

# From Chatbots to Workflows and Agents: Developing a Beginner's Mind to Adopt Responsible GenAI into Legal Practice

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In collaboration with:



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# Table of Contents

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<b>Preface</b> .....	2
<b>Project Methodology and Challenges</b> .....	8
<b>“Day in the Life” of Featured Legal Practitioners and Allied Professionals User Personas</b> .....	12
<b>Private Practice</b>	
Paralegals, Clerks, Legal Executives & Trainees .....	13
Associate Lawyers (Transactional) .....	14
Associate Lawyers (Advisory & Dispute Resolution) .....	15
Partners .....	16
Practice & Business Development Managers .....	17
<b>Legal &amp; Compliance Departments</b>	
Legal Counsel & Legal Operations Managers .....	18
Compliance Officers .....	19
<b>Industry Contributor Insights on AI Transformation Journeys Using Copilot (in organisation alphabetical order)</b>	
Bayer South East Asia Pte Ltd .....	20
Clifford Chance .....	22
CLP Power Hong Kong Limited .....	24
Eversheds Sutherland .....	27
Johnson Stokes & Master .....	30
Microsoft .....	33
MTR Corporation Limited .....	36
Stephenson Harwood .....	38

# Developing a Beginner's Mind to Adopt Responsible GenAI into Legal Practice

## Preface

As at the mid-point of 2026, the continuous and rapid rate of development in artificial intelligence (AI) chatbots, workflows and now agents over the past few quarters has been breathtaking.

The companies with the largest stock market valuations in the world (alongside some of the highest valued startup unicorns in history seeking public capital market debuts in the near future) are vying for the attention of enterprises large and small to use their generative artificial intelligence (GenAI) platforms to improve productivity and service delivery, and ostensibly also profitability through this new form of **digital cognitive labour**.

While this tremendously impacts many knowledge workers across the labour market, [Goldman Sachs Research in March 2026](#) reiterated its view that 44% of all Legal work tasks in the United States could be automated by AI, ranking second only after Office and Administrative Support. This signals a seismic shift in the future of work that is recognised by the legal regulators in jurisdictions such as [Hong Kong](#) and [Singapore](#). Specifically, GenAI impacts the demand and delivery of legal work, the role that human lawyers ultimately play, and the importance of nurturing and investing in distinctly human capabilities. These capabilities include problem-solving and contextual understanding, judgement and taste, and communication and accountability, each of which underpin trusted legal advice and service.

At a time when GenAI tools and capabilities are increasing and business models are evolving at a rate that reflects the timely-named movie "Everything Everywhere All At Once", this project seeks to encourage individual legal and allied professionals to put aside their pre-conceptions and embrace what Zen monk Shunryu Suzuki called the "beginner's mind", where "there are many possibilities, but in the expert's there are few".



**Brian W Tang**

Law, Innovation, Technology & Entrepreneurship Lab at University of Hong Kong Faculty of Law (LITE Lab@HKU)  
Founding Executive Director; Asia-Pacific Legal Innovation & Technology Association (ALITA) Co-chair

When ChatGPT kicked off the consumer large language model (LLM) era in 2022, it was one of the first major modern products that was introduced without a specific use case nor an instruction manual. Many legal professionals experimented with such online general purpose consumer grade GenAI tools. In certain cases, insufficient verification has also resulted in [reported embarrassing and unprofessional court submissions](#) with non-existent citations or hallucinations, serving as a stark reminder of the critical importance of operationalising human verification and accountability.

GenAI is different from the expert-based AI systems that our [award-winning](#) interdisciplinary and experiential Law, Innovation, Technology & Entrepreneurship Lab at the University of Hong Kong Faculty of Law (LITE Lab@HKU) had been using since 2019. Our undergraduate law and other students originally learned to develop computational thinking by using rules-based no code / low code tools to build proof-of-concept workflow automation co-designed with legal industry partners to address real-life issues. LLMs are ever-more impressive powerful stochastic tools that generate fluent, human-like linguistic output in response to conversational prompts of users, not from mathematically deterministic logic processes but from probabilistic next-word or token predictions based on training from the corpus of internet-sized data pools.

Accordingly, users of GenAI must “learn by doing” individually and/or with colleagues within their specific practice groups to try new ways of improving their productivity and service delivery while acknowledging that the underlying LLMs may continue to change “under the hood”, which reinforces the essential need for appropriate enterprise-wide policies, governance guardrails and user training.

Since then, several venture-capital funded domain specialist legal AI providers specifically trained on a corpus of public and proprietary data with dedicated preset workflows are currently on the desks of many lawyers at large law firms and legal departments. Recently, frontier model firms on which these platforms are based have also begun targeting the legal sector.

In the meantime, there is a growing cadre of legal builders and legal engineers using frontier models to “vibe-code” bespoke legal workflow and agentic solutions and have even [released impressive pilots into open source](#), but they currently remain the exception rather than the norm. How might other lawyers begin their own journeys as citizen developers and build solutions that can help streamline and augment their daily workflows, while operating in a safe enterprise environment to maintain client confidentiality and legal professional privilege?



## Current Consumer-Grade LLM and Open Source Legal Solutions

## Enterprise-Grade LLM Legal Solutions

### Common Core Implementation Requirements:

Staff AI policies  
Governance and verification processes  
Staff training

### Out-of-the-Box Offerings:

Confidentiality and security  
Enterprise harnesses & safeguards  
Integrations  
Preset chatbots, workflows & agents  
Builder tools

Comparison of current consumer-grade LLM and open source legal solutions and enterprise-grade LLM legal solutions: Common core implementation requirements and out-of-the-box offerings

Photographers have an adage that “the best camera is the one you have with you”.

If one asks almost any lawyer around the world what software they are most likely to use or are familiar with, the response is likely to be Microsoft Word, and increasingly Microsoft Outlook for emails and Microsoft Teams for online communications, united within the Windows operating system.

So when Microsoft’s Corporate, External and Legal Affairs Department (Microsoft CELA) in Hong Kong reached out last year to collaborate with LITE Lab@HKU, it provided an exciting opportunity to explore extending my pedagogical thesis:

Can undergraduate law and other student researchers use the same tools as the legal industry to reproduce some of the real life solutions from pioneering practitioners to share those learnings to benefit and inspire other practitioners across the broader, more traditionally conservative legal profession in their own responsible AI transformation journeys?

## Lawyer-Builders: Mindset is Key for the GenAI Journey

As outlined in further detail on the project methodology and challenges below, LITE Lab@HKU, Microsoft CELA and the Singapore-based Asia-Pacific Legal Innovation & Technology Association (ALITA) (which I co-chair) outreached to various pioneering legal and allied professionals in Hong Kong and beyond to (i) map out typical “Days in the Life” of various law firm and legal department user personas and (ii) share the practical insights on chatbot, workflow and beginner agent solutions they have created using M365 Copilot and Copilot Studio “tools at hand”. These use cases were then “translated” by student researchers (who were former LITE Lab@HKU students) into easily replicable cookbook-like “recipes”.

We hope that this project can serve to inspire time-constrained legal and allied professionals to develop their own bespoke solutions as GenAI-driven platforms become more powerful and user friendly.

On an individual level, beginner mind lawyer-builders should simply start by:

- ① reflecting upon and identifying one's own pain points and daily workflow practices; and
- ② starting small to experiment and iterate building practically useful solutions using the GenAI tools at hand to streamline and augment their daily workflow and improve legal service delivery.

Once existing daily workflows are improved, more novel workflows will undoubtedly evolve in future with the multiplication of the digital cognitive labour which enables individuals to create a multitude of agents to scale their activities and impact and evolve the way they work, how enterprises organise themselves, and what clients expect.

## Law Firm and Legal Department Leaders: Key Strategic Questions and Hints for Incorporating GenAI into Legal Practices

As GenAI legal platforms are increasingly available to law firms and their corporate clients at the same time, their commercial relationship is also evolving. Clients and law firm leadership must ask:

- ◆ How can law firms apply GenAI to strengthen judgement-driven work, improve quality and efficiency, and develop scalable and customised solutions for clients that **distinguish them from their competitors?**

💡 The ability to develop and retain GenAI prompts, skills and workflows within a firm's institutional knowledge management may well prove to be a particular firm's institutional edge.

- ◆ How should law firms and legal departments **re-design practice-focused workflows** (e.g. drafting, review, research, matter management, knowledge sharing) to harness GenAI while ensuring appropriate human oversight and alignment with professional and ethical standards?

