

# The Managing Partner's Guide to Microsoft 365 Copilot

Bring AI into your firm  
– or get left behind



Microsoft Cloud

# Can you afford to be left behind?

This guide is designed to help law firms understand three things:

- How to use AI for your firm through Microsoft 365 Copilot securely.
- The steps your organisation must take to get ready for its deployment.
- How to maximise the potential of Copilot and AI to support the future growth of your law firm.

After all, 75% of firms are already using AI to their advantage; and one in three have even committed to increasing their tech spend.<sup>1</sup>

"AI is everywhere, unlocking potential across all industries at an unprecedented pace. In the legal sector, it's a case of disrupt or be disrupted. While it's natural for firms to feel apprehensive about embracing AI, doing it right can help you put the necessary guard rails in place, ensuring both innovation and compliance to help you get the most out of AI for your firm."

**Mark Rotheram,**  
Chief Technology Officer, BCN



# Introduction



75% of leading law firms already use AI and see it as a selling point to win business.<sup>2</sup>

Artificial Intelligence (AI) is rising up the agenda at law firms across the country.

Many see it as the instigator of a fourth industrial revolution. Tech leaders say it will have a bigger impact on the world than mobile phones or the internet.

As a result, spending on the technology is rapidly accelerating, especially in law firms.

But adopting AI isn't an open and shut case.

You might be intrigued, excited, nervous or sceptical – but whatever your views, AI is here and it will disrupt your firm, whether you're ready for it or not.

The rewards for the pioneering firms who take an early lead are significant – turbocharged productivity; first-mover competitive advantage; greater appeal in a crowded recruitment market – while for those who wait, there's a very real risk of falling behind.

With the launch of Microsoft Copilot the tech corporation has brought the power of AI into the mainstream – putting the platform directly into the hands of users.

Because Copilot knows how firms use M365 apps, it understands how to employ AI to make them more efficient. And by making its apps more efficient, Microsoft promises to do the same for your firm – driving greater value from your team, your processes and your decision-making. All of which benefits your most important stakeholders: clients.

# What is generative AI and why should you employ it in your law firm?

**"10.8% of employees have tried ChatGPT in the workplace at least once and 4.7% of employees have inputted confidential corporate data into the platform."** <sup>3</sup>

To understand the value of Copilot it's important to understand the recent progression path of generative AI.

You may be familiar with tools like ChatGPT and Midjourney, which use Large Language Models (LLMs) to generate content.

At a simple level, LLMs involve training algorithms to understand and mimic patterns of data to create realistic versions of human outputs, such as images, music or copy. In short, they understand what we say and respond in a human manner.

Using generative AI, law firms can create a myriad of useful content, from client communications to contracts. It can even help with detecting fraud or summarising large case files.

Globally, 73%<sup>4</sup> of law firms are already using, or intend to use, generative AI in their work. And the potential benefits for forward-thinking firms are tantalising. At a time when 83% of law firms are under increasing pressure to deliver faster response times, AI can help you to meet changing expectations.

The fact is, a large share of your workforce is likely to be using AI tools to improve the way they work already. Many of them could be uploading confidential information into generative AI tools like ChatGPT. Without the correct security measures in place, this activity could leave you open to copyright infringement and even cyber attacks, with financial and reputational damage a very real possibility.

Managing Partners must therefore be prepared to put in guard rails to enable their employees to use AI safely without compromising the integrity of their firm.

Because when they are used correctly, AI tools can be the catalyst to a more profitable, successful future.

# Setting out the case for Microsoft Copilot

Microsoft has invested billions to bring the power of AI to businesses. It offers three packages:

- 1– Copilot Pro for individuals
- 2– Copilot for Business
- 3– Copilot for Enterprise (bigger firms with frontline workers)

Copilot is delivering a huge leap in business AI.

Microsoft has created a centralised AI and workflow engine, which forms a secure productivity hub for your business. It integrates the Microsoft Graph and AI LLMs with the M365 application portfolio, working alongside your employees to generate relevant answers and assistance in your firm's business context.

With Copilot Business and Enterprise your team can access a tool that taps into your data – including your calendar, emails, chats, documents and meetings – to free you and your fee-earners from menial tasks and the drudgery of repetitive work.

Firms using Copilot have seen it become an organising layer for teams. It transforms workflows to boost collaboration by breaking down the walls between departments and turbocharges productivity by accelerating traditionally lengthy processes, for better results and higher profit margins.

