

# Don't Tell Your Attorneys – AI isn't just for them!

Using Microsoft Copilot to demonstrate ways you might harness the power of AI.



# Today's Agenda

- 01 Very briefly: Review of AI Terminology and the LLMs behind Copilot and how it works
- 02 Security & Confidentiality - Why Your Data Is Safe
- 03 The CRAFT Framework - Building Better Prompts
- 04 Live Examples: Yes, we'll risk it!
- 05 Copilot Across Your M365 Apps
- 06 Some thoughts and key takeaways

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Very briefly: Review of AI Terminology and the LLM's behind Copilot and how it works

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Security & Confidentiality - Why Your Data Is Safe

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The CRAFT Framework - Building Better Prompts

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Live Examples: Yes, we'll risk it!

05

Copilot Across Your M365 Apps

06

Getting Started at Your Firm

We'll try to have fun with this.

This presentation was created using a simple Copilot prompt. I'll point out some of the good, bad and head scratchers. (spoiler alert – robots!)

# The Why?

## Feeling the pAIIn!

- A lot of attorney focus on AI. Drafting documents, summarizing briefs – not as much on getting support tasks done
- My own frustration – Industry presentations – not a sales pitch for Copilot
- My clients struggles – I'm not getting useful output
- AI Backlash – I hate it... it keeps nagging me and wasting my time



# Copilot for Law Firm Administrators

Your AI-Powered Assistant for  
Small to Mid-Size Firms (10-100 Staff)

Microsoft 365 Business Premium



# The Simple Powerpoint Prompt

Create a presentation using Copilot to assist in the typical tasks performed by a small to mid-size law firm administrator (firm size between 10 and 100 staff). Include a summary of why Copilot is secure and how it is safe to upload confidential data into Copilot. Include instructions on creating good prompts for Copilot with an easy to remember acronym for building prompts. Prepare a bulleted summary for the best uses for Copilot within each of the Office 365 applications included in Microsoft 365 Business Premium include pleasant and humorous pictures to represent the points where possible. Use the sample uploaded logo to create a theme with similar colors and with the logo included in a tasteful way.

# What Is Microsoft Copilot?

- M365 Copilot = Front door to enterprise AI
- AI assistant built directly into your Microsoft 365 apps
- Works inside Word, Excel, Outlook, Teams, PowerPoint, OneNote, SharePoint, and OneDrive
- Understands context from your emails, documents, chats, and meetings
- Drafts, summarizes, analyzes, and organizes in seconds
- Not a replacement for your expertise - it's a productivity multiplier
- 90%+ of Fortune 500 companies already trust it



# AI Glossary: Key Terms to Know

## Artificial Intelligence (AI)

Technology that enables computers to simulate human-like reasoning, learning, and decision-making.

## Large Language Model (LLM)

An AI system trained on massive amounts of text data that can understand and generate human language - the "brain" behind tools like Copilot.

## GPT (Generative Pre-trained Transformer)

A family of LLMs created by OpenAI. "Generative" means it creates new content; "Pre-trained" means it learned from vast data before you use it; "Transformer" is the architecture that processes language.

## Prompt

The instruction or question you type into an AI tool - the better the prompt, the better the result.

## Grounding

The process of connecting AI responses to your actual data (emails, files, chats) rather than general knowledge - this is what makes Copilot useful for your specific work. And connects to current material.

## Hallucination

When an AI confidently generates information that sounds plausible but is factually incorrect - always verify AI outputs.

## AI Glitches

Informal term for what's known as AI artifacting or generation artifacts. This is the three armed person image problem.

## AI Slop

Low-quality, mass-produced content generated by AI that has little originality, accuracy, or value.

## Semantic Search

AI-powered search that understands meaning and context, not just keywords - how Copilot finds relevant content across your Microsoft 365 data.

## Token

The basic unit AI uses to process text - roughly 3/4 of a word. Longer prompts and responses use more tokens.

# The LLMs Behind Copilot

Copilot is not an LLM. It is an orchestration layer that connects large language models to your Microsoft 365 data and apps. Microsoft does not produce the LLMs that power Copilot.

## How Copilot Works

1. You type a prompt in a Microsoft 365 app.
2. Copilot sends your prompt + relevant context from Microsoft Graph to an OpenAI LLM.
3. The LLM generates a response.
4. Copilot formats and delivers the result back in your app.

## LLMs Powering Copilot (2025-2026)

### OpenAI GPT-5 / GPT-5.2

Primary model for complex reasoning tasks. GPT-5's router automatically selects the best sub-model for each prompt.

### OpenAI GPT-4o

Fast, efficient model for routine tasks like quick summaries, formatting, and simple Q&A.

### Anthropic Claude

Available for select Copilot experiences. Operates under Microsoft's Data Protection Addendum.