💡 Identifying AI champions, creating optimal GenAI-output verification loops to reduce the "verification tax" against potential misstatements or omissions, as well as custom benchmarking of "what constitutes good enough" before any legal work product is submitted to a client, counterparty or court will be key.

- ◆ What kinds of **training and cultural change support** can law firms and legal departments (and also law schools) provide to lawyers and business support teams to enable effective and responsible use of AI tools in their day-to-day work, and at the same time equip staff to succeed in the new workplace paradigm?

💡 Cultivating management, delegation and oversight skills with respect to humans and GenAI agents alike for parallel and long horizon tasks, as well as developing judgement and communication skills, will be pivotal for enterprises and their employees to thrive.

- ◆ Which GenAI platforms reliably provide law firms and legal departments with LLMs that **satisfy all relevant local regulatory requirements** as well as reflect local cultural and linguistic norms?

💡 Legal practices operating in more than one jurisdiction will need to consider a strategy of using GenAI platforms that permits using different LLMs or other techniques.

- ◆ How should law firms evolve their **pricing models and service delivery** beyond hourly measurement and billing in light of changing client expectations in this GenAI era?

💡 Many large law firms are already launching hybrid tech and service offerings, and the emergence of AI native law firms that have been licensed in the [United Kingdom](#) and [United States](#) and backed by venture capital demonstrate the unique opportunities for small and medium law firms (SME law firms), new boutique legal practices and non-profit organisations to scale their legal service offerings and access to justice.

- ◆ For the future of the entire legal profession, how do we ensure that law students and junior lawyers develop and maintain the **requisite skills without detrimental cognitive offloading** from potential GenAI over-dependency?

💡 [Practising Legal Institute's Competency Framework for AI Ready Lawyers](#) is a great initiative, and law schools, training departments and supervisors will need to develop and ladder programmes that better distinguish [AI for productivity \(which focuses on being frictionless\)](#) with [AI for learning \(which requires friction for developing mental muscles\)](#), and to ensure that lawyers use AI to augment their "Gyms of the Mind" and are not reduced to merely being "AI checkers".



At the same time, to enable a flourishing of beginner minds for exploring structured innovation, employer law firms, legal departments and law schools alike should **cultivate “safe spaces and times”** and **incentivise** their employees and students to have the mind space to maintain an open and critical mindset regarding these new technologies and their output, and retaining responsibility for such.

Amidst the complexity and noise, no one has and can alone solve this [wicked problem](#), and so **industry-wide initiatives** remain vital. Agreed-upon benchmarking metrics and standards regarding whether the probabilistic output produced for any specific legal use case is “good enough” can assist users and vendors alike to reduce adoption friction of GenAI solutions. In addition, curated roundtables of law firms and legal departments, such as those conducted by LITE Lab@HKU in Hong Kong and expanded through ALITA across the Asia-Pacific region and beyond, can enable candid sharings for these important and vexed questions to be discussed, experiments shared and insights gained.

I named [my AI governance framework Chiron](#), whom the poet Homer called the “justest and wisest of centaurs”, and was inspired by grandmaster Garry Kasparov’s “centaur chess” concept of optimal human-machine collaboration after his historic loss to AI in chess.

It is hoped that legal practitioners and allied professionals, with the support of their leaders, would be inspired by this project to re-create and experiment to create their own impactful solutions as “humans-working-in-the-loop” starting with the “tools at hand” and **progress from AI literacy to AI fluency to better serve and maintain the trust of our clients and society.**

# Project Methodology and Challenges

## Project Methodology

A fundamental thesis of this project is that many pioneering legal practitioners and allied professionals are already using the “tool that they have with them”, namely Microsoft 365 Copilot and potentially Copilot Studio, which is within their enterprise approved secured environment and often already subscribed to under the company’s general technology budget rather than requiring a specific budget allocation by the legal department or legal practice.



The project methodology was as follows:

- ① outlining a non-exhaustive typical “Day in the Life” of certain common personas within law firms and legal & compliance departments, with the hope to inspire those personas as to the further possibilities of using GenAI in their Practice of Law and Business of Law workflows.
- ② outreach by Microsoft CELA, ALITA and LITE Lab@HKU to certain dedicated professionals in law firms and corporate legal & compliance departments (some of whom have previously been project partners to LITE Lab@HKU’s Lawtech and the Future of the Legal Professional Sandbox course and some of whom are ALITA Ambassadors) to invite them to comment on the “Day in the Life” scenarios, share their personal insights as legal industry contributors about their AI transformation journeys by completing a series of set questions as well as sharing specific use cases they have developed applying Copilot.
- ③ LITE Lab@HKU’s undergraduate research assistants, who are LITE Lab@HKU alumni (and not current students to avoid conflict of interest), assist with “translating” the contributed Copilot solutions into practical legal use case “recipes” (including several video walkthroughs) that are reviewed by such pioneering contributors, with the hope that these “cookbook” recipes can be easily replicated, forked and/or inspire other applications.

# Project Challenges

This “cookbook” project faced some of the major challenges currently commonly encountered by enterprises undergoing their own AI adoption and transformation journeys:

① the rapid rate of real-time technology change implemented “under the hood” (including incorporating newer LLMs) means that input of users of the general purpose or specialist GenAI platform three months ago may not output the same result as when one logs in to use today.

② the platform user interface designs are constantly being updated for improvement, which means that users may need to re-learn how to use the platform tools to which they may have grown accustomed.

③ the prompt engineering input techniques used in older versions may not give rise to the same output as new versions, where there is a renewed focus on “context engineering”, which Andrej Karpathy calls [“the delicate art and science of filling the context window with just the right information for the next step”](#) for retrieval of documents, memory and tools, as well as intention. This means that as GenAI capabilities grow from being AI chatbots to AI workflows and AI agents, users may need to learn new ways to engineer their context prompts as well as progressive disclosure (also known as Skills) to avoid context overload.

Given the above, “**change fatigue**” and “**AI workflow fragility**” are real challenges to AI transformation journeys, with the risk of many “throwing the baby out with the bathwater” if a trialled GenAI tool does not live up to its expectations or if output varies over time as the underlying models evolve. This in turn reduces the trust held by time-constrained non-technical knowledge workers that may prevent further investment of valuable time and effort into developing deployable tools. Appropriate design of incentives, verification frameworks and management of expectations are critical.

Given the above rapid developments and corollary challenges, we have extracted the contributed recipes to be kept in a separate online repository which may be retired when they become out of date.



# Critical Importance of GenAI Permissioning and Governance

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A significant benefit of the Copilot platform is to allow lawyers and enterprise users to connect their email and calendar in Outlook to their Word and Excel documents in SharePoint relatively seamlessly, leveraging existing user permissions to maintain security.

As a corollary, it is paramount to devise **appropriate AI and data governance policies**. Risk appetites need to be pre-determined, as tools used purely within the legal department have a lower risk than tools that will be accessed by clients (internal or external), and similarly GenAI tools for productivity have a lower risk than those used for legal research and analysis which require greater human oversight and input.

**Legal professionals should liaise more closely with their information technology security (InfoSec) colleagues** to develop the appropriate organisational infrastructure, access management and AI harnesses to allow individually built GenAI tools to be safely shared and scaled across the relevant legal department, practice group and/or entire law firm accordingly. InfoSec and risk management departments will need to be extra vigilant of "Shadow AI" with the emergence of ["secret cyborgs"](#) and agentic deployments by overly enthusiastic employees who may not fully appreciate the dangers and vulnerabilities of agents being let loose into the enterprise wild.

And SME law firms without InfoSec colleagues may need to consider external consultants to assist with the permissions setup.

Clear governance frameworks supported by technology that provides centralised control and access management are essential to mitigate risks while enabling the responsible scaling of AI capabilities across the organisation.

In addition, law firms and legal & compliance departments as users of GenAI will increasingly need to consider **ethical considerations** in the decision of what and how they deploy GenAI. Given that many Hong Kong and Singapore based lawyers are likely to cover multiple jurisdictions across the Asia-Pacific region, some of these considerations include sovereign AI and use of unconscious bias training data, energy consumption, and cross-border supply chain dependency.

