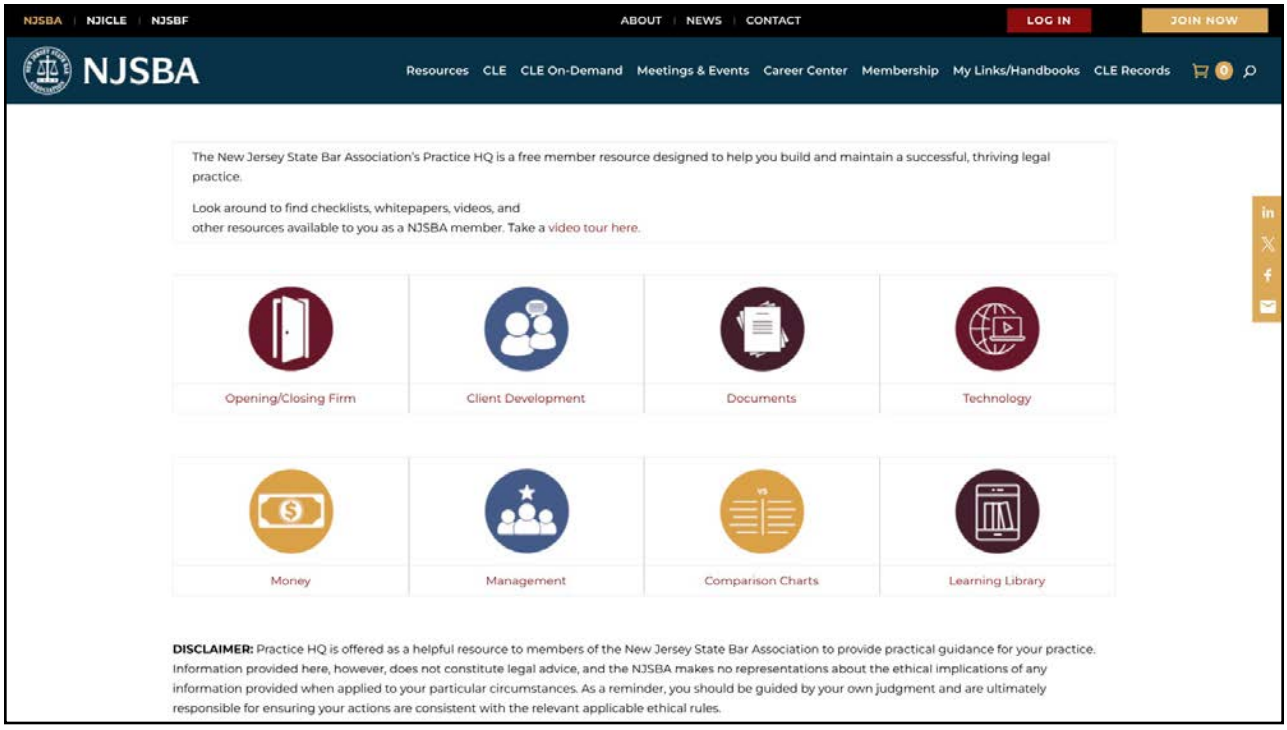
All in on AI

Jeffrey Schoenberger (jeff@lawyerist.com)



Definitions

Generative Pre-Trained Transformer (GPT)

- Created to function like a human brain, trained on input, such as large data sets, to produce outputs (answers to questions)

Generative AI

- Learns patterns and structure of input to generate new data that has similar characteristics

What's Old Is New

- **Sounds impressive**
- **Until you think about what computers have always done**
- **Think about an early computer game like Zork or Oregon Trail**
  - The computer stored data
  - You would type a direction (a prompt)
  - The computer would take your prompt, compare it to the data and return a result

So, What's The Big Deal?

- **50 years after those early computer games**
- **The amount of potential data available is incredible**
- **The speed with which a prompt can be processed is incredibly fast**

Types of AI

- **There are three types of AI based on capabilities**
  - Narrow AI
  - General AI
  - Super AI
- **There are four types of AI based on functionality**
  - Reactive Machine
  - Limited Memory
  - Theory of Mind
  - Self-Awareness

AI Capabilities

- **Narrow AI**
  - Has one narrow task and cannot perform beyond this task
  - *e.g.*, Siri or Alex have a limited set of pre-defined functions
- **General AI (or Strong AI)**
  - Can learn tasks that a human can learn
  - Has not been achieved yet
- **Super AI**
  - Surpasses human intelligence and understands emotion and desire
  - May never be achieved

AI Functions

- **Reactive Machine**
  - Reacts to present data but does not remember the past
  - *e.g.*, IBM Deep Blue that defeated Garry Kasparov
- **Limited Memory**
  - Trains from past data to make decisions
  - Past data is only used for a short time
  - *e.g.*, Self-driving cars

AI Functions (cont.)

- **Theory of Mind**
  - Understands emotions, sentiments and thoughts
  - Conceptual only
  - *e.g.*, Kismet robot and Sophia
- **Self-Awareness**
  - Understands emotions and has its own emotions
  - Hypothetical only

What Is AI?

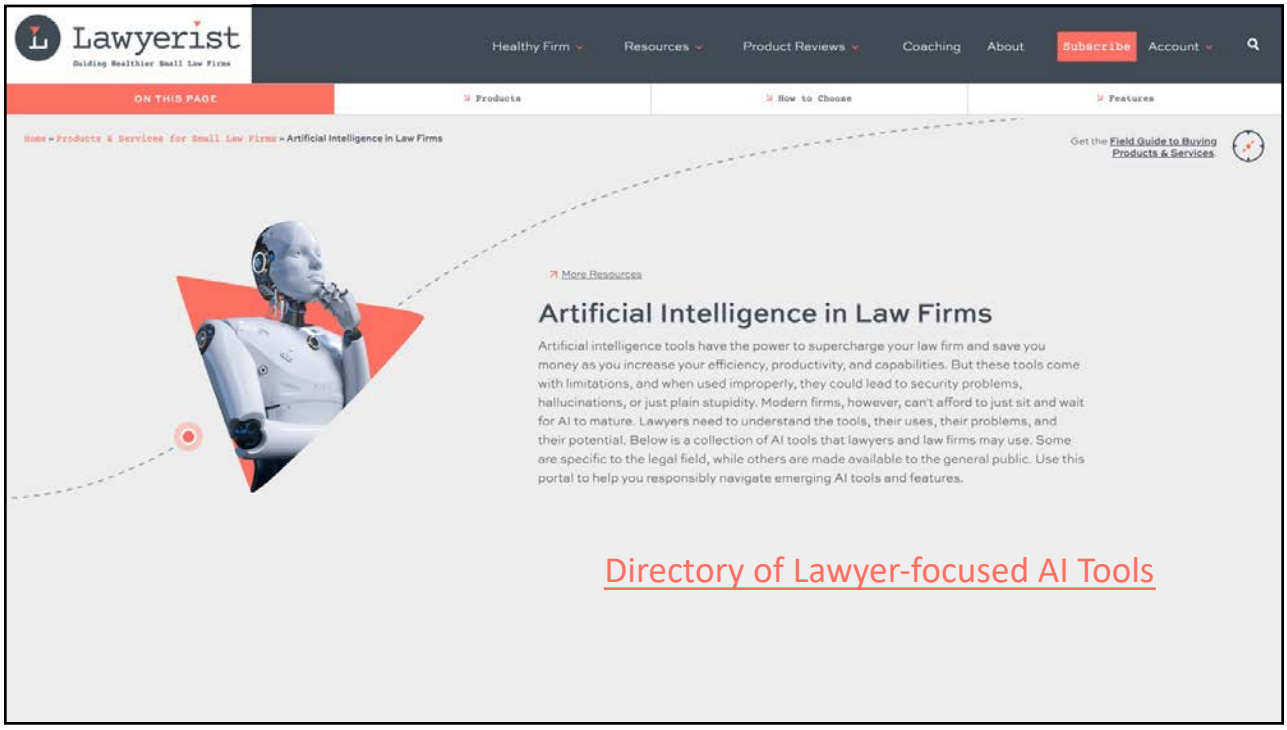
- So far, AI does what computers have always done.
- It just has a bigger data set and does it much faster.

Limitations

- AI is only as good as the data it can analyze.
- AI is only as good as the prompt.
- AI is only as good as how it is programed to respond to the prompt.

AI Tools You Already Use

- Smart Assistants (Siri, Alexa)
- Healthcare (Well)
- Automobiles (Assisted Driving, Self-Driving)
- Finance and Banking (Betterment)
- Travel (Google Maps)
- Social Media (Meta)
- Retail (Amazon)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Artificial Intelligence in Law Firms
Artificial intelligence tools have the power to supercharge your law firm and save you money as you increase your efficiency, productivity, and capabilities. But these tools come with limitations, and when used improperly, they could lead to security problems, hallucinations, or just plain stupidity. Modern firms, however, can't afford to just sit and wait for AI to mature. Lawyers need to understand the tools, their uses, their problems, and their potential. Below is a collection of AI tools that lawyers and law firms may use. Some are specific to the legal field, while others are made available to the general public. Use this portal to help you responsibly navigate emerging AI tools and features.
Directory of Lawyer-focused AI Tools

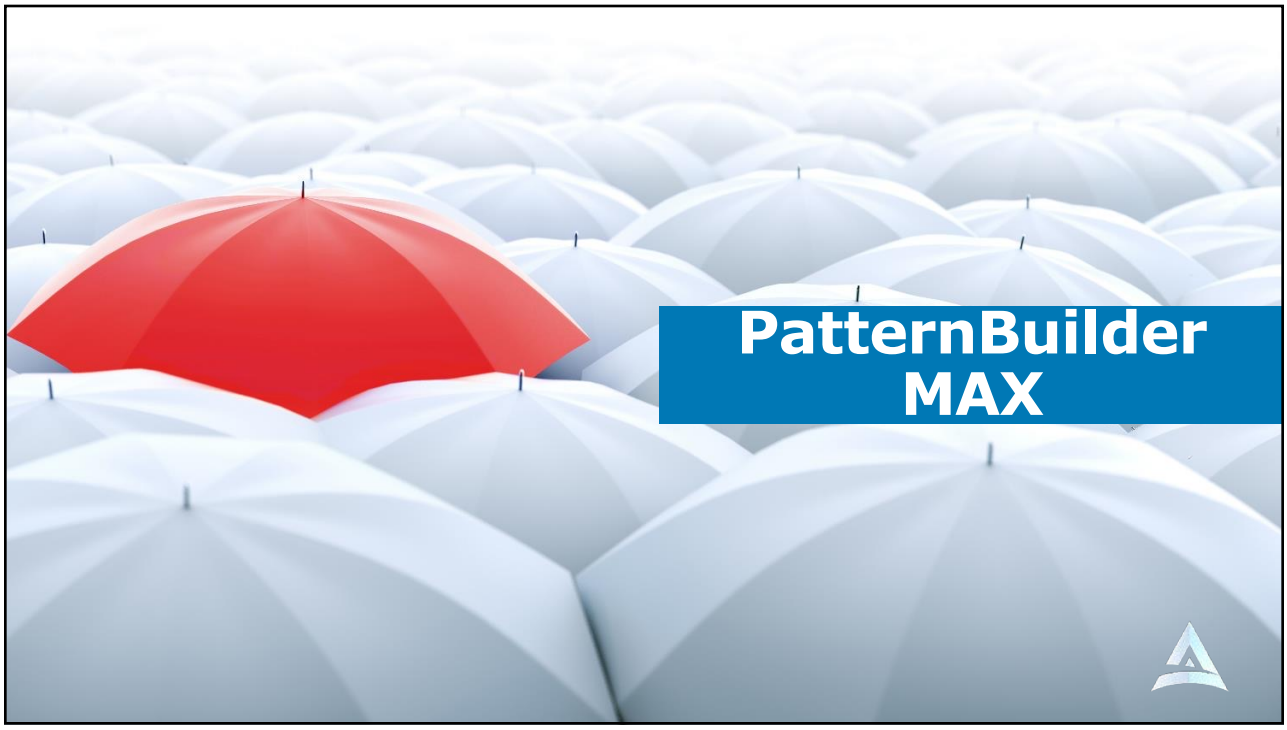
ChatGPT

Open AI

- **Founded by Elon Musk, Sam Altman and others in 2015**
- **Originally focused on machine learning tools for video games**
- **2018 report explained GPT (Generative Pre-Trained Transformer)**
  - Created to function like a human brain, trained on input, such as large data sets, to produce outputs (answers to questions)
- **Best known products are Dall-E and ChatGPT**

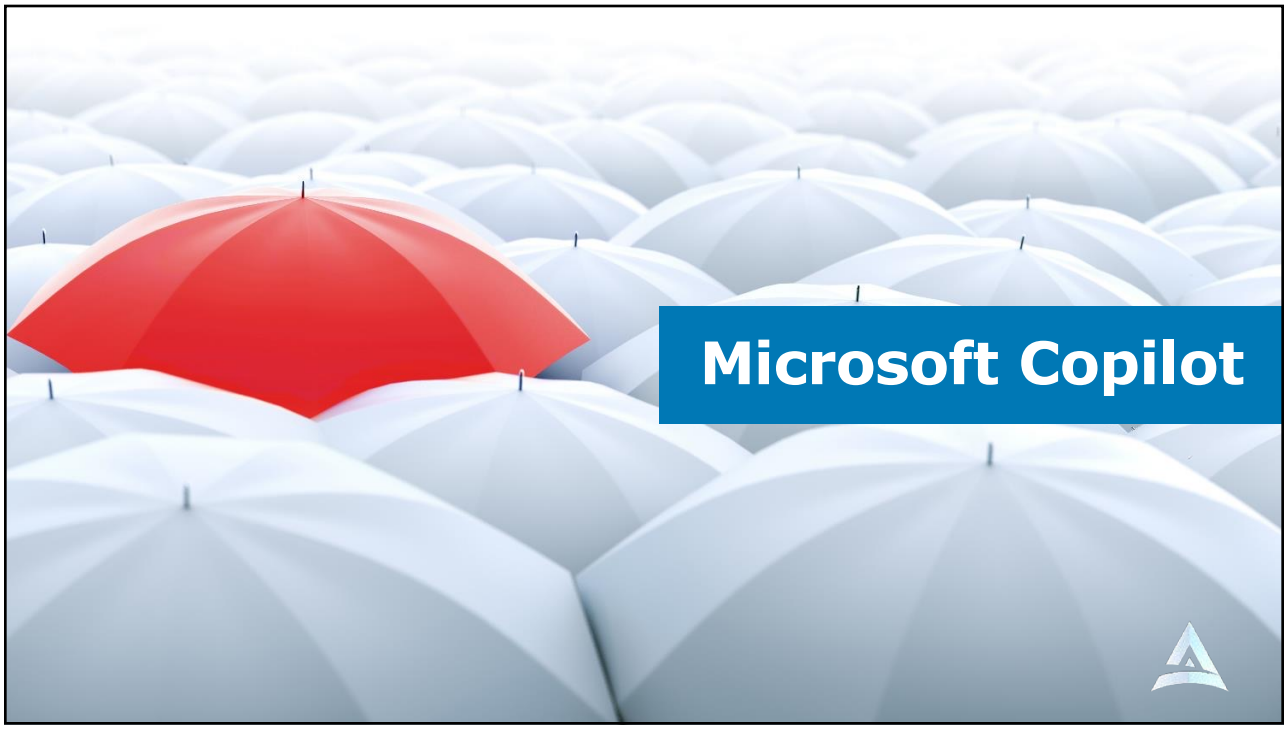
Chat GPT

- **Trained on Input from Large Data Sets**
  - From the Internet – websites, articles, books, forums
- **Learns the patterns and structures of language.**
- **Produce Outputs**
- **Uses what it learns about the patterns and structures of language to answer questions.**



PatternBuilder Max

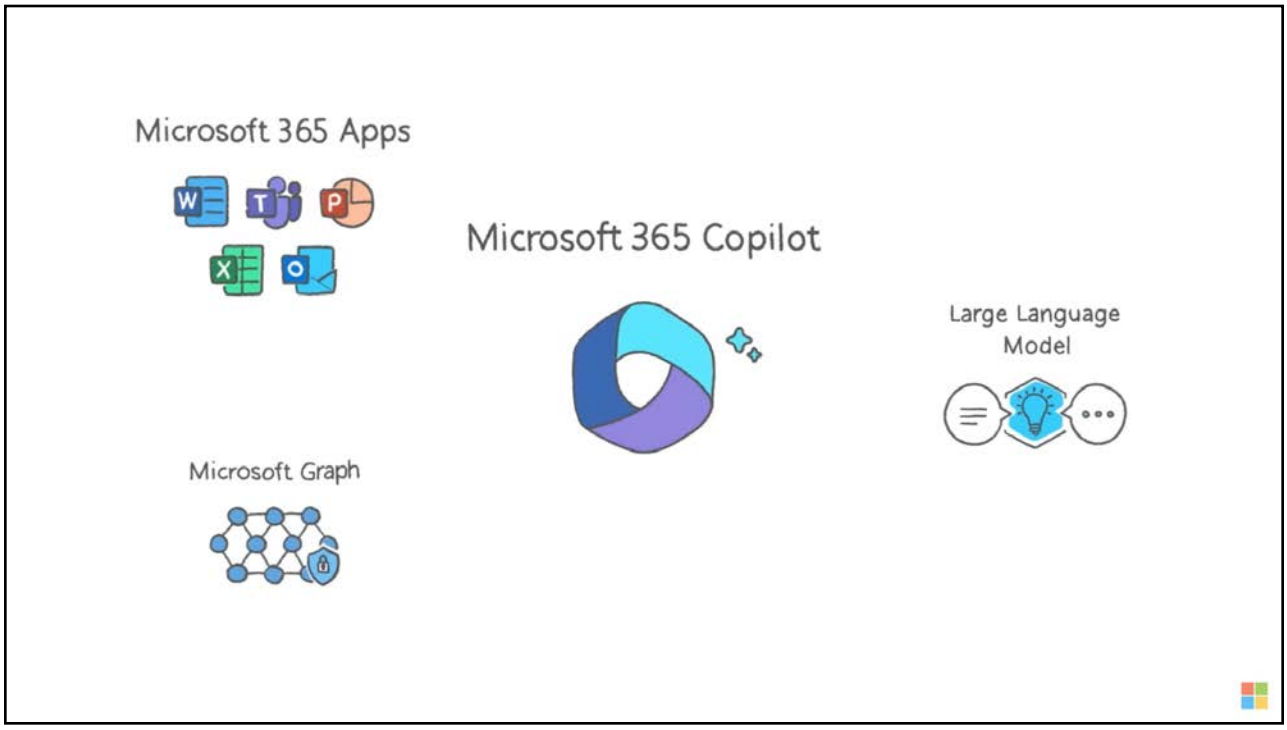
- Uses your data
- Prompt templates are provided (apps)
- Watch PatternBuilder MAX in Action