The initial launch of Copilot and its first-generation features was just the beginning – Copilot Wave 2 is once again changing the game.



# What will 'Copilot Wave 2' do for your firm?

AI development moves on at pace, and Microsoft has already released the [next version of Copilot](#).

Microsoft hails the latest iteration of Copilot as the new 'UI for AI': a place where users and Copilot technology can work with each other to research and simplify complex tasks; producing results that can push your organisation forward.

The second wave of Copilot brings new ways to work, designed to keep you organised without dragging you out of your workflows.

Whether you need to make sense of your inbox or analyse large data-sets the technology takes the weight off your shoulders by handling cumbersome tasks while you save billable hours and add value.

**In Teams:** Copilot can summarise your meetings, capture the main points and actions discussed, and even link to other M365 apps like Planner to create project plans on the go.

**In Word:** Copilot can create draft content for you based on basic prompts. So, articles, contracts, job descriptions and presentation materials can be produced in seconds, drawing on earlier documents and your usual written approach.

**In Excel:** Copilot gives you one gateway to all of the data across your systems, from tracking capacity and pricing information, to client feedback, Excel becomes a workbook to shape and analyse data.

**In PowerPoint:** Copilot allows you to create compelling, persuasive presentations in your firm's template. The technology develops an outline, populates it with starter text, and lets you choose from company-approved images to add a flourish.

**In Outlook:** Copilot helps you to streamline your communications. The 'Prioritise My Inbox' feature analyses the context of your messages alongside your work objectives. The AI understands what's most important in enabling you to achieve your short- and long-term goals, and sets out next best actions to take.

In short, the more sophisticated Copilot becomes, the more complex tasks it will be able to handle on behalf of legal teams. That means your firm will be freed up to focus on the work that matters: successfully representing your clients, providing solutions, and accelerating the whole process without cutting back on quality.

**"It's going to give everyone a superpower they've never had before."**

Jon Friedman, corporate vice president of design and research at Microsoft on Copilot.<sup>5</sup>

# Secure by design

## Of course, security is a huge concern for law firms.

You deal with sensitive, proprietary data and sensitive aspects of cases on a daily basis. So if you want to integrate AI, you need to know that your information is secure.

Because Copilot is integrated into Microsoft 365, it inherits all of your firm's security, compliance, and privacy policies. This means you can be sure that anything uploaded to, or created by Copilot that taps into the data, will remain within your organisation.

Furthermore, Microsoft has committed to working with AI responsibly and reinforcing its AI security principles, offering appropriate guard rails and data sovereignty by design.

## AI security principles



Secure **by design** and secure **by fault**

Your data is **your data**

Your data is **not used to train AI models** without your permission

Rigorous **Responsible AI** practices

[As a signatory to the Microsoft Partner Pledge, BCN will follow Microsoft's responsible AI principles.]



# Securing buy-in for M365 Copilot from your law firm

The benefits of Copilot for your frontline M365 users are clear; vastly improved productivity, the opportunity to develop new AI skills, and a focus on more interesting work.

But you or your wider team may have concerns that we answer here.

## Far from taking jobs, AI will create a new way of working.

According to a global Microsoft survey, 68% of people<sup>6</sup> say that with the weight of their work hours spent communicating – via email, meetings and instant messaging – they don't have enough uninterrupted focus time during the day. This lack of focus time means a lack of innovation, breakthrough ideas, and productivity.

With AI and Microsoft 365 Copilot, these communication burdens, and their detrimental impact on energy and interest, can be lifted.

Meetings can be treated as a digital record rather than a point in time. Copilot can provide intelligent meeting recaps and recordings, to release time for more valuable activity. Email threads can be summarised and responded to in seconds. Actions can be captured and assigned without the need for human follow-up.

### And employees are excited about the possibilities.

Though there is some concern among employees about AI replacing their jobs, far more are eager to use its potential to lessen their workloads.

According to Microsoft's survey, 76% would be comfortable using AI for administrative tasks, 79% would use it for analytical work, and 73% would employ it for creative work.

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## Don't wait for your competitors to make the first move.

The legal landscape is already moving, fast.

