

Case Study

**Law firm unlocks
Copilot with BA
Insight's iManage
Connector.**

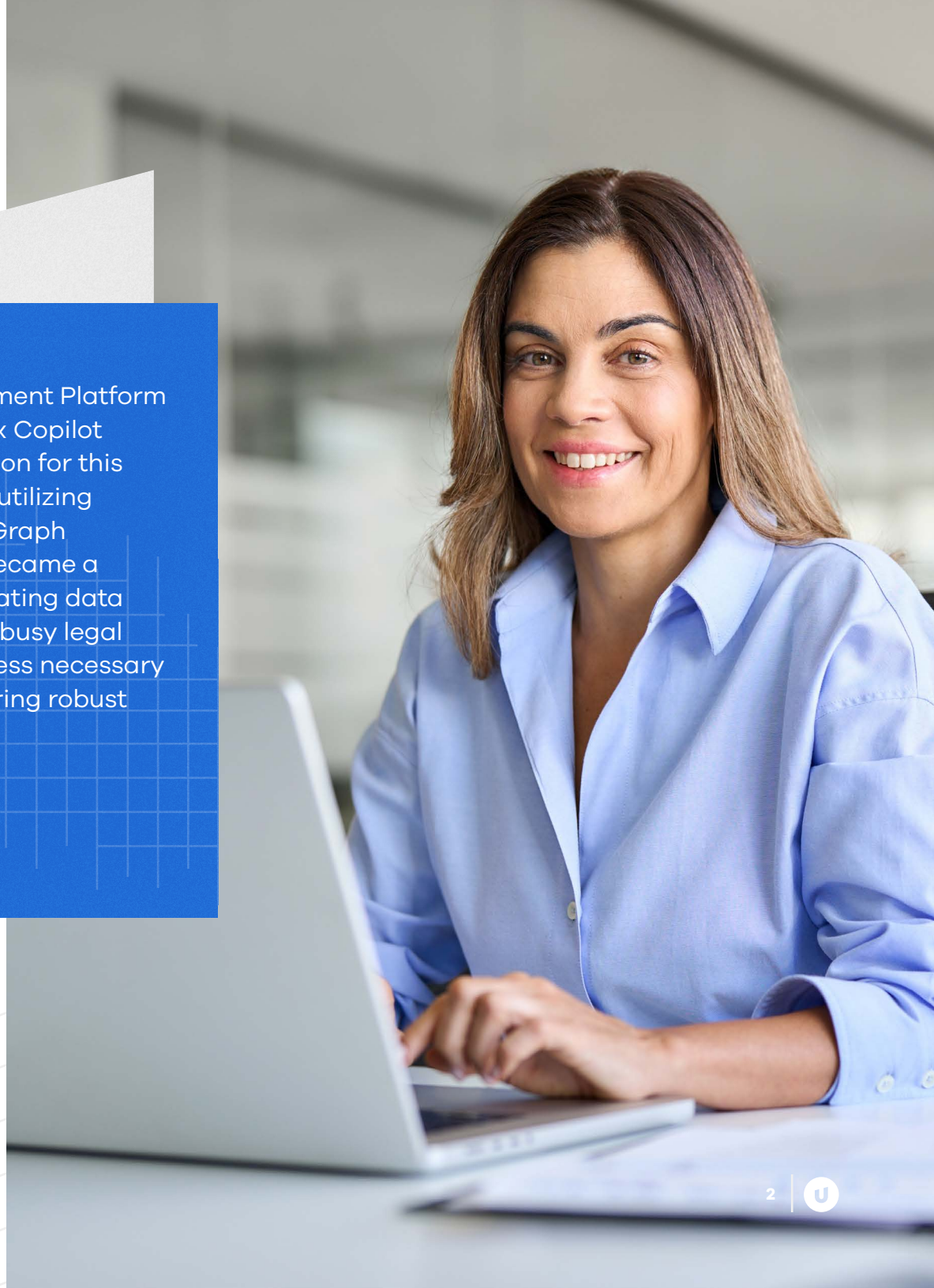
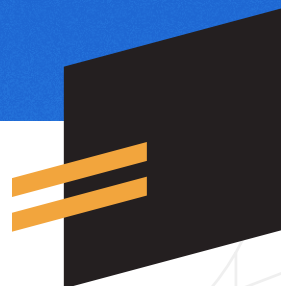


INDUSTRY
Legal

COMPANY

This firm focused on maximizing its return on value instead of going in a different direction than Copilot or allowing it to become another tool that doesn't provide much value.