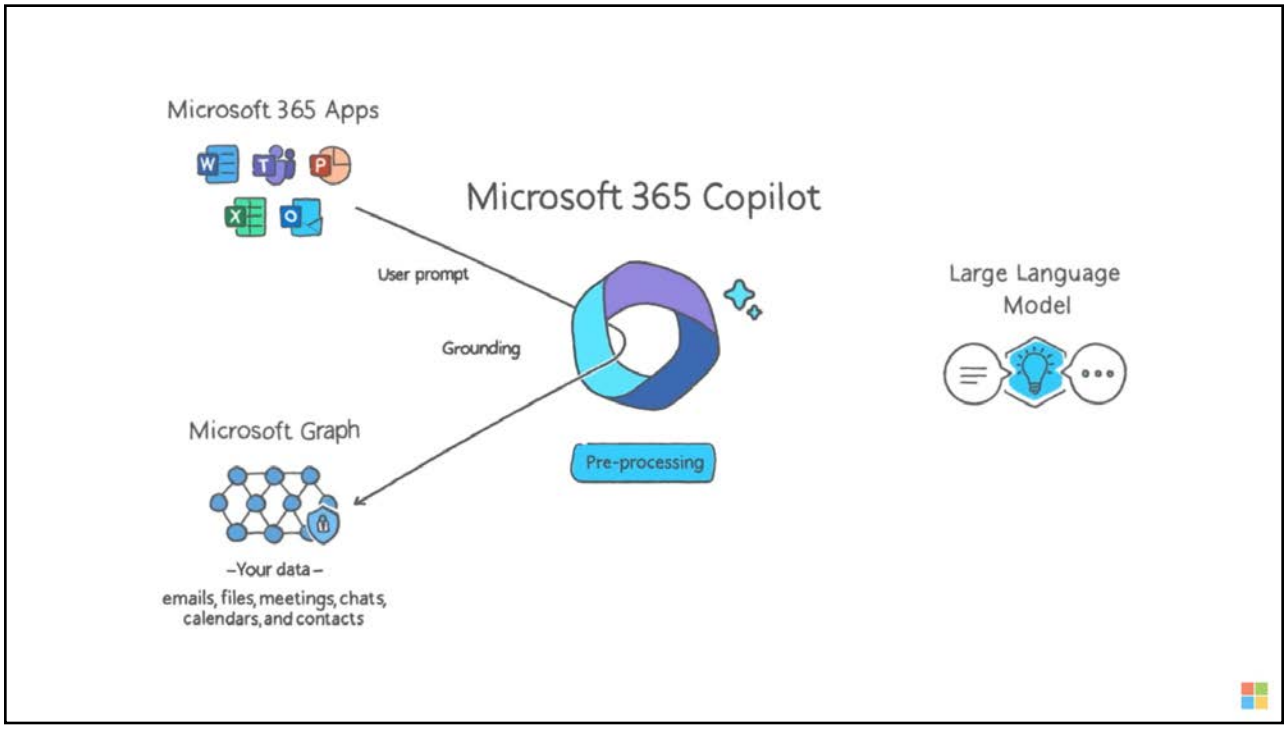


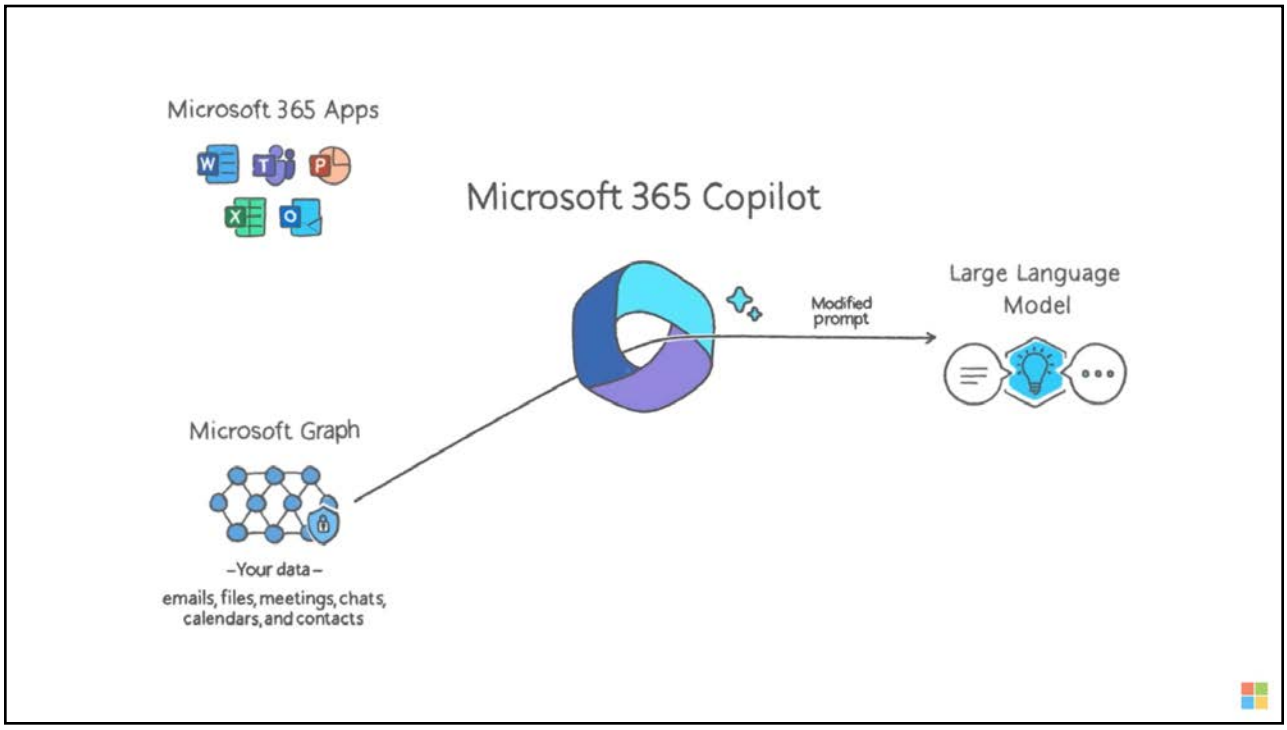
Microsoft M365 Copilot

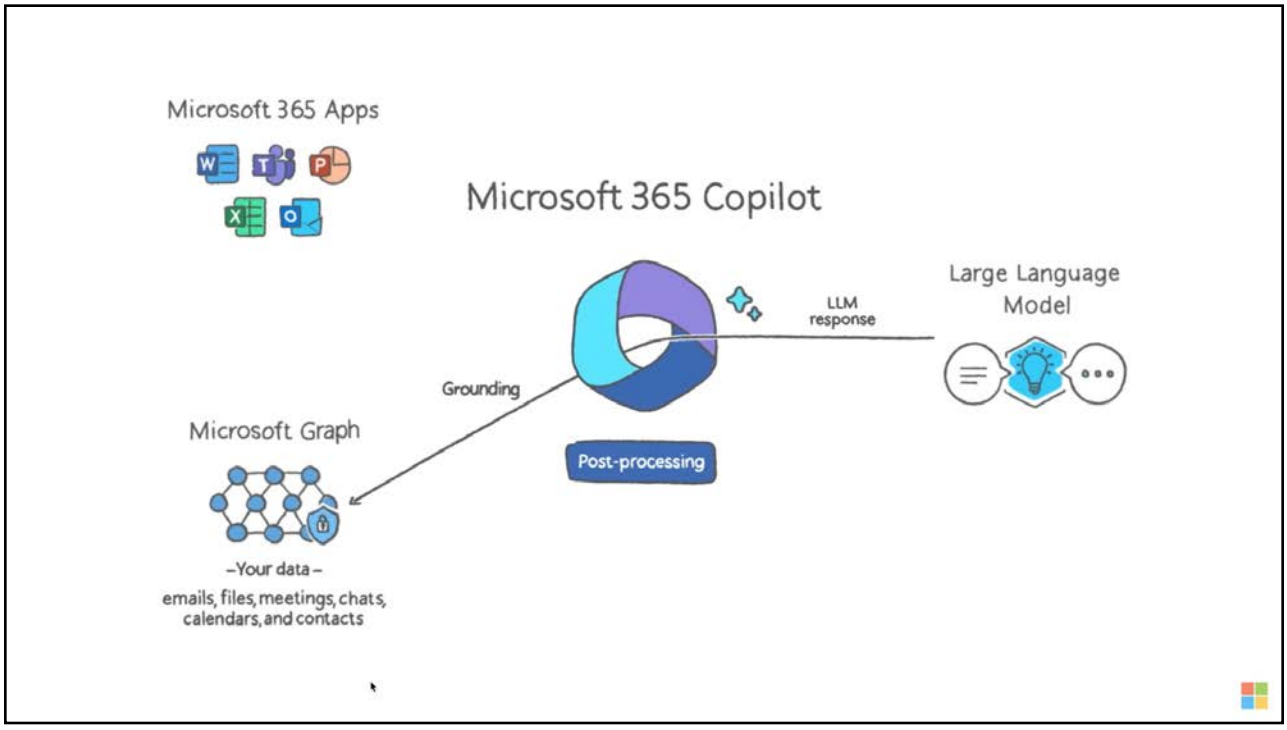
Examples:

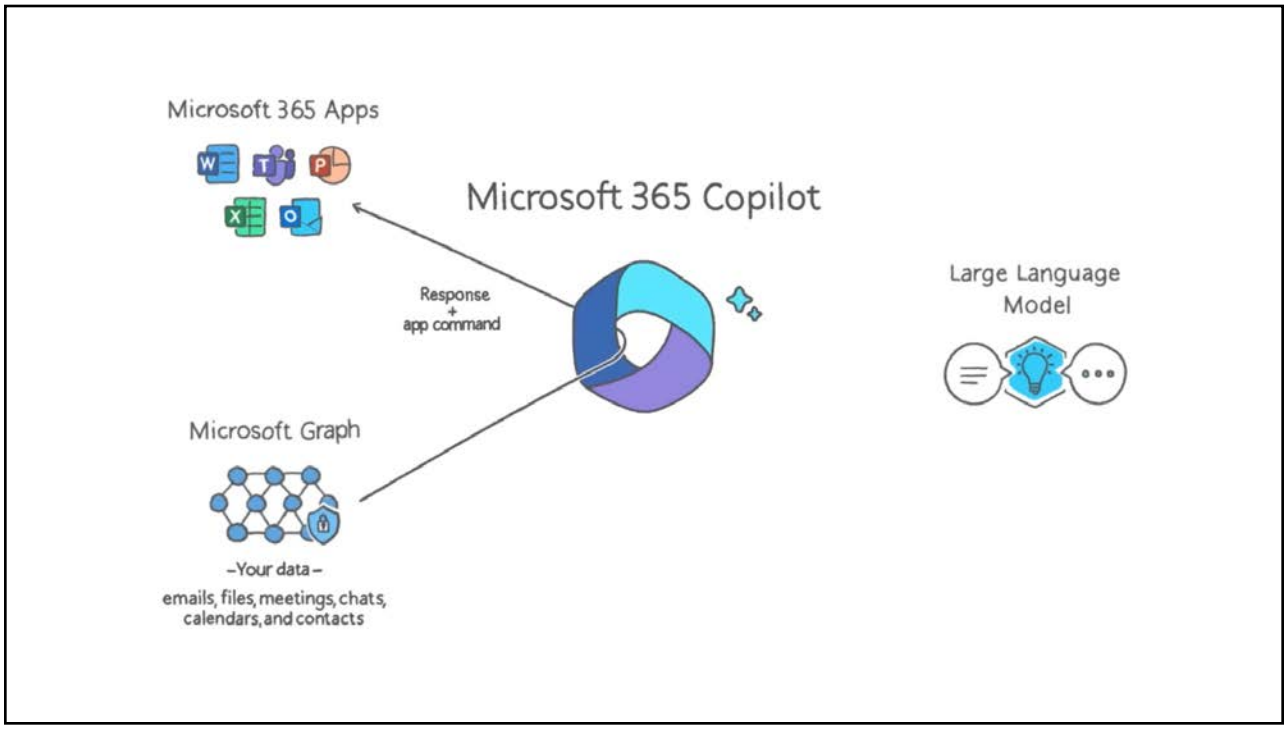
- **Transform a Word document**
- **Turn a Word into a PowerPoint**
- **Write an Excel formula for you**
- **Create an Excel chart for you**
- **Translate an email in Outlook**
- **Summarize an email conversation**

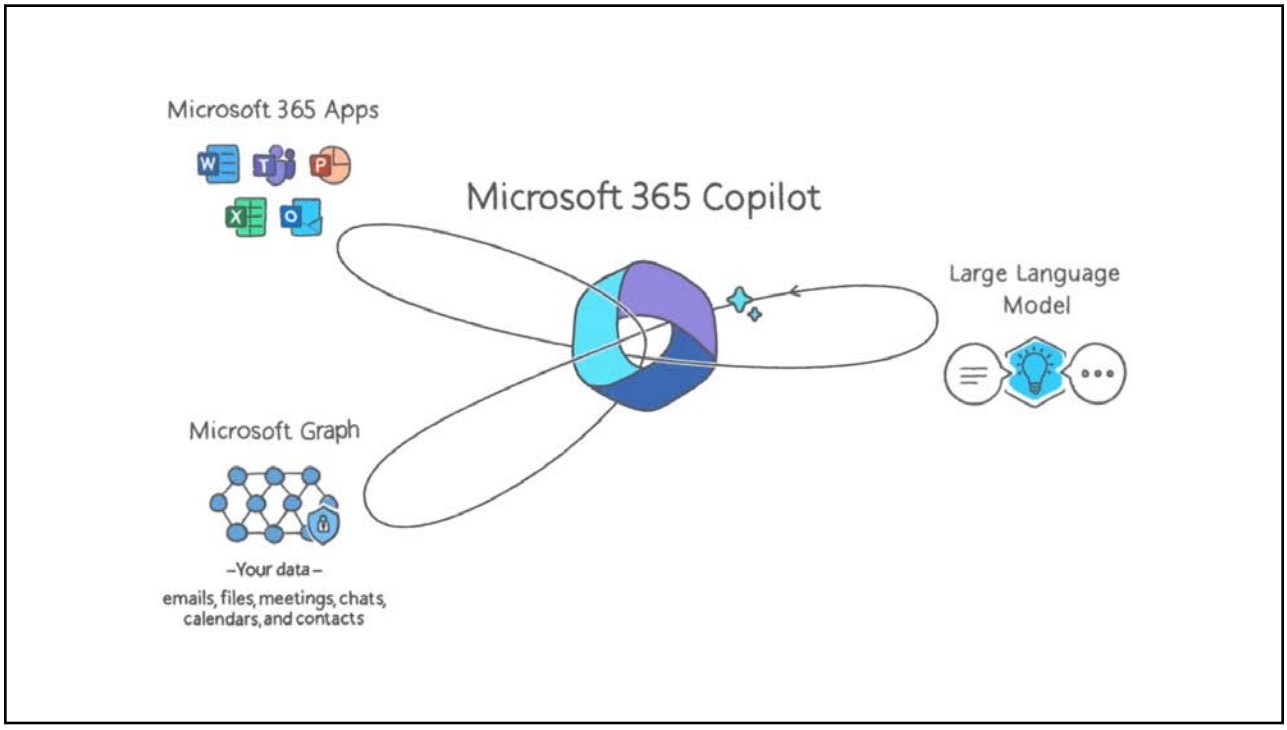

Microsoft 365 Apps
Microsoft 365 Copilot
Large Language Model
Microsoft Graph


Microsoft 365 Apps
Microsoft 365 Copilot
User prompt
Grounding
Large Language Model
Microsoft Graph
Pre-processing
–Your data–
emails, files, meetings, chats, calendars, and contacts


Microsoft 365 Apps
Microsoft 365 Copilot
Large Language Model
Modified prompt
Microsoft Graph
–Your data–
emails, files, meetings, chats, calendars, and contacts

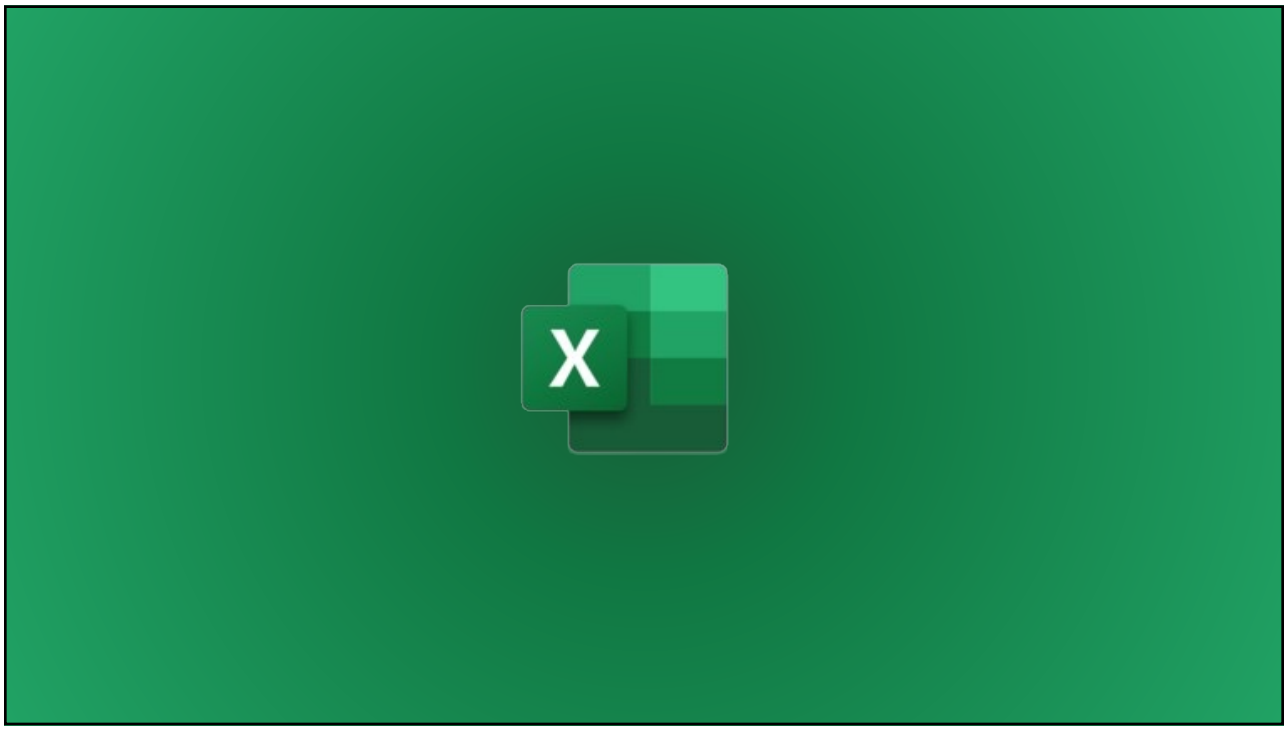

Microsoft 365 Apps
Microsoft 365 Copilot
Large Language Model
LLM response
Grounding
Microsoft Graph
Post-processing
–Your data–
emails, files, meetings, chats, calendars, and contacts


Microsoft 365 Apps
Microsoft 365 Copilot
Response
+
app command
Large Language
Model
Microsoft Graph
–Your data–
emails, files, meetings, chats,
calendars, and contacts


Microsoft 365 Apps
Microsoft 365 Copilot
Large Language
Model
Microsoft Graph
–Your data–
emails, files, meetings, chats,
calendars, and contacts

Microsoft M365 Copilot

- **Launched in November 2023, but…**
  - only for large corporate customers,
  - who already spent a lot with Microsoft (at least 300 licenses),
  - and were willing to buy many Copilot licenses.
- **Now?**
  - the doors will be open to all…
  - but the best features will cost a monthly fee beyond your standard MS 365 cost.