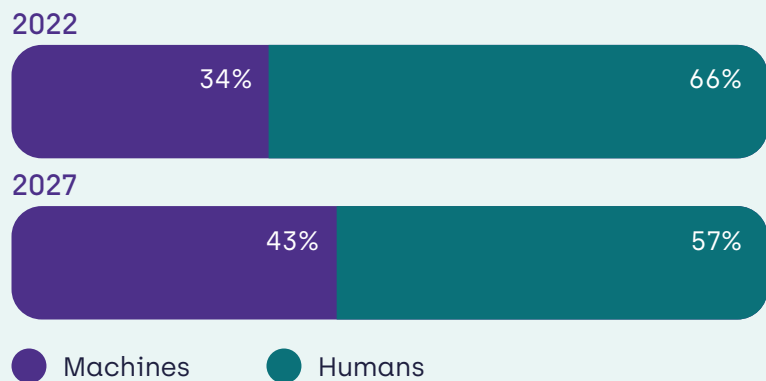
According to a study,<sup>7</sup> 92% of those surveyed planned to increase their adoption of AI to use for legal analytics in the next year, while 68% said they already relied on their legal analytics to price out projects.

**As the legal landscape shifts, the winners will be those firms that embrace AI and upskill their employees to use the technology.**

### Future of jobs

## Human-machine frontier

Proportion of tasks completed by humans vs machines:



## The £24.70 licence fee will be repaid many times over.

Copilot costs £24.70 per user licence per month – a cost that will be recouped many times over in terms of the productivity savings it introduces to your firm.

Ask yourself, would you pay £24.70 per month for your employees to produce high quality work in half the time? To unlock more billable hours? Learn new skills twice as fast, and produce contracts or summarise case histories with precision and in a fraction of the time?

**It's also important to note that not every M365 user will need a Copilot licence from day one. In fact, by trialling the technology with a handful of licences to begin with, it's possible to assess its value and understand where else it could be deployed and customised to work most effectively for you.**

Aside from the productivity gains, the price of Copilot is the price of peace of mind. Copilot is the secure way to introduce AI to your law firm – your data remains firmly within your walls and is properly managed at all times. Because it's trained on your data to provide more contextual responses, it's both a better fit, and a safer way to integrate AI into your organisation.





## Trust the technology.

AI is nothing new – you've been trusting the technology for many years via tools like Alexa, chatbots, online shopping recommendations and facial recognition on your phone.

The key benefit of Copilot is that it draws its responses from your data, so there's a higher chance they'll be correct, secure and relevant. But as with all new tech, you'll probably prefer to check the results it generates to begin with. As you appreciate the accuracy of the results, you'll learn to trust it more.



# Firm foundations

Don't wait for your competitors to make the first move: get the right foundations in place, in a way that offers structure and control.

Before installing M365 Copilot it's important to begin with an audit of your existing data governance and security.

**Permissions** – 'just enough access'. Because Copilot will draw on any data its users have permission to access, it's vital that you lock these permissions down in advance of deployment [BCN can run a [Sharepoint Permissions](#) Audit and other security checks to better understand these settings.] Ensure your data is in the right place on your server and is classified correctly to restrict access to any sensitive information.

**Data governance** – the effectiveness of Copilot will depend on the data sources that are indexed by M365. An abundance of data will mean better results. Incorrect or incomplete data will mean lower accuracy.

