



FAQ: Litera Drafting and Microsoft Technology

Following our webinar “[Beyond the Desktop: A New Era in Legal Drafting Tools](#)”, this FAQ answers audience questions and provides further clarification on Litera’s vision for our Drafting applications, Microsoft Copilot, and Microsoft Add-In technology within the legal industry.

***Disclaimer:** The following FAQ is based on Litera’s research and is not produced by Microsoft. Information provided in this FAQ is as of Jan 15, 2024. Copilot and M365 are a rapidly evolving landscape, so we encourage you to conduct further research to stay up to date.

Questions related to Microsoft Copilot and Add-Ins

1. How much does Copilot cost per user per month?

According to [Microsoft](#), M365 Copilot is available for \$30 per month per user. M365 Copilot provides AI-powered chat and is integrated with Teams, Word, Outlook, PowerPoint, and other Microsoft 365 applications. For additional enterprise requirements and considerations, please access our webinar recording [here](#).

Note: Microsoft removed the 300-seat minimum purchase requirement, announced on January 15, 2024, several days after our Webinar aired.

2. Can you provide further thoughts on the poll results regarding the use of new Outlook? 48% responded that they are using new Outlook. Have they eliminated all COM add-ins and is this a firm-wide initiative or are we only discussing specific individuals within the firm?

Our poll question within the webinar asked, "Is your firm using new Outlook?" and the results showed that 48% of the firms where our webinar attendees (100+ people) are employed are using new Outlook. Based on the question, we can assume that the individuals responding to the poll are providing insight into their firm-wide initiatives rather than individual experiences.

Some tools – Mimecast and Litera's own Metadact Server are good examples – have Office Add-ins which are supported in the new Outlook. Additionally, there is a toggle which permits users to move between new and classic Outlook where they will have access to their COM add-ins, admittedly not something a user would do often.

Microsoft did make this deprecation known to all of its software partners and we know the development tools for Office Add-ins – notably for New Outlook and Exchange Online-- are rich. This may just be a matter of time and release timing for the other third-party add-ins to catch up.

3. The Microsoft Copilot experience is being hailed as exciting. Can you provide additional insight into its practicality, meaningfulness, and usefulness within a law firm? How much value does it add?

Microsoft 365 Copilot is a generalist virtual assistant that enhances user capabilities across the Microsoft 365 suite. The AI-powered tool automates and streamlines tasks, making technology more accessible and intuitive through natural language interaction. The technology provides several benefits to users, including:

General Tasks

- Completing tasks related to data analysis, email management and collaborative work faster
- Providing faster and higher-quality answers to questions posed by legal professionals by scanning their entire Microsoft 365 environment
- Enhancing the user experience with an intuitive tool that relies on natural language queries
- Availability across devices to enable legal professionals to work from anywhere
- Providing insightful summaries for email, Teams messages, etc., and crafting draft responses, enabling legal professionals to provide enhanced communication and client experiences
- A secure tool that does not train AI with your firm data and emphasizes security and privacy with features such as end-to-end encryption and regular security audits

Specific Use Cases for Legal Professionals

Document Creation and Review

- In M&A deals, it can help draft a preliminary term sheet, and then lawyers can use Litera Compare in negotiations to capture any changes that the other parties have made to the document.
- In IP transactions, Copilot may be helpful in trademark and copyright agreements.
- In corporate finance, Copilot can be used to help draft a forbearance agreement

Data Extraction & Summarization

- For example, for M&A attorneys, Copilot can help summarize underwriting agreements and IPOs.

Legal Research

- Copilot can generate search queries and filter results to help attorneys find what they are looking for as they prepare their documents for court: complaints, answers, motions and briefs.

All these benefits, and more, allow legal professionals to increase productivity and save more time to focus on higher value work.

4. The second poll question in the webinar asked participants to indicate if their firm is using Copilot or not. The results showed that only 10% are using Copilot but 48% are also using new Outlook. Can you please provide insights into this discrepancy?

We have been hearing from our customers that they want to use Copilot and in order to do so, they need to start using New Outlook. Based on these customer conversations, we would have expected the results of the poll to be more closely aligned.