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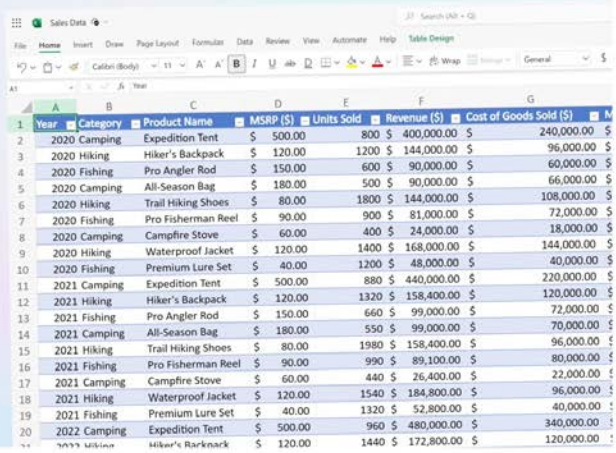
Copilot in Excel

Analyze, filter, format, sort, and edit data instantly



Year	Category	Product Name	MSRP ($)	Units Sold	Revenue ($)	Cost of Goods Sold ($)
2020	Camping	Expedition Tent	$ 500.00	800	$ 400,000.00	$ 240,000.00
2020	Hiking	Hiker's Backpack	$ 120.00	1200	$ 144,000.00	$ 96,000.00
2020	Fishing	Pro Angler Rod	$ 150.00	600	$ 90,000.00	$ 60,000.00
2020	Camping	All-Season Bag	$ 180.00	500	$ 90,000.00	$ 66,000.00
2020	Hiking	Trail Hiking Shoes	$ 80.00	1800	$ 144,000.00	$ 108,000.00
2020	Fishing	Pro Fisherman Reel	$ 90.00	900	$ 81,000.00	$ 72,000.00
2020	Camping	Campfire Stove	$ 60.00	400	$ 24,000.00	$ 18,000.00
2020	Hiking	Waterproof Jacket	$ 120.00	1400	$ 168,000.00	$ 144,000.00
2020	Fishing	Premium Lure Set	$ 40.00	1200	$ 48,000.00	$ 40,000.00
2021	Camping	Expedition Tent	$ 500.00	880	$ 440,000.00	$ 220,000.00
2021	Hiking	Hiker's Backpack	$ 120.00	1320	$ 158,400.00	$ 120,000.00
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2022	Camping	Expedition Tent	$ 500.00	960	$ 480,000.00	$ 340,000.00
2022	Hiking	Hiker's Backpack	$ 120.00	1440	$ 172,800.00	$ 120,000.00

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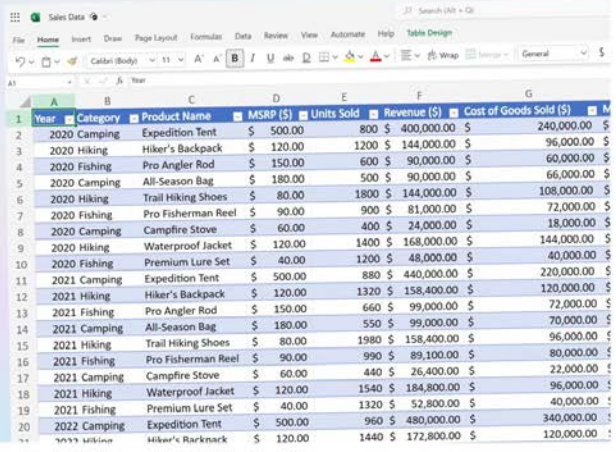
Copilot in Excel

Implement conditional formatting with a single prompt



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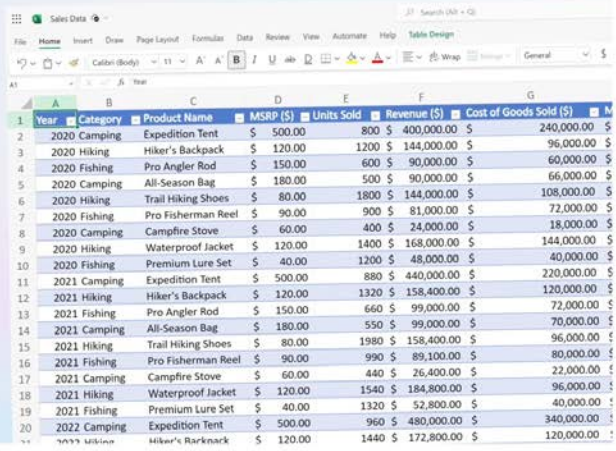
Copilot in Excel

Visualize key insights



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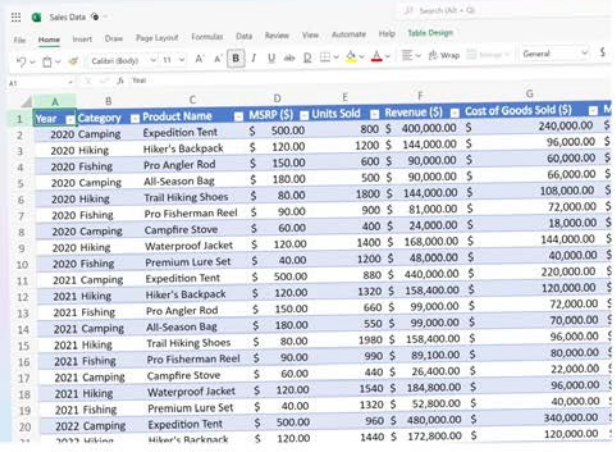
Copilot in Excel

Build compelling charts with a single prompt



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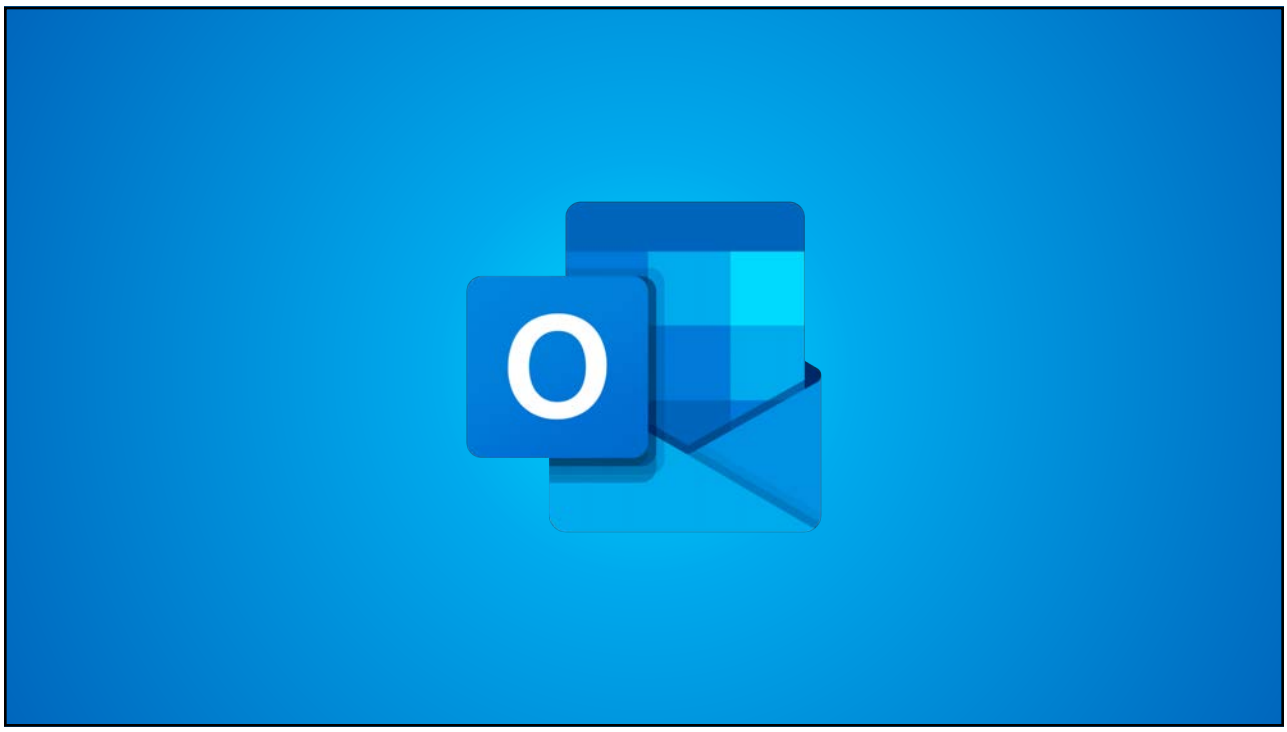

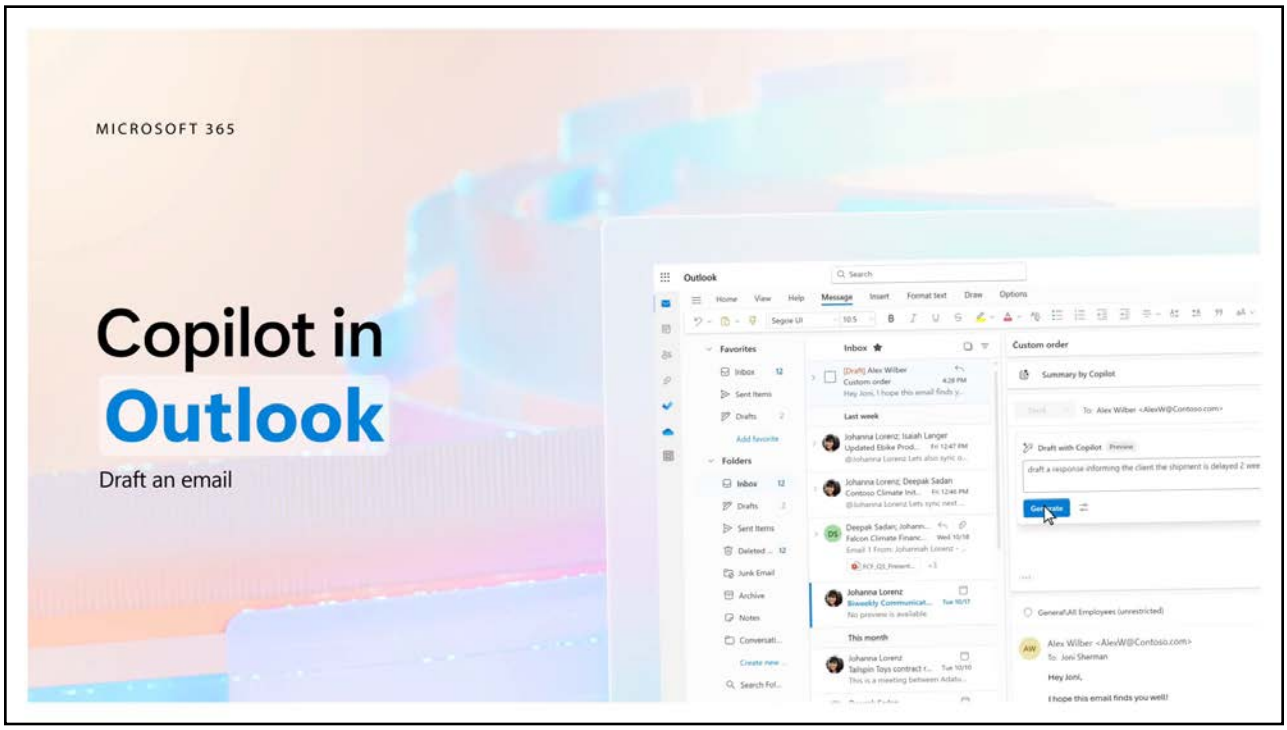
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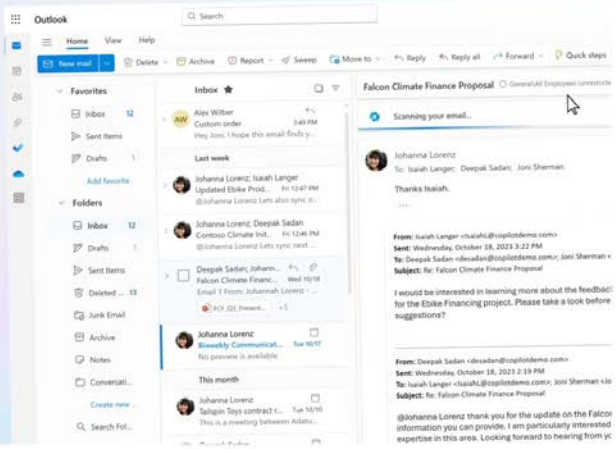
Copilot in
Outlook
Draft an email

