Learn how to create your own custom ChatGPT model to reword client communications, summarize depositions, provide marketing ideas, and more—so you can take your practice to the next level.

Custom AI at Your Fingertips

By || **Michael McCready**

Unless you've been living under a rock, you've heard about artificial intelligence. Learning a new technology can be overwhelming, and you may not be sure where to start. You might even be tempted to take a wait-and-see approach. But AI is no longer the future—it's the present, and you should learn how to use it.

With that being said, AI isn't going to replace trial lawyers. However, trial lawyers who embrace AI's power will outperform those who don't, making their practices more efficient and effective. This isn't about surviving the shift, it's about thriving in it.

Large language models (LLMs) can help answer questions and streamline everyday processes in your firm. The key to optimizing your law practice with one LLM, OpenAI's ChatGPT,[1] lies in creating custom Generative Pre-trained Transformers (GPTs). You can use the free web version of ChatGPT, which taps into trillions of pieces of content, but the real power is in custom GPTs.

A custom GPT is important because it allows you to control the data it searches, and it lets you adjust privacy settings to keep your material confidential. You might have to add some data limitations, such as, "Please reference only statutes and case law in your response," or "Please reference only the uploaded attachments in your response." Without these limitations, the GPT will search its entire LLM, potentially providing responses that don't align with your needs. Setting up a custom GPT is simple, but it's just the beginning of the journey.

First, log in to ChatGPT with a Plus subscription.[2] On the left side of the screen, select "Explore GPTs." Then, select the "+Create" button in the top right corner and follow the instructions.

Next, go to "Settings—Data Controls" and turn off "improve the model for everyone." This ensures your data remains solely within your custom GPT.[3] On the next screen, give your custom GPT a name and description.

In the "Instructions" box, specify the tasks it will perform and how it should do them. Under "Knowledge," upload examples, forms, and other documents that will help the model respond to your queries. After you've completed the setup, you can test your custom GPT.

Try interacting with the GPT by typing questions or commands to see how it responds. If you're not happy with the results, adjust the instructions. For example, if you ask it to give you a

deposition summary, the GPT will likely generate a narrative summary. To get a more useful result, ask the GPT to give you a page-and-line summary of the deposition instead. Once you're satisfied, select "Publish." You now have a custom GPT tailored to your needs.[4]

Crafting Effective Queries

After setting up your GPT, the next skill you must master is determining what to ask the GPT and how to formulate your prompt to get a quality response. Keep in mind one important caveat: Because AI can hallucinate answers, you must double-check all facts, case law, and information you receive from ChatGPT. Crafting effective queries is essential for obtaining accurate, relevant responses. Keep these important guidelines in mind, which were written by ChatGPT itself.[5]

Be specific and clear. Clearly articulate your question or request to avoid ambiguity. Instead of prompting the GPT with "Tell me about negligence," it's more effective to write, "Explain the elements required to establish negligence in a personal injury case in Arizona."

Provide context. Offer background information to help ChatGPT better understand your request by asking questions like, "I'm preparing for a wrongful termination lawsuit in Arizona. Can you outline the key steps involved in filing a claim?"

Set the role or perspective. Direct ChatGPT to respond from a specific viewpoint or expertise. For example, ask, "As a seasoned trial attorney, what strategies would you recommend for cross-examining an expert orthopedic surgeon in a medical malpractice case?"

Use explicit constraints. Specify any limitations or requirements for the response. If you're looking for a response within a certain word limit, you could write, "Summarize the key points of the

Arizona Rules of Civil Procedure related to discovery in 200 words using bullet points."

Encourage step-by-step reasoning. For complex tasks, ask ChatGPT to break down the process, with a query like, "Outline the steps involved in filing a motion for summary judgment in a federal court case."

Iterate and refine. If the initial response isn't satisfactory, provide additional details or rephrase your query. You can refine your question by asking, "Can you provide more details on the evidentiary requirements for proving fraud in a civil lawsuit in Arizona?"