However, we can only speculate given our poll asked for a simple Yes or No answer. Our thoughts are that Copilot's release is fairly recent. Unlike New Outlook, Copilot's Preview was extremely limited. Yet in the case of New Outlook, it was released in a wide Preview in April 2023 after having been tested by Microsoft Insiders for over a year prior to that. Its general release was on September 23, 2023 – and Enterprises got it at no additional cost.

Additionally, our question was focused on Copilot, which is one of many AI virtual assistants. We speculate that if we ask about whether firms are using Copilot or ChatGPT, the results might be higher than 10%.

Equally In our poll we simply asked if firms were using "Copilot". Yet: Microsoft Copilot and Microsoft M365 Copilots for the M365 Apps for Enterprise are different.

- **Microsoft Copilot** › The browser-based chat enabled when you are logged into an Enterprise account – formerly known as Bing Chat Enterprise (rebranded on November 15, 2023). This searches the Web. Additionally, those who are implementing Windows 11 at this time have not only access to this level of Copilot but if they have purchased new hardware for Windows 11, they'll have a new Copilot key on its keyboards.
- **Microsoft M365 Chat** › Offers enterprise Copilot-enabled Chat within the Office portal, searches your Enterprise and is enabled only when you have an M365 Copilot license for \$30.
- **Microsoft M365 Copilot(s)** › These are the Copilot Office Add-ins which are unique to each application context, also components to the \$30 license fee.

This specificity may have been missing and the 10% may be those who have enabled the Microsoft Copilot (aka Bing Chat Enterprise) within the browser and/or in their new Windows 11 environment.

The Microsoft M365 Copilots including M365 Chat became available beginning November 1, 2023. Up until January 15, 2024, several days after our Webinar aired, Microsoft had a 300-seat minimum purchase requirement for Microsoft 365 Copilot. This could account for the surprisingly low percentage of respondents saying they're currently using it. Now that the requirement is removed, we hope to see higher percentages in the future.

During the webinar we showcased the Microsoft M365 Copilot for Word and the M365 Chat. Again, Litera will be conducting further research to add further specificity to the current state.

5. Is there any timeline from Microsoft on when new Outlook will be the only option?

As of this writing, New Outlook does not yet have its automatic update date.

Note about Classic and New Teams: If you are running Teams: Microsoft recently announced the automatic update date from Classic to New Teams. That date is March 31, 2024.



Questions related to Litera's vision for document drafting apps

1. What is Litera's vision for drafting apps

We are currently in development of Litera Add-In. The Litera Add-In is a modern, web enabled, Office Add-in. It affords the user a single interface that will power Litera applications and provide curated experiences across our Drafting, Workflow, and Firm Performance tools with improved performance and stability.

To achieve this vision, we are initially transforming our Drafting applications into web-based tools that can be easily plugged into the Litera Add-In. The new Litera Drafting applications will:

- Provide a modern and more intuitive user experience and interface with reimagined workflows
- Be accessible across devices so users can create, proofread, compare, clean, and publish documents from anywhere
- Improve performance and experience across Word and Outlook with faster loading times
- Ensure compatibility with new Outlook and any other new Microsoft applications
- Require less IT reliance for deployment by reducing the number of installers, separate icons and ribbons, etc.
- Reduce IT time in maintenance by automatically pushing updates and making them available instantly

2. When will Litera Add-In and the new drafting apps be available?

We are aiming to make the Litera Add-In and the web-based drafting applications available throughout 2024, starting with our document proofreading, repair, and comparison applications.



3. How will Litera customers access the Litera Add-In?

The Litera Add-In will be available to download in the Litera Customer Center with later availability in the Microsoft Office store. The application will support a centralized deployment.

4. Has Litera replaced or eliminated all of its COM add-ins?

No, Litera has not replaced or eliminated COM add-ins within our drafting applications. We are working to transform these applications to be web-enabled Office Add-In apps. However, we will continue maintaining our tools that leverage COM add-in technology for several years, according to our Product Lifecycle Policy (see www.litera.com › Customer Center › Support › Product Lifecycle Policy) and taking into consideration customer feedback.

5. Do you envision creating a workflow across Litera Drafting applications within Copilot? For example, create a document with Litera Create then access Best Authority to build a Table of Authorities.

As seen on the webinar, legal professionals can use Litera drafting tools and M365 Copilot hand-in-hand. Our speaker, Sherry Kappel, Litera Evangelist, showed how users can initiate a first draft using Litera Create by accessing enterprise-approved templates and then leveraging M365 Copilot to draft the body of the letter. You can view the brief demo in the [on-demand webinar recording](#).