MICROSOFT 365

Copilot in Outlook

Summarize an email thread



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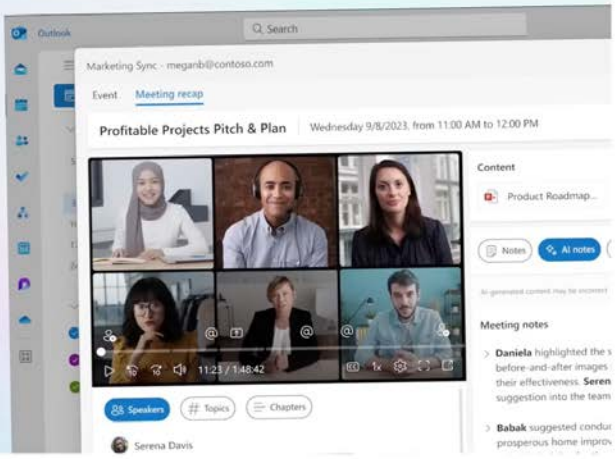
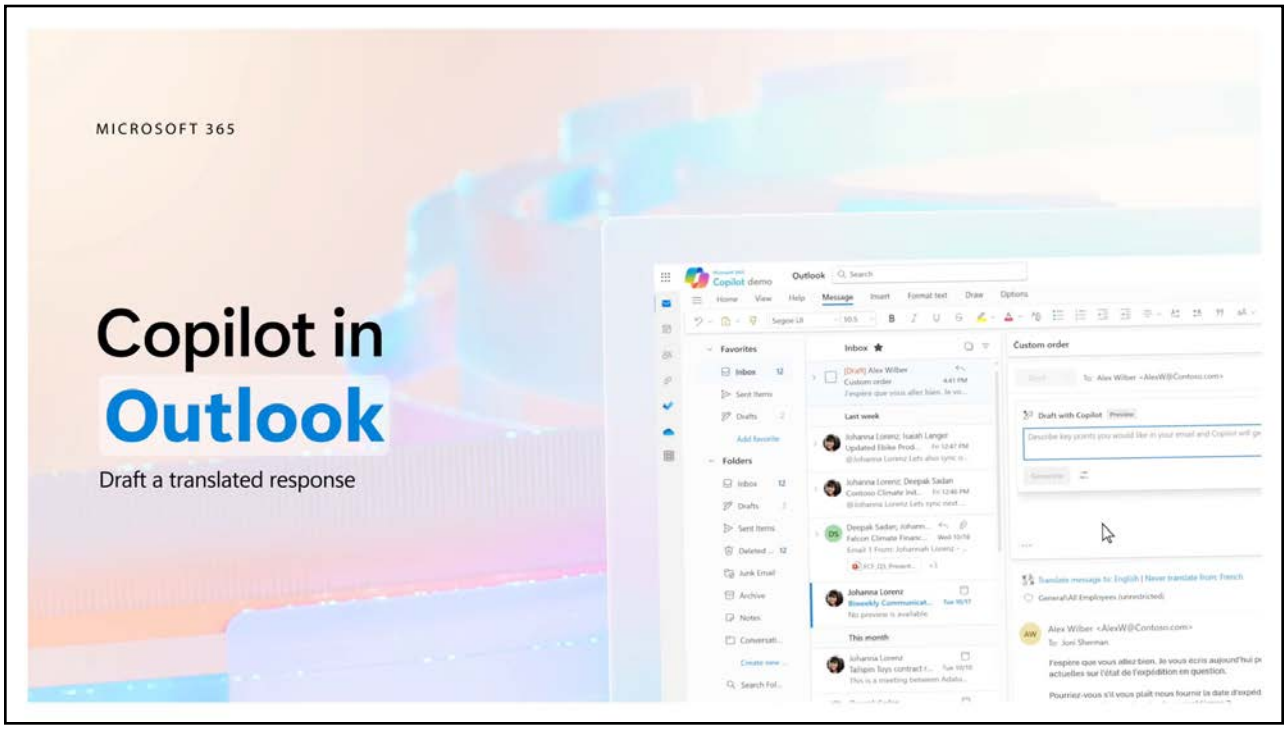
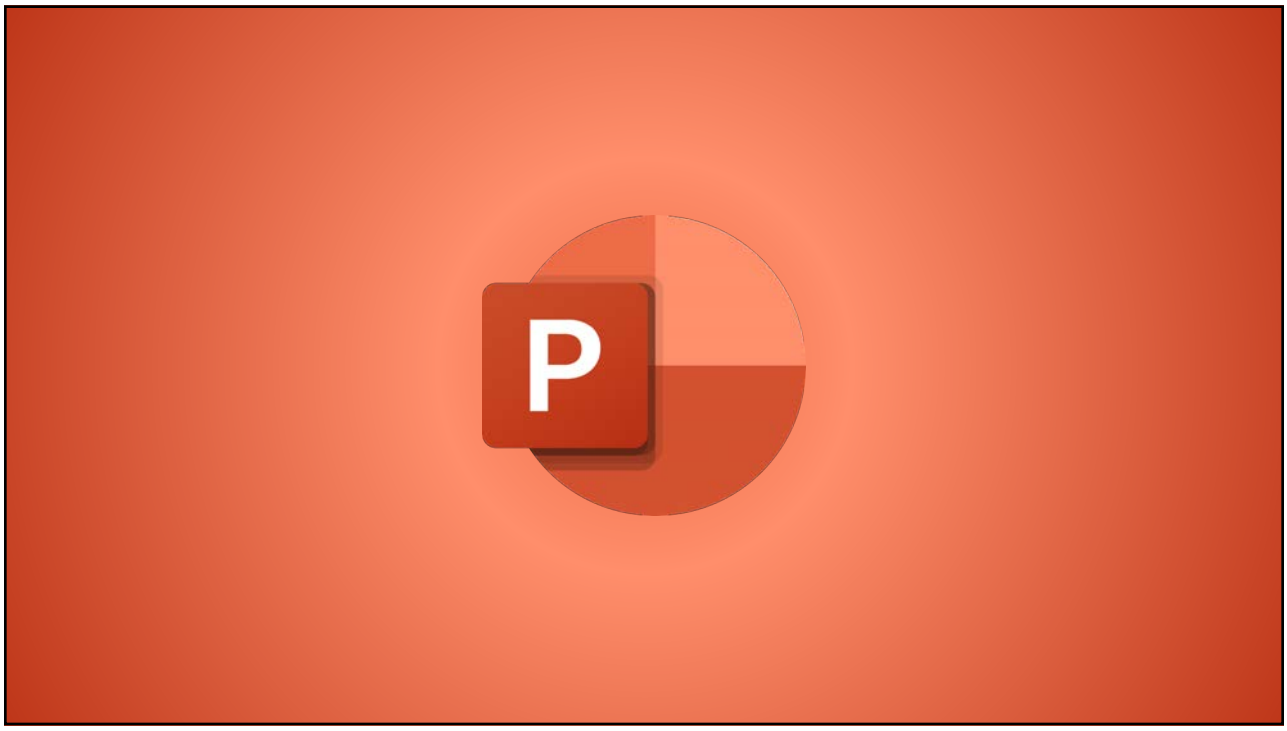
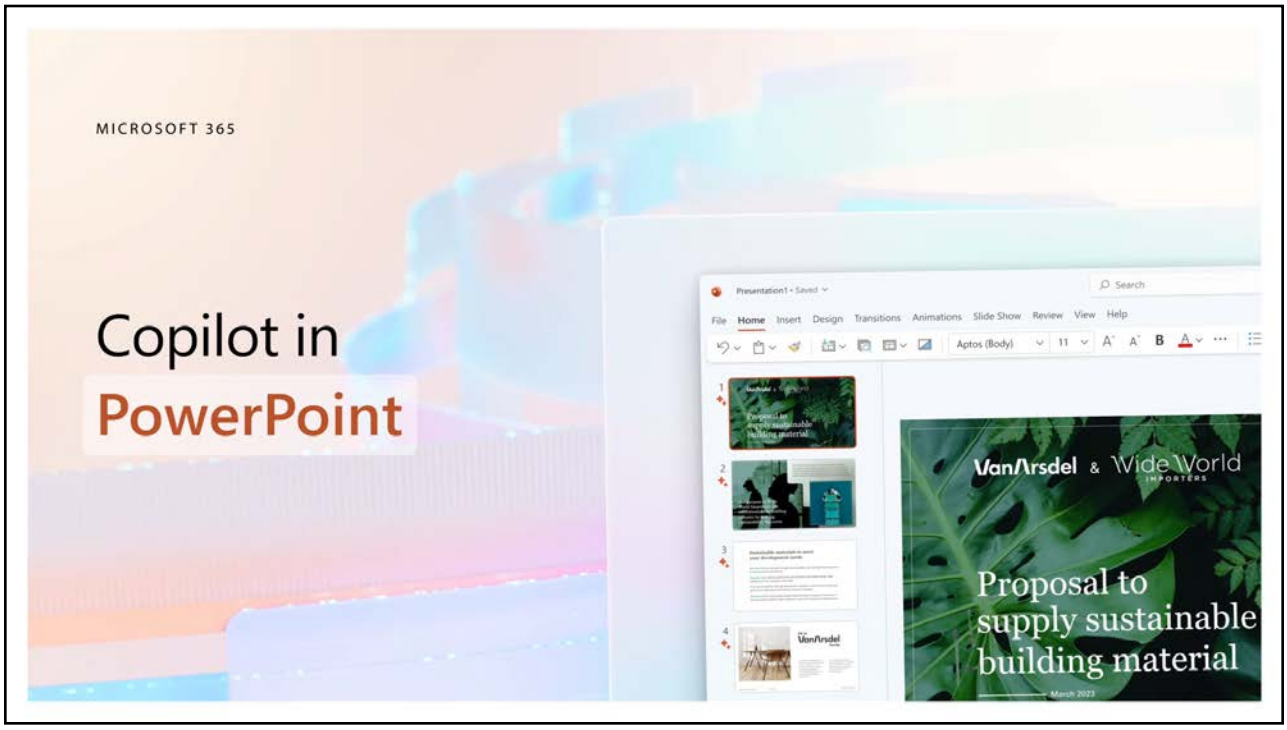
Copilot in Outlook

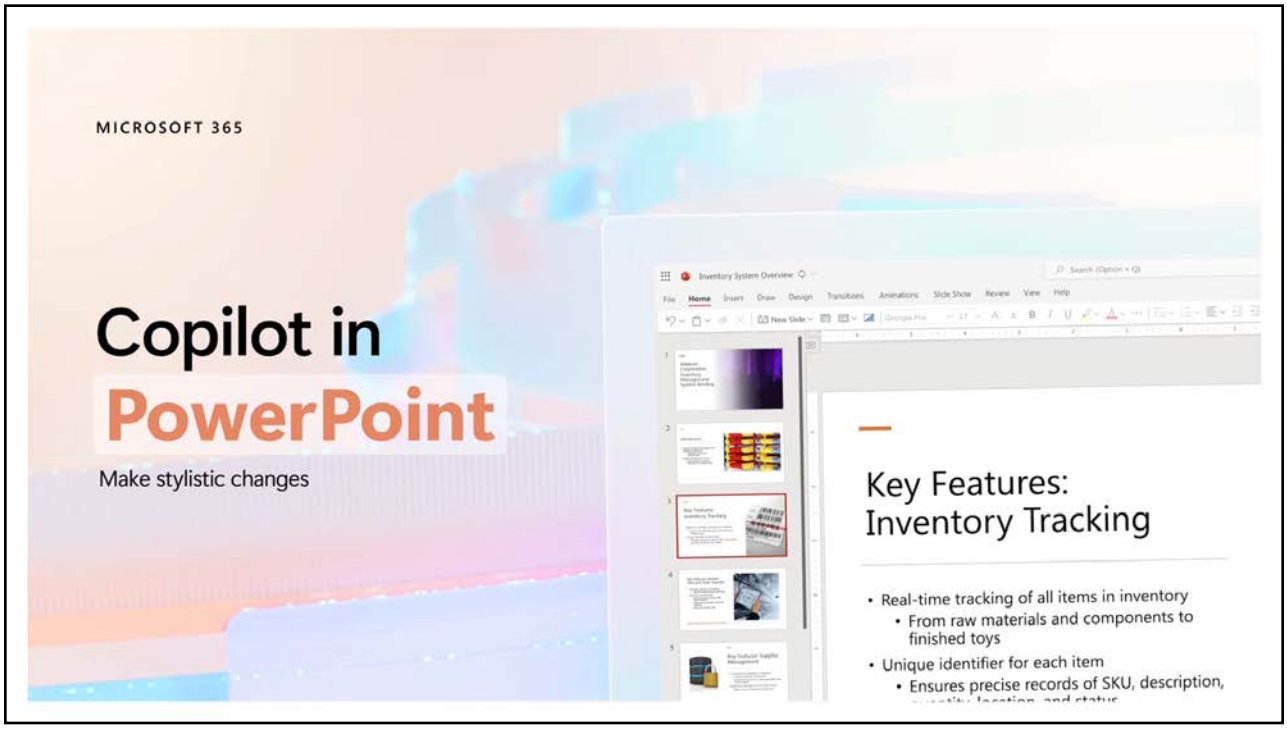
Follow a Meeting

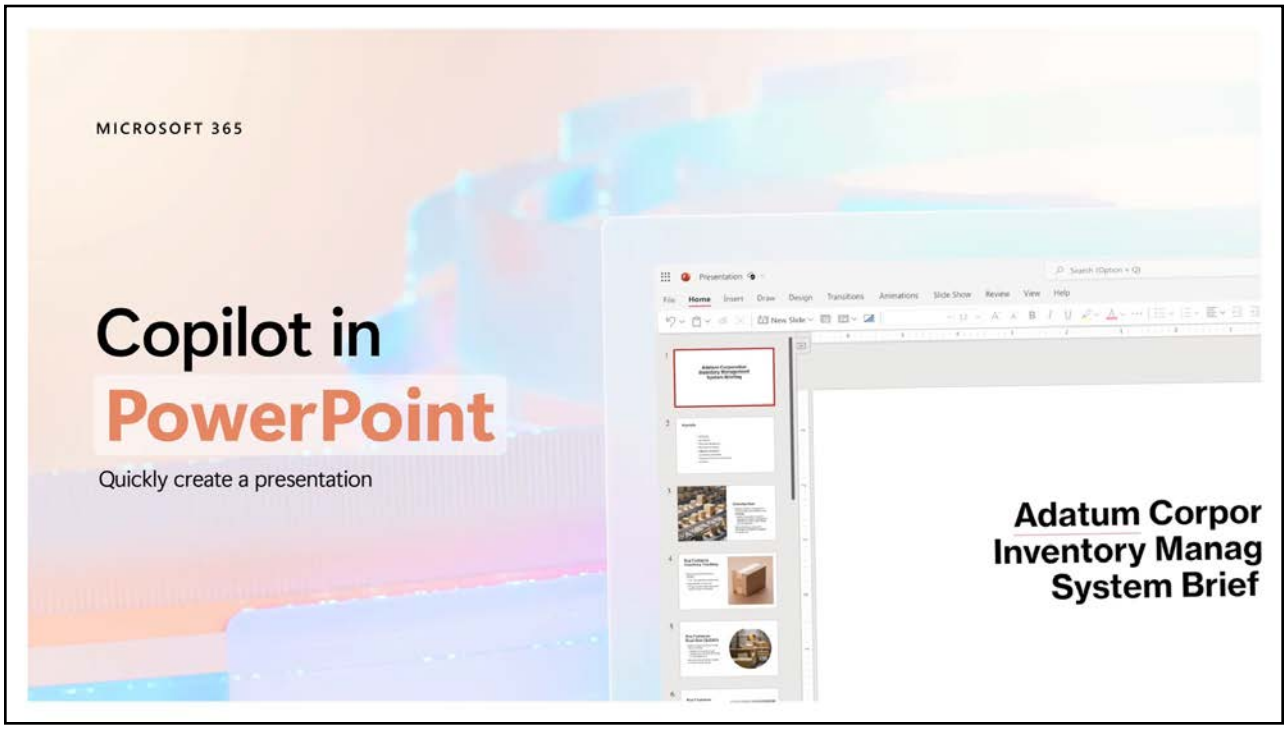


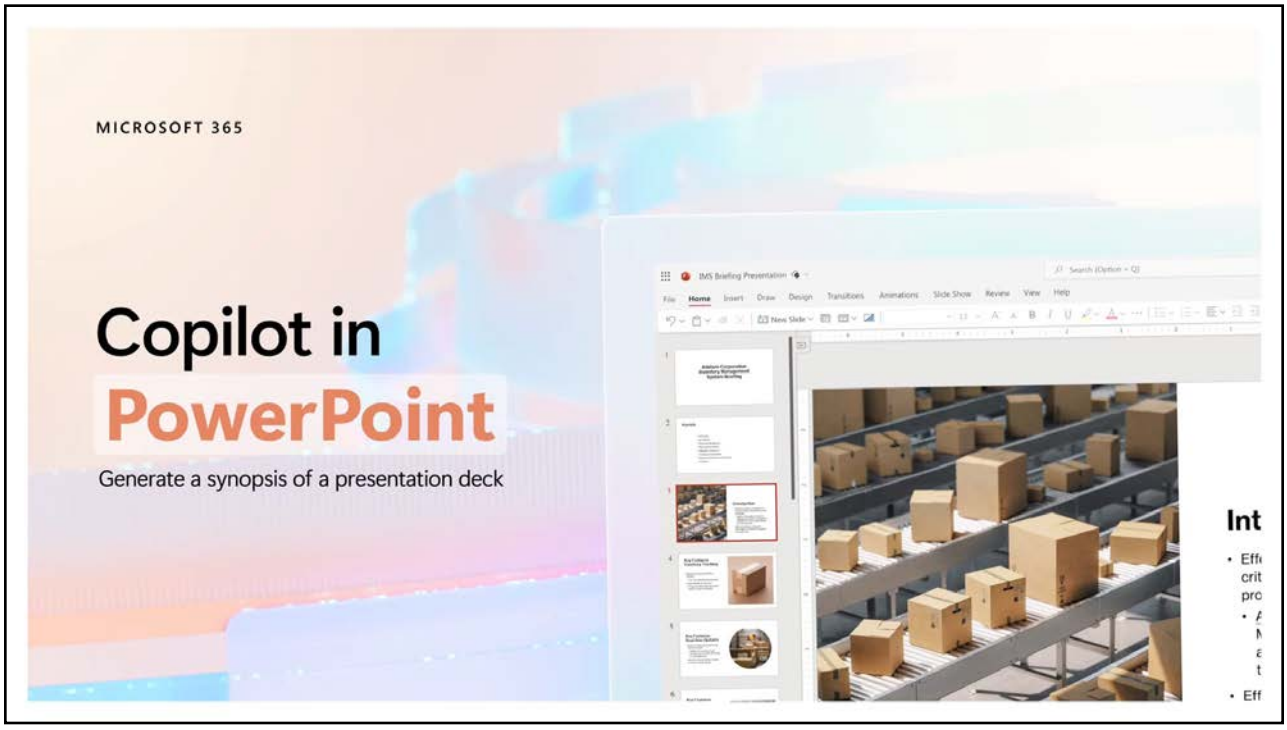

MICROSOFT 365
Copilot in
Outlook
Draft a translated response




MICROSOFT 365
Copilot in
PowerPoint
Proposal to supply sustainable building material


MICROSOFT 365
Copilot in
PowerPoint
Make stylistic changes
Key Features: Inventory Tracking
Real-time tracking of all items in inventory
From raw materials and components to finished toys
Unique identifier for each item
Ensures precise records of SKU, description,


