Blue J Workshop Series

Building A Repeatable Process with Blue J

What We'll Cover

The 5-Step Repeatable Process

Getting the most out of Blue J means knowing how to structure your prompts — not just what to ask, but when and how to push deeper.

1. **Ask Your Question**
2. **Verify the Sources**
3. **Refine the Analysis**
4. **Pressure Test the Answer**
5. **Create the Deliverable**

STEP 1 OF 5

Ask Your question

Start with your core tax question.

A strong prompt has:

1. **Clarity**
   Clear and unambiguous language.
2. **Context**
   Provide enough background info and documentation to guide the system.
3. **Neutrality**
   Neutral questions lead to objective answers.
4. **Relevance**
   Ensure prompt is relevant to the desired outcome
5. **Completeness**
   Include all necessary details to avoid assumptions.
6. **Use of Tax Terminology**
   Incorporate tax terms helps improve the accuracy and relevance if the terms are commonly found in source documents.

STEP 2 OF 5

Verify the Sources

Review the linked authorities, including statutes, regulations, cases, and analysis

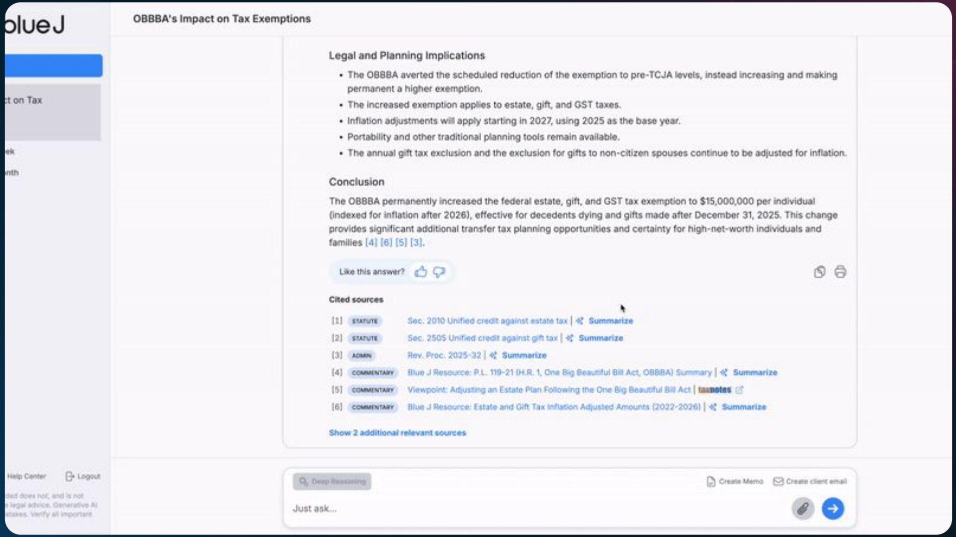
Review Source Materials

Read through the source materials, including statues, regulations, cases, and analysis.

Ask Questions About the Source

Ask questions about the source materials used to formulate the answer.

Reviewing Citations in Blue J



STEP 3 OF 5

Refine the Analysis

Ask follow-up questions to:

- Test Different Scenarios
- Explore Exceptions
- Layer in Context
- Evaluate Alternative Positions

STEP 4 OF 5

Pressure Test the Answer

Ask your solution to:

- Defend Its Conclusion
- Identify Contrary Authority
- Explain Competing Interpretations
- Point Out Weaknesses in the Analysis

Pressure Testing Prompt Examples

Pressure testing doesn't require starting over. Simple follow-up questions can help you validate your analysis, uncover exceptions, and build greater confidence in your final conclusion.

- **What else exists in the source materials that could challenge the analysis so far?**
  Reduces confirmation bias by searching for evidence that challenges the current conclusion.
- **Are there any risks to the position as stated in this thread?**
  Highlights potential exposure, uncertainty, and practical considerations before relying on the conclusion
- **What risks or areas of uncertainty remain?**
  Identifies unresolved issues, judgment calls, or areas where additional research may be warranted before advising a client.
- **What facts would change this conclusion?**
  Quickly identifies the key assumptions driving the analysis and highlights which facts are most material.

Create the Deliverable

Turn the thread into a polished deliverable

Choose the format that fits your audience

1. **Client Email**
   Concise, non-technical, executive tone.

2. **Client Memo**
   Detailed, with an executive summary.

Client Email

A short, plain-language summary written for someone without a tax background.

Client Memo

A fuller write up with an executive summary, facts, analysis and conclusion.

Executive Summary

Facts

Analysis

Conclusion

Other Output Formats to Try

Once you're comfortable with the core workflow, push further with these formats.

Presentation Outline

Turn your analysis into slide-ready talking points

Pre-Meeting Speaking Notes

Prep for a client call with a clean set of notes

Questions to Test a Junior's Understanding

Turn the thread into a quick comprehension check

The 5-Step Prompting Process

Getting the most out of Blue J means knowing how to structure your prompts — not just what to ask, but when and how to push deeper.

1. Ask Your Question
2. Verify the Sources
3. Refine the Analysis
4. Pressure Test the Answer
5. Create the Deliverable

Ready to put this into practice?

Q&A

Thank you