

INFORMATION PAPER

Copilot for Microsoft 365®: A Step-by-Step Flight Plan for Legal Teams

Fire Up Your Productivity Engine
and Deliver High-Impact Work Faster

HAYSTACK®



Do More with More Efficiency

Time is a precious commodity for legal teams. Facing increasing pressure to deliver more at an accelerated clip, your organization can work more effectively with the right tools, empowering you to focus on more strategic, higher-impact work.

That's where Copilot for Microsoft 365[®] enters the chat. Powered by large language models (LLMs), including pre-trained models like Generative Pre-Trained Transformers, Copilot is a chatbot that enhances productivity, automates content creation, and assists users in understanding information through a seamless chat experience.

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Microsoft AI Landscape

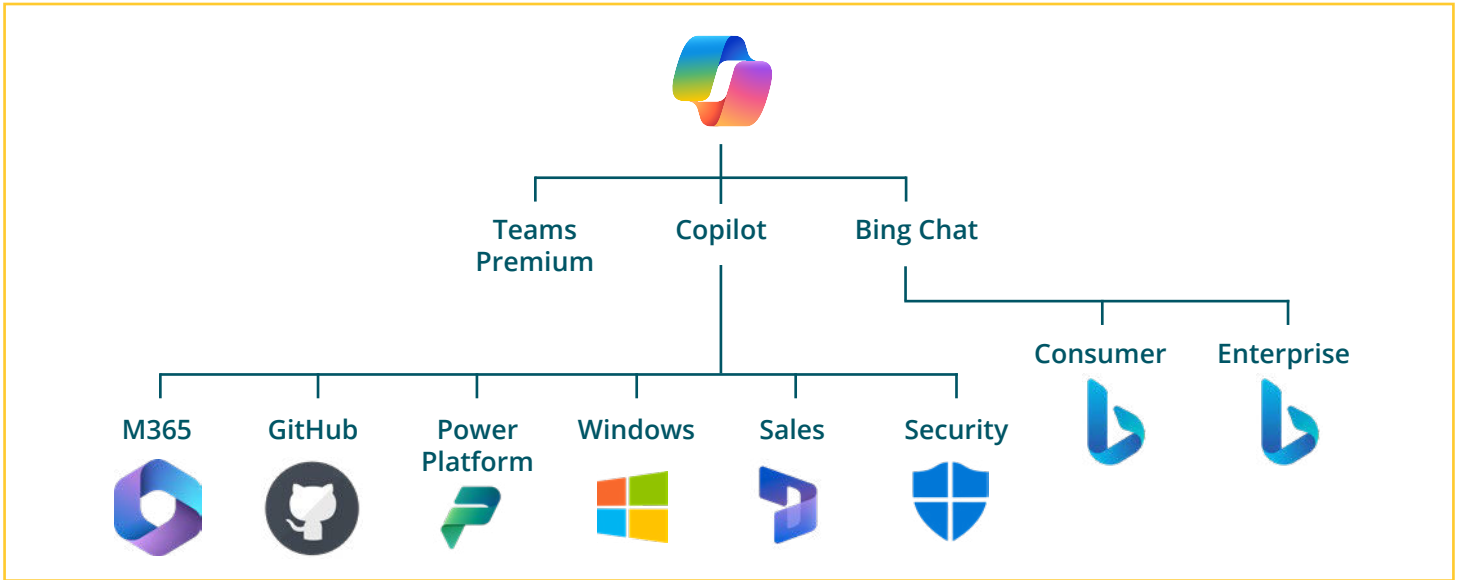


Figure 1

Microsoft Copilot for Microsoft 365® Architecture