MICROSOFT 365
Copilot in
PowerPoint
Quickly create a presentation
Adatum Corpor
Inventory Manag
System Brief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Copilot in
PowerPoint
Generate a synopsis of a presentation deck
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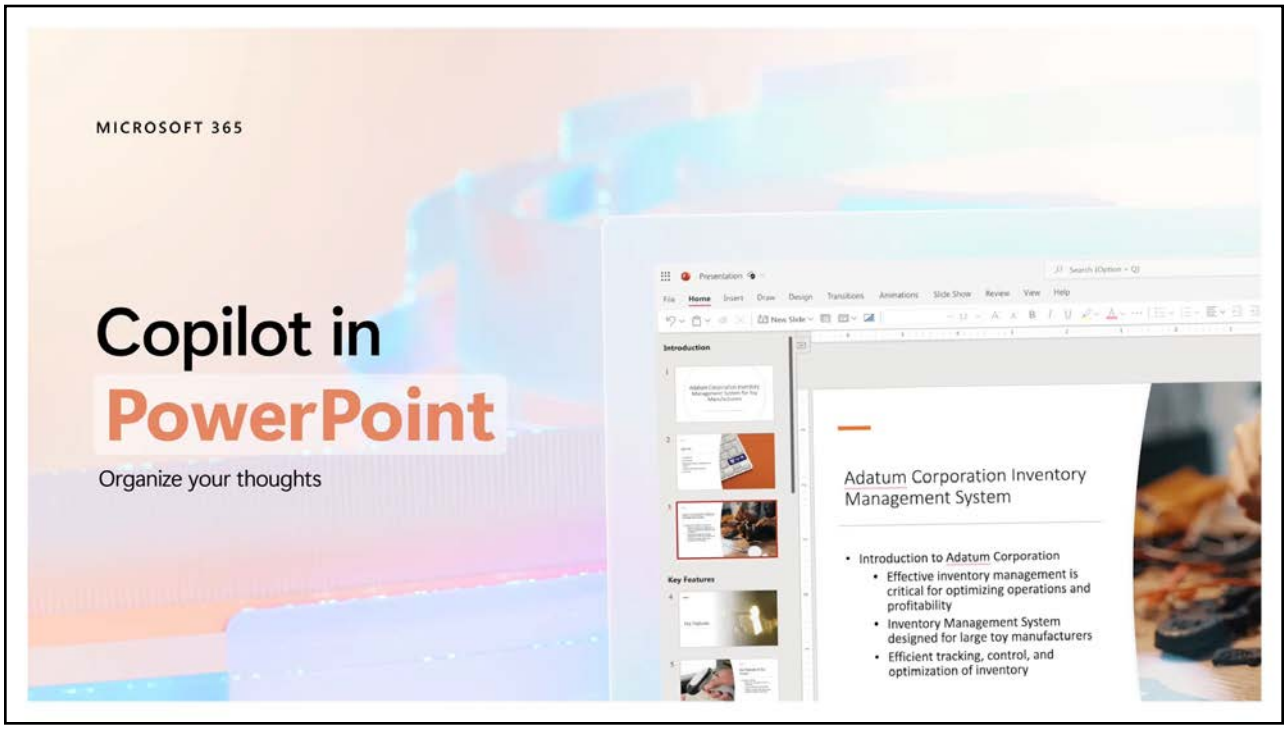
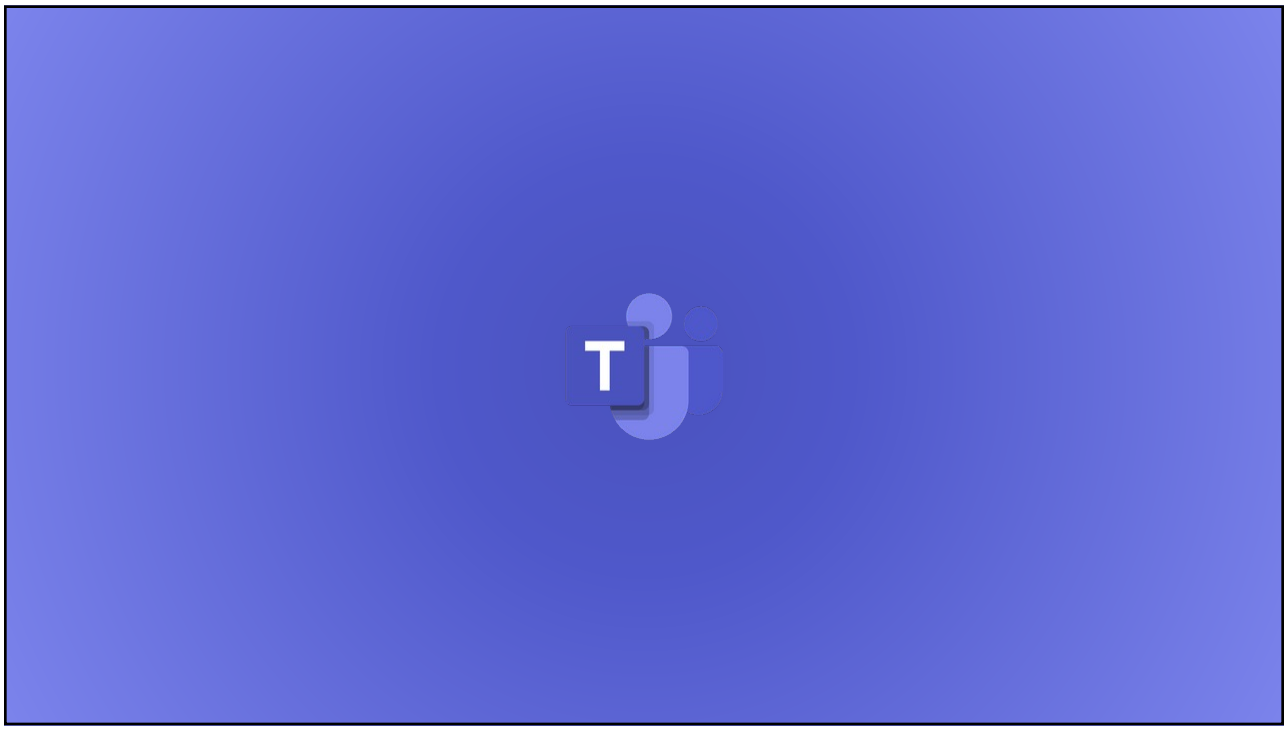
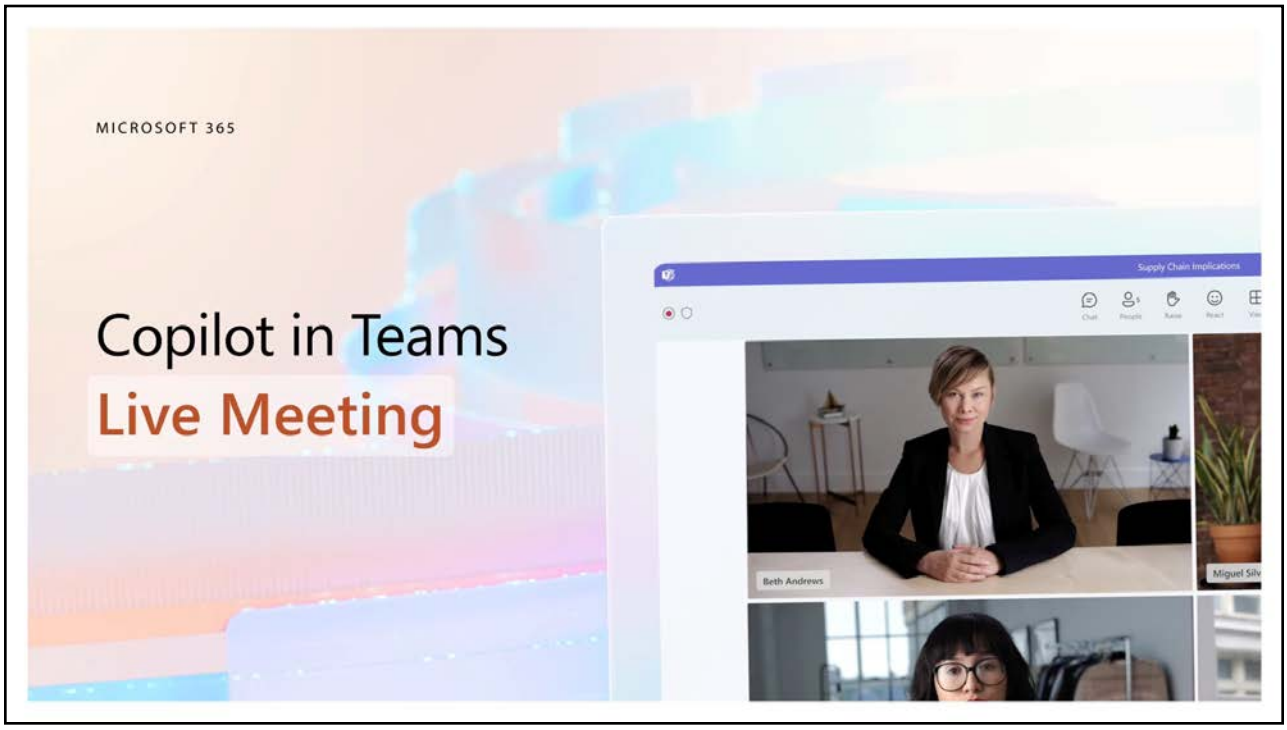

MICROSOFT 365
Copilot in
PowerPoint
Organize your thoughts
Introduction
Key Features
Adatum Corporation Inventory Management System
Introduction to Adatum Corporation
Effective inventory management is critical for optimizing operations and profitability
Inventory Management System designed for large toy manufacturers
Efficient tracking, control, and optimization of inventory

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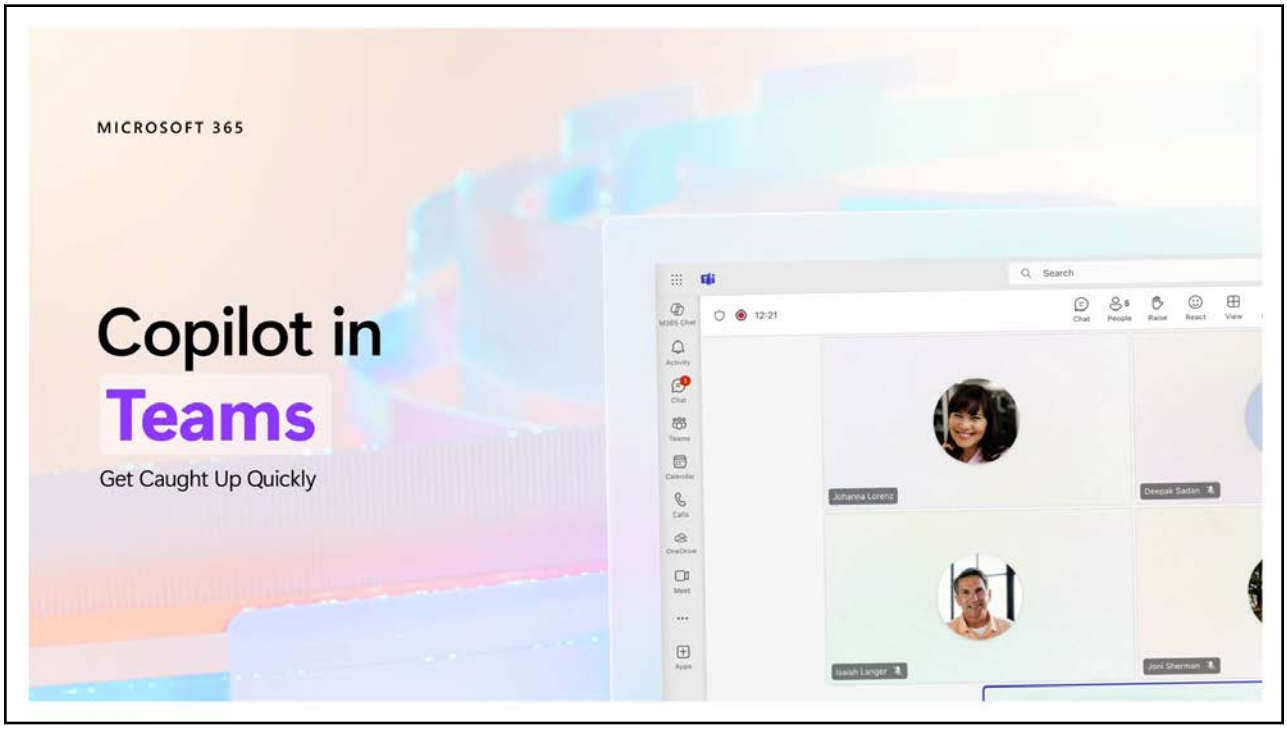
Copilot in Teams
Live Meeting
Supply Chain Implications
Beth Andrews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Copilot in
Teams
Get Caught Up Quickly
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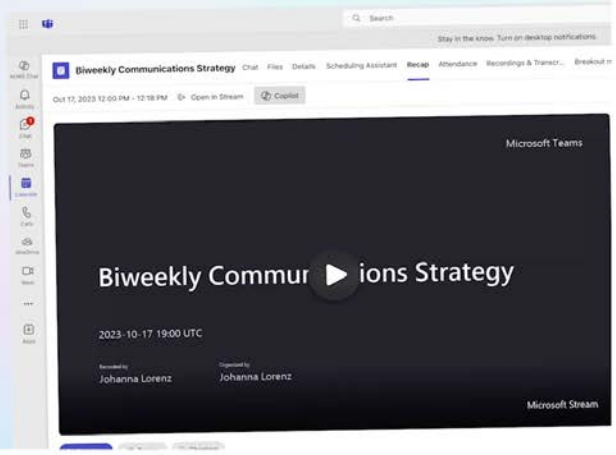
Johanna Lorenz
Deepak Sadan
Isaiah Langer
Joni Sherman

