It's All About The Prompt

Presenters

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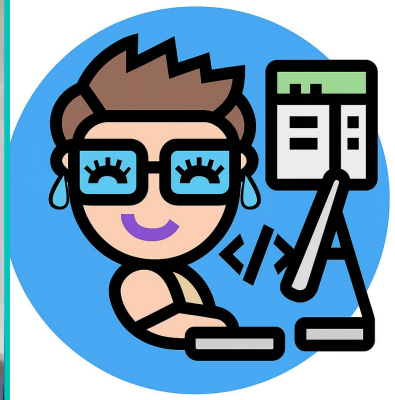

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Why do we need to learn how to write good prompts?

- In today's rapidly evolving information landscape, AI and large language models (LLMs) are transforming how we access and manage data. But the key to unlocking their true potential lies in one crucial element: the prompt.
- The quality of your output hinges on the clarity and precision of your input. Precise prompts can improve policies' implementation and refine data discovery.
- With specific keywords, context, formats and constraints to guide LLMs towards more efficient and accurate outcomes, different prompt formats (e.g., role-playing, example-based, chain-of-thought) can drastically affect the quality and relevance of AI responses.

Effective Prompt Engineering

- Be clear about context, role, and objective in every prompt.
- Define the output structure to align with governance systems.
- Use specific criteria (fields, categories, timelines) to drive consistency.
- Break large or complex tasks into smaller, logical steps.
- Frame prompts in compliance and policy terms to support defensible outcomes.
- Review and iterate prompts to improve metadata accuracy and automation.

Example #1: Data Quality

Without Prompt Engineering

- "Summarize this document."

With Prompt Engineering

- "Summarize this policy document in three bullet points that identify:
  - Document type
  - Creation date
  - Retention category"

Outcome: Clean, metadata-ready summaries that align with retention policies.

Example #2: Workflow Accuracy

Without Prompt Engineering

- "Describe these files."

With Prompt Engineering

- "Review these PDFs and provide a one-sentence description including:
  - Business function
  - Department
  - Applicable retention rule"

Outcome: Consistent file descriptions for automated classification.

Example #3: Role-Playing – Policy Guidance

Simple Prompt

- "How do we manage old emails?"

Engineered Prompt

- "Act as a RIM/IG practicioner
  - I'm a department manager preparing for an audit.
  - Outline three steps to ensure email records over seven years old are archived or deleted per policy."

Outcome: Actionable and context-aware policy recommendations.

Example #4: Role-Playing – eDiscovery Readiness

Simple Prompt

- "What are best practices for legal holds?"

Engineered Prompt

- "Act as an eDiscovery project manager.
  - Provide a five-step checklist for issuing and tracking legal holds across shared drives, emails, and collaboration tools."

Outcome: Targeted workflows for faster, defensible eDiscovery.

Example #5: Structured Output – Record Classification

Simple Prompt

- "Organize these records"

Engineered Prompt

- "Create a table listing the following fields for each document:
  - Filename
  - Owner
  - Creation date
  - Retention schedule
  - Status (active, inactive, disposition-ready)"

Outcome: Structured data that integrates directly with recordkeeping systems.

Example #6: Complex Task Breakdown – Policy Improvement

Without Prompt Engineering

- "Improve our retention policy."

With Prompt Engineering

- "1. Identify outdated sections of the current retention policy.
  2. Propose three updates based on 2025 regulatory changes.
  3. Recommend a timeline for review and approval."

Outcome: Clear, stepwise improvements aligned with governance objectives.

Working Session

- Now it’s your turn!

Contact us

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Thank you for attending!

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