

GUIDE

Should you be using Copilot in your Law Firm?

How Microsoft's AI Assistant Can Save Hours Without Compromising Compliance



Chapman Technology Partners



AI in the Workplace

Artificial intelligence is changing how UK law firms manage their daily workload and one of the biggest shifts is Microsoft's Copilot. Built into tools your firm already uses, Copilot promises to save hours each week by drafting, summarising, and automating routine tasks.

But for regulated firms, efficiency can't come at the cost of confidentiality. So, should your law firm be using Copilot and if so, how can you do it safely?

What is Microsoft Copilot?

Microsoft Copilot is an AI-powered assistant integrated into Microsoft 365 applications such as Word, Outlook, Excel and Teams. It uses natural language commands to automate tasks, produce drafts, summarise documents, and even generate insights from your firm's data.

For legal teams, Copilot can:

- Draft client correspondence, contracts, or case summaries instantly
- Extract key clauses or obligations from lengthy agreements
- Prepare standard documents and templates for repeat work
- Summarise Teams meetings or notes directly into case files

“Copilot can deliver real value for law firms, but its success depends on governance. Without strong data protection and access controls, you risk exposing sensitive information.”

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The Benefits of Copilot for Law Firms

1. Reclaim Billable Time

Research from The Law Society shows solicitors spend up to 40% of their time on administrative tasks. Copilot automates much of that workload, freeing your team to focus on fee-earning work.

2. Improve Document Accuracy

AI-assisted drafting reduces human error and standardises templates across your firm. This helps ensure compliance with internal and regulatory requirements.

3. Boost Knowledge Management

Copilot can surface relevant precedents, previous case notes, or clauses from your internal document base, helping teams find information faster and make informed decisions.

The Risks You Need to Manage

1. Confidentiality and Data Access

If not configured correctly, Copilot may pull data from areas of your Microsoft 365 tenant that contain client-sensitive information. It's essential to apply strict access permissions and understand how AI interacts with your internal files.

2. Regulatory Compliance

AI use must comply with SRA and FCA requirements, including the principles of confidentiality, accuracy, and accountability. Firms must ensure any AI-generated work is verified by a qualified solicitor before being used externally.

3. Reliability and Hallucination Risks

Copilot can produce inaccurate or incomplete information. Human oversight is non-negotiable. AI should support professional expertise, not replace it.

How to Decide if Copilot is Right for Your Firm

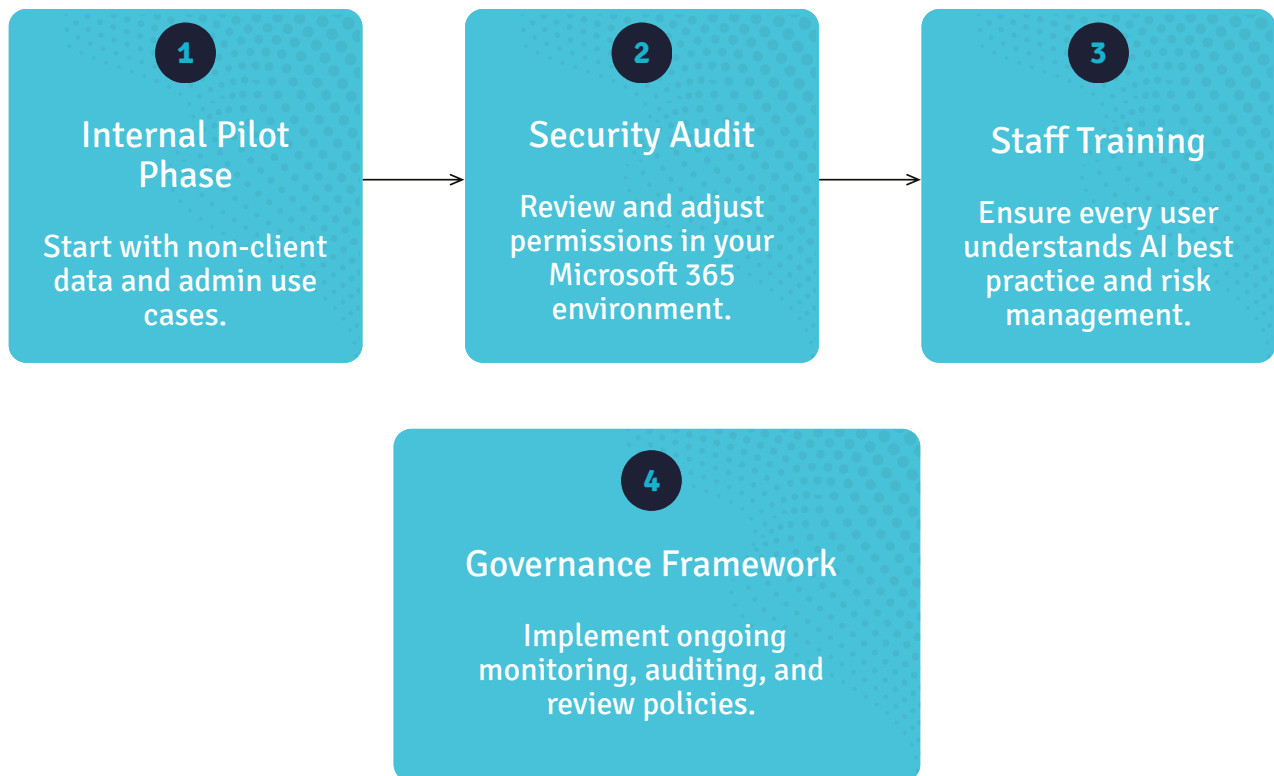
Ask yourself:

- ✓ Are your Microsoft 365 permissions correctly configured?
- ✓ Do you have a clear AI governance policy in place?
- ✓ Has your IT partner conducted a data security assessment?
- ✓ Are your staff trained to use AI responsibly and within compliance boundaries?

If any of these answers are “no”, your firm may not yet be ready for Copilot, but a structured readiness assessment can bridge that gap.

A Smart Implementation Plan

At Chapman Technology Partners, we recommend a phased rollout approach:



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Next Steps

If your firm is exploring how to safely adopt Copilot or other AI tools:

- Learn more about our [AI Consultancy for Regulated Firms](#)
- Read related resources here: [Practical Guides for Regulated Firms](#)

Book your free [15 minute intro call here](#) and let's discuss how we can help your business grow with the right technology advice and guidance.

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