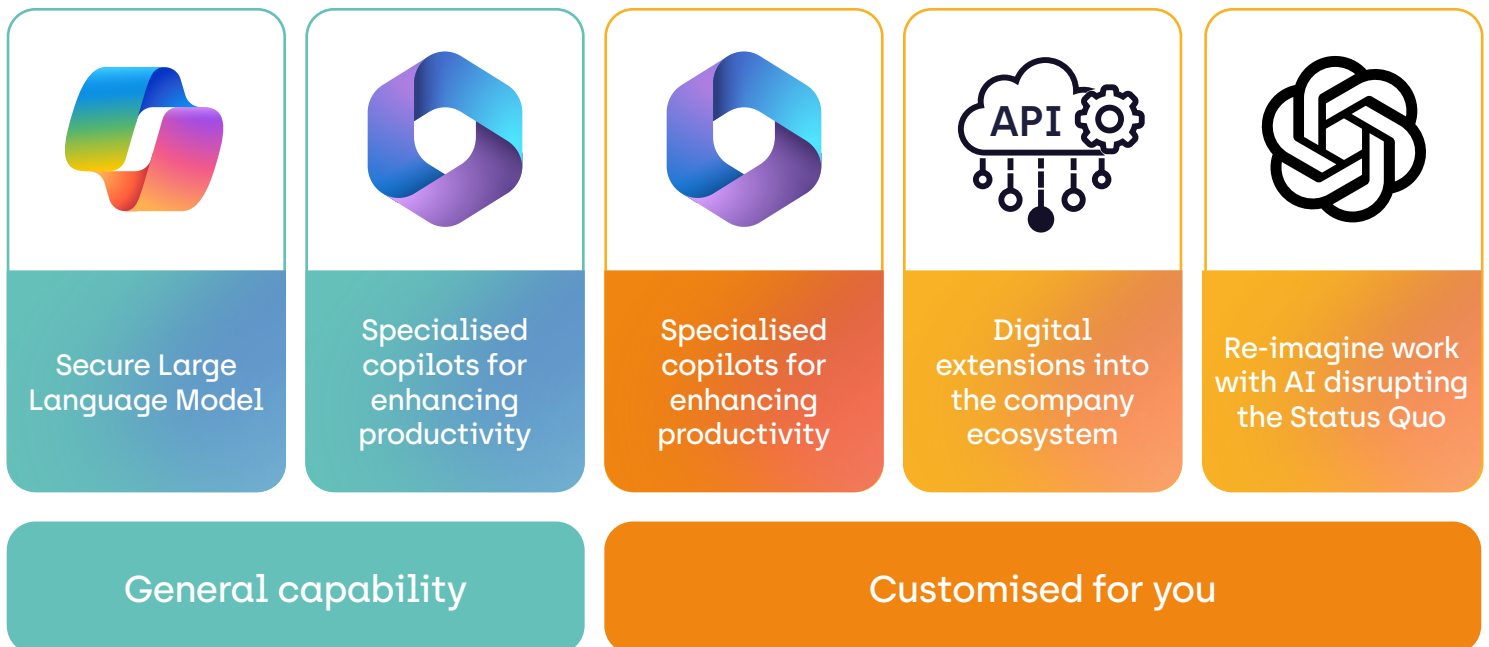
**Security** – Copilot aligns to the privacy and security policies you have in place. Review your [cyber security](#) in advance of deployment to ensure your M365 environment is set up in the correct way. This is a critical step to keep your law firm safe from bad actors: BCN offers a [free cyber security assessment](#) to understand the vulnerabilities at your business today, and how we can fix them.





# Embarking on your path to AI

Microsoft's approach to AI is to provide a base, generic capability to everyone, then layer in more complex AIs that can reach further into your business ecosystem.



Once Copilot has been configured into your day-to-day work via Microsoft 365, it's time to think about what else could be possible – and how you can take full advantage of AI to support your growth.

One-off projects can embed Copilot into your broader Microsoft suite, including [Business Central](#), [Power Apps](#), [Power BI](#) and more, while custom built LLM applications could take you beyond Copilot into unique automations and use cases for your specific business processes.

# Going beyond Generative AI

Here are some potential ideas to get you thinking about the possible uses of AI outside of generative, and how AI applications could propel your law firm beyond the norm in future:

## Criminal law

Train AI on the Police and Criminal Evidence Act to provide details on how detained persons should be treated; allow the tool to assess a detainee's custody record to determine whether their rights were breached.

## Family law

Enter multi-disciplinary meeting minutes and social service/school action plans into the platform, to identify themes and issues for consideration in court orders and applications.

## Property law

Load local bylaws and deeds into AI, providing details of any offences committed e.g. by overgrown trees or extensions blocking light to a neighbour's property.

Outputs such as these could be used in live cases, or to triage cases and quickly decide whether action should be taken, and what that might be.