# Credit and Appreciation

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I would like to sincerely thank Microsoft for their financial and other support and The Law Society of Hong Kong for their institutional support of this project. In addition, the insights and recipes contributed by our legal industry contributors were invaluable for providing practical guidance to fellow legal and allied professionals - in organisational alphabetical order, many thanks to Mel Nirmala (Bayer South East Asia Pte Ltd), Andrew Beasley (Clifford Chance), Elaine Chong (CLP Power Hong Kong Limited), Albert Yuen, Natalie Chen, Lauren Lau (Eversheds Sutherland), Jonathan Voo (Johnson Stokes & Master), Amy Lee (Microsoft), Ann Leung (MTR Corporation Limited), and Simon Schmeing and Daniel Wilberforce (Stephenson Harwood). Last but not least, this project would not have been possible without the tremendous effort of my former LITE Lab@HKU students and current undergraduate research assistants Garry Lau and Kotomi Hasegawa, who recreated the recipes contributed by the legal industry contributors. It is to you and my past, current and future LITE Lab@HKU students to whom I dedicate this project.



# “Day in the Life” of Featured Legal Practitioners and Allied Professionals User Personas

To allow busy legal and affiliated professionals to more easily identify how they can use their “tools at hand” as part of their respective AI and digital transformation journeys to improve their legal service delivery, we have featured **7 user personas across Private Practice and Legal & Compliance Departments (including corporations, public sector and non-profit organisations)**, namely:

## 1. Private Practice

- Paralegals, Clerks, Legal Executives & Trainees
- Associate Lawyers (Transactional)
- Associate Lawyers (Advisory & Dispute Resolution)
- Partners
- Practice & Business Development Managers

## 2. Legal & Compliance Departments

- Legal Counsel & Legal Operations Managers
- Compliance Officers

Within each of these representative “Day in the Life” workflows, we have highlighted and linked to online Copilot “recipes” contributed by our pioneer legal industry contributors to inspire busy legal and allied professionals regarding the “art of the possible” so that they can easily replicate, fork and/or create their own solutions. Please note that the terminology, workflows and functionalities outlined are expected to evolve over time.



As GenAI progresses at its rapid pace, it is highly likely that new and novel workflows will be developed as the digital cognitive labour movement evolves, especially as long horizon GenAI agents improve. GenAI usage can also lead to career compression by junior professionals to perform tasks conducted by their seniors; however, development of judgment remains vital.

9:00 - Prepare a daily legal digest

Ask **Copilot Chat** to summarise regulators' announcements, guidance notes, circulars, consultation papers or court decisions.

Next level

Use **Researcher Agent** to conduct in-depth research across designated sources and the web, producing a structured summary of new developments (e.g. categorised by jurisdiction or practice area), highlighting the nature of the update, the relevant authority, and any obligations or penalties. The output can then be adapted into a daily digest email for internal circulation.



10:15 - Translate documents and communications

Ask **Copilot Chat** or **Copilot in Word** to translate documents and communications clause by clause, with the original and translated text shown side by side for ease of comparison.

Next level

Use a customised **Copilot Agent** linked to the firm's standard clause library and glossary to ensure that the translations reflect the preferred terminology and drafting conventions.

Inspired by students from:



11:00 - Prepare chronology

Upload relevant files and email threads to **Copilot Chat** and ask it to prepare a chronology of key events for a litigation case.

Next level

Use **Copilot Chat** or **Researcher Agent** to review newly uploaded materials alongside the existing chronology and generate an updated version that incorporates additional events, highlights how they fit into the timeline, and flags potential gaps or inconsistencies.



14:15 - Prepare a research memorandum on a new regulation

Use **Copilot Chat** or **Researcher Agent** to draft a structured research memo about a new regulation, covering its scope, key obligations, maximum penalties and implications for industry or business.

Next level

Use **Copilot Notebooks** to organise relevant legislation, guidelines, case laws and internal notes in one place, creating a reusable knowledge base. You may share notebooks within your team to collaborate in real time and exchange knowledge.



16:00 - Conduct due diligence research

Ask **Copilot Chat** to conduct research on a target company based on recent news, public announcements and regulatory filings, and to highlight potential red flags.

Next level

Use a customised **Copilot Agent** configured with a pre-defined due diligence checklist (e.g. corporate structure, sanctions exposure, litigation history) to prepare an initial report on the target company, flagging areas that may require manual follow-up.

Inspired by:

Clifford Chance



16:45 - Review billing narratives

Create a customised **Copilot Agent** to review time entries against the firm's internal guidelines and flag problematic entries (e.g. typos, block billing and vague descriptions).

Next level

Provide additional context to **Copilot Agent**, including the specific billing requirements from a particular client (e.g. fixed quotes, special hourly rates or special billing instructions) and ask the agent to review the time entries and suggest alternative billing narratives.

Inspired by:



## 9:30 - Annotate term sheets

Upload a term sheet to **Copilot Chat** and ask it to annotate the document by mapping each key term to the corresponding provisions in the facility agreement and other related finance documents.

### Next level

For any terms not reflected in the facility agreement or related finance documents, ask **Copilot Chat** to convert each term into draft clause language suitable for inclusion into the agreement.

## 10:30 - Proofread draft agreements

Ask **Copilot Chat** or **Copilot in Word** to review draft agreements. In particular, ask Copilot to identify typos and formatting issues, flag inconsistent defined terms, and check numbering and cross-references.

### Next level

Use **Copilot in Word** to propose revisions to the agreements in redline using the Edit function in the Word Copilot chat box.

## 12:00 - Prepare for a client conference

Before the meeting, ask **Copilot in Loop** to prepare a brief and question checklist. Copy relevant background facts from correspondence or files into the Loop page and ask Copilot to help organise them into sections (e.g. "Chronology", "Outstanding Documents"). Loop is a platform that allows users to collaborate in real time and is great for team planning and co-authoring.

### Next level

During the meeting, use **Facilitator in Teams** as an AI-powered assistant to generate notes in real time. For in-person meetings, tap "Take notes with Facilitator" in the Teams mobile app to enable the agent to transcribe the conversation.

After the meeting, use **Facilitator** to generate a meeting recap, capturing discussion points, decisions made and action items.

## 15:00 - Review contracts

Upload the firm's contract review playbook and relevant contracts to **Copilot Chat** or **Copilot in Word** and ask it to summarise the key clauses in a table format to identify discrepancies in different contract versions as well as suggested amendments based on the playbook.

### Next level

Ask **Copilot Chat** to generate briefing notes or presentation materials which highlight potential red flags (e.g. uncapped liability, unusual governing law clauses) by reference to the firm's contract review guidelines.

## 16:00 - Prepare a deal bible

Upload the executed versions of all relevant transaction documents to **Copilot Chat** and ask it to generate a summary describing the key documents and highlight any post-closing obligations.

