

Client status-update replies with ChatGPT: a cheat sheet for law, insurance and accounting firms

"Are we going to win?" "When will they pay?" "When do we get our refund?" AI drafts lean toward reassurance, and the easiest answer is usually the one you can't give.

The routine

1. Open the thread, click **Expand all** and copy every message. Leave out anything the reply doesn't need.
2. In a new chat, paste the thread oldest first, then your numbered facts, then what a good reply looks like.
3. End with: "Don't invent details or promise anything that isn't in the facts."
4. Ask for a table of every promise or claim and the fact behind it. Fix what it flags with specific changes.
5. Click **Reply** in Gmail, paste, read it once more, then click **Send**.

What not to promise

Law firms

An outcome or a payment date. A missed deadline isn't an automatic win; the judge decides. A scheduling conference isn't a trial.

Insurance agencies

Payment dates, amounts, coverage decisions or rates. The carrier decides. Rental has a daily limit on the declarations page.

Accounting firms

A refund date. Once the IRS accepts the return, the IRS decides when it's issued. Point clients to "Where's My Refund?"

Lines to keep in every facts list

- Who decides the rest: the judge, the carrier or the IRS.
- How documents come in: the secure client portal, never by text.
- The client's own step, like reviewing and e-signing the return before you file.
- One apology if you missed their email: "That's on us."

Before it goes out

- Check each date against the court's notice, and have the attorney approve it if that's your practice.
- Insurance replies: only the policy, the carrier and a licensed agent can confirm coverage, payments or rates, so a licensed agent reviews it.
- Tax answers: have a CPA or enrolled agent review anything about taxes.
- Remove Social Security, license and bank numbers and birth dates. On personal plans, turn off training under **Data controls**.

Remember: Say what the file shows, who decides the rest and what you'll do next. Never promise an outcome, coverage or a date someone else controls.

Have a professional review it. This prompt helps you draft, not decide. AI can get the law wrong and doesn't know your jurisdiction or your facts, so have a licensed attorney review anything legal before you send or sign it.

Practice it free: Reply Faster to a Client Asking for a Case Update: ChatGPT for Small Law Firms at learn.ynteractive.com/modules/law-case-update-reply. This sheet: learn.ynteractive.com/content/cheat-sheets/client-status-update-replies. Businesses in the lesson examples are made up. By Robert Breen, October 1, 2026.