*Microsoft has launched its own MAI (Microsoft AI) brand for specialized models like MAI-Transcribe and MAI-Voice, but these are not the LLMs used in Copilot. Microsoft also develops smaller Phi models for lightweight on-device tasks.*

# Your Data Never Leaves Your Tenant

## Tenant Boundary

All prompts, responses, and grounding data stay within your Microsoft 365 tenant. Nothing is shared externally.

## No Model Training

Your firm's data is never used to train AI foundation models. This is contractual, not just policy.

## Permission-Based

Copilot only surfaces content the signed-in user already has permission to access. No surprise data leaks.

# Safe for Confidential Legal Data

## Best Practices

- ✓ Use Enterprise Copilot (M365) - never consumer versions for client data
- ✓ Apply sensitivity labels to all confidential documents
- ✓ Run least-privilege access reviews before rollout
- ✓ Create firm-wide AI acceptable use policies
- ✓ Verify Copilot outputs before using in legal work

## Avoid These Risks

- ✗ Never use free/consumer Copilot with client data - privilege may be waived
- ✗ Don't skip permission cleanup - overshared sites are the #1 risk
- ✗ Avoid enabling third-party plugins without vetting
- ✗ Don't assume Copilot understands attorney-client privilege
- ✗ Never treat AI output as legal advice without review



# Building Better Prompts

The CRAFT Framework

# The CRAFT Framework

*A simple acronym to write prompts that get great results every time*

- C** **Context** Give background info - what project, what matters, what's the goal?
- R** **Role** Tell Copilot who to be - a paralegal, editor, analyst, or strategist
- A** **Action** State exactly what you need done - draft, summarize, compare, analyze
- F** **Format** Specify the output shape - bullets, table, email, memo, checklist
- T** **Tone** Set the voice - professional, casual, client-friendly, formal

# CRAFT in Action: A Law Firm Example

## **C Context:**

"I'm a law firm administrator preparing for our quarterly partner meeting. We need to review our billing performance for Q1 2026."

## **R Role:**

"Act as a financial analyst specializing in law firm operations."

## **A Action:**

"Analyze the attached billing data and identify the top 5 trends, any concerning patterns in collection rates, and compare to industry benchmarks."

## **F Format:**

"Present findings as an executive summary with bullet points, followed by a comparison table."

## **T Tone:**

"Professional and concise - suitable for presenting to senior partners who want actionable insights."

# You are in charge

## **AI hallucinates**

When it does, be prepared to correct it. It can take patience.

## **AI misunderstands**

Expect to rephrase and explain.

## **AI disagrees with you**

Sometimes you have to argue with AI to get the right answer. “You are incorrect, check the latest shared calendar and note that the holiday party is on December 9<sup>th</sup> in 2026.”

**Iterate, Iterate, Iterate... It costs you nothing to ask again.**

# Copilot Across Your M365 Apps

Best uses for each application in Microsoft 365 Business Premium

W

E

O

T

P

O

S

# Let's look at examples

## **PowerPoint Presentation**

Pulled relevant information, built a professional looking deck, created a color theme based on our logo. Made some unfortunate judgements. But saved a LOT of time.

## **Email Analysis**

Mining information from email sources.

## **Compare Documents**

A simple sample of using AI to create an understandable comparison of health plans.

## **Admin Employee Search**

Sample evaluation of synthetic resumes against a firm job posting to speed resume analysis and surface possible issues. Using a Copilot agent.

## **Invoice Analysis**

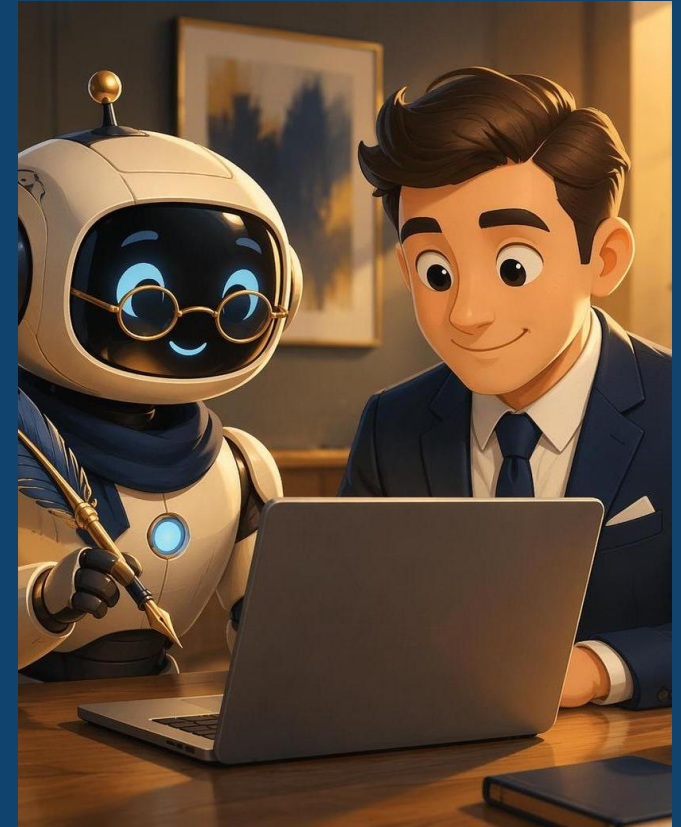
AI extracts, formats and calculates data and prepares a downloadable Excel workbook.