Just as we had to master Boolean searches in law school before Google made it easy with natural language searches, mastering the art of the query is essential.[6] While following these six steps, always double-check every response an LLM generates for accuracy because they can sometimes provide inaccurate results.

Office Policies and Procedures

No matter your firm size, you should have an office handbook and a set of standard operating procedures (SOPs). These can be formal or simply stored in a directory on your firm's shared computer drive.

Upload these documents to a GPT. Allowing it to search your manuals can provide several benefits. First, the GPT can find answers much faster than you could manually reviewing a table of contents, or worse, flipping through miscellaneous documents. For example, ask, "What do I do when a certified letter green card comes back undeliverable?" If you have a policy for that, the GPT will provide a response within seconds, saving you from having to scour your SOPs.

Second, some questions may not have a precise answer, and responses may require information gleaned from

multiple locations. For example, a question like, "What happens if I swear at my supervisor?" may not have a direct answer in your office handbook. However, the GPT will likely provide a response regarding appropriate workplace behavior and disciplinary procedures.

If the GPT does not provide the citation (which it usually does, since most people prefer it), you can ask for the exact citation or location of the information it retrieved. Try asking offbeat questions to see how the GPT interprets them in relation to your data. You'll be amazed at its analysis. Uploading your office handbook[7] or SOPs is a task you can do yourself, right now.

Summarize Depositions

You can also create a GPT to summarize depositions. While some court reporters provide summaries, and certain AI subscription services offer this as well, you can do it yourself. What's more, you can customize your GPT to provide summaries in the way you prefer.

Create a GPT called "Deposition Summarizer." Make sure you've turned off "improve the model for everyone" before uploading any confidential information. Next, upload a transcript and ask the GPT to summarize the deposition.

If you simply request a deposition summary, you'll receive just a summary of the testimony. While that may be helpful if you didn't attend the deposition, I typically prefer a summary with page and line numbers that I can reference for trial.

The best way to train your GPT for this command is to upload prior deposition summaries you've created and ask it to generate a summary in that style. To broaden your understanding of deposition summaries, ask the GPT, "What style summaries do trial lawyers frequently request?"

Here's a response you might receive:
- page-line summaries
- topic-based summaries
- chronological summaries
- issue-based summaries
- key points summaries
- narrative summaries
- abstract summaries
- comparative summaries

Try requesting one or more of these styles for your deposition summaries. I've found this extremely helpful because I hadn't considered other types of summaries before.

Take chronological summaries, for instance. These are useful because they organize information from the deposition in chronological order, which can save you time on administrative tasks.

Finally, always ask the GPT to delete the transcript once you're finished (or delete it manually). You can type "Please delete the uploaded transcript" into the chat box, and the GPT will comply. This ensures the GPT doesn't use information from multiple transcripts across different cases.

Reword Templates

AI can also help you reword what you've written. If you use templates for client communication, you can review them with ChatGPT. By following the guidelines for framing an effective
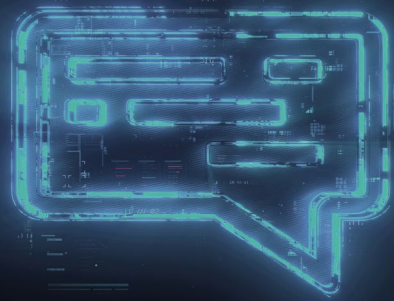
query, you can refine and edit your client communications.

For example, you can write a prompt like, "I am a trial lawyer, and I want to communicate effectively with my clients. Please reword my communication in a style that is professional, friendly, and reassuring, written at a level someone with a high school education can understand."

By framing a query this way, you can generate clear explanations of litigation stages for clients—like answering interrogatories, preparing for

depositions, and attending mediation. If you provide deposition prep materials, think about rewording them to ensure they're accessible to a layperson.