MICROSOFT 365

Copilot in Teams

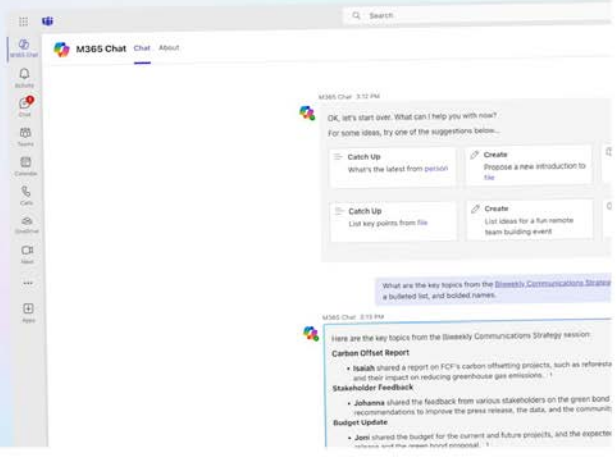
Participants biggest concern

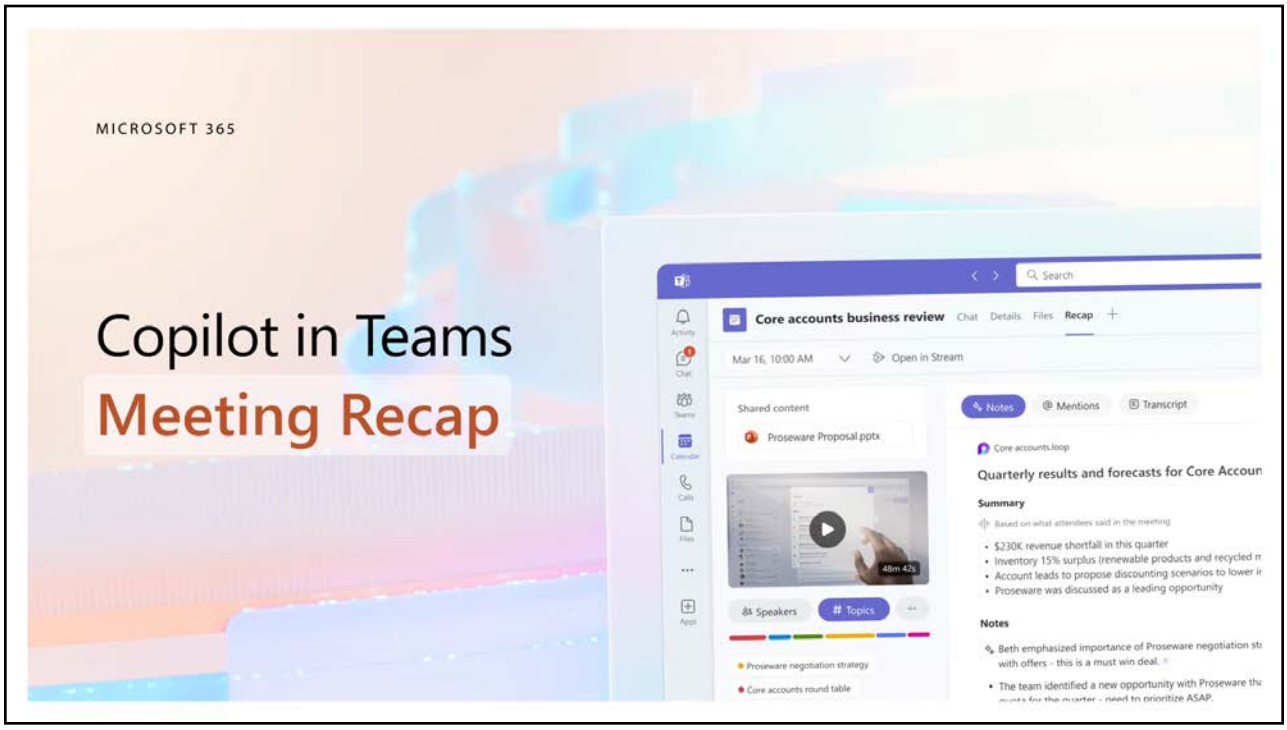


MICROSOFT 365

Copilot in Teams

Get a quick overview of what was covered in a meeting




MICROSOFT 365
Copilot in Teams
Meeting Recap
Core accounts business review
Chat
Details
Files
Recap
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Shared content
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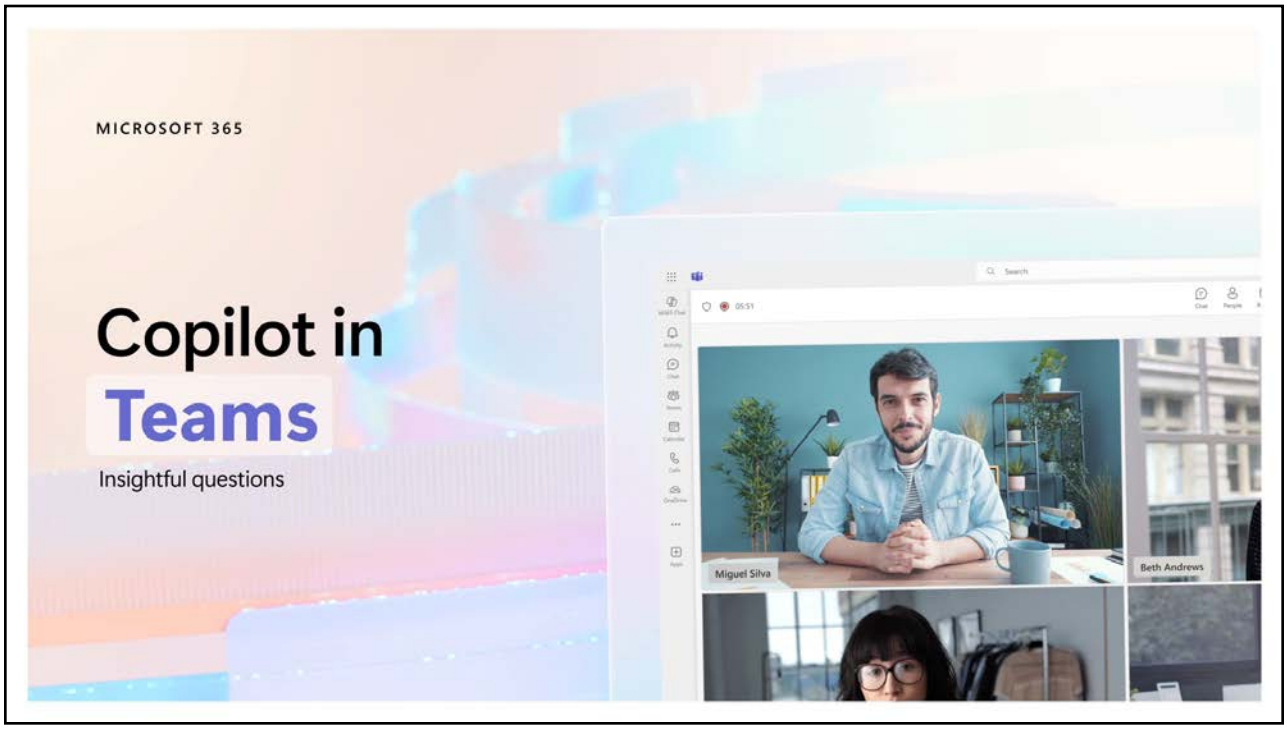
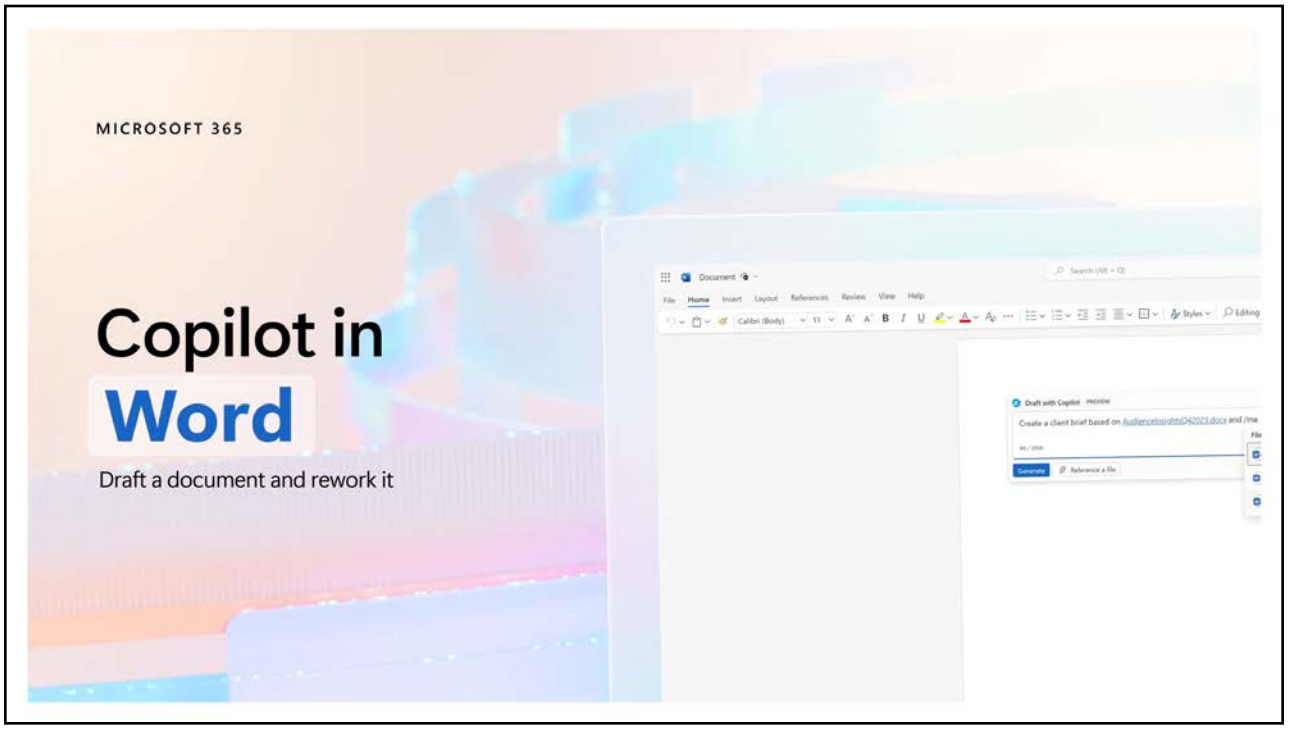
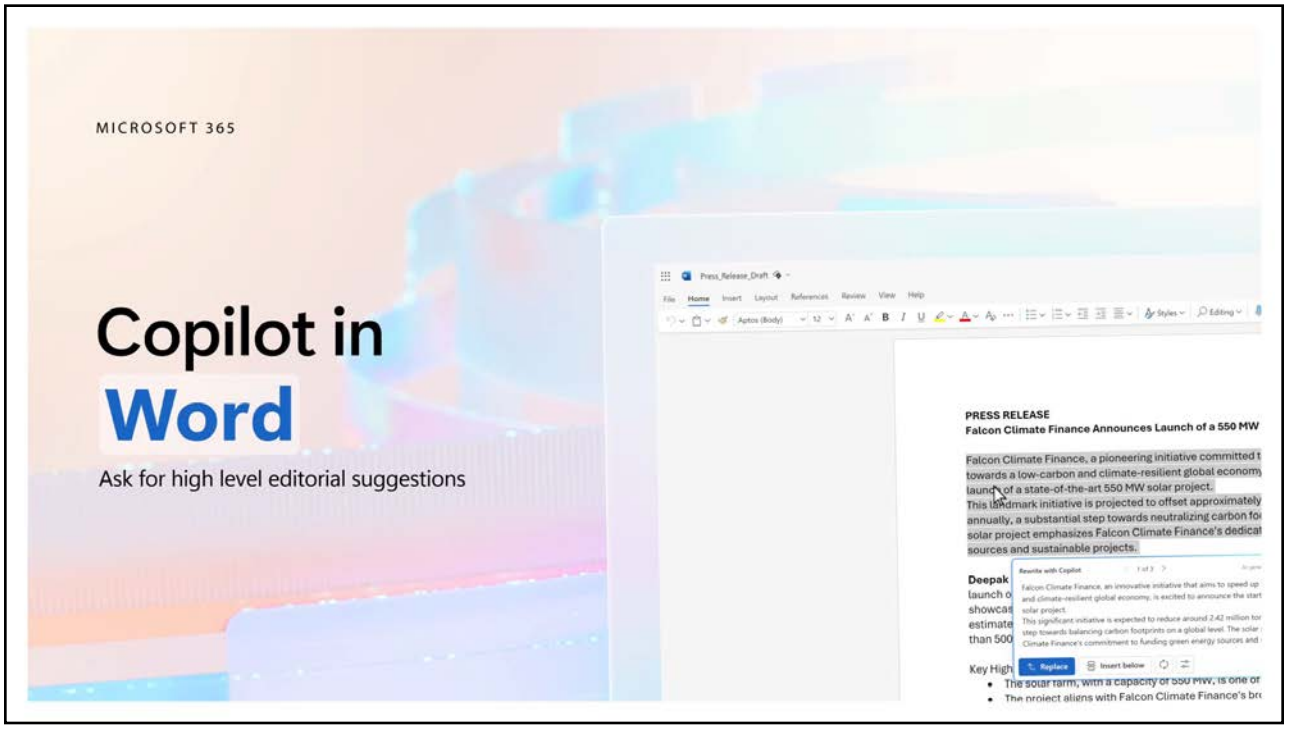
Notes
Mentions
Transcript
Quarterly results and forecasts for Core Accoun
Summary
$230K revenue shortfall in this quarter
Speakers
Topics
Notes

MICROSOFT 365
Copilot in
Teams Phone
Daniela Mandera


MICROSOFT 365
Copilot in
Teams
Insightful questions
Miguel Silva
Beth Andrews


MICROSOFT 365
Copilot in
Word
Draft a document and rework it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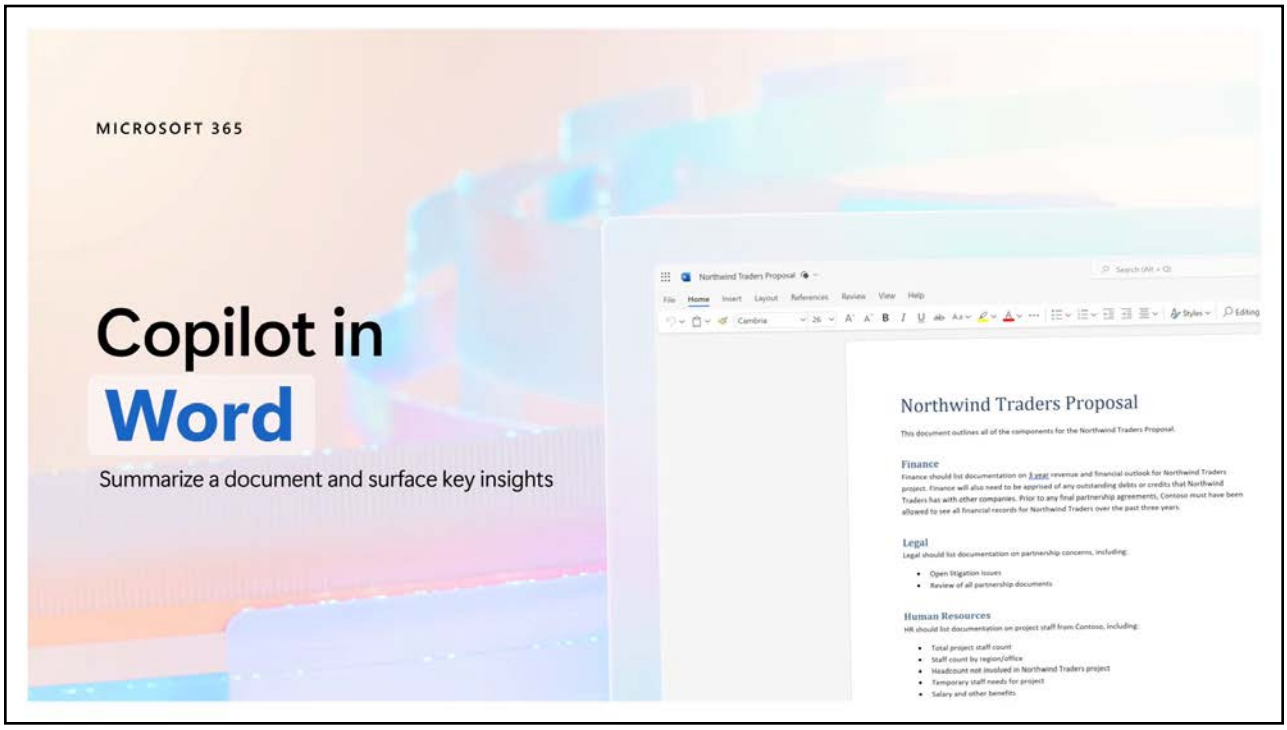
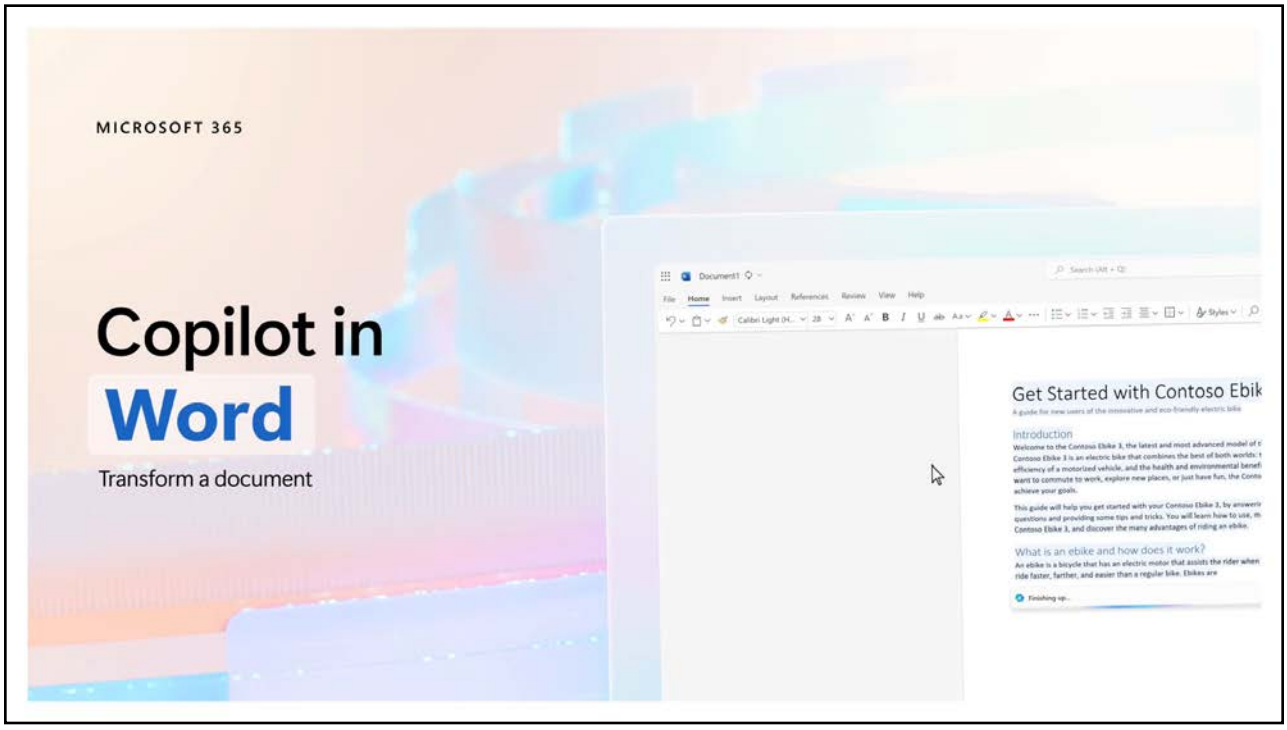
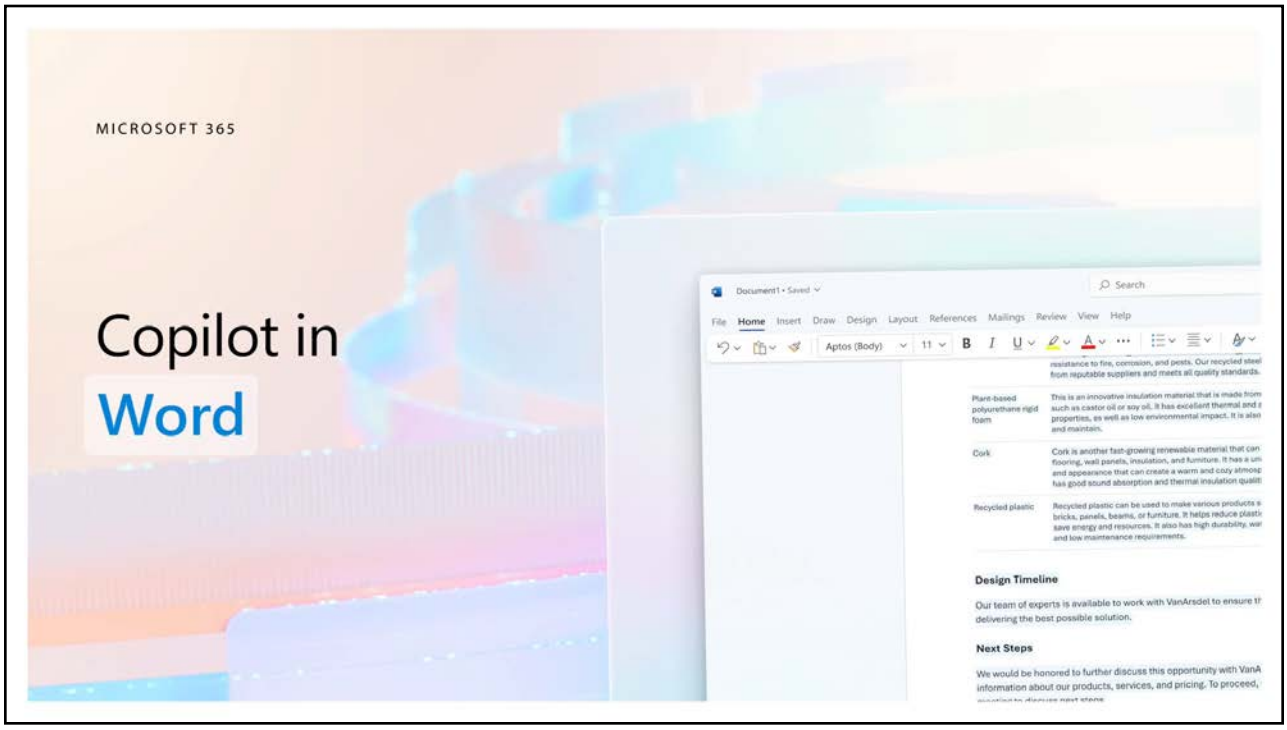
Copilot in
Word
Ask for high level editorial suggestions
PRESS RELEASE
Falcon Climate Finance Announces Launch of a 550 MW


MICROSOFT 365
Copilot in
Word
Summarize a document and surface key insights
Northwind Traders Proposal
This document outlines all of the components for the Northwind Traders Proposal.
Finance
Legal
Human Resources