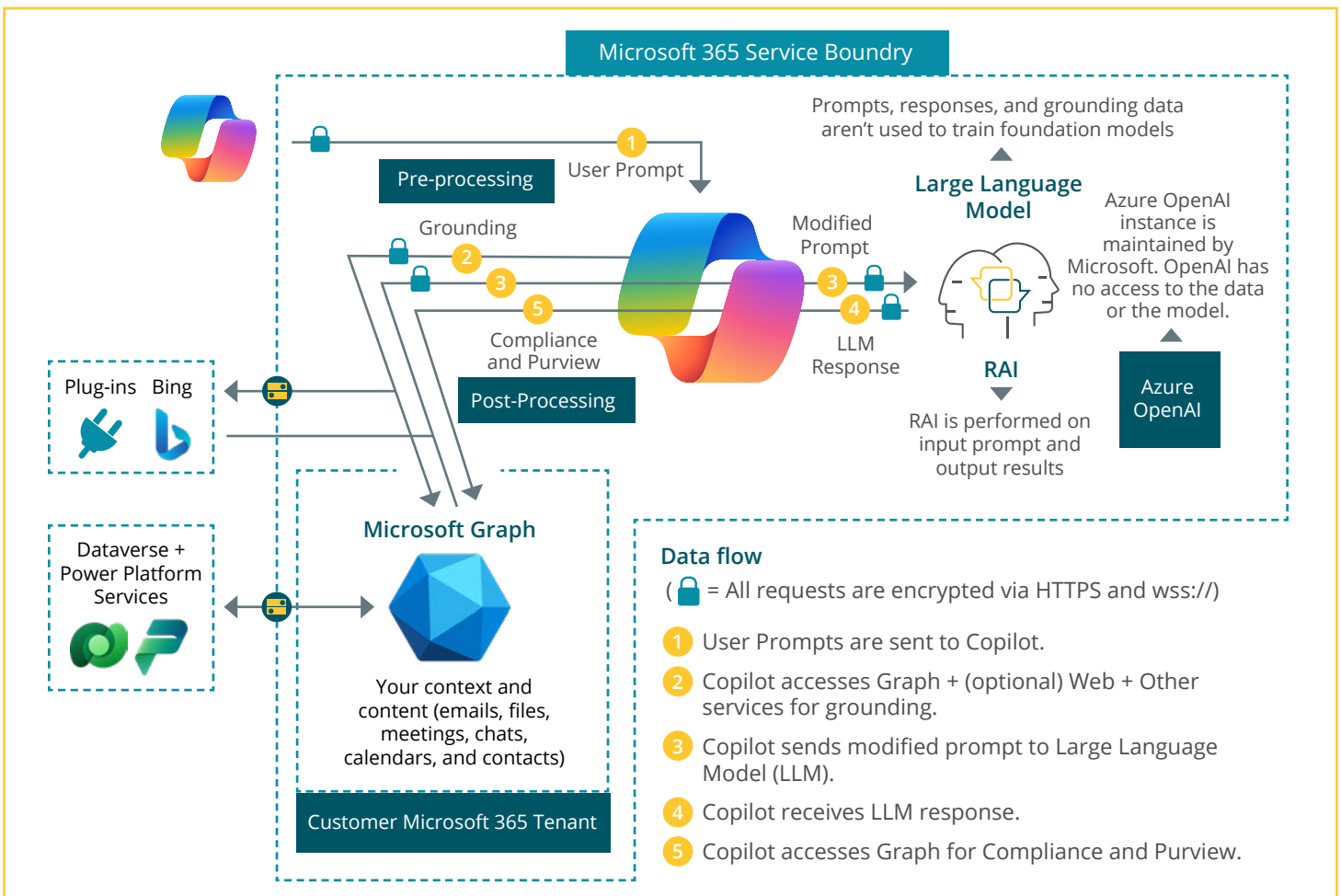


Figure 2

Revolutionize How You Work

Simply put, Copilot understands, summarizes, and generates content. What does this mean for legal teams? It means you can accomplish more quickly and strategically.

GitHub data [showed](#)¹ that among their developers using Copilot:

88%

reported being more productive.

74%

reported that they can focus on more satisfying work.

77%

reported spending less time searching for information or examples.

3 Use Cases for Legal Teams

Organizations seeking to maintain their competitive edge understand Microsoft Copilot's value and actively invest in this tool to transform how they work. Let's get into the specifics of what that looks like for legal teams with three use cases:





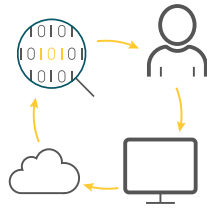
Use Case #1: Contract Management

With its many moving parts, contract management can be arduous and time-consuming.

