

## 1. Introduction & Context

## 2. Document Review & Editing

- **AI-Powered Editing**
  - Use AI for advanced grammar and style checks ("grammar check on steroids").
  - Make briefs, letters, and instructions more persuasive.
  - Compare documents for consistency and accuracy.
- **Document Collaboration**
  - Collaborate on settlement agreements, purchase, buy/sell, family settlement, and prior estate planning (EP) documents.
  - Identify opportunities for improvement from multiple perspectives.
- **Discovery & Deposition**
  - Review discovery requests and deposition outlines.
  - Summarize depositions and brainstorm strategies.

## 3. Workflow Automation & Meeting Management

- **Document Uploads & Review**
  - Centralize all documents for easy access and review.
- **Meeting Capture & Follow-Through**
  - Capture meeting notes and ensure actionable follow-up.
  - Address the challenge of "messy notes" that don't lead to action.
- **Status Updates & Summaries**
  - Provide regular status updates and case summaries.
  - Track billable time efficiently.

## 4. Microsoft Apps Integration

- **Outlook**
  - Triage/prioritize/summarize emails and summarize by case, especially after returning from vacation.
  - Draft replies efficiently.
  - Meeting prep - based on calendar invites/emails; context about issue raised in invitation....
    - I have a meeting w/ "new person" tell me about... public profile...; approach
    - Networking opportunities - who do they know that you may know
    - Deep dive
  - \*\*It's a conversation;
  - Anything missed/need to get ahead of....
  - NOT a substitute for task/calendaring...
- **PowerPoint & Word**
  - Review and edit presentations (.ppt) and documents (.docx).
- **OneNote**

- Organize rough note outlines and reference materials.
- Meeting notes per template
- Copy/paste summary from Teams meeting summary
- **Teams**
  - Record and summarize consultations, meetings, trainings, office procedure updates and witness interviews.
  - Recap tasks and reuse key information.
- **Excel**
- **Researcher or Deep Research**

## 5. AI & Copilot Capabilities

- **Copilot Chat**
  - Weekly summaries and meeting preparation.
  - Time entries based on emails and other MS data.
- **Advanced AI**
  - Custom GPT/Agent
    - Trained to operate the way you want based on a certain knowledge base
    - GPT is a General Purpose Transformer; agent is specific
      - Search for X and then write a summary and blog post with links to resources...
  - AI chat - custom trained bot w/ series of questions
  - Scheduled tasks and programming support.
  - Assistant for ongoing task management.
  - Summarize: depositions; documents; pleadings; source documents; client summary
  - Refine/prepare first draft
  - Collaborate on what you think is last draft
  - Offer suggestions re: LOI; Petition; Responses, DST, demand letter; estate plan...;
  - Researcher/Agents
  - Role Playing
    - Consultations

## 6. Action Items & Task Management

- **Decisions & Open Questions**
  - Track decisions and unresolved questions.
- **Assigned Tasks**
  - Maintain a task table for accountability.
- **Client Updates**
  - Ensure timely and clear communication with clients.