BA Insight's AI Enablement Platform streamlined a complex Copilot and iManage integration for this legal organization. By utilizing BA Insight's powerful Graph Connectors, Copilot became a strategic asset, eliminating data silos so attorneys and busy legal professionals can access necessary knowledge while ensuring robust security protocols.



Siloed data limited their AI's potential.

Once this firm took their Copilot implementation project, they realized deploying Copilot only within their M365 Office suite wouldn't be enough. With iManage being at the center of their work, from storing case files and accessing documents to doing research, they needed to extend those Copilot experiences into iManage in a way that didn't compromise security or quality. Without a secure extension of Copilot, attorneys couldn't ask the most valuable questions like "What is the latest version of (x) contract?" or "Summarize the key points of our last three IP litigation cases." Without visibility into iManage, this forced lawyers to continually manually hope and search through documents, and it caused an even bigger silo in their business. Their AI technology wouldn't be talking to their most used repository.

Copilot didn't have all the context, so how could it make the most informed answer? Without seamless access to iManage, lawyers would experience inconsistent results and incomplete answers. The firm juggled a few choices; plugins and Graph Connectors became options. While plugins were attractive at first, the firm wanted to be able to leverage the semantic index. This would provide more context to their queries and much better Copilot outputs; unfortunately, this wasn't available via plugins as the technology does not leverage the semantic index. The objective became apparent for the firm's leadership: to securely extend Copilot functionality into iManage with Graph Connector technology.

AI enablement eliminates the Copilot silos.

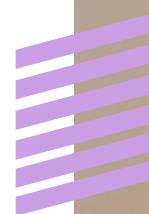
This firm focused on maximizing its return instead of going in a different direction than Copilot or allowing it to become another tool that delivers little value. Graph Connector technology became the clear choice for extending these experiences with the ability to leverage the semantic index to get more contextual answers and the security and accessibility retention throughout the indexing process. BA Insight's Graph Connector technology became the apparent route to extend Copilot experiences into iManage, allowing the firm to provide real-time access to their most coveted legal knowledge in iManage and leverage their content in M365 for more content.

With this BA Insight and Microsoft Copilot integration, attorneys now could:

Retrieve case files instantly in iManage by asking Copilot direct, natural language queries and leverage this newly found information for Copilot use cases.

Generate case summaries, memos, documents, agreements, and more by pulling information directly from iManage, SharePoint, Word, etc., eliminating the manual synthesis and analysis of information.

Extend Copilot with a solution that respects security and accessibility at the source when indexing to maintain confidentiality and compliance.



Enhanced efficiencies and competitive advantages.

Law firms need fast, reliable access to institutional knowledge. Case law, contracts, client confidentiality, and client satisfaction are paramount to any successful firm. This leading global law firm faced a critical challenge as it explored the potential of generative AI. Their attorneys needed instant, context-rich insights that would drive productivity without compromising security or compliance.

By extending Copilot experiences into iManage via Graph Connectors, the law firm saw immediate improvements in legal workflows.

- **Time savings:** Attorneys saved time finding information and streamlined low-value tasks through Copilot use cases like summarizing documents, creating briefs and agreements, and doing tedious research.

- **More accurate drafting:** With an extended Copilot solution, briefs, drafts, and research became much higher quality. Copilot had more context, with more documents indexed in Microsoft Graph. This allowed better insights that streamlined work and didn't call for constantly checking the accuracy of answers given.
- **Stickier Copilot solution:** With a more comprehensive solution, Copilot became stickier across the entire user base. More value was being driven, which improved user engagement and retention. The firm realized the time to value much quicker.
- **No sweat security:** With security and accessibility respected at the source, there is no need to worry about client confidentiality. This was a great relief

from the leadership's mind, knowing that at the core of their solution, security, compliance, and accessibility controls were at the top of their minds.

A future-proofed approach to AI in legal.

For this law firm, unlocking Copilot's potential wasn't just about efficiency; it was about staying competitive in a legal world that AI increasingly drives. By enabling Copilot to extend seamlessly into iManage, they transformed how they conduct legal research, analyze contracts, and prepare for cases. Now, attorneys can focus on what they do best: deliver exceptional legal counsel with speed, accuracy, and confidence to drive change for their clients.

Protecting AI investments across the enterprise

Upland BA Insight's AI Enablement Platform allows enterprises to access, prepare, and expose the knowledge needed to power AI projects. BA Insight is AI agnostic; using