIN

- Allegations that are not evidence
- Transfers without explanations
- Client memories with missing dates
- Orders that do not align
- Records scattered across systems

THE MODEL MAY

- Infer a bridge that does not exist
- Flatten disputed facts
- Overstate weak evidence
- Mistake confidence for accuracy
- Turn uncertainty into polished prose

The Bounded Prompt Model

01

ROLE

What may AI be?

02

TASK

What discrete work?

03

CONTEXT

What must it know?

04

CONSTRAINTS

What must it not do?

05

OUTPUT

What makes review easy?

06

REVIEW

What must you verify?

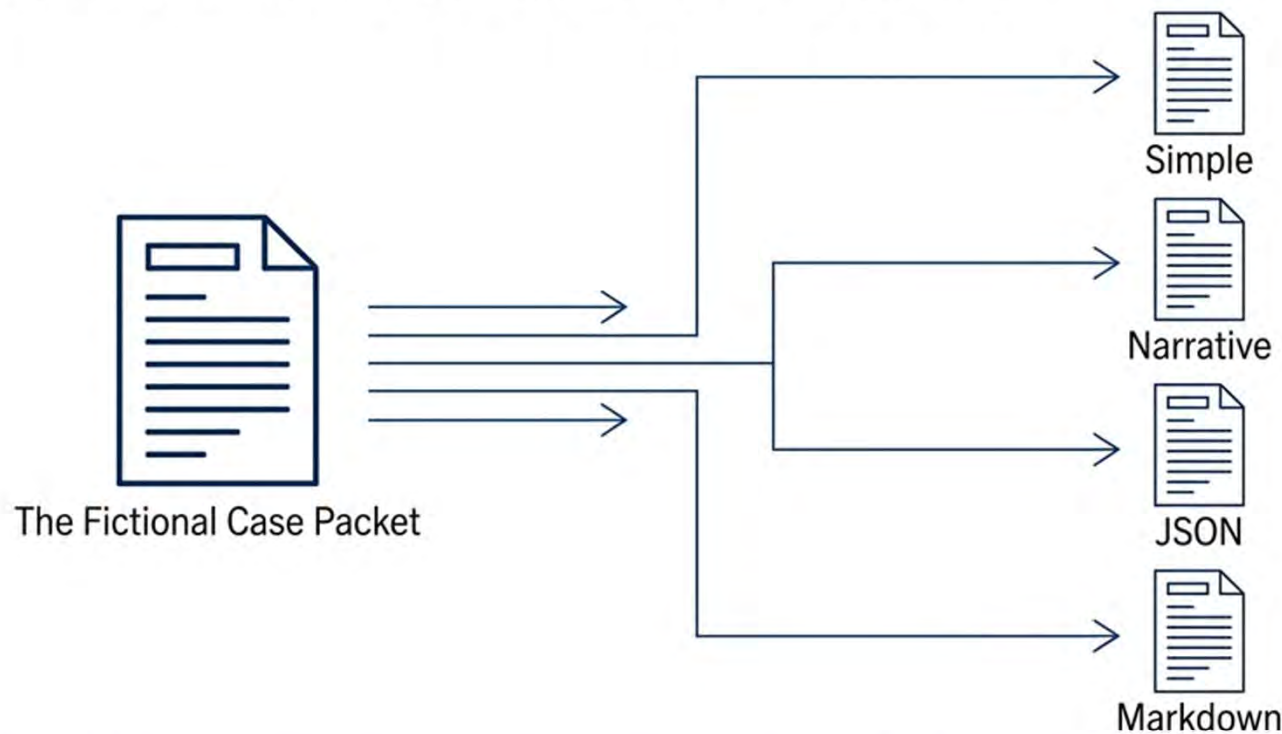
Boundaries keep professional judgment in human hands.

DEMO

Four Prompts – Four Results

- **Simple-** quick sentence goals
- **Narrative** –longer text with more information. “Talking with the LLM”
- **JSON-** lightweight, text-based data format (coding language)
- **Markdown** - lightweight formatting tags—such as headings (#), bold text (**), and bullet points (-) to structure instructions. This clear visual hierarchy helps the AI separate context, constraints, and tasks, reducing misunderstandings and improving output quality

One Case File. Four Distinct Work Products.



- **The Input:** A fictional case packet (High-asset divorce, SAPCR, Asterion business valuation, alleged asset depletion).
- **The Test:** Four completely different prompt structures applied to the exact same text.
- **The Result:** The model did not manufacture four different cases—but it produced four entirely different types of attorney work.

Simple

Review all uploaded files and tell me what this matter is about.

Identify:

The client and other important parties.

What happened.

The current status of the matter.

The most important documents.

The main legal or business issues.

Any deadlines or urgent risks.

Anything missing, inconsistent, or unclear.

What the next attorney should do.

Assume Texas law applies. Do not use external sources. Cite the uploaded files when possible.

Narrative

I am handing you a client matter that another attorney will need to take over. **Act as the senior associate responsible for bringing that attorney fully up to speed.**

Review everything I have uploaded, including emails, client communications, transcripts, contracts, governing documents, pleadings, discovery, court filings, orders, correspondence, financial records, public filings, drafts, and prior work product. **Assume** this is a Texas matter unless the documents clearly indicate otherwise.

Prepare the kind of internal case memo you would give to a partner who needs to understand the matter quickly but also needs enough detail to begin working without having the original attorney explain the background. Start by explaining what the matter is about, who the client is, who the other important parties are, what the client wants, and where the matter currently stands. Then walk through the relevant history in chronological order. Distinguish confirmed facts from client reports, allegations, disputed facts, and matters that remain unclear.