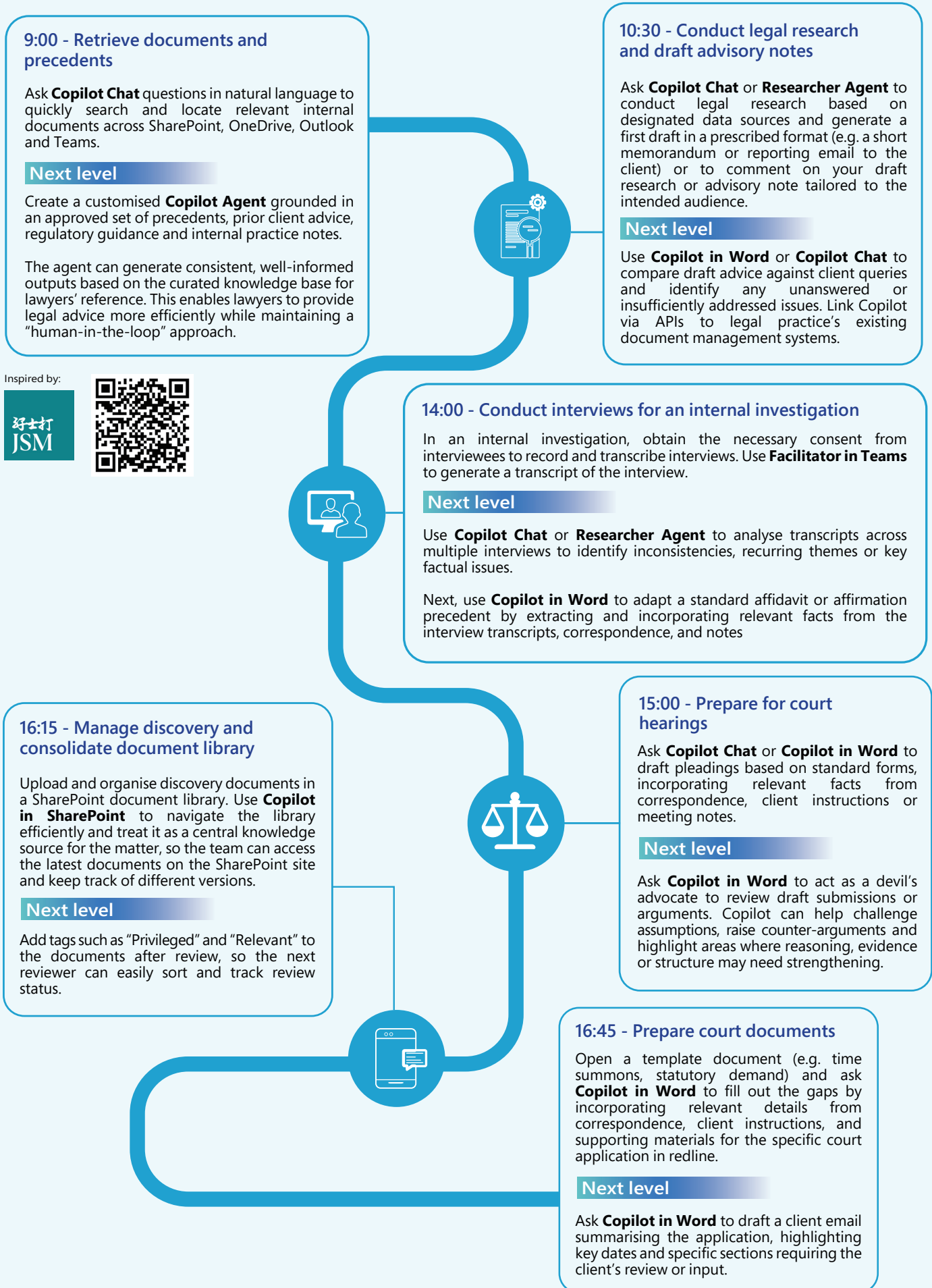
### Next level

Ask **Copilot Chat** to prepare a structured index based on the documents uploaded (e.g. by document type or party) to assist with preparing the deal bible.

Inspired by:

EVERSHEDS  
SUTHERLAND





Inspired by:



**9:00 - Manage fee communications and billing review**

Use **Copilot in Outlook** or **Copilot Chat** to draft engagement letters, emails on fee arrangements or responses to billing queries.

**Next level**

Create a **Copilot Agent** to review timesheets by analysing raw data exported from the billing system against the matter budget and internal guidelines. The agent can flag vague and potentially unbillable entries and propose corrections. It can also generate per-fee-earner review tables and a master budgeting table for further analysis.

Inspired by:

EVERSHEDS  
SUTHERLAND



STEPHENSON  
HARWOOD  
(Singapore) Alliance



**10:00 - Prepare for a client meeting**

Use **Copilot Chat** to gather information about a client or prospective client ahead of meetings, such as the client's business model and recent news and developments, public announcements, transactions or disputes, and existing matters with the firm.

**Next level**

Ask **Copilot Chat** to identify potential legal, regulatory, or commercial risk areas based on the client's recent activities and existing matters and to prepare tailored talking points and anticipate key questions from the client.

**11:00 - Brainstorm with AI thought partner for contract negotiation**

Ask **Copilot in Word** to review a draft agreement to highlight potential counter-arguments and new ideas for responses and to protect clients' interests.

**Next level**

Use **Copilot Chat** as a thought partner in contract negotiation. Simulate a 2-3 round negotiation, outlining the counterparty's likely response, showing how their stance may evolve, and recommending how you should adjust your responses at each stage.

**15:00 - Analyse financial performance**

Use **Copilot in Excel** to review associates' time entries and generate charts and visualisations that highlight performance trends.

**Next level**

Ask **Copilot in Excel** to identify patterns in write-offs or low utilisation and flag matters, clients or workstreams that may require closer review from a commercial or profitability perspective.

**14:15 - Facilitate management committee discussions**

Use **Copilot in Loop** to prepare management committee meeting briefs, helping structure key issues, practice developments and key decision points. Loop canvases enable partners to collaborate in real-time.

**Next level**

Use **Facilitator in Teams** to capture aligned decisions and draft follow-up emails to colleagues outlining key tasks and deadlines.

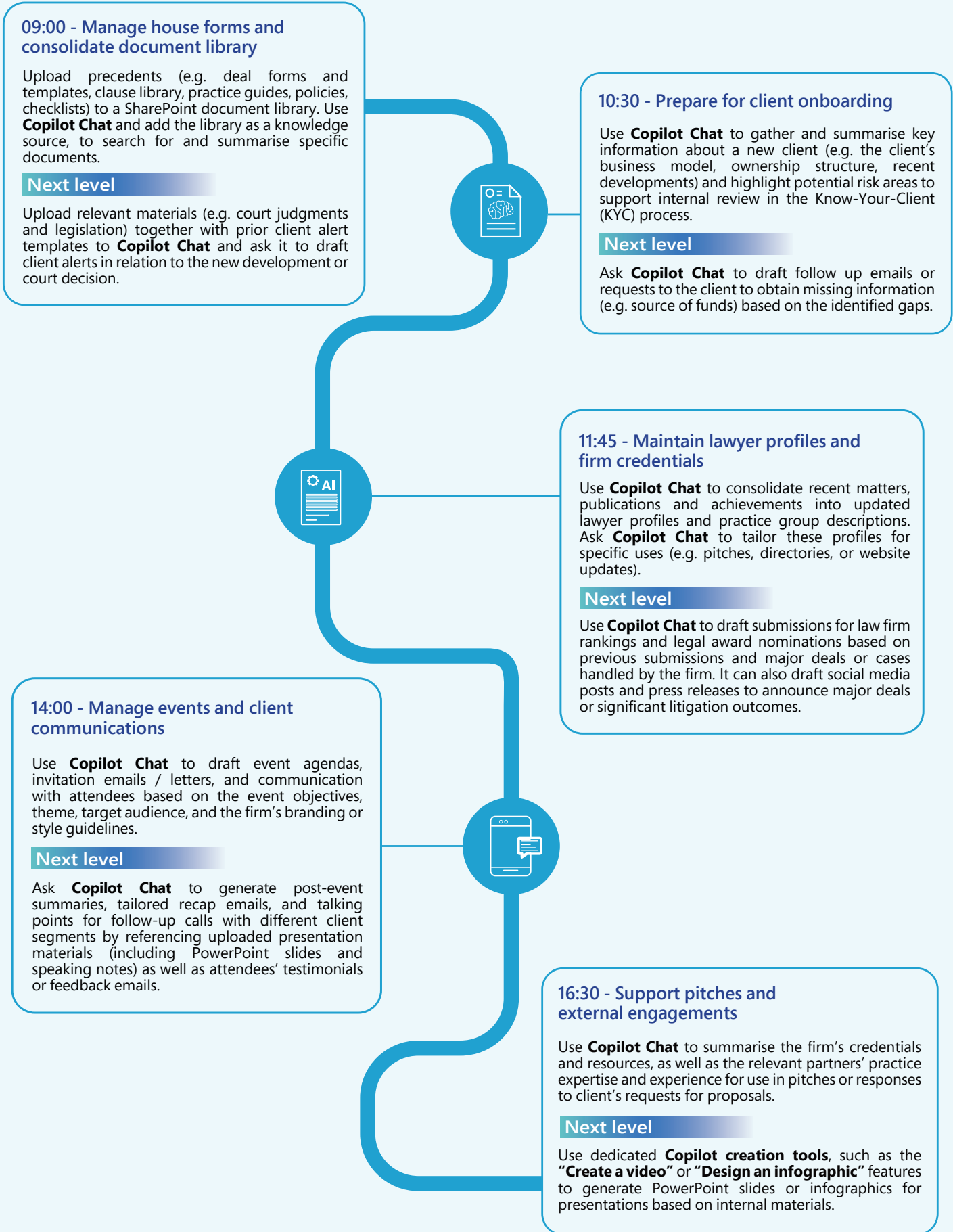
**16:30 - Manage people and team development**

Use **Copilot in Word** or **Copilot Chat** to draft job descriptions aligned with team needs and hiring managers' feedback.

**Next level**

Use **Copilot Chat** to consolidate feedback across multiple sources into evidence-based assessments, highlighting strengths, development areas and suggested next steps for each team member.