My office has reworded our templates to opposing counsel by instructing ChatGPT to write in a manner that is "civil and respectful, yet clear, firm, and assertive." You can delegate the task of reexamining routine correspondence to your staff, as long as you meet the ethical requirements under the Model Rules of Professional Conduct by approving these communications.

Advertising and Marketing

Consider using a GPT to help create and schedule your social media calendar. Start by creating a marketing GPT and providing details about your practice. Use the query, "Ask me 10 questions

about my professional practice, who I'm trying to reach, and what services I offer, so you understand what I need. I post on Facebook, Instagram, and LinkedIn, and I want to post three times a week on each platform, with a balance of educational, humorous, and promotional posts. Provide your response in a chart with three columns: column one for the platform, column two for the text,[8] and column three for a prompt I can use with DALL-E[9] to create an image for the post."[10]

You can, of course, get much more

creative with the details in the prompt. If you are not happy with one or more of the suggestions, provide feedback to the GPT to refine the results.

AI offers powerful capabilities that you can start using right away. When you get stumped, ask, "What else should I ask that may be relevant?" This approach will help you craft more precise queries, making your process even more efficient. �госьеⓉ

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Crafting effective queries in ChatGPT is essential for obtaining accurate, relevant responses, but be sure to always double-check its responses for accuracy.

Notes

1. This article refers to OpenAI's ChatGPT throughout, but there are other LLMs, such as Anthropic's Claude, Google's Gemini, and Meta's Llama. Just as some prefer Westlaw over Lexis, or vice versa, I encourage you to explore other LLMs. Make sure you know whether the LLM will train on your data before entering confidential information. For further reading on AI, *see* Jonathan H. Lomurro, *AI in Action: Transforming Your Firm's Workday*, 61(3) Trial 30 (Mar. 2025) and Jessica Paluch-Hoerman, *Jumpstart Your AI Journey*, 60(6) Trial 22 (June 2024).

2. Access the login page for ChatGPT here: chatgpt.com/auth/login?sso.

3. Limiting the data used in a custom GPT reduces, but does not eliminate, the possibility of hallucinations. A hallucination occurs when an LLM generates completely fabricated information. Always verify the accuracy of any work an LLM, such as ChatGPT, produces.

4. Explore "Customize ChatGPT" and "Settings."

5. While I wrote most of this article myself and not with AI, I want to fully disclose that these six guidelines come directly from ChatGPT. I include this footnote because regulations and proposals governing AI may require attorneys to disclose any use of AI to generate material, typically images. For example, states like Pennsylvania require attorneys to disclose any use of AI in filings, with further steps mandating lawyers to check each citation for accuracy. Eve, *What You Need to Know: AI Disclosure Rules in Legal Filings*, (Mar. 19, 2025), https://www.eve.legal/blogs/what-you-need-to-know-ai-disclosure-rules-in-legal-filings#:~:text=Pennsylvania,any%20AI-spawned%20inaccuracies% E2%80%8B.

6. Save these tips and refer to them periodically until framing queries becomes second nature.

7. Here's a bonus tip for handbooks: Have your GPT review your handbook and suggest any missing topics. Then, switch to a general GPT and ask it to draft provisions to include in your handbook. Once satisfied with your handbook, enter this into the general GPT, "You are a seasoned employment lawyer. Please review this handbook for compliance with employment law." While you should never rely on ChatGPT for legal advice, this is a useful way to improve your handbook with potential areas you may have overlooked.

8. I recommend prompting the GPT for suggested post lengths for each platform.

9. DALL-E is an AI tool that generates images from text descriptions. You simply describe what you want, like, "a cat wearing sunglasses," and it creates an image based on your description. Think of it as a digital artist that brings ideas to life through text.

10. An effective DALL-E prompt works like a GPT query. It should describe the image clearly, include the desired style, specify camera and lens types, and outline any editing preferences.