

How the lawyers may use AI?

Possible use cases and best practices

In an era of rapid technological advancements, lawyers are increasingly turning to modern artificial intelligence (AI) tools like Microsoft 365 Copilot. These tools offer numerous benefits to both in-house and law firm lawyers. However, as with any information technology, proper preparation is essential for effective use. Below, we outline potential applications and best practices using Microsoft 365 Copilot as an example. This AI tool is integrated with various applications such as Teams, Word, PowerPoint, Outlook, and Excel. Additionally, it can utilize data from the Internet or other applications through appropriate plug-ins. This capability is particularly relevant for lawyers who manage large databases, such as legal opinions and contracts, stored in dedicated applications outside of Microsoft 365.



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Ways for lawyers to use Microsoft 365 Copilot

Transcription of meetings in Teams

It is possible to enable automatic transcription of meetings. This transcription can then be used to (i) translate the meeting into other languages (both during and after the meeting); (ii) ask Copilot specific questions and instructions about the meeting, including summarising the meeting or preparing a to-do list.

Example prompts:

"Create a summary of the meeting [on [date] at which I was absent]"

"Summarise a list of items that need to be prepared by me after the meeting"

"Indicate the issues that were not resolved at the meeting"

Preparation of PowerPoint presentations

It is possible to prepare slides or an entire PowerPoint presentation based on a lawyer's written instructions or on the basis of a document.

Example prompts:

"Create a presentation based on the attached document [link to document stored on OneDrive]"

"Create a presentation outlining the following [topic description]"

Summary/verification of documents in the browser

Microsoft 365 Copilot can prepare a summary of documents available online or answer questions about these documents, or compare them. The answers can be used to produce, for example, summaries of new legislation, to compare successive versions of laws or regulation, to identify relevant parts of judgments and arguments, to perform analyses.

Example prompts:

"Summarise this article and discuss the key points in points"

"Indicate which article of the document [link to legal act] may relate to [topic description]"

"Compare and indicate at points the differences between bill X and bill Y"

Ways for lawyers to use Microsoft 365 Copilot

Summary of correspondence and tasks to be carried out in Outlook

This enables quick identification of key tasks and their prioritization.

Example prompts:

"Summarise all emails that have come in since I logged out yesterday in which I was mentioned or have a task to complete"

"List by priority all emails from the last few days in which I have still outstanding tasks"

"Summarise tasks and meetings for today"

Summary of the organisation's documentation via Copilot chat

Copilot chat allows you to ask a variety of questions to improve your knowledge management and preparation process.

Example prompts:

"Summarise recent emails with client X and suggest a list of topics we should discuss at an upcoming meeting"

"Create a summary of recommendations related to program Y for client Z"

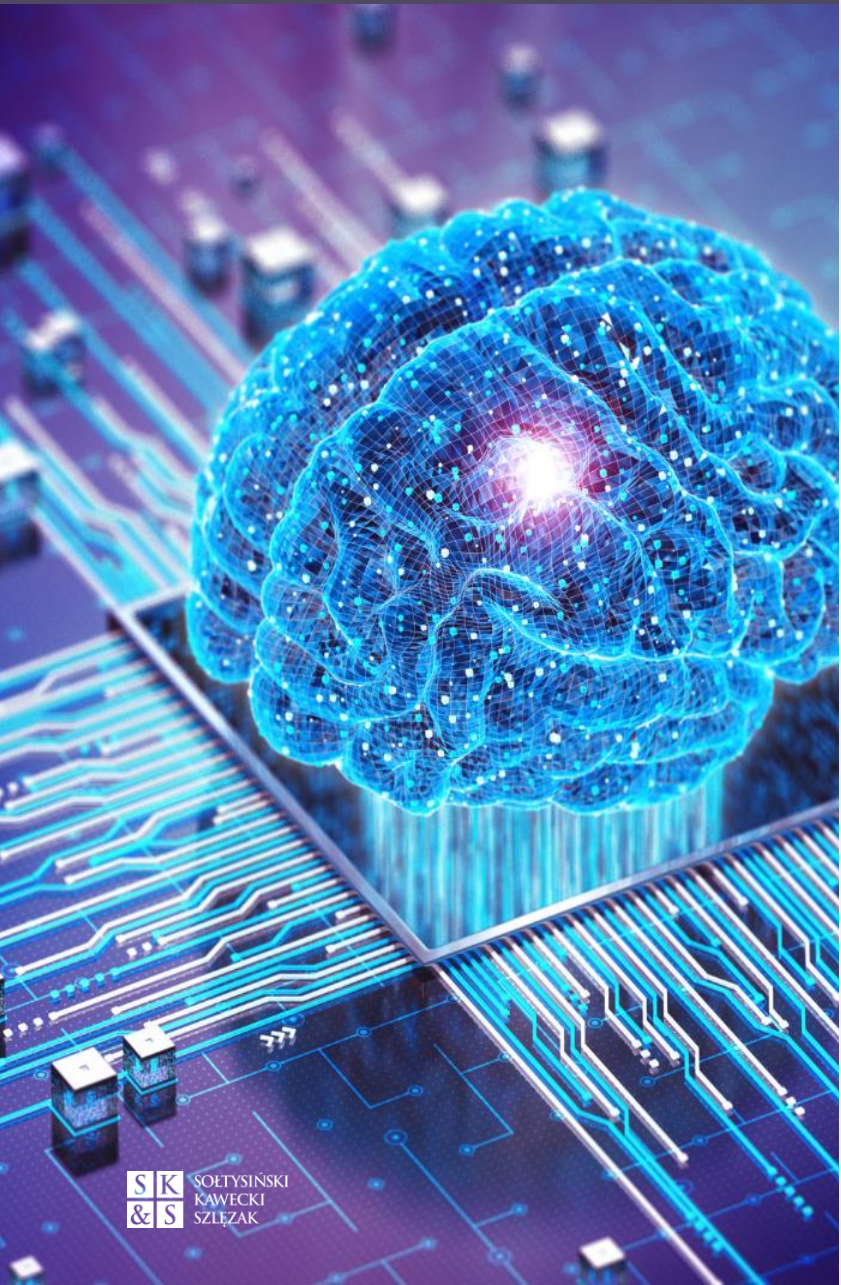
Assistance in verifying contracts or other documents in Word