# Private Practice - Practice & Business Development Managers



# Legal & Compliance Departments - Legal Counsel & Legal Operations Managers

## 9:30 - Prepare a chronology

Create a customised **Copilot Agent** to extract key dates, actors and event descriptions from emails and unstructured documents, and organise them into a structured chronology to support legal review and analysis.

### Next level

Apply a predefined, structured workflow within the **Copilot Agent** to update the existing chronology once a new document arrives and to highlight potential gaps or inconsistencies for legal review.

## 10:30 - Monitor regulatory developments

Create a scheduled prompt in **Copilot Chat** to monitor regulatory updates from selected external sources (e.g. regulators' websites, external advisors' alerts, industry publications) over the past week and summarise developments that may impact the industry.

### Next level

Ask **Copilot Chat** to draft an email to the team that summarises the latest regulatory developments and highlights potential impacts on business operations.

Inspired by:



Inspired by:



## 12:15 - Create a legal request triage

Upload various workflow descriptions and decision tree documents to SharePoint, allowing business users to navigate internal procedures and guides using dynamic SharePoint content.

### Next level

Link the **Copilot Agent** to intake channels (e.g. email or Teams) so it can automatically categorise incoming legal requests, route them to the appropriate team or lawyer and generate initial responses or acknowledgements.

## 14:00 - Analyse contracts

Upload standardised company contracts (e.g. non-disclosure agreement) templates and internal review guidance to a designated SharePoint location, enabling users to quickly locate the relevant documents using **Copilot in SharePoint**.

### Next level

Upload a third-party contract to **Copilot Chat** or a customised **Copilot Agent** and ask it to review the contract based on the internal review guidance, identifying key issues and gaps.

Inspired by:



## 16:30 - Draft legal correspondence / documents

Use **Copilot Chat** to draft legal correspondence / documents (e.g. warning letters, cease-and-desist letters).

### Next level

Open a template document. Upload the relevant materials to **Copilot in Word** and instruct Copilot to edit the template directly based on the facts set out in the uploaded materials and complete all placeholder fields in redline.

Inspired by:



## 9:30 - Conduct due diligence / KYC

Ask **Copilot Chat** to aggregate information from publicly available regulatory filings into a due diligence tracker and draft a structured Know-Your-Customer (KYC) report, with potential red flags summarised in a risk matrix for compliance review.

### Next level

Use **Copilot Chat** to aggregate multiple KYC reports and produce a quarterly summary by jurisdiction, identifying recurring red flags, shifts in risk profiles, and key regulatory or enforcement trends for compliance review.



## 10:30 - Produce training materials

Use **Copilot Chat** to draft content for internal training materials (e.g. an explanatory note, video script, or PowerPoint slides) to explain key regulatory developments.

### Next level

Upload the relevant materials (e.g. explanatory note) and use dedicated **Copilot creation tools**, such as the "Create a video" or "Design an infographic" features, to produce engaging training materials (e.g. a short training video or an infographic) that convey the key compliance obligations.

Inspired by:



## 12:00 - Conduct privacy impact assessments (PIA)

Use **Researcher Agent** or a customised **Copilot Agent** to analyse the privacy impact of a new company initiative against the six Data Protection Principles under the Personal Data (Privacy) Ordinance, and generate a draft PIA report, highlighting risk areas, data flows, and mitigation considerations for compliance review.

### Next level

Build a customised **Copilot Agent** to populate regulatory filing templates and pre-fill forms with case data, reducing manual data entry.

Inspired by:



## 15:00 - Update internal compliance manuals

Use **Copilot Chat** to summarise a new regulatory guidance into an executive briefing note and produce PowerPoint slides for management briefing.

### Next level

Ask **Researcher Agent** to identify discrepancies between new regulatory guidance (e.g. codes of practice) and existing compliance manuals stored in SharePoint, and to propose updated texts.

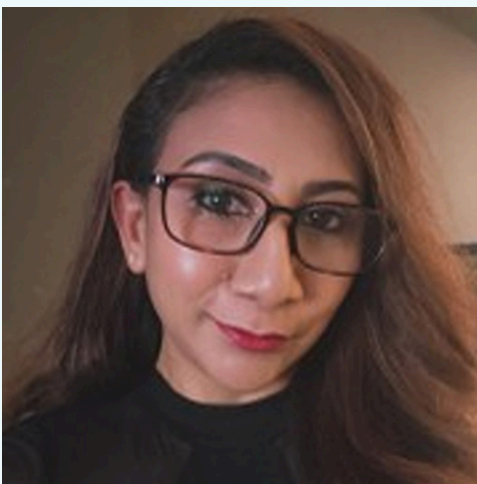
## 17:30 - Manage compliance incidents

Use **Copilot Chat** to extract and consolidate key information from investigation notes and related communications and prepare a high-level summary (e.g. timeline, key facts, affected parties and initial assessment of impact).

### Next level

Ask **Copilot Chat** to convert the incident summary into a structured report based on the applicable reporting requirements and templates.

# Industry Contributor Insights on AI Transformation Journeys Using Copilot



## Mel Nirmala

LPC Operational Excellence Lead, ASEAN

*Bayer South East Asia Pte Ltd*

“*...lawyers who still hide behind lengthy contracts and draft every line from scratch, assuming that this workflow will last forever, may want to reconsider.*”

### Extent of use of Microsoft ecosystem and other internal chatbot in current tech stack

Bayer ASEAN Law, Patents & Compliance (LPC) Team operates entirely on M365 (Teams, SharePoint, Power Apps/Automate, Outlook). We built LEX, an agentic AI co-pilot studio, legal navigator in Teams that triages and routes Compliance, Data Privacy, Contracting and Compliance Express queries — eliminating manual redirection and establishing a single entry point for ASEAN users with human in the loop system.

### Popular GenAI use cases implemented to date

- LEX: Automated triage + routing across ASEAN, saving ~2,500 hours annually from reduced manual redirection.
- Auto-linking users to standard operating procedures (SOPs), policies, approvals for Data Privacy, Compliance and Procurement Contract forms.
- Power Apps + Copilot–assisted guided intake, normalizing unstructured requests.
- Power Automate workflows for lifecycle management, routing accuracy and audit trail.
- Embedded legal navigator guidance with disclaimers for NDA/DPA basics in Teams.

## Opportunities / next steps for increased adoption of general purpose GenAI and workflow automation like Copilot and Copilot Studio

Expand LEX across all four divisions in Bayer. Strengthen connectors to ServiceNow, SAP, shared mailboxes and analytics. Introduce a telemetry layer (feedback-to-conversation mapping, routing accuracy) and launch an internal Agent Catalog to enable reuse of agentic workflows. Scale iterative releases aligned to the ONE LPC Entry Point roadmap.

## Challenges relating to GenAI solution adoption and how best to overcome

We navigate data loss prevention (DLP) restrictions, production knowledge-refresh regressions, content consistency, and adoption barriers.

## Benefit of initiatives like this cookbook

A practical, guardrailed recipe library that enables non-technical legal teams to adopt GenAI safely, quickly, and consistently - reducing experimentation cost and accelerating operational standardization.

## How the legal profession will change in the next 10 years and top tips

When AI is at its best, it quietly takes over the repetitive and boring work in the legal ecosystem. A few decades ago, the idea of machines doing triage sounded impossible. Today, even a non-technical person can build a triage system with AI in minutes.

As technology continues to advance, most of the mundane and mindless tasks will naturally be handed over to the machines. Humans will focus on redefining how we use AI, data and real-world context to create smarter, more evolutionary solutions. The human mind will remain the core source of judgment, working alongside AI to produce sharper reviews, faster answers and better strategic positioning for any business. Legal work is no exception.

This also means that lawyers who still hide behind lengthy contracts and draft every line from scratch, assuming that this workflow will last forever, may want to reconsider. That world is disappearing quickly. Human advice is still what stands in court, so the message is simple: use AI, but do not depend on it blindly. Use it to make your submissions thorough, strategic, clear and structured in the most efficient way.

At the end of the day, lawyers still love clean documents.

# Clifford Chance



## Andrew Beasley

Director of Operations India and  
Global Legal & Technology  
Transformation Lead

*Clifford Chance*

“*Clear communication on AI’s role as an enhancer, combined with transparent metrics and adherence to ethical principles will build confidence and accelerate adoption.*”

## Extent of use of Microsoft ecosystem and other internal chatbot in current tech stack

Clifford Chance was among the earliest organisations – not just law firms – to decide to deploy Microsoft Copilot globally. The Firm has already adopted Copilot at scale, with over 90% of employees actively using it today. Across the firm, lawyers have formed grassroots “innovation groups” and built their own prototype agents to automate some tasks.

