**Practice Prompts – Enterprise Legal Focus**

**Legal Professionals**

Copilot in Word:

* Draft a legal opinion memo analyzing a recent regulatory change. Summarize key provisions, potential impacts, and compliance requirements. Recommend practical steps for the client.
* Write a template for board resolutions. Include sections for background, decision, and implementation steps. Ensure clarity and legal sufficiency in language and structure.
* Summarize the facts and holding of a recent court case. Focus on implications for ongoing or future matters. Present the summary for use in internal briefings.
* Develop a due diligence checklist for M&A transactions. List required documents, review steps, and responsible parties. Organize the checklist for easy tracking.
* Create a training module outline for new associates on legal research methods. Include objectives, recommended resources, and practice exercises. Make the outline adaptable for various areas of law.

Copilot in Excel:

* Build a case management spreadsheet. List case numbers, client names, deadlines, and current status. Highlight upcoming deadlines using conditional formatting.
* Create a legal billing tracker to record billable hours and expenses. Input details by client, matter, and attorney. Summarize totals for monthly invoicing.
* Generate a Pivot Table to analyze case outcomes by jurisdiction and case type. Aggregate win, loss, and settlement rates. Present findings for quarterly performance reviews.
* Use VLOOKUP to match client IDs to engagement letters in the records. Reference the Engagement Letters tab and flag missing documents for follow-up.
* Set up a contract review log. Track contract titles, review dates, responsible attorneys, and status. Highlight contracts pending review for more than 30 days.

**Legal Support Roles**

Copilot in Word:

* Write an intake form template for new legal matters. Include sections for client details, matter description, and urgency level. Make the form user-friendly for both clients and staff.
* Draft a summary of recent changes to filing procedures. Highlight new requirements, deadlines, and responsible team members. Organize the summary for quick reference.
* Create a guide for managing legal document templates. List template types, storage locations, and version control steps. Provide best practices for keeping templates up to date.
* Summarize meeting notes from a legal team huddle. Capture decisions made, tasks assigned, and follow-up actions. Present the summary in a clear and concise format.
* Develop a protocol for responding to discovery requests. Outline required documents, timelines, and communication channels. Use checkboxes for task tracking.

Copilot in Excel:

* Set up a filing status tracker for court submissions. List all cases, submission due dates, and completion status. Highlight overdue filings in orange.
* Build a contacts directory for outside counsel and expert witnesses. Include names, specialties, and contact information. Mark preferred contacts with a star symbol.
* Create a Pivot Table to track document production by case and deadline. Summarize documents sent, received, and pending. Present data in an organized dashboard view.
* Use VLOOKUP to match case numbers to corresponding court docket entries. Reference the Docket List tab and flag unmatched entries as “Review Needed.”
* Design a workflow tracker for legal support tasks. List task descriptions, assignees, and due dates. Use color coding to show task status (in progress, completed, overdue).

**Cross-Functional Legal Collaboration**

Copilot in Word:

* Write a joint update on the status of compliance reviews across business units. Include completed reviews, pending areas, and next steps. Aim for clarity and collaboration in tone.
* Develop meeting notes capturing collaborative problem-solving between Legal and Compliance teams. List discussed issues, proposed solutions, and agreed actions. Format the notes for easy reference.
* Draft a cross-departmental training announcement on new legal requirements. Detail session topics, dates, and registration procedures. Ensure clear instructions for all invitees.
* Summarize outcomes of a policy alignment review involving multiple departments. Highlight key agreements, unresolved issues, and follow-up actions. Present the summary for management review.
* Create a template for risk assessment reports that require input from Legal, Risk, and Compliance. Provide sections for each area and instructions for joint completion. Make the format collaborative and adaptable.

Copilot in Excel:

* Build a compliance issue tracker monitored by Legal and other departments. List issue details, status, risk ratings, and assigned owners. Highlight critical issues automatically for escalation.
* Create a project timeline for joint legal and business initiatives. List milestones, responsible teams, and completion dates. Visualize progress with Gantt-style charts.
* Use a Pivot Table to summarize regulatory filings by department and deadline status. Identify bottlenecks and overdue items. Present results in an actionable summary sheet.
* Set up a VLOOKUP formula to merge legal and compliance ownership data by project code. Reference ownership lists from both teams and flag unmatched codes for review.
* Design a dashboard to display compliance training completion rates across departments. Use charts to compare rates and highlight areas needing improvement.