## **Excel to easily manipulate data**

Using synthetic data created by Copilot to show you don't need Excel skills for things you can describe.

# Copilot in Word

- Draft engagement letters, retainer agreements, and client correspondence from brief instructions
- Summarize lengthy contracts, depositions, and court filings into concise bullet points
- Rewrite complex legal language into plain English for client-friendly communications
- Compare document versions and generate redline summaries highlighting material changes
- Create structured first drafts from templates, then refine tone and detail level
- Generate tables from document content - organize deadlines, parties, and obligations automatically



# Copilot in Excel

- Analyze billing data to spot trends in collections, write-offs, and realization rates
- Create formula columns with natural language - "add a column calculating the variance"
- Generate charts and visualizations from raw financial data for partner presentations
- Highlight anomalies - "make all cells red where the amount exceeds \$10,000"
- Sort, filter, and summarize trust account reconciliations and expense reports
- Build forecasts for staffing needs, revenue projections, and budget planning



# Copilot in Outlook

- Summarize long email threads to quickly extract key decisions and action items
- Draft professional responses to client inquiries, vendor requests, and internal memos
- Catch up after time off - get a prioritized summary of what needs your attention
- Adjust email tone from formal to friendly, or concise to detailed, with one prompt
- Schedule and prepare for meetings with AI-generated agendas based on email context
- Flag emails requiring urgent follow-up and suggest response templates



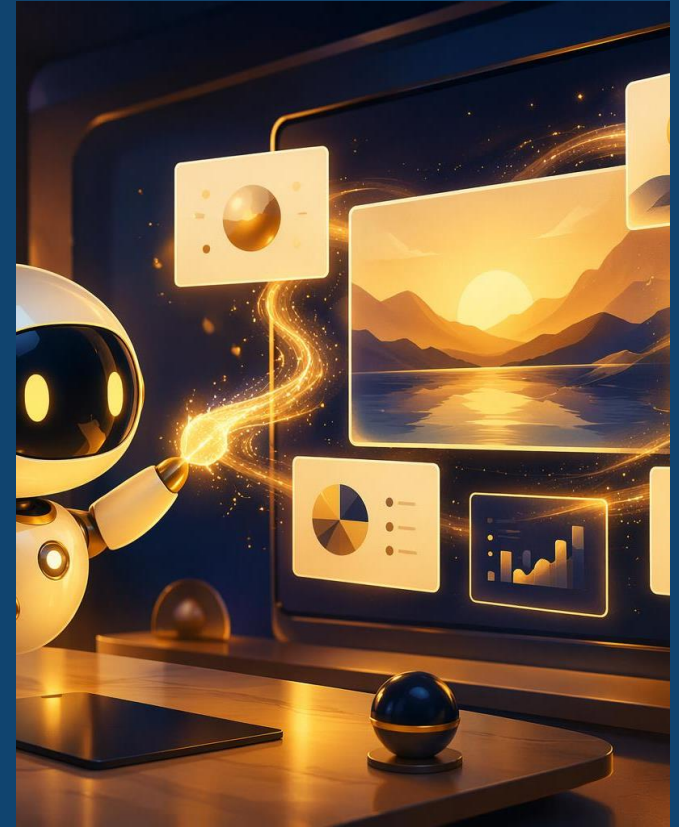
# Copilot in Teams

- Generate meeting summaries with action items, decisions, and next steps automatically
- Catch up on meetings you missed - get AI transcription summaries with key takeaways
- Ask questions during live meetings - "What has been decided about the Smith matter?"
- Create follow-up task lists from meeting discussions and assign to team members
- Summarize chat threads to find decisions buried in long conversations
- Draft agendas for recurring firm meetings based on previous discussion patterns