CC Assist, our in-house AI platform built on Microsoft Azure, enables lawyers to securely upload confidential documents and perform legal tasks such as multi-document review, summarisation, and drafting. Azure’s enterprise-grade security and scalability ensure that CC Assist meets the rigorous confidentiality and compliance standards expected in legal practice.

Complementing this, Copilot Work provides seamless access to Microsoft applications including Outlook, Teams, OneNote, OneDrive and our firm’s intranet, while Copilot Web extends capabilities to external web search.

## Popular GenAI use cases implemented to date

The firm has used AI to redesign existing services: a regulatory compliance agent now automatically tracks changing laws and generates tailored impact assessments, reducing the time spent by trainees compiling 300-page PowerPoints. What was once a labour-intensive, unbillable task is now a popular subscription offering for clients.

## Opportunities / next steps for increased adoption of general purpose GenAI and workflow automation like Copilot and Copilot Studio

Clifford Chance is proud to be part of the Frontier Firm AI Initiative, hosted at Harvard Business School in collaboration with Microsoft. The firm is exploring how the “lawyer of the future” will work in tandem with AI – deploying intelligent agents for research and first-draft preparation, allowing lawyers to concentrate on higher-value strategic counsel and critical advisory work. Ultimately, the firm aspires to create real competitive advantage for its clients and to use AI insights to help them see what’s around the corner.

Working with the Initiative, the firm is also developing benchmarks to measure Copilot’s impact on productivity and efficiency, while ensuring alignment with Clifford Chance’s AI Code and ethical principles.

## Challenges relating to GenAI solution adoption and how best to overcome

Adoption hurdles include cultural resistance, trust gaps, and ethical concerns around accuracy and confidentiality.

To overcome these, firms must implement robust governance and provide continuous training. Clear communication on AI’s role as an enhancer, combined with transparent metrics and adherence to ethical principles will build confidence and accelerate adoption.

## Benefit of initiatives like this cookbook

This cookbook bridges the gap between theory and practice, offering tested, real-world workflows that accelerate safe and effective GenAI adoption. It empowers legal professionals to innovate confidently, share best practices across jurisdictions, and build trust in AI through transparent, collaborative knowledge exchange.

## How the legal profession will change in the next 10 years

Lawyers will collaborate seamlessly with AI agents as firms embrace AI-augmented expertise. Legal practice is likely to emerge as a hybrid model where AI manages drafting, compliance, and predictive analytics, enabling lawyers to focus on strategic counsel. Data-driven insights will transform decisions, shifting from reactive problem-solving to predictive legal strategies.

Ultimately, legal services will be faster and more deeply integrated with clients’ business objectives.

## Top tip to other legal users for adoption of general purpose GenAI and workflow automation like Copilot and Copilot Studio

Establish governance frameworks early, including data security and ethical guidelines. Measure ROI through productivity metrics and user feedback to demonstrate tangible value and drive cultural buy-in.



## Elaine Chong

General Counsel

*CLP Power Hong Kong Limited*

“  
*...demystify AI, making  
it more approachable  
and easier to adopt  
within legal teams.*  
”

### Extent of use of Microsoft ecosystem and other internal chatbot in current tech stack

CLP uses Microsoft-based chatbots to boost efficiency and support. These smart bots handle translations and answer compliance questions—like privacy or the new Security of Payment Ordinance—quickly and clearly. By making information easy to find, they keep things running smoothly. Our next target: chatbots to improve contract drafting and streamline the compliance works in a smarter manner.

### Popular GenAI use cases implemented to date

- Rapidly growing adoption of AI tools is fostering a culture of “Working with AI,” driving productivity and innovation.
- GenAI is used to automate translation tasks, enabling multi-language support and greater accessibility.
- GenAI creates training videos, accelerating knowledge sharing across different departments and teams.
- AI-driven deep-dive research and comparative analysis are conducted with enhanced speed and accuracy.
- Comparing contractual provisions with GenAI improves time-efficiency in legal review processes.
- Engaging posters and materials are designed for internal communications and education, leveraging AI capabilities.

## Opportunities / next steps for increased adoption of general purpose GenAI and workflow automation like Copilot and Copilot Studio

AI is poised to revolutionize our in-house legal practice, serving as a dynamic tool that empowers each professional to “Work with AI.” By merging our deep experience, legal judgment, and the drive to break down silos, we can better integrate knowledge and collaborate with our business units through AI-powered solutions. Our commitment centers on weaving GenAI and advanced workflow automation into our comprehensive regulatory and legal knowledge bases. One of our future steps is to leverage on Copilot Studio to design and deploy AI Agents tailored to compliance tasks and hopefully, they will be able to actively assist with monitoring, interpreting, and reporting on regulatory changes, making complex compliance matter more manageable and transparent. On people, our focus includes equipping our legal professionals with the skills necessary to harness GenAI for contract review, research, compliance, and drafting.

## Challenges relating to GenAI solution adoption and how best to overcome

When I think about adopting GenAI solutions and finding legal solutions for business, one major hurdle is the breaking down organizational silos and finding ways to collaborate more effectively across teams. Harmonizing legacy data, frequently stored in inconsistent or fragmented formats, can also be difficult. To address these barriers, my focus is on standardizing data structures, and building data governance frameworks, while promoting collaboration between business teams. On the people front, building

confidence in AI adoption and investing in data augmentation skills are vital steps. By developing these capabilities, we can work smarter and become more effective users of AI.

## Benefit of initiatives like this cookbook

This cookbook is a brilliant initiative for the legal community. By sharing authentic, real-world AI use cases from across the industry, I believe it delivers tangible value—showing exactly how these technologies can make a difference in our daily work. For me, highlighting such successes helps demystify AI, making it more approachable and easier to adopt within legal teams. I am really inspired by how these stories spark innovative ideas, encouraging a culture of experimentation with AI-driven solutions. This meaningful initiative can help accelerate LegalTech transformation and empower in-house lawyers like me to drive AI adoption and deliver greater impact.

## How the legal profession will change in the next 10 years

Looking ahead, it’s likely that the legal profession will undergo a dramatic transformation driven by AI advancements. In the next ten years, we may see lawyers embracing AI to automate routine tasks, boost research precision, and simplify compliance processes. As AI takes on more of the operational workload, in-house counsel could increasingly act as supervisors or strategists—channeling their expertise into high-value transactions, complex negotiations, and nuanced legal judgment.

Ultimately, this evolution has the potential to foster unprecedented efficiency and spark innovation across the legal industry.

Top tip to other legal users for adoption of general purpose GenAI and workflow automation like Copilot and Copilot Studio

- To me, I think it's necessary to embrace continuous learning: Stay curious and keep up with emerging AI tools and workflow automation trends. A positive, open mindset makes it easier to adapt and identify new opportunities for process improvement.
- Also, start small, collaborate widely: Begin with manageable projects and actively seek input from colleagues across teams. Humility and a willingness to learn from others' experiences will help you build confidence and foster greater adoption.





## Albert Yuen

Partner  
Head of Technology & Digital - Asia



## Natalie Chen

Associate (Technology & Digital - Asia)



## Lauren Lau

Associate (Technology & Digital - Asia)

*Eversheds Sutherland*

“  
...legal professionals will  
increasingly need  
proficiency in technology,  
data analytics, and AI  
oversight.”

Extent of use of Microsoft ecosystem and other  
internal chatbot in current tech stack

The Microsoft ecosystem is utilised extensively on a daily basis. M365 Copilot is used across various apps, including Microsoft Outlook, Teams, Word, PowerPoint and Excel, to perform tasks such as summarising, drafting and analysis.

Our firm also utilises the Microsoft 365 Chat for internal chats across inboxes, Teams, and documents.

Popular GenAI use cases implemented to date

Top use cases of Microsoft 365 Copilot in our firm involve helping users save time by drafting, summarising and automating tasks, e.g.:

- Drafting emails (Outlook)
- Summarising email chains (Outlook)
- Drafting documents (Word)
- Drafting meeting notes and actions (Teams)
- Prioritising inboxes (Microsoft 365 Chat)

- Recapping complex meetings (Teams)
- Consolidating the latest information from a person by emails, chats and files (Microsoft 365 Chat)
- Summarising documents (Word)
- Drafting slides (PowerPoint)
- Creating formulas (Excel)
- AI hallucinations risks – negligence claims and reputational damage can become significant risks for law firms. Human-in-the-loop review and oversight for outputs are crucial in providing legal advice and client communications.

