

Empowering Legal Teams with Foundational AI

Choosing the Right Tools—Microsoft CoPilot vs. OpenAI ChatGPT

By Brandi Pack, AI Specialist, UpLevel Ops

In today's legal environment, where teams are chronically understaffed and budgets are under constant scrutiny, legal leaders face a significant challenge: How can they deliver more value, faster and smarter, while staying within resource constraints? The answer lies in leveraging foundational AI tools—technologies that automate repetitive tasks, optimize workflows, and empower legal professionals to focus on strategic, high-value work.

This isn't just theory—it's a priority across the legal industry. A survey by the Blickstein Group, [2024 Legal Service Delivery in the Age of AI Report](#), revealed that 80% of Legal Department Operations (LDO) professionals are either planning to upgrade their existing GAI tools in 2025 or implement them for the first time. This surge in adoption highlights the urgency for legal leaders to act now and ensure they're selecting the right tools to maximize results.

However, the stakes are high. According to the *Blickstein LDO survey*, organizations that adopt the right AI tools for the right tasks see a 20% increase in productivity. In contrast, teams that overuse or misuse AI—applying it to tasks it isn't suited for—can face a 20% decline in productivity, further straining resources and morale.

This highlights the importance of being intentional when choosing and implementing AI solutions. Foundational AI tools, like **Microsoft CoPilot** and **OpenAI ChatGPT**, are uniquely positioned to address the challenges legal teams face:

- **Microsoft CoPilot** excels at automating tasks within the Microsoft 365 ecosystem, such as document generation, data management in Excel, and real-time meeting support.
- **OpenAI ChatGPT** shines when applied to user-facing, dynamic workflows, such as legal document summarization, clause analysis, and conversational FAQs tailored to specific knowledge bases.

For many legal teams, IT and InfoSec policies may already dictate which tools are permissible. While these constraints can feel limiting, the good news is that measurable gains are achievable with either solution when aligned with the right tasks. CoPilot and ChatGPT, individually, can help legal teams streamline operations, reduce manual effort, and unlock capacity for higher-value work.

It is important to note that where flexibility exists, legal leaders must be proactive advocates for their teams, ensuring access to the best tools available. A combined approach leveraging ChatGPT and CoPilot allows organizations to achieve the most robust, scalable results. Legal teams can optimize productivity and future-proof their operations by aligning AI tools to their strengths—user-facing tasks for ChatGPT and workflow automation for CoPilot.

The time to act is now. Foundational AI tools have never been more accessible, flexible, or easy to implement, offering legal teams a clear pathway to greater efficiency, accuracy, and innovation.

The Right Tools for the Right Tasks

In an era where efficiency is no longer optional but necessary, selecting the right foundational AI tools is critical to ensuring your legal team delivers maximum value with minimal friction. The choice isn't simply about adopting AI; it's about aligning the tools with specific tasks and workflows to unlock their full potential. Two of the most impactful options, OpenAI ChatGPT and Microsoft CoPilot, each offer unique strengths. Together, they form a powerful, complementary toolkit that can address user-facing

tasks and backend automation, helping legal professionals reclaim time, reduce errors, and optimize performance.

Understanding these tools' strengths, purpose, and integration capabilities is essential for aligning AI solutions to your team's goals. Below is a detailed breakdown of where **ChatGPT** and **CoPilot** excel and how they can work together to deliver maximum impact.

OpenAI ChatGPT	Microsoft CoPilot
Ease of Adoption	
- ChatGPT is designed for immediate usability. Its intuitive and user-friendly interface makes it easy to deploy, even for teams with limited technical support. - Legal professionals can build custom GPTs with minimal effort to address tasks like summarizing documents, answering FAQs, or analyzing contracts. - GPTs can be quickly tailored to unique workflows and can function independently of specific platforms or systems.	- Microsoft CoPilot seamlessly integrates into Microsoft 365 applications (Word, Excel, Outlook, Teams, etc.), making it an ideal tool for teams already relying on Microsoft workflows. - Legal professionals benefit from real-time AI assistance for tasks like drafting documents, summarizing emails, or automating meeting follow-ups. - However, for advanced custom agent development, IT teams are often needed to handle backend workflow setup. CoPilot is highly effective within the Microsoft ecosystem but may have limited flexibility for user-facing or standalone tools.
Customization	
- Legal teams can connect ChatGPT to external tools and platforms, expanding its capabilities far beyond a single environment. - By loading documents into ChatGPT's knowledge base, ChatGPT delivers context-specific answers, allowing it to act as a personalized AI legal assistant. - The Custom GPT feature enables teams to create AI assistants that specialize in specific legal tasks, such as summarizing contracts, identifying risks, or providing tailored responses to inquiries.	- CoPilot has deep access to Microsoft 365 data, enabling it to automate tasks like data analysis in Excel, meeting scheduling in Teams, or drafting and organizing documents in Word. - CoPilot is less flexible for external integrations, as its primary strength lies in streamlining tasks within Microsoft applications rather than functioning as a standalone or user-facing AI tool.
Capabilities and Best Use Cases	
OpenAI ChatGPT is best for: Content creation and summarization: Quickly generate responses, summarize lengthy case files, or draft client-ready documents.	Microsoft CoPilot is best for: Automating tasks within Microsoft tools: Drafting emails, creating meeting agendas, analyzing data in Excel, and building presentations in PowerPoint.