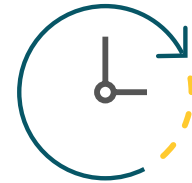
Here's a snapshot of common [contract management challenges](#):²



89% of organizations don't feel their contracting process is "very effective."



Human contract review takes **92 minutes**, on average.



Contract professionals spend up **to two hours** finding specific language in a document.

Contract Management Prompts

Copilot can assist in reviewing, drafting, and summarizing contracts. It can also compare documents, highlight discrepancies, and suggest standard clauses, **significantly reducing your time** on contract management.

Harness this tool's potential with prompts like:

"Summarize each party's key obligations and rights in this contract."

"Identify any clauses related to termination, confidentiality, and liability in the following contract and provide a brief overview of each."

"Highlight any deviations from our standard contract template in this document."



Use Case #2: Legal Research

A case's success often hinges on a robust and timely research process. Lawyers spend³ **between 5 and 10 hours each week** on legal research. When combined with the other daily tasks that teams have—client communication, case management, and brief drafting—these hours add up.

Turn the Tedious into Impactful

Instead of spending all this time poring over case law, Copilot can streamline legal research by quickly providing relevant case law, statutes, and legal articles. With this time, you can use these insights to craft your case and drive a winning result.

Legal Research Prompts

Harness this tool's potential with prompts like:

"Find recent case law on breach of contract related to remote service delivery failures."

"Summarize the latest amendments to the consumer protection law applicable to e-commerce businesses."

"Provide an overview of the trademark registration process in the United States and the EU."



Use Case #3: Legal Document Automation

Legal teams must create a series of standard legal documents, of which there are many. Legal documents may include:



Articles of
Incorporation



Bills of Sale



Contract
Amendments



Deeds
of Trust



Employment
Agreements

And that's only the first few letters of the alphabet. The point is that teams must create numerous legal documents, and this is another task that eats up your hours, energy, and attention.

Legal Document Automation Prompts

Eliminate the manual work using Copilot to automate document creation and ensure consistency across your documents.

Harness this tool's potential with prompts like:

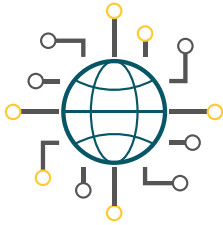
"Generate a clause on data protection that complies with GDPR for our service agreement."

"Provide a non-disclosure agreement clause that includes intellectual property rights protection."

"Suggest language for a force majeure clause that covers pandemics and natural disasters."

Paving the Right Foundations Before Takeoff

As illustrated above, Copilot can yield significant time savings. To reap this tool's full benefits, you must implement Copilot successfully, and to do that, you must establish three foundational elements:



Geolocation Data Segregation



Classification and Sensitivity Labels



Records Management

Geolocation Data Segregation

Step one includes segregating data based on geolocation to comply with regional data protection regulations. Compliance is [critical](#)⁴ as 137 out of 194 countries have legislation to protect data and privacy.

When segregating geolocation data, ensure data is stored and processed in data centers located in the same region as the data's origin or in accordance with specific legal requirements. Microsoft 365® (M365) offers data residency options to help organizations meet these requirements, allowing them to choose the data centers where they store their data.

Classification and Sensitivity Labels

Implementing classification and sensitivity labels is a foundational step in ensuring that your organization handles data appropriately, especially when classifying data as low, moderate, or high risk.

- **Low Risk:** Public data and data individuals can easily recreate or recover.
- **Moderate Risk:** Internal data, such as your organization's operating procedures.
- **High Risk:** Sensitive and confidential data that individuals should not disclose to the public.

M365 offers powerful tools that automatically or manually classify data based on its content and context. Once classified, your organization can apply sensitivity labels to control and govern access to data. These labels are crucial in enforcing data protection policies, such as encryption and access restrictions, ensuring your organization effectively safeguards sensitive information.

Records Management

Proper records management—defining policies for retaining and disposing of records according to legal and operational requirements—is essential for compliance, legal, and business continuity reasons. **Poor records management costs your organization** time and money: On average, employees [spend](#)⁵ \$120 worth of time daily searching for documents.