### Benefit of initiatives like this cookbook

These initiatives provide practical guidance for legal professionals to harness the transformative power of AI, augment workflows and enhance productivity. They also encourage adoption of GenAI among lawyers (including those less tech-savvy), practically helping them automate and standardise workflows, ensuring reliable and cost-effective outputs while fostering innovation.

### How the legal profession will change in the next 10 years

As GenAI adoption becomes more extensive, we expect hybrid skill sets to become a key differentiator beyond traditional legal expertise. For example, legal professionals will increasingly need proficiency in technology, data analytics, and AI oversight. Growing regulatory focus on ethical AI use may also heighten the demand for upholding compliance and professional responsibility.

### Top tip to other legal users for adoption of general purpose GenAI and workflow automation like Copilot and Copilot Studio

Start small and secure – use GenAI tools on low-risk and repetitive tasks to free up time for higher-value advisory work. Make sure that there are organisation-wide robust frameworks and protocols

### Opportunities / next steps for increased adoption of general purpose GenAI and workflow automation like Copilot and Copilot Studio

Our firm acknowledges the value of GenAI for internal workflow automation, and continues to develop its AI strategy, including pilot rollouts of various legal AI tools.

We regularly update internal training and knowhow with a dedicated project team leading implementation. Policy guidance and principles on the use of Copilot are also readily accessible.

To further enhance opportunities for GenAI adoption, knowledge sharing is encouraged through a dedicated Teams channel involving international users, which is seeing active contribution.

### Challenges relating to GenAI solution adoption and how best to overcome

- Confidentiality risks – we routinely handle privileged and sensitive information. To mitigate this, we must set out and adhere to robust protocols such as ensuring all AI interactions are kept within the Microsoft 365 compliance boundary and complying with any client-specific terms restricting use of their data in GenAI.

in place for safe and effective use of AI, and train teams regularly to avoid misuse. In managing workflows, legal expertise should be combined with AI automation so that workflows are redesigned for efficiency without compromising accuracy, quality and professional judgement.





## Jonathan Voo

Senior Innovation Manager

*Johnson Stokes & Master*

“*...competitive advantage will not come from access to AI tools...but from how firms integrate them into workflows, curate their knowledge, and train their lawyers to operate effectively in this environment.*”

### Extent of use of Microsoft ecosystem and other internal chatbot in current tech stack

Our firm extensively uses Microsoft 365 for collaboration, document management, and secure communication. Teams, SharePoint, and Power Platform underpin workflows. We have piloted an internal chatbot for knowledge retrieval and FAQs, with plans to integrate Microsoft Copilot for advanced document drafting and compliance automation across practice areas. Initial deployments have reduced first draft preparation time for selected tasks, with value seen in improved consistency, faster turnaround, and better use of lawyer time on higher value work. Adoption has been strongest where use cases are narrow, low risk, and clearly measurable.

### Popular GenAI use cases implemented to date

- Automated summarisation of lengthy contracts and case documents
- Drafting standard legal templates and client correspondence
- Research assistance for case law, regulatory updates, and compliance checks
- Legal advice agent for generating structured first-pass advice covering risks, options and possible next steps
- Generating first drafts for internal knowledge articles
- Automating repetitive administrative tasks such as billing narratives and time entry
- Enhancing client experience through quick-turnaround document reviews and FAQs

## Opportunities / next steps for increased adoption of general purpose GenAI and workflow automation like Copilot and Copilot Studio

Expand Microsoft Copilot integration into our document management system and enhance contract lifecycle management support. Build custom Copilot Studio workflows for more complex processes and integration with other applications. Scale adoption through targeted training and governance frameworks to ensure ethical, secure, and efficient deployment across all practice groups, including client-facing opportunities.

Adoption is driven by leadership sponsorship, practice champions, targeted training, prompt libraries, feedback loops, and clear metrics. GenAI is best suited to first drafts, summarisation, issue spotting, and workflow support, but requires caution for final advice, complex judgement, high risk matters, and sensitive or privileged data.

## Challenges relating to GenAI solution adoption and how best to overcome

Key challenges include security concerns, data privacy, and the risk of hallucinations (inaccurate output). Expectations around Microsoft Copilot for legal work need to be managed, and it should not be seen as a silver bullet. Overcoming these challenges requires more targeted training, sharing success stories, and fostering a culture of innovation while maintaining client trust and confidentiality. All outputs require lawyer review and judgement. Use is limited to approved environments and must comply with confidentiality, privilege, and data handling requirements.

## Benefit of initiatives like this cookbook

This cookbook, developed in collaboration with LITE Lab, accelerates adoption by offering practical, proven recipes tailored to legal workflows. Many of the use cases are common across law firms, which presents a valuable opportunity to collaborate and enhance established practices. We have learnt a great deal from the students involved and have refined our own processes as a result.

## How the legal profession will change in the next 10 years

The legal profession is moving away from manual document work towards higher-value strategic advice. Generative AI will continue to take over routine tasks, making legal services faster, more consistent and easier to access. Lawyers are unlikely to disappear, but their role will evolve into that of AI-enabled editors and advisers, focusing on judgement, risk and client relationships.

Over the next decade, we can expect to see AI-integrated matter management, more reliable knowledge retrieval across firm systems, document automation combined with generative AI, and an expansion of structured legal operations roles. Lawyers will increasingly work within AI quality assurance workflows, reviewing outputs rather than producing everything from scratch.

Much of this shift will be driven by client expectations, with clients increasingly asking how AI is being used and whether it delivers measurable improvements in efficiency, cost and quality. In turn, this will place pressure on traditional billing models,

which may become misaligned with AI-enabled delivery.

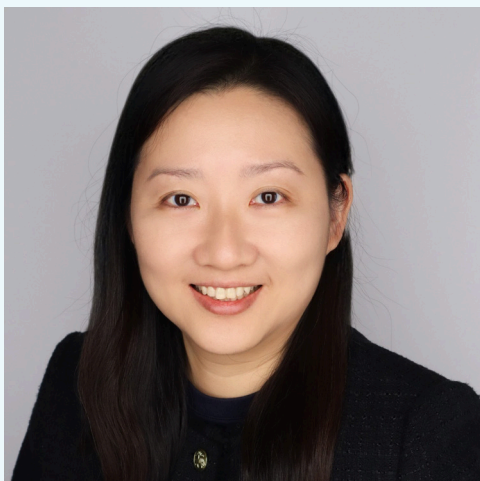
At the same time, competitive advantage will not come from access to AI tools, which are becoming commoditised, but from how firms integrate them into workflows, curate their knowledge, and train their lawyers to operate effectively in this environment. The talent model will also evolve, with greater emphasis on hybrid roles such as legal engineers and AI specialists, alongside changes to how junior lawyers are trained.

Taken together, these changes point towards a profession built around automation, predictive analytics and self-service platforms, where lawyers focus on complex problems and proactive advice. Law firms are likely to look less like traditional partnerships and more like technology-enabled consultancies, although access to justice and talent development will remain ongoing challenges.

[Top tip to other legal users for adoption of general purpose GenAI and workflow automation like Copilot and Copilot Studio](#)

Begin with low-risk use cases such as document summarisation and drafting. Early engagement with stakeholders is essential to set clear expectations and address compliance requirements. Training and strong governance will ensure ethical and secure use. Success should be measured through efficiency gains and client satisfaction. Once proven, scale gradually and embed GenAI into core workflows without disrupting existing processes. Start small, remain open to experimentation, and scale what proves effective.





## Amy Lee

Chief Legal Director

Microsoft Hong Kong

“Use AI regularly and explore different ways of leveraging this new technology to help you work smarter and faster – be creative.”

### Extent of use of Microsoft ecosystem and other internal chatbot in current tech stack

- Extensive use of full suite of Microsoft products and services, including Microsoft 365 (M365) applications (e.g. Word, Outlook, Teams, M365 Copilot and Copilot Agents).
- Proactively exploring Copilot and Copilot Agents to streamline different workflows and improve work efficiency, to empower our lawyers to focus their time on high-value work.

### Popular GenAI use cases implemented to date

- Teams meeting recaps, insights and transcripts (M365 Copilot in Teams).
- Email and legal document drafting, comparison and summary (M365 Copilot / Copilot in Outlook / Copilot in Word).
- Legal, business, policy research (Copilot Researcher).
- Knowledge agents for navigating large SharePoint sites and locating content (SharePoint Agents).
- Streamline and scale departmental workflows (e.g. legal request intake and triage).
- Meeting preparation (M365 Copilot in Teams / PowerPoint).