Pay particular attention to the documents. Identify which documents appear signed, final, filed, served, court-entered, operative, superseded, unsigned, incomplete, or merely drafts. If different documents conflict, explain the conflict and identify which document likely controls. Do not assume that a document is effective simply because it appears in the file. Analyze the matter as an experienced Texas business and litigation attorney. Depending on the nature of the matter, address corporate authority, ownership, governance, contract rights, notice requirements, defaults, remedies, claims, defenses, procedural posture, discovery, deadlines, damages, settlement leverage, preservation obligations, insurance, indemnity, limitations, and any other material issues.

Be candid. Tell the next attorney which facts and documents support the client's position and which do not. Identify weak documents, unsupported client assumptions, missing exhibits, inconsistent names or dates, incomplete execution, missing approvals, missing pleadings, missing service records, incomplete discovery, and any other gaps that could affect the analysis.

JSON

```
{  
  "role": {  
    "position": "Senior associate at a Texas law firm",  
    "experience": [  
      "Texas business and corporate law",  
      "Texas contracts",  
      "Texas civil litigation",  
      "Texas arbitration",  
      "Attorney case-file handoffs"  
    ]  
  },  
  "jurisdiction": {  
    "default_law": "Texas",  
    "default_procedure": "Texas",  
    "exception": "Use another jurisdiction only if the reviewed documents clearly establish that  
another jurisdiction applies."  
  }  
}
```

Markdown

#Assignment: Prepare a Texas Case-File Handoff Memo

##Role

###Act as a senior associate in a Texas law firm with experience in:

- Texas business and corporate law.
- Contracts and commercial disputes.
- Entity governance and ownership disputes.
- Texas civil litigation and arbitration.
- Attorney case-file transitions.

##Objective

####Review all uploaded materials and prepare a comprehensive case memo for the partner or attorney taking over the matter.

The four prompts produced four different kinds of attorney work:

Prompt Style	What the Model Primarily Produced	Principal Gain	Principal Risk
Simple	An issue-spotting overview	Fast prioritization and independent identification of salient issues	Omission and limited auditability
Narrative	Senior-associate judgment and strategy	Synthesis, anomaly detection, and practical legal reasoning	Inconsistent coverage and greater dependence on model discretion
JSON	A controlled decision and data framework	Repeatability, traceability, categorization, and downstream reuse	False precision, schema-induced blind spots, and format failure
Markdown	An audit-ready case-handoff package	Comprehensive coverage, document status, workflow, and execution controls	Critical points may be buried, duplicated, or treated as equally important

Assign one discrete task

GREEN-LIGHT VERBS

- Organize
- Identify
- **Compare**
- Categorize
- **Summarize**
- Rewrite

RED-FLAG VERBS

- Decide
- **Recommend** strategy
- Predict outcomes
- Determine credibility
- **Choose** the best argument
- **Tell me what to do**

Choose an output that makes errors visible

STRONG FORMATS

- Chronology
- Comparison chart
- Gap list
- Checklist
- Issue outline
- Evidence matrix

WHY STRUCTURE MATTERS

- Prose can glide over missing facts
- Columns force source attribution
- Categories expose disputes
- Checklists support supervision
- Tables make verification faster

Review is not merely proofreading

VERIFY THE WORK

- Facts and sources
- Dates and chronology
- Applicable law and jurisdiction
- Evidentiary support
- Tone and factual strength

VERIFY THE WORKFLOW

- Confidentiality compliance
- Approved tool and matter limits
- Court-specific AI rules
- Strategic consequences
- Final lawyer judgment

Undefined voice creates unintended risk

AUDIENCE CHANGES THE VOICE

- Client: calm, candid, practical
- Opposing counsel: firm, controlled
- Court: credible, restrained
- Mediation: persuasive, flexible

“PROFESSIONAL” IS NOT ENOUGH

- State the audience
- State the objective
- Define what not to promise
- Define what not to concede
- Set the desired level of urgency

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Six boundaries keep professional judgment in human hands.

12 copy and paste AI prompts

1. Create a chronology from these facts for use in a Temporary Orders hearing. Do not infer missing dates.
2. Group these discovery responses by issue.
3. Based on the attached deposition transcript, identify admissions, inconsistencies, and follow-up questions for trial or a subsequent deposition
4. Based on these exhibits and pleadings, Create an outline only. Do not draft argument and do not include client responses. Hearing has a limit of 20 minutes and outline should only go for 15 minutes.
5. Rewrite this email in plain English for a client.
6. Identify factual gaps requiring verification.
7. Separate allegations from documentary evidence.
8. List facts supporting Holley v. Adams best-interest factors without weighing credibility.
9. Identify impeachment opportunities from these exhibits.
10. Convert these notes into a hearing outline.
11. List missing evidence before filing.
12. Create a discovery follow-up list.

AUDIENCE EXERCISE

Activity: AI Delegation Audit

Would you give this assignment to a first-day associate?

ASSIGNMENT

SUGGESTED CLASSIFICATION

Summarize 1,200 text messages

Needs more instructions

Recommend whether emergency relief should be filed

Never delegate

Create a chronology from medical records

Needs more instructions

Draft a client email explaining temporary orders

Needs more instructions

Determine which parent is more credible

Never delegate

Access Materials, Prompts, and Results

<https://sbot.org/AdvFam2026CLE>