We can go further and suppose that after a user finishes drafting the letter with Copilot, they can engage Litera Check to proofread and style the document, create Tables of Content and Tables of Authority, and more.

As our speakers highlighted during the webinar, Copilot is a generalist assistant and can be used as a complement to your legal-specific tools. In addition, we envision our Drafting applications will work within Copilot, so stay tuned for more information!



6. Do some of the use cases for Microsoft Copilot and Microsoft M365 Copilots in legal conflict with Litera Drafting tools?

We believe the M365 Copilots, although generalists, complement Litera Drafting tools.

Microsoft M365 Copilot for the M365 Apps for the Enterprise are a series of application-specific assistants for general users. They can be used to conduct research, summarize emails, Teams messages, meetings, and help in data extraction and summarization tasks, craft quick email responses, draft preliminary term sheets, etc. and they are interactive within each application context.

Litera's drafting tools provide a legal-specific lens beyond the Microsoft M365 Copilots and can amplify its effectiveness. For example:

- **Document creation:** Users can access firm-approved templates via Litera Create, use M365 Copilot to draft a quick letter, and then add legal-specific precedent language using the Litera Create content library.
- **Document proofreading:** M365 Copilot can inform you if you have spelling mistakes within your documents, but it may not be able to spot issues with your definitions or cross-references. Additionally, to surface these issues, users would need to ask M365 Copilot specific questions for each category of issue, so whether there are spelling errors, whether names, dates, and amounts are correct, whether the numbering scheme is correct. Litera Check can surface all these with one click of the Analyze button and show users all issues with proofreading and styling their documents.
- **Document comparison:** M365 Copilot can conduct high-level document comparisons, but it does not have the capability to generate legal-specific redlines, generate redlines of changed-pages only, customize comparison views, etc. Litera Compare provides legal-specific functionality that goes far beyond a general document comparison.
- **Document cleaning:** M365 Copilot does not have the ability to clean your documents from risky metadata within Outlook. It can help you draft the email

response, but users still have to engage Litera's Metadact to clean documents from metadata, comments, and track changes, and allow the ability to select various cleaning policies depending on document risk.

- **Document publishing:** M365 Copilot can provide instructions of how to convert a document into PDF, but it cannot publish it for you. Litera's pdfDocs allows users to publish documents in PDF, edit and redact PDF documents, add documents to create a binder, etc.

Links to Resources Used During the Webinar

- Loading the DOM and runtime environment - Office Add-ins ([Microsoft Learn](#))
- Office Add-ins platform overview - Office Add-ins ([Microsoft Learn](#))
- Ten things to know before buying M365 Copilot ([Directions on Microsoft](#)), ILTA's Decoding the Blueprint: Generative AI Implementation Paths programming on December 14, 2023
- MSFT Roadmap [here](#)
- Microsoft Copilots ([Directions on Microsoft](#))
- How to prepare for Microsoft 365 Copilot ([Microsoft Community Hub](#))
- Copilot for Microsoft 365 ([Microsoft Adoption](#))
- It's not about AI – It's about trust. ([microsoft.com](#))
- Copilot for Microsoft 365 User Onboarding Toolkit ([Microsoft Adoption](#))
- Adopt, extend and build Copilot experiences across the Microsoft Cloud ([Microsoft Learn](#))
- Overview of Copilot in Fabric (preview) - Microsoft Fabric ([Microsoft Learn](#))
- Overview of Copilot for Power BI (preview) - Power BI ([Microsoft Learn](#))
- Microsoft Security Copilot ([Microsoft Security](#))
- Bringing the full power of Copilot to more people and businesses ([microsoft.com](#))
- Full Keynote: Satya Nadella at Microsoft Ignite 2023 ([youtube.com](#))



For more than 25 years, Litera has been at the forefront of legal technology innovation, expanding the impact and potential of what legal professionals can accomplish using industry-leading AI and machine learning tools from the best minds in the business. The world's largest law firms and corporate legal departments use Litera's best-in-class ecosystem of legal technology to transform the way they win matters, perfect documents, run deals, and manage cases. With more efficiency, productivity, and accuracy, Litera empowers legal professionals to do less busy work, and more of your life's work.

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