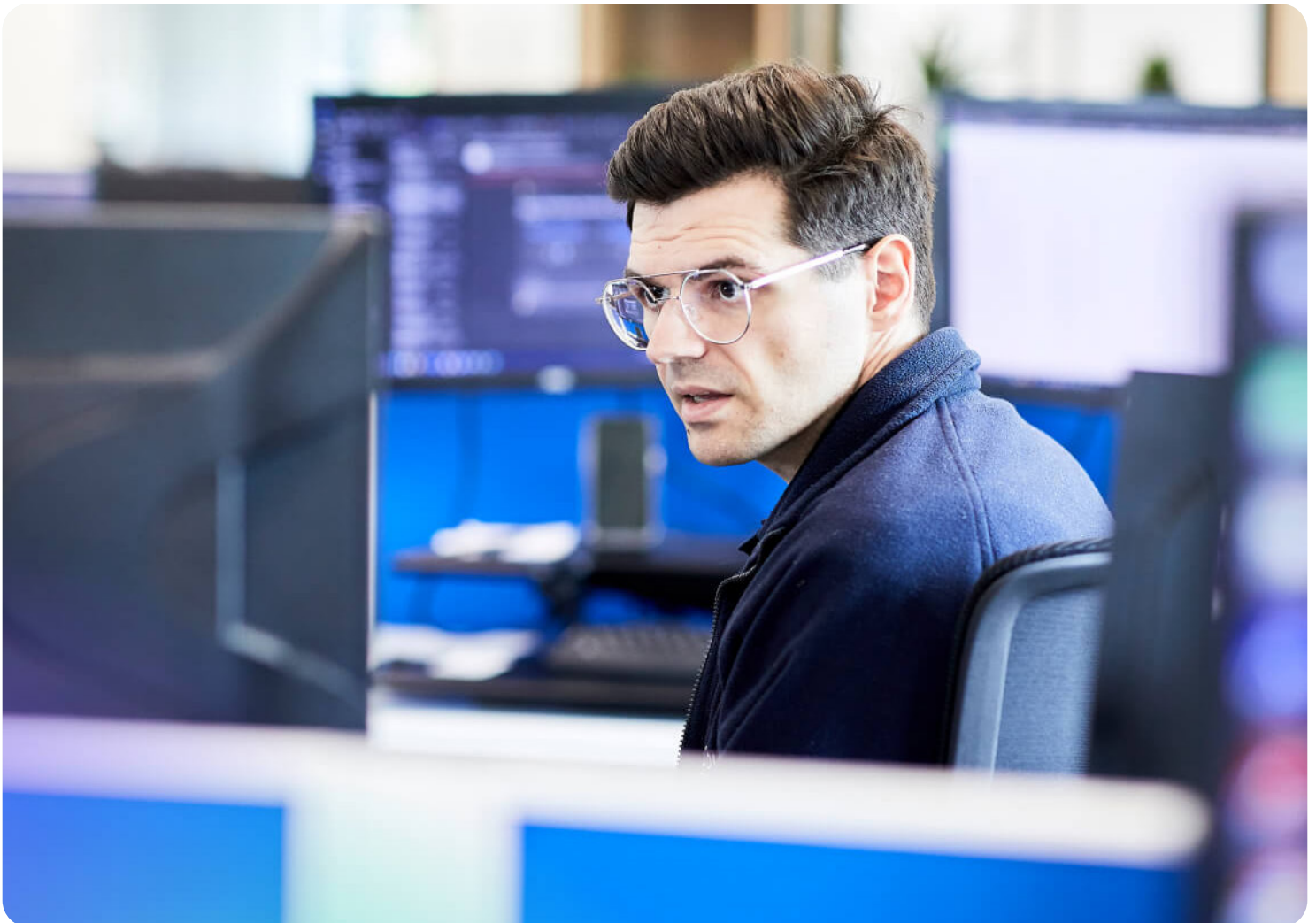
## Endless possibilities

Whilst these are just hypothetical ideas for now, our Data and AI team can work with you to understand your systems and processes to help create bespoke solutions designed for your business and transform your ideas into reality.

## Map out your journey

Our Microsoft 365 User's AI Strategy Guide, which includes a roadmap for implementation in your law firm, is available on request

You may not have a plan for AI in your firm until you've tried out M365 Copilot. Many of our legal clients choose a user group to trial the technology first, to reveal its value to their specific firm. While this is a great way to dip your firm's toe in the water, it's also essential to think about your medium to longer-term strategy and where AI can provide the most help across your organisation; where its focus should be; and where you're willing to invest to maximise its potential.





# Where AI and Copilot can take your law firm

AI is already shaking up the legal profession - and it's here to stay. If your business doesn't act fast and join the disruptors using AI tools to make change and move forward, it faces disruption.

Wherever you are on your AI journey, BCN's experts can help guide your next steps and inspire your future strategy. From automating repetitive admin to free up your fee-earners' billable time, to analysing case files to reduce inefficiency, we can help you decide where to start, and where you're heading.

As a Solutions Partner for Microsoft Cloud, our relationship with Microsoft gives us access to its wide range of capabilities and new technology. We are accredited with all six designations and have also achieved specialisations.

With our data scientists and full stack development team, we can help design your future AI roadmap and customise M365 Copilot for your law firm to create brand new, AI-infused applications to bring the power of automation to different functions across your organisation.





Are you ready to embrace the tech that's currently changing your industry and keep ahead of the pack?

Let's talk about how we can help you take your law firm to the next level with Copilot.

Get in touch

#### About BCN

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