MICROSOFT 365
Copilot in
Word
Transform a document
Get Started with Contoso Ebik
Introduction
What is an ebike and how does it work?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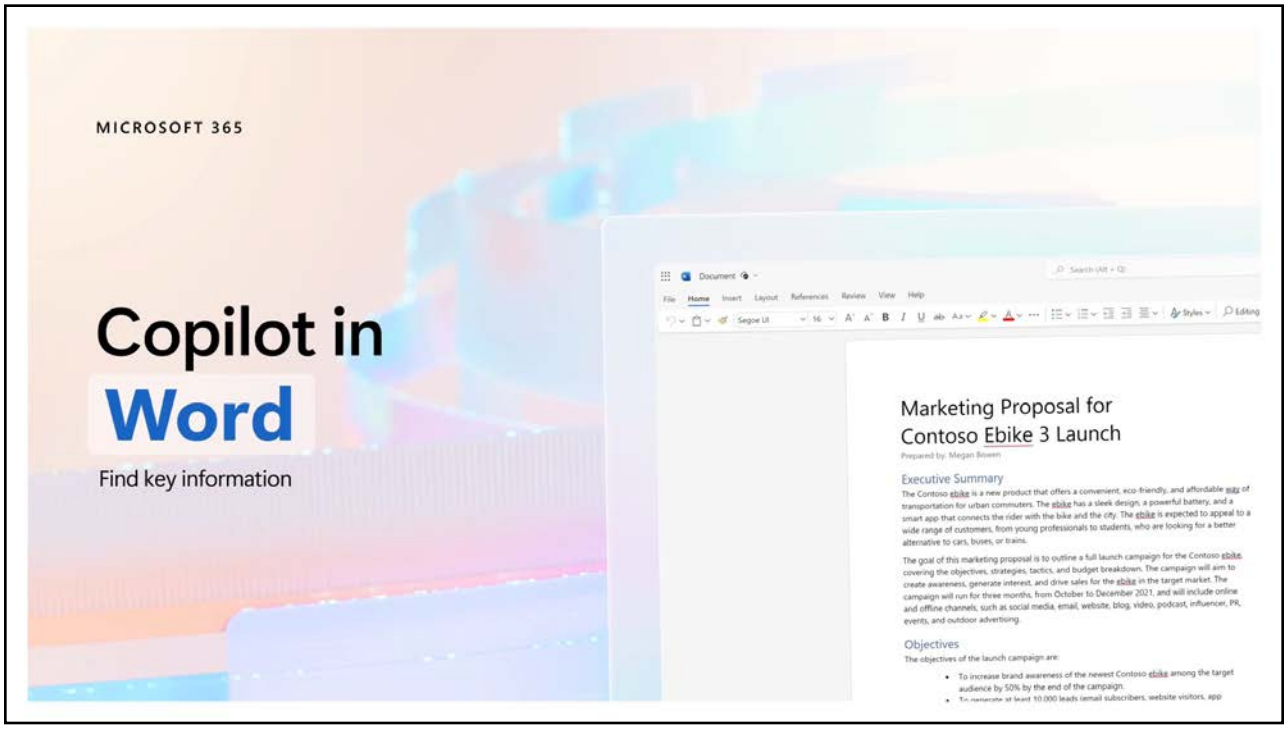
Copilot in
Word
Design Timeline
Next Steps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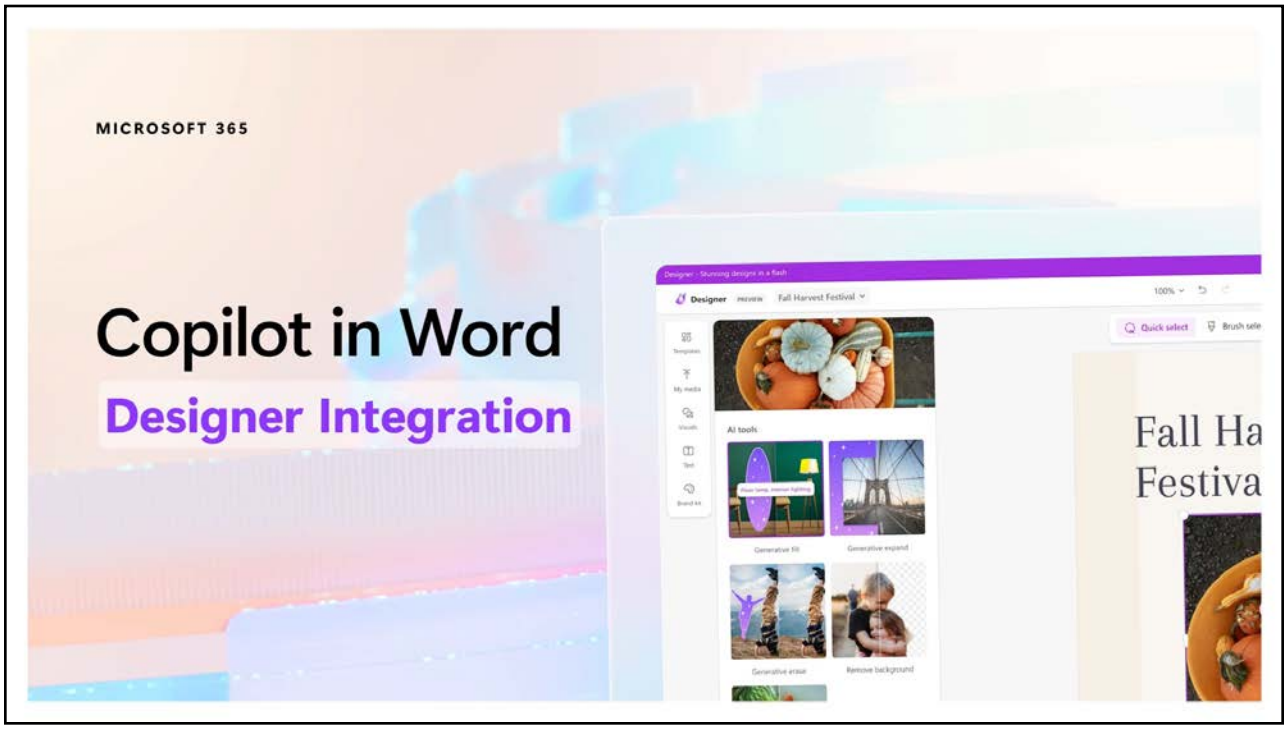
Copilot in
Word
Find key information
Marketing Proposal for
Contoso Ebike 3 Launch
Executive Summary
Objectives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Copilot in Word
Designer Integration
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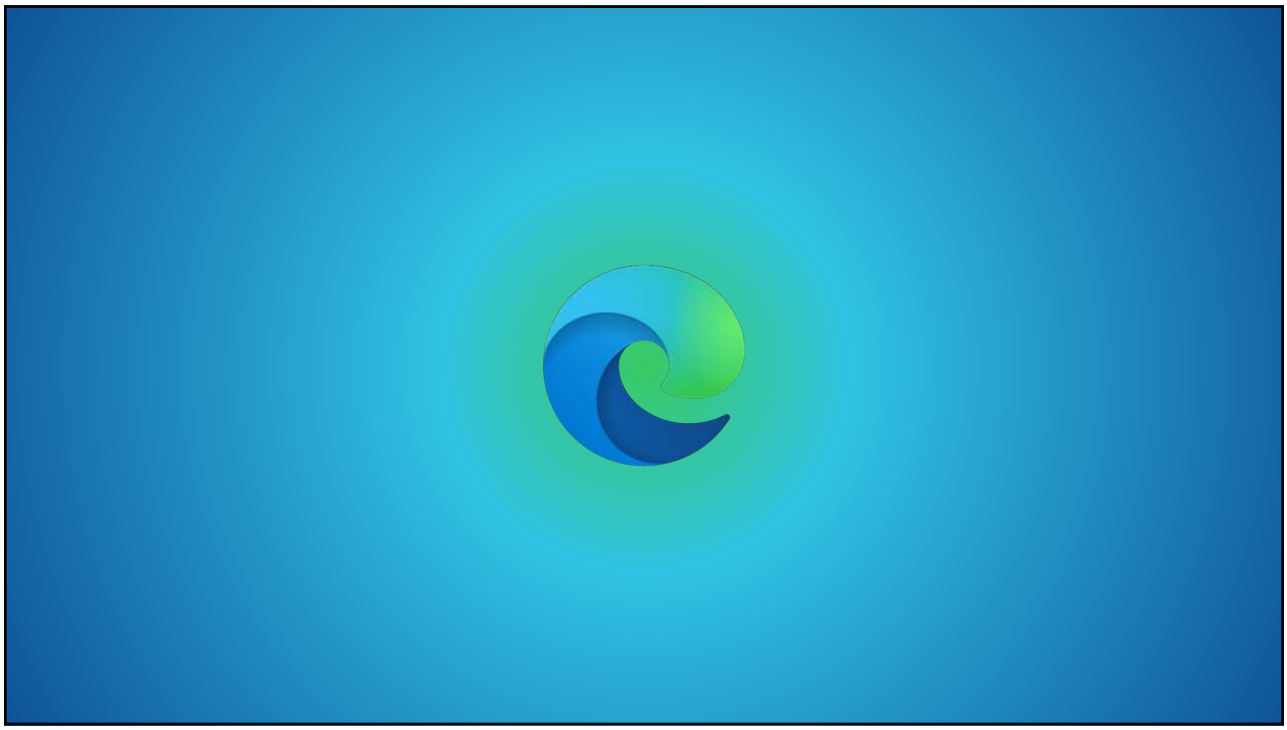

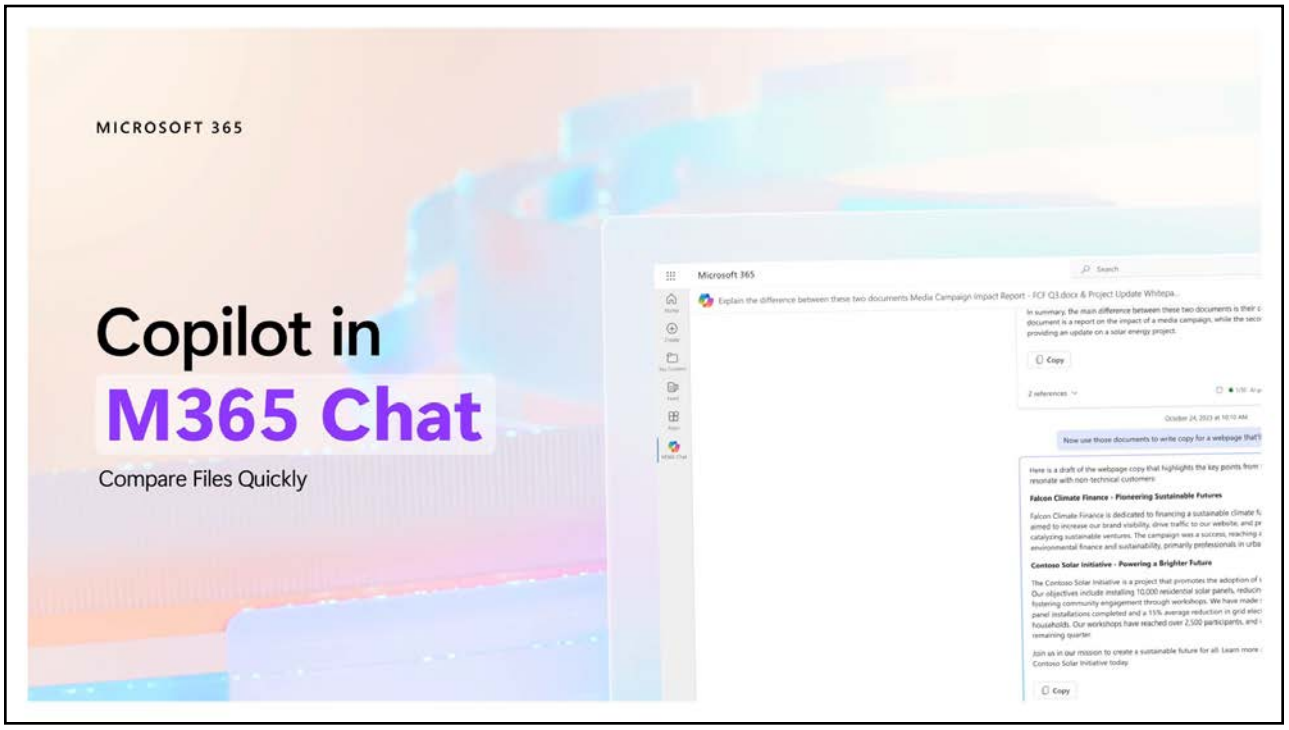
MICROSOFT 365
Copilot in
M365 Chat
Compare Files Quickly
Microsoft 365

Price &
Availability

Copilot Pro & Copilot for MS 365

- **Subscribe to Microsoft 365 (most tiers)**
- **Then pay an additional $20 or $30/user/month**
- **Receive:**
  - Copilot features we talked about in Microsoft 365 apps
  - Access to GPT-4 and GT4-Turbo (a step up from the free ChatGPT, which is version 3.5)
  - Tools to create AI-driven images
  - Works in apps on the web, Windows, macOS, and iPadOS (iPhone and Android coming soon)
  - Build your own custom Copilot GPT using a new Copilot GPT Builder tool (coming soon)
- **Learn More:**
  - Copilot Pro (personal and family) – $20/user/month
  - Copilot for MS 365 (business and enterprise) - $30/user/month (annual commitment)
  - Details about Copilot capabilities in each MS app, including Windows

AI Legal Learning Resources

- How to Safely Use AI in Your Tech Stack
- Managing Your Practice with AI
- Harnessing Chat GPT in Your Firm, with Joyce Brafford from Rocket Matter
- Fair & Ethical AI, with Matthew Butterick
- Using AI to Stay Ahead, with Greg Siskind

THANK YOU!

Jeffrey Schoenberger
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MICROSOFT & ARTIFICIAL INTELLIGENCE

By: Danielle DavisRoe
Jeffrey Schoenberger
Paul Unger

BACKGROUND

It's hard to believe that only a year ago, OpenAI and its artificial intelligence (AI) creation, ChatGPT, burst into the public consciousness. It seems so much longer. If you haven't experimented with ChatGPT, which you can try for free, we encourage you to do so. Ask it questions and engage it in "conversation."[1]

When prompted with the question, "Why is Microsoft interested in ChatGPT," the AI responds:

> "As of my last knowledge update in January 2022, Microsoft has shown interest in various AI technologies, including natural language processing and chatbot systems. However, I don't have specific information on any direct involvement or interest in GPT-3 or ChatGPT by Microsoft at that time.
>
> It's possible that Microsoft, like other technology companies, may see the potential of advanced language models like GPT-3 for various applications, such as improving virtual assistants, enhancing customer support chatbots, or developing new communication tools. These models can be used to generate human-like text, answer questions, and engage in natural language conversations.
>
> If there have been developments or announcements since my last update, I recommend checking more recent sources or Microsoft's official communications for the latest information on their involvement or interest in ChatGPT or similar technologies."[2]

As Tim Curry's character says in the 1985 comedy classic *Clue*, this answer "was both true and misleading." While Microsoft may not be interested in ChatGPT specifically, Microsoft is undoubtedly interested in the success of OpenAI. Between 2019 and 2023, Microsoft has invested roughly $3 billion into OpenAI. Furthermore, the technologies developed by OpenAI serve as the heart of Microsoft's growing repertoire of AI tools, which it markets under the Copilot brand.

POSSIBILITIES

Copilot, and other AI products, hold the potential to be as revolutionary as electronic spreadsheets, word processors, and graphical user interfaces. These prior technological advances eliminated tedious work and democratized access to powerful capabilities. Microsoft has traditionally played a strong role in expanding access to

[1] Please do not enter any client information into ChatGPT or other AI tools without understanding how the service may store and use in the future whatever you proffer. Most consumer-centric AI tools retain your queries for training of their AI creations. Some business-focused tools, like NetDocuments' ndMAX and paid tiers of Microsoft Copilot, pledge not to store or harvest your activities for their own gains.

[2] This query was made of ChatGPT 3.5 on December 4, 2023. Because of the nature of large language model (LLM) AI tools, we cannot guarantee you asking the same question will produce the same result. Your result should be similar.

revolutionary technologies. For example, the first version of Microsoft Office, released June 19, 1989, cost $949,[3] substantially less than buying separate word processor, spreadsheet, and presentation programs.[4]

The first AI features under the Copilot umbrella span Bing (Microsoft's search engine), Edge (its web browser), Windows, and the Microsoft 365 applications, including the eponymous Excel, PowerPoint, and Word.

These well-known tools, alongside Microsoft Graph and large language model (LLM) AI,[5] serve as the foundation for the Copilot ecosystem.

Microsoft refers to these many AI tools across product categories as Copilots. As the technology improves and Microsoft expands use cases, expect to see new Copilots created and disused ones sunset.

GETTING STARTED

Curious users can access the basic Copilot experience from a web browser, any web browser. The experience is better if you use Copilot within Edge. Microsoft hopes to be your Windows Copilot as well. Thus far, the browser-based and Windows-based Copilot tools are free to try. The story differs with Microsoft Office, where Copilots will likely prove most useful.

Copilot for Microsoft 365 is currently open to a few commercial customers for $30/user/month. When Copilot 365 becomes "broadly" available, a firm must be using Microsoft 365 E3 or E5 tiers, or Office 365 E3 or E5 tiers. Microsoft's E3 tier costs $36/user/month. Adding Copilot nearly doubles the per-user cost. Microsoft has not yet announced availability or pricing for the typical law firm tiers of Business Standard and Business Premium.

Nevertheless, we expect that, as with office suites in the 1990s, Copilot and its attendant AI niceties will improve in capability and decrease in cost. What follows are descriptions of what you have to look forward to with Microsoft using AI to make daily work easier.

EXCEL & COPILOT

Copilot is making data analysis easier than ever. If you have data in Excel, copilot can work with it.

COPILOT / EXCEL PREVIEW

Here are the key features of Copilot integrated with Excel:

MANIPULATE AND FORECAST DATA

Want to forecast your revenue if you increase your billable rates by 10%? Copilot can add a column that does the math for you. Let Copilot write the formulas and do the heavy lifting for you.