### Opportunities / next steps for increased adoption of general purpose GenAI and workflow automation like Copilot and Copilot Studio

- Work with outside counsel to leverage Copilot Agents for consolidating legal knowledge base and preparing legal advice for Microsoft in a more cost-efficient manner.
- Automate legal, business and policy development monitoring and research.

## Challenges relating to GenAI solution adoption and how best to overcome

Microsoft Corporate, External and Legal Affairs Department (CELA) consists of around 2,000 global legal and business professionals, working in over 20 practice groups in more than 50 jurisdictions. Like many legal organisations, CELA navigates an increasingly dynamic and complex legal, regulatory, and compliance landscape. The workload is growing not just in volume, but in speed and complexity. CELA has been on a multi-year digital transformation journey to tackle this and other challenges, but much of the technology infrastructure and data has remained siloed. Navigating a legal technology ecosystem with various domain-specific applications requires consolidation and aggregation of data from those systems. It's also important to encourage our lawyers to invest time to experiment and use the new technologies.

We overcome the aforesaid challenges by:

- Investment in Data Infrastructure – CELA has harnessed the power of Copilot and AI, which helps the team to transform vast amounts of data into actionable insights, achieve scale, and drive forward with increased agility while enhancing the efficiency, quality, impact, and scale of its work.
- AI Adoption Efforts – CELA has developed methods to encourage innovation and experimentation, including:

- (i) appoint individuals across practice groups to help drive Copilot and AI adoption, engagement and transformation activities;
- (ii) regular communications from our leaders to share their favourite Copilot features and best practices;
- (iii) expert- and peer-led training to boost Copilot and AI usage; and
- (iv) Copilot Hackathon to invite innovative use case ideas from our legal and business professionals.

Such efforts paved the way for continuous use and seamless integration of Copilot and AI into our professionals' practices.

## Benefit of initiatives like this cookbook

- Learn from industry peers on AI use cases.
- Reusable recipes speed up implementation of AI for legal industry.
- Share best practices of responsible AI adoption.

## How the legal profession will change in the next 10 years

- Routine drafting, review, and research will be AI-assisted, freeing lawyers to focus on higher-value work such as judgement, risk strategy, and client counsel.
- Workflows will be data-driven, collaborative, automated, and integrated with secure Copilot agents embedded across document and communication platforms.

## Top tip to other legal users for adoption of general purpose GenAI and workflow automation like Copilot and Copilot Studio

Start your AI transformation from low-hanging fruits: using Copilot and building Copilot Agents with low-risk, high-frequency tasks. Use regularly and explore different ways of leveraging this new technology to help you work smarter and faster – be creative. Measure ROI and outcomes (e.g. time saved and quality improvements) to secure buy-in. Define guardrails and approvals early. Use enterprise-grade AI technologies and check the technology provider's privacy, data and security policies.





## Ann Leung

Legal Operations Manager

*MTR Corporation Limited*

“*...helping individual users in different scenarios, enhancing document analysis, and integrating with workflows and automation tools.*”

### Extent of use of Microsoft ecosystem and other internal chatbot in current tech stack

We rely on the readily available Microsoft 365 tools, including Copilot, Power Automate, and SharePoint for workflow automation and document management in Legal Operations. We have also developed an internal chatbot prototype with our corporate AI tool to assist with FAQs.

### Popular GenAI use cases implemented to date

Our colleagues are usually using GenAI for:

- Summarizing Teams meetings and generating action lists from recordings
- Drafting and proofreading emails, documents, and templates
- Extracting key obligations from contracts and compliance frameworks
- Structuring and drafting Power Automate workflows
- Researching various topics and market developments for decision support
- Navigating SharePoint document libraries more efficiently
- Cross-checking templates and ensuring information consistency between files

## Opportunities / next steps for increased adoption of general purpose GenAI and workflow automation like Copilot and Copilot Studio

We are broadening general purpose GenAI by helping individual users in different scenarios, enhancing document analysis, and integrating with workflows and automation tools. We are also improving our database and systems, as well as assessing automation options for routine tasks.

## Challenges relating to GenAI solution adoption and how best to overcome

Key challenges include data privacy, governance, and user adoption. We attempted to address these challenges by clarifying security frameworks, strengthening policy requirements, and continuous training to build confidence. We believe that robust change management and stakeholder engagement are critical to ensure smooth integration and maximize value.

## Benefit of initiatives like this cookbook

It facilitates open exchange of knowledge and actionable insights, allowing legal teams to benefit from real-world examples and drive innovation efficiently without duplicating prior efforts.

## How the legal profession will change in the next 10 years

I expect to see more data-driven automations in the future with AI handling routine tasks, predictive analytics, and certain compliance monitoring. Lawyers

can focus on strategic advisory roles, business engagements and other value-adding activities.

## Top tip to other legal users for adoption of general purpose GenAI and workflow automation like Copilot and Copilot Studio

Begin with small steps to build trust and show value while using the case to demonstrate to stakeholders what is about to happen. Combine technology with process redesign, set up governance structure, and monitor results so that the product is ready as a cohesive piece for long-term adoption.

# STEPHENSON HARWOOD

(Singapore) Alliance



## Simon Schmeing

Senior Innovation Manager



## Daniel Wilberforce

Senior Digital Transformation Manager

*Stephenson Harwood*

“Using technology-driven processes will no longer remain optional but become business-as-usual...”

Extent of use of Microsoft ecosystem and other internal chatbot in current tech stack

We use Microsoft 365 cloud services: Word, Excel, Outlook, PowerPoint, Teams, SharePoint, OneDrive for document collaboration, and Power BI for insights. Security and identity are safeguarded by Entra and Defender solutions. Copilot seamlessly powers AI-driven productivity, collaboration, and workflow automation, keeping work smart and connected without leaving the Microsoft ecosystem.

Popular GenAI use cases implemented to date

We have adopted GenAI for a range of tasks including:

- Copywriting – Improves the spelling, grammar, readability, and tone of written content.
- Chronology – Creates a chronology of events from documents.
- Due Diligence – Completes a short form due diligence template for narrowly defined concepts.

- Term Sheet Checker – Assesses if provisions agreed in a term sheet are included in draft documents.
- Legal Principle / Area Explanation – Produces a detailed and structured explanation for legal principles.
- Meeting Facilitation & Transcription

### Opportunities / next steps for increased adoption of general purpose GenAI and workflow automation like Copilot and Copilot Studio

We have piloted Copilot with 110 users across all offices with measurable productivity gains. This pilot gives us the confidence to consider a wider adoption of Copilot in the firm. Next steps: expand usage to Legal Admin Teams; embed Copilot into M365 workflows, and leverage Copilot Studio for custom agents and automation. Broader opportunities include scaling Copilot GenAI for all users for meeting facilitation, and data insights for business-driven decision making.

### Challenges relating to GenAI solution adoption and how best to overcome

Challenges can broadly be categorised in three areas, (1) policy, (2) technical, (3) change management. While the first area is a question for legal departments with relatively few decision makers, advocating for a permissive policy is beneficial. Technical questions can typically be resolved by IT departments and revolve about rollouts and integrations. The change management area is critically important. Adoption requires people to change how they themselves work. Having

an innovation team looking at processes holistically and allowing sharing of learnings is crucial for wide adoption.

### Benefit of initiatives like this cookbook

Cookbooks address the challenge of disseminating know-how within the industry. Having guidance on how to implement and integrate fully developed end-to-end processes saves developing time for individual users and firms. Furthermore, gaining inspiration and insights into use-cases with an existing and experienced ROI helps convincing stakeholders on embracing this technology.

### How the legal profession will change in the next 10 years

Like many industries, the legal profession is undergoing a significant change in the wake of GenAI. Using technology-driven processes will no longer remain optional but become business-as-usual and mandatory to provide quality legal services. However, AI-generated content will still require human assessment and supervision to ensure accuracy.

## Top tip to other legal users for adoption of general purpose GenAI and workflow automation like Copilot and Copilot Studio

There is no perfect moment to start on your GenAI journey. It is important to get started and pivot while GenAI develops. It is prudent to start with low-risk, perhaps boring, workflows to develop your skills, before developing higher-risk workflows that might be more glamorous and impactful at the start. Having senior and operational champions who support each other collaboratively during this change is essential to embedding new workflows deep into an organisation's DNA.





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