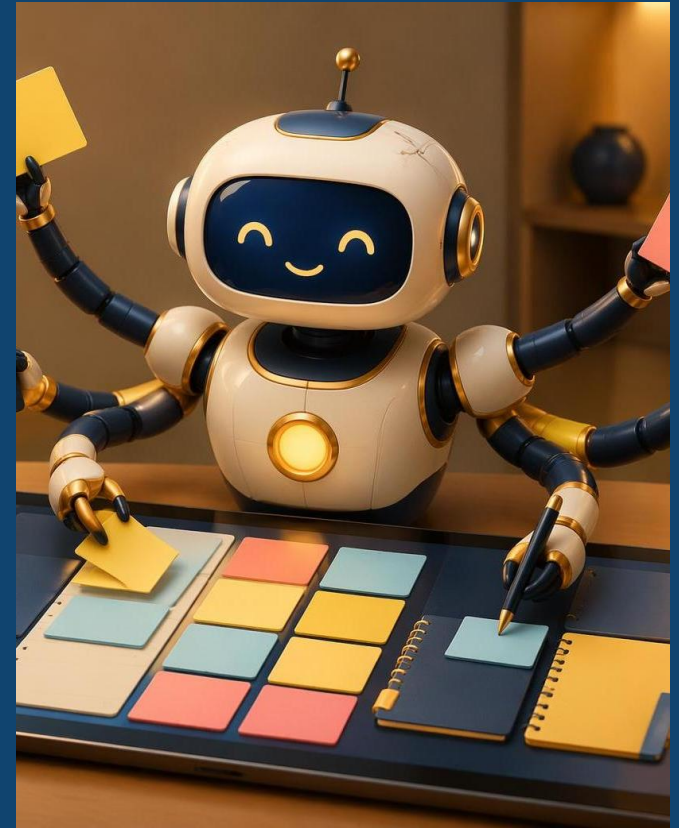
# Copilot in PowerPoint

- Create presentation drafts from Word documents, outlines, or brief descriptions
- Generate professional slides for partner meetings, client pitches, and training sessions
- Add relevant images, layouts, and design suggestions that match your firm's style
- Summarize a long presentation into a concise executive overview deck
- Reorganize and restructure existing presentations with natural language commands
- Create speaker notes from slide content for presentation preparation



# Copilot in OneNote

- Summarize meeting notes into organized action items with owners and deadlines
- Create structured to-do lists from unorganized notes and brainstorming sessions
- Draft follow-up plans from handwritten or typed research notes
- Organize matter notes by topic, date, or priority with AI-powered categorization
- Rewrite rough notes into polished memos or client-ready summaries
- Generate checklists for common firm procedures like new client intake or case closing



# Copilot in SharePoint & OneDrive

- Search across firm documents using natural language - "find the Jones NDA from last quarter"
- Summarize documents stored in SharePoint libraries without opening each file
- Extract key information from files across multiple matter folders simultaneously
- Create summaries of large document collections for litigation review preparation
- Organize and tag documents with sensitivity labels for compliance management
- Generate reports from content stored across team sites and shared libraries



# Getting Started at Your Firm

## Phase 1 (Weeks 1-4)

Clean up SharePoint permissions, enable sensitivity labels, configure DLP policies, set up MFA and Conditional Access

## Phase 2 (Weeks 5-8)

Start with administrative and business functions - billing, HR, marketing. Train on CRAFT prompts. Gather feedback.

## Phase 3 (Weeks 9-14)

Add practice group pilot with lower-risk workspaces. Disable third-party connectors. Monitor audit logs.

## Phase 4 (Weeks 15-24)

Deploy to all staff. Establish ongoing training program. Create firm AI acceptable use policy. Track adoption metrics.





# Key Takeaways – From AI

- 1 Enterprise Copilot is safe for confidential legal data - your content stays in your tenant and never trains AI models.
- 2 Use the CRAFT framework (Context, Role, Action, Format, Tone) to get consistently great results from every prompt.
- 3 Start with administrative tasks, then expand to practice groups after securing permissions and training staff.
- 4 Copilot is a productivity multiplier, not a replacement - always review AI output before using it in legal work.
- 5 The firms that adopt AI thoughtfully will serve clients faster, reduce costs, and attract top talent.

**Questions & Discussion**

# You only have to ask...

- **You get unlimited wishes**
- **The wishes aren't always granted as you intend**
- **The guardrails of the bottle are important**





# Key Takeaways – From Alan

- 1 Your expertise is the piece that AI can't replace. You know how to do your job so tell AI how to help you. In most cases with Copilot in Office Apps, if you can describe it, you can do it.
- 2 Be thoughtful about AI and its output. AI output may be good enough – particularly if you are transparent.
- 3 Copilot is one tool of many. At under \$30/month, the cost is trivial if used well. You may need other tools too. Copilot is useful particularly in your Microsoft environment.
- 4 All AI use doesn't have to be profound. The cumulative effects of efficiencies only in Office Apps can be enough.
- 5 You are in charge of AI. It can be as important to tell AI what NOT to do as to tell it what to do.

**Questions & Discussion**