CONDITIONAL FORMATTING

Conditional formatting can give you quick insights into your data by color coding it. Conditional formatting applies formatting when certain conditions are met. Want to make the top five billable hours green? Conditional formatting can do that, updating the colors when the data changes. With Copilot you can apply conditional formatting without writing complicated formulas.

---

[3] $2,354.68 in 2023 dollars.

[4] This first release was for the Mac and contained Word 4, Excel 2.2, PowerPoint 2.01, and Mail 1.37. The first version of Office for Windows, containing Word 1.1, Excel 2, and PowerPoint 2, shipped in October 1990.

[5] All currently-hyped Ais, including ChatGPT, are based on the large language model framework. Fundamentally, when the AI "responds" to your question, its response is created based on what word should most probabilistically flow based on the context. For example, if the last word written were "chicken" then whether an LLM followed with "salad," "soup," or "nugget" may be dictated by whether you asked for a summer story, winter story, or a children's story.

IDENTIFY KEY INSIGHTS

Not sure what to make of your data? Ask Copilot for key insights to get a grasp on the numbers quickly.

CREATE CHARTS

Need to graph your data? Tell Copilot what you're looking for, and it will create the chart for you.

OUTLOOK & COPILOT

DRAFT EMAILS

Copilot can help you draft emails. Click the prompt button on Outlook's toolbar and instruct Copilot to "draft a response telling the client that shipment is delayed by two weeks." Copilot generates a draft email that you can edit. You can edit the tone in which Copilot writes, such as casual, neutral, and formal, even after Copilot presents the draft. View a demo of this forthcoming feature.

EMAIL THREAD SUMMARY

This Copilot feature is one of the most exciting because it is easy to explain and understand, and its time savings are apparent. Even if you are good about taking vacations and seriously unplugging from work emails, you know that, upon your return, you face a raft of emails to sift through. Copilot within Outlook can summarize an email thread. Click on a grouped conversation in your Outlook inbox and tell Copilot to summarize it. Copilot reviewed a 12-email thread in this demo video and reduced it to three bullet points.

FOLLOW A MEETING

Sometimes, we're double-booked for meetings. Rather than declining the second meeting, have Copilot attend in your stead. With Copilot within Outlook, you can RSVP to a Teams meeting with "follow." When the meeting starts, the organizer will be notified that the meeting is being recorded for "follow" purposes. Once the meeting concludes, Copilot prepares a recap for your review. Copilot can summarize the meeting and let you know if attendees assigned you any action items. View a brief demo video.

TRANSLATION DRAFTING TOOL

In addition to helping create emails, see the Draft Emails item, Copilot can translate its drafts as part of the creation process. Instead of writing "draft a response telling the client that shipment is delayed by two weeks," prompt Copilot with "draft a response in French telling the client that shipment is delayed by two weeks." As demonstrated in this video, such a feature will be beneficial in practices with large numbers of non-English speakers where some attorneys or support staff need occasional assistance with routine communication. Do not rely on it for translating jargon-heavy text.

POWERPOINT & COPILOT

While many people draft and deliver presentations regularly and feel excited about doing so, others find the process daunting and require assistance to design and create engaging slides. Recognizing this need, in 2023 Microsoft announced that Copilot will not only work with Word, Outlook & Excel, but also PowerPoint to revolutionize the way people create and deliver presentations. In this document, we will explore how Microsoft Copilot works with PowerPoint to help individuals improve their presentation skills.

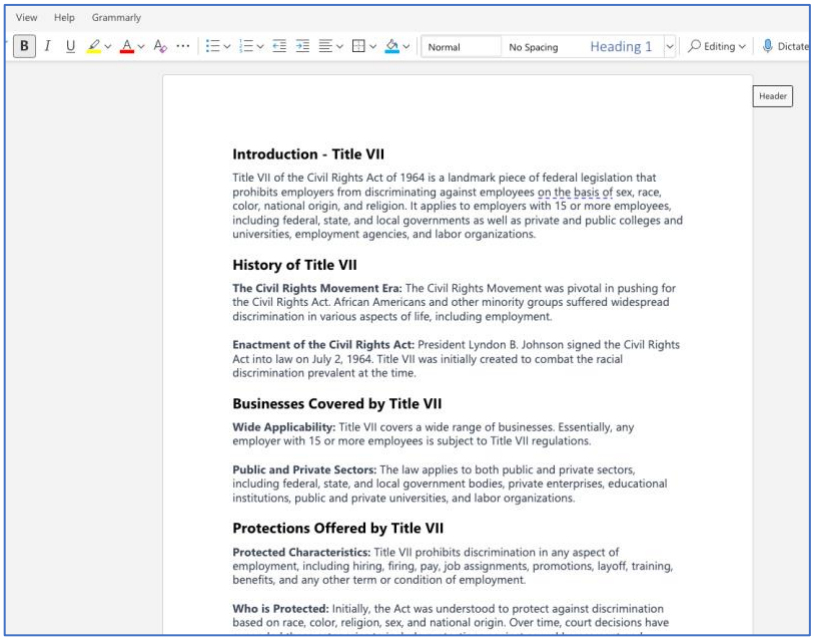
Microsoft Copilot is an add-on fee-based utility that is AI-driven. It is an intelligent assistant integrated into PowerPoint. This feature leverages the power of natural language processing (NLP), machine learning (ML), and other advanced technologies to provide real-time assistance to presenters during the entire presentation creation and design process. Copilot aims to enhance the user experience by offering suggestions, automating repetitive tasks, and providing valuable insights, ultimately helping legal professionals create more effective and visually appealing presentations.

Copilot may not purely adhere to my design methodology for legal professionals that I have been teaching for 20 years, but based on what I have seen so far, it does provide presenters with a good initial PowerPoint draft that can usually be edited fairly easily to adhere to your own design preferences and standards.

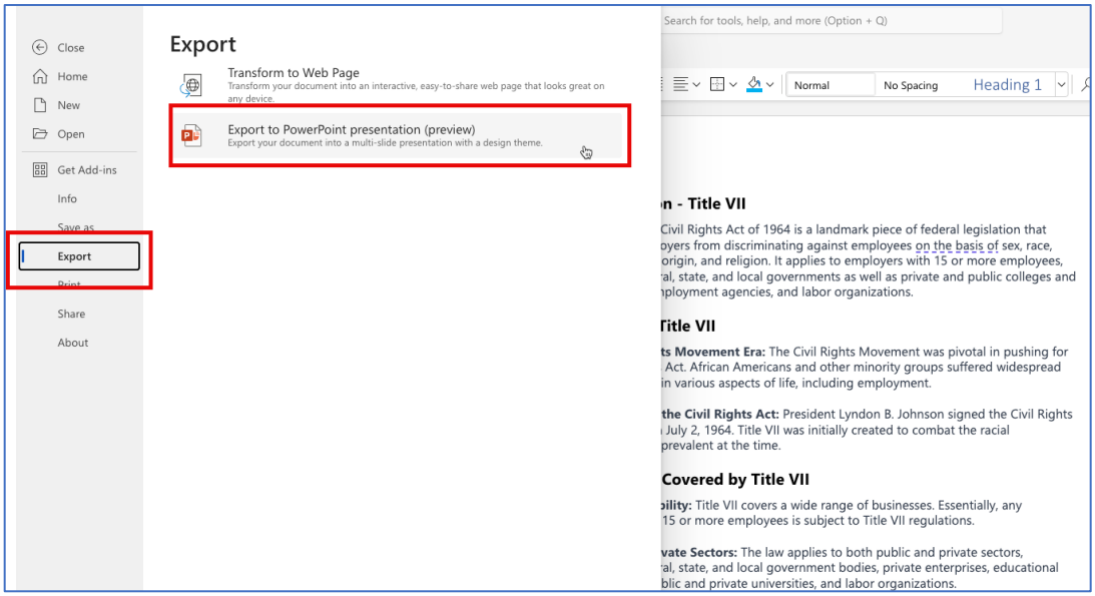
Microsoft has already incorporated *some* AI into Word Online and PowerPoint, but it is only available via M365 Word Online (Web). Nonetheless, it is impressive. If you draft a paper or an outline in Microsoft Word, you can simply export the Word document to PowerPoint, and it uses machine learning to develop a decent set of slides within seconds. Here's how it works and how it looks:

1. Log into your M365 Word Online account (you cannot perform this feature from Word that is installed locally on your computer).

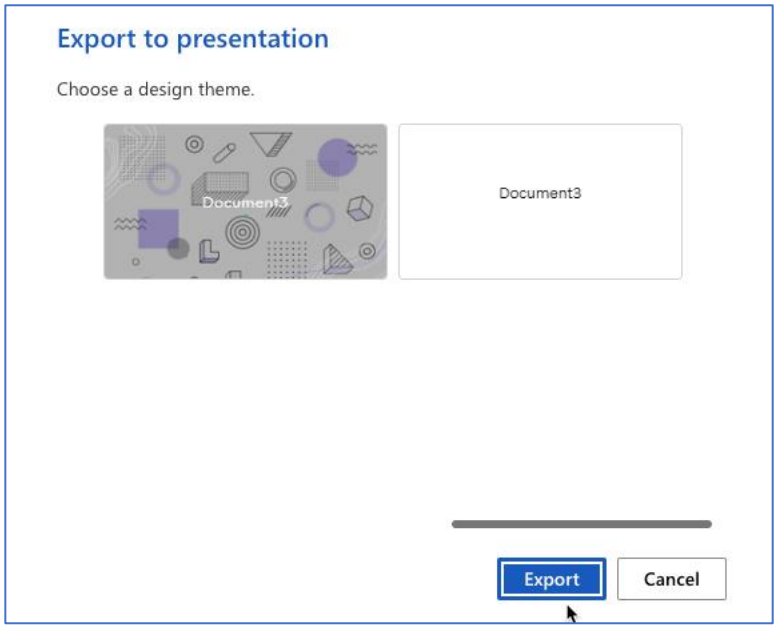
   Draft your document or copy and paste it from something you have already created.



2. Select **File** > **Export** > **Export to PowerPoint Presentation**



3. Select the desired theme and click **Export**.



COPILOT / POWERPOINT PREVIEW

Here are the key features of Copilot integrated with PowerPoint:

CONTENT SUGGESTIONS

One of the core purposes of Copilot is to assist users in generating content for their slides. It achieves this by analyzing the presenter's spoken words and offering text suggestions. For instance, if you describe an idea verbally, Copilot will convert your spoken words into written text on a slide, saving time and reducing the need for manual typing. This feature is especially beneficial for users who struggle with expressing their thoughts in writing.

DESIGN AND LAYOUT

Creating visually appealing slides can be hard, even for experienced presenters. Copilot addresses this issue by providing design and layout recommendations. It can suggest color schemes, font styles, and slide layouts. Users can simply accept these suggestions to instantly improve the aesthetics of their presentations. This is important because if Copilot simply summarizes words within bullet points, that will not make for an effective presentation.

SPEAKER NOTES AND REHEARSAL

Copilot also assists with speaker notes and rehearsing. It can generate speaker notes based on the content of each slide, helping presenters prepare talking points. During rehearsal, Copilot can listen to the presenter's speech and using AI offer real-time feedback on pacing, tone, and engagement. This feedback is helpful for one’s delivery.

SLIDE TRANSITION AND ANIMATION SUGGESTIONS

Copilot can suggest slide transitions and animations to improve the flow and visual appeal of your presentation.

SLIDE REORDERING

Microsoft claims that Copilot can assist in reordering slides based on the logical flow of the presentation or the user's preferences. I have not seen this yet, but it definitely has me curious.

ALIGNMENT AND SPACING

Copilot can suggest adjustments to the alignment and spacing of elements on slides to improve aesthetics.

LAYOUT CLEANUP

Copilot can recommend improvements for cluttered or poorly organized slides, helping to create more effective presentations.

ACCESSIBILITY
Copilot can suggest accessibility improvements, such as alternative text for images or proper formatting for screen readers, to ensure that the presentation is inclusive and compliant with accessibility standards.

AUDIENCE ENGAGEMENT
Keeping the audience engaged is crucial. Copilot can analyze the content and suggest interactive elements such as polls, quizzes, or animations to maintain audience engagement. These features can be integrated into the presentation to create a more appealing experience.

CONTENT VERIFICATION
Copilot will help verify the accuracy of the content by checking facts and references against trusted sources.

IN SUMMARY
Microsoft Copilot promises a significant leap forward in the world of presentation software. By combining AI-driven capabilities with PowerPoint, it might be able to empower users to create more engaging and effective presentations while saving time. With its content generation, design assistance, and rehearsal feedback, Copilot just might prove to be a very powerful tool in your technology toolbox.

TEAMS & COPILOT
For those who use Teams for video conferencing, Copilot will be incredibly helpful with streamlining your communication and improving meeting efficiency and efficacy.

COPILOT / TEAMS PREVIEW
Here are the key features of Copilot integrated with Teams:

CATCH UP
Running late to a meeting? You can ask Copilot to catch you up. Within moments, you'll be up to speed on everything that happened before you joined the meeting.

DISCERN OPINIONS
Quickly get a summary of others' concerns or things they are most excited about by asking Copilot. Ask at any time during a meeting to get a quick reading of the room.

FOLLOW MEETINGS
Not able to attend a meeting? With Copilot, you can follow the meeting and get a recap delivered to you in Teams after the meeting ends.

WORD & COPILOT
DRAFT A DOCUMENT WITH COPILOT
Most attorneys probably heard about the New York lawyer sanctioned for using ChatGPT to write a brief he filed. For the unfortunate attorney, ChatGPT didn't merely generate bad prose; it invented cases and holdings to fit the attorney's propositions. It then attributed these invented rulings to real federal judges. In addition to a $5,000 fine, Judge Castel ordered the attorneys to send letters to "the judges whose names were wrongfully invoked," notifying them of the sanctions.

Such problems are likely with generally trained LLM AI tools. Forthcoming legal-specific options should avoid this problem, particularly after the publicity New York generated.

In the meantime, one way to take advantage of AI to help you draft is to ask Copilot to create a document based on your own prior documents. Instead of ChatGPT or another AI scouring the internet, Copilot within Microsoft Word relies on the content you point to. In this video, the user asks Copilot to "Create a client brief based on AudienceInsightsQ42023.docx and MarketTeamBriefR4.docx."

Copilot then analyzes the two "sample" documents and creates a third one, amalgamating the first two. As Scott Kelly, senior manager at NetDocuments, describes its AI document tool, PatternBuilder MAX, creating draft documents this way is "like [giving] a set of instructions to a smart intern." Or perhaps a summer or first-year associate.

What Copilot returns will not be perfect, but it beats combing documents manually or starting by staring at a blank screen.

MAKE TAILORED EDITS

Even if you are a tech-forward attorney, perhaps you lack confidence that anything Copilot drafts from scratch is a good place to start, even if your own documents serve as the source material. Microsoft understands this and offers you the option to start small by asking Copilot to rewrite discrete document parts, such as a paragraph or two.

SUMMARIZE WITH COPILOT

During World War II, Winston Churchill frequently instructed subordinates to "report on one side of a page." Earlier in his career, commenting on a government committee report, he remarked, "This paper, by its very length, defends itself from ever being read." We've all had that feeling too. While Copilot cannot yet produce punchy, persuasive prose, it can help you avoid trudging through overlong documents. First, open the file, then click the Copilot button on Word's Home ribbon. In the question prompt, type "summarize this document in 3 sentences." Watch a sample of the future of Word time-savings in this video.

TRANSFORM DOCUMENTS

One thing we frequently advise law firms to do is document their processes. Having business-critical knowledge siloed in a single individual who might quit or become otherwise unavailable is unsound. Write down how you do core firm tasks, both substantive (things you do for clients) and administrative (things you do to keep the business running). Maybe you already have a series of FAQ documents for discrete tasks. Copilot in Word can take those discrete documents and intelligently combine them into a single operations manual. Microsoft terms this "transforming" a document, e.g., from an FAQ to an instruction manual. Watch this video for an example.

TURN NOTES INTO A DRAFT DOCUMENT

In addition to creating a new document based on existing documents, as discussed in **Error! Reference source not found.**, Copilot can connect Word to your notes in OneNote and use those notes as the raw material for a draft document. It's a great way to avoid writer's block, especially when you don't have time for it. For example, you could request Copilot to "draft an operating agreement for ABC Widget Co. using the Widget notes in OneNote and based on XYZ Sprocket Agreement.docx." Watch a demo in this video.

UNEARTH KEY INFORMATION

Perhaps you don't need Copilot to summarize an entire Word document, as described in Summarize with Copilot. All you need to know are two specific facts contained somewhere in the document your colleague prepared. Open Word, click the Home ribbon, and select the Copilot button. In the question box, ask questions like "How much money does the operating agreement require each member to contribute to the company?" Microsoft provides an example with a marketing budget.

VISUALIZE THE TEXT-HEAVY

Legal documents are usually text-heavy, with few visual aids or diagrams. Using Designer integration with Copilot in Word can help incorporate appropriate imagery. Designer analyzes the text and recommends relevant pictures and clip art. Choices include not just stock images and Microsoft-provided clip art, but also pictures from your own library. If you were drafting a patent application, Copilot might suggest relevant technical drawings from the client's file stored on OneDrive or SharePoint, which you can further customize with Designer. Watch a sample video to see the potential.

DOCUMENT DIFFERENCES VIA THE WEB

We're accustomed to comparing documents in Word or Acrobat, but not like this. The typical document comparison tool is very detailed and exacting. It tells you which spaces were deleted, which verb tenses changed, and which paragraphs were combined. The tool does not examine content. It could not tell you that one document was a sales brochure and another an instruction manual.

On the face of it, that question seems absurd. Why would I compare those two documents? You probably wouldn't on a one-to-one basis. But suppose you received 90 documents in three folders as discovery responses from opposing counsel? Wouldn't it be nice to point a Copilot at the three folders and have AI tell you the first folder is mostly routine email and memos, with a particular document or two encompassing the bulk of valuable information, the second folder contains product specifications, and so on?

Using document analysis engines in this way changes how we think about "comparing" documents. View this YouTube video for a preview of what's coming.