M365 includes comprehensive records management features that enable organizations to classify, retain, review, and dispose of records in a manner that meets regulatory and business needs. These features support the entire records management lifecycle, from declaration through retention to disposition, ensuring you manage your information effectively and comply with legal obligations.

Go Beyond Software Implementation with HaystackID's Copilot Readiness Program

An investment in Microsoft Copilot is an investment in your organization's future. Work with HaystackID to ensure you get the most out of your tech stack.



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HaystackID delivers tailor-made solutions that transform the way businesses leverage technology. Our dedicated practice is not just about implementing software, but about understanding and aligning with the unique business processes of each organization.

Nate Latessa, Executive Vice President of Advisory Services

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Preparing for a Secure Landing

We've designed M365 Ready, our Microsoft 365 Copilot Readiness Program, to guide companies through the secure adoption and integration of Microsoft Copilot and SharePoint Premium into their business environment. We prioritize security by aligning Copilot's adoption with the highest data protection and compliance standards.

With our program, your organization can accrue numerous benefits like:

- Automated Content Creation and Workflows
- Intelligent Search
- Real-time Collaboration
- Customizable Workspaces
- Secure Document Sharing and Storage
- AI-powered Analytics and Reporting
- Advanced Security Features
- Compliance and Governance Tools

Your Copilot to Successful Implementation

Your path to a more productive workforce is one consultation away. After requesting a consultation with our experts to discuss specific goals and objectives for Copilot, we will evaluate your organization's security posture and IT infrastructure to determine readiness for a secure Copilot and SharePoint Premium deployment.

From there, we'll build a tailored plan—risk assessment, mitigation plans, compliance with relevant regulations—to **securely integrate Copilot and SharePoint Premium** into your business environment while maintaining data integrity and privacy.

Our experts will be your team's copilots every step of the way, including technical setup and integration. We will help securely install and configure Copilot and SharePoint Premium, ensuring the integration meets your organization's security policies and standards.

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HaystackID's distinction lies in our holistic approach, where we offer not only the technical expertise to migrate, manage, and protect data but also ready organizations for the future with our advanced eDiscovery training and playbooks.

Matt Miller, Senior Vice President – Information Governance and Data Privacy



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Learn More About HaystackID Microsoft 365 Services

Now's the time to build your flight plan for soaring productivity, collaboration, and security for your organization. [Contact us](#) today to learn more about HaystackID Microsoft 365 services.

Sources

¹ Microsoft. "Introducing Microsoft 365 Copilot – your copilot for work."

<https://blogs.microsoft.com/blog/2023/03/16/introducing-microsoft-365-copilot-your-copilot-for-work/>

² Contract Safe. "43 Contract Management Statistics Ahead of 2024." <https://www.contractsafe.com/blog/contract-management-statistics#:~:text=89%25%20of%20organizations%20don't,cost%20as%20much%20as%20%2450%2C000>

³ Alto Pro. "Lawyers Spend 17% of Workday on Legal Research." <https://altaprorpg.com/lawyers/lawyers-spend-17-of-workday-on-legal-research/#:~:text=The%20average%20lawyer%20spends%20between,for%20key%20words%20and%20phrases>

⁴ UNCTAD. "Data Protection and Privacy Legislation Worldwide." <https://unctad.org/page/data-protection-and-privacy-legislation-worldwide>

⁵ Archive Corporation. "Statistics that Matter: How Effective Records Management Transforms Business Operations." <https://www.archivecorp.com/records-management-statistics/>

About HaystackID®

[HaystackID](#) solves complex data challenges related to legal, compliance, regulatory, and cyber events. Core offerings include Global Advisory, Data Discovery Intelligence, HaystackID Core® Platform, and AI-enhanced Global Managed Review powered by its proprietary platform, ReviewRight®. Repeatedly recognized as one of the world's most trusted legal industry providers by prestigious publishers such as Chambers, Gartner, IDC, and Legaltech News, HaystackID implements innovative cyber discovery, enterprise solutions, and legal and compliance offerings to leading companies and legal practices around the world. HaystackID offers highly curated and customized offerings while prioritizing security, privacy, and integrity. For more information about how HaystackID can help solve unique legal enterprise needs, please visit HaystackID.com.