It is possible to ask specific questions about documents opened in Word, for example contracts.

Example prompts:

"Summarise this document in 3 points"

"Indicate points on data protection"



Preparing for implementation

In Poland, there are no legal provisions or bar association guidelines that prohibit lawyers from using AI. However, depending on how AI is used and what data is processed, other specific regulations such as professional secrecy or data protection may still apply. Therefore, the implementation of AI could start with the following steps:

- **Step 1:** determining for what purposes the tool will be used [e.g. support in the provision of legal services by lawyers, including for analysis of legislation, transcription of meetings, preparation of first drafts of contracts/legal documents, etc.].
- **Step 2:** verifying how a particular solution works → information on supplier websites.
- **Step 3:** identifying the regulations that will apply to the use of the tool → in the case of lawyers, most of which are mostly: professional secrecy regulations, data protection regulations, intellectual property protection regulations, regulations concerning the industry in which company lawyers operate (e.g. the financial sector).
- **Step 4:** assessing whether the tool meets these requirements and preparing recommendation, policies and guidelines → verification should be based on three basic pillars: contractual, organisational and technical.
- **Step 5:** implementing developed recommendations, policies and guidelines and ensure ongoing knowledge and awareness.

Pillar 1: Contract

It is important to analyze the contractual safeguards for AI tools. This involves reviewing the contracts provided by Microsoft and the related documentation, especially considering the use and rights to customer data, processing of personal data, intellectual property (IP), and confidentiality.

Pillar 2: Organisation

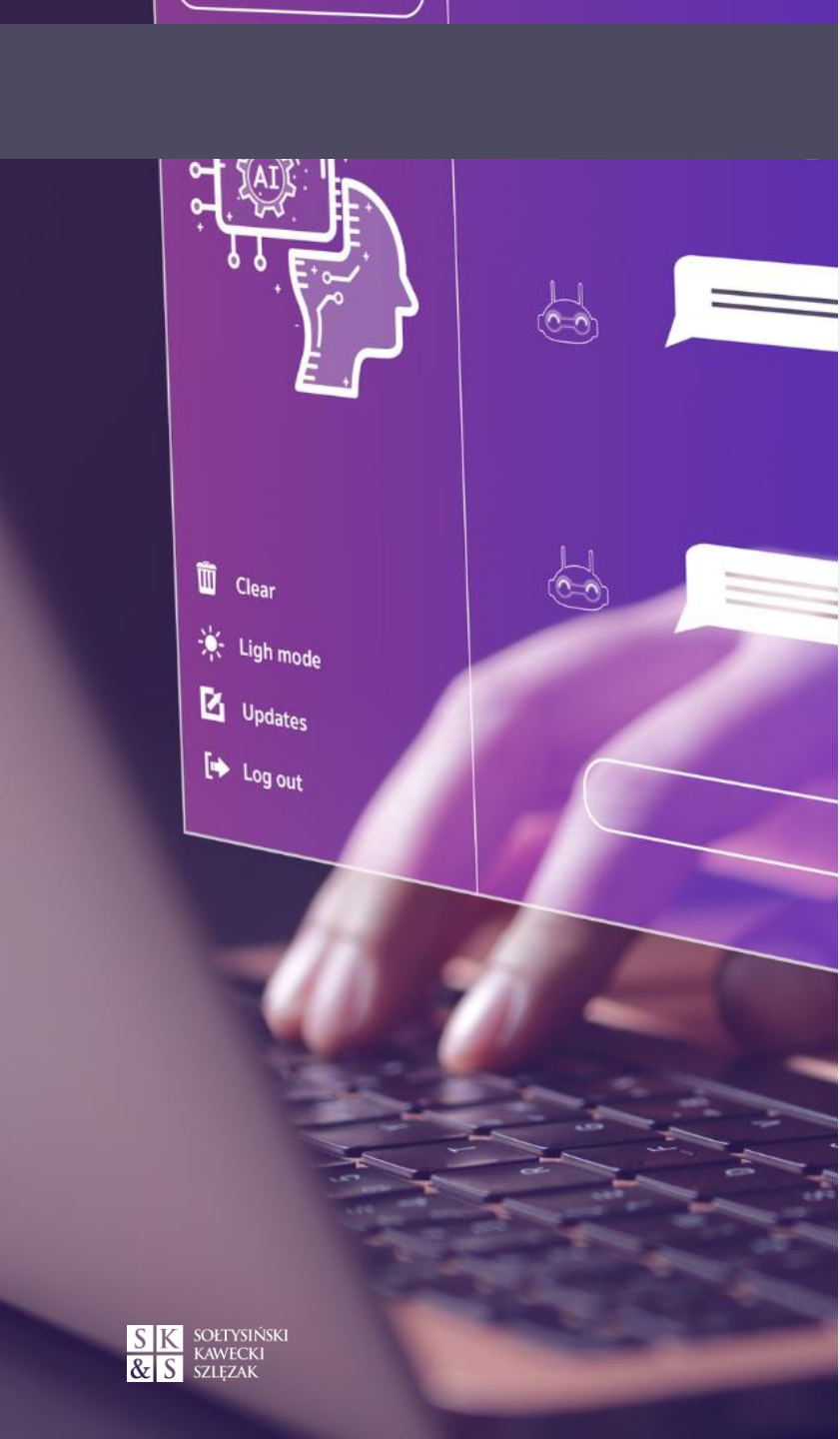
To ensure compliance and mitigate AI risks, it is essential to develop internal policies and guidelines for the responsible use of AI. These should include:

- Rules on the protection of professional secrecy, including when client consent must be obtained and what precautions must be taken.
- AI implementation teams should be multidisciplinary, with lawyers collaborating with technical staff.
- If prompts might contain personal data, it is recommended to perform a data protection impact assessment (Article 35 GDPR).
- For transcriptions, it is good practice to ask for permission to transcribe a meeting, especially when it involves a client or an external entity, and to make the transcription available to participants after the meeting.
- Regular training sessions on the use of AI.
- Ongoing evaluation and assessment of upgrades, such as AI agents.

Pillar 3: Technical verification

Many AI-based technology providers publish materials and training to help their customers verify and supervise AI solutions from a technical perspective, as well as to develop their AI competencies. Additionally, it is possible to seek assistance from entities that implement AI solutions or from technology partners for support in conducting audits and resolving AI issues. While having a specialized technical department within the firm is not always necessary, it is advisable to consult a lawyer specialized in AI for any questions or problems that may arise.





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Microsoft's terms of service have been updated to clarify and regulate issues specifically related to AI, particularly M365 Copilot. The relevant contractual provisions can be found primarily in the Product Terms or in Data Processing Addendum. The same Microsoft contract, which is already known to customers implementing our cloud solutions (e.g. Azure, Office 365), applies to services using AI.

It is worth noting that there are different 'copilot' services - the consumer version of Microsoft Copilot is not subject to business agreements with Microsoft. Microsoft 365 Copilot is a product that is subject to Microsoft's data protection and security agreements with customers. In addition, Microsoft Copilot is available in the Bing browser, with commercial data protection. The agreement for M365 Copilot or the commercial version of Microsoft Copilot in particular states that the base models will not be trained on customer data contained in prompts or output, includes a description of the security measures which are implemented, and also indicates that Microsoft does not become the owner of the output content.

Microsoft also provides resources to support entities implementing AI in their organisations. Service Trust Portal platform offers documents, reports, and resources for organizations, including those related to AI.

Additionally, a wide range of AI-related materials and training is available on the Microsoft Learn platform.

[Product Terms](#)

[Service Trust Portal](#)

[Microsoft Learn](#)

Risks and measures to mitigate them

The use of AI, like any technology, can involve risks. Below are some of the most significant risks and how to mitigate them:

- **Hallucinations:** AI can generate false content, such as non-existing rulings or decisions. M365 Copilot adds links to source material that can be verified. It is crucial that content generated by AI is verified by a human.
- **Risk of disclosure of confidential information:** Implement solutions to prevent the use of tools that do not provide adequate protection (e.g., blocking 'free or consumer versions' and redirecting to tools with adequate protection), introduce appropriate organizational instructions, and ensure proper technical configuration.
- **Being not up to date:** Pretrained models are static and do not contain information on recent judgments, events, or cases. Lawyers should consider that a solution may not have been trained on recent developments (e.g., new laws) and may generate erroneous results.
- **Overreliance on AI and lack of transparency:** Excessive use of AI can lead to a loss of competence among staff. Additionally, AI often acts as a 'black box,' making it difficult to understand how it arrives at certain conclusions. It is important to adequately train lawyers in key competencies and require active verification of the information provided by AI.

Contact us!



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