• Dynamic, user-facing tasks: Build conversational tools for legal research, clause identification, and client FAQs. • Flexibility and independence: ChatGPT works outside of platform restrictions, providing legal teams with tools that are scalable and easy to customize. • Custom GPT Development: Legal teams can quickly develop specialized AI bots for specific workflows, such as processing contracts or analyzing case law.	• Real-time workflow optimization: Teams benefit from on-the-go AI assistance integrated directly into their existing Microsoft 365 tools. • Backend automation: CoPilot reduces time spent on routine tasks like tracking project status, managing inbox communications, or summarizing meetings.
--	---

Together, these tools create a scalable AI ecosystem that can adapt to evolving legal demands. Teams can leverage ChatGPT's flexibility and CoPilot's productivity enhancements to eliminate inefficiencies, empower professionals, and prepare for continued AI advancements.

Real-World Legal Case Studies

By strategically implementing OpenAI ChatGPT and/or Microsoft CoPilot, legal teams can achieve immediate, tangible benefits that improve efficiency, accuracy, and ROI. The following examples highlight how these tools are delivering real results:

- V500 Systems implemented ChatGPT to automate legal document analysis. Using GPT's natural language processing capabilities, the AI assistant analyzed and summarized large volumes of contracts and case files in seconds. This resulted in a 70% efficiency gain, drastically reducing manual review time while improving accuracy and consistency. Lawyers were freed to focus on client-facing work and strategic decision-making, creating more value for their clients.
- Chase Crawford LLP deployed a custom CoPilot agent to streamline legal research, draft documents, and answer internal FAQs. The AI agent saved each legal professional an average of 15 minutes per week—a seemingly small improvement that scaled across the team to provide significant time savings over months. This efficiency made their AI investment immediately sustainable and impactful.
- TAL (Australian Life Insurer) leveraged Microsoft CoPilot to automate and enhance workflows around routine documentation. Employees saved nearly a full workday per week by enabling AI-powered summarization and interpretation of unstructured documents. This alleviated manual workloads, increased job satisfaction, and allowed staff to focus on more strategic activities.
- Edward Morris, a Technology Entrepreneur, utilized ChatGPT to conduct investment analysis during the IPO of chip designer Arm. By streamlining the analysis of vast amounts of financial data and providing sophisticated insights, Morris achieved a 30% return on investment. This approach bypassed traditional wealth management services, demonstrating the cost efficiency and accessibility of AI for data-intensive decision-making.

These examples show that when even one tool is already in place, legal teams can leverage its strengths to drive quick wins and measurable ROI. Where flexibility exists, combining ChatGPT's user-facing capabilities with CoPilot's automation workflows delivers the most robust results.

A Vision of the Future

We have never had access to tools that are this easy to use, offering unprecedented flexibility and customization. These capabilities allow teams to quickly adapt solutions to their unique workflows and pain points. Now is the time to take advantage of these advancements. Solutions must also be scalable to keep pace with the rapid evolution of AI, ensuring your legal team remains efficient, adaptable, and ready for whatever comes next.

While the AI space grows increasingly crowded, with new tools and advancements announced daily, it's essential to tune out the noise and not get overwhelmed. The foundation of any successful AI strategy begins with the basics—foundational AI tools like OpenAI ChatGPT and Microsoft CoPilot. These tools provide a solid starting point that is flexible, customizable, and scalable, allowing you to build confidence and adapt to changing demands. By focusing on the right strategy and aligning AI tools with your specific needs, your legal team can drive measurable value today while staying prepared for the future of AI innovation.

Ready to explore how foundational AI can empower your legal team? **UpLevel Ops** can help you design a tailored, secure, and scalable strategy for Next Level success. Reach out to us today to get started.

Source: *Blickstein Group: LDO Survey: 2024 Legal Service Delivery in the Age of AI Report*
<https://www.blicksteingroup.com/law-department-operations-survey>

Learn more about the **AI Advantage** from **UpLevel Ops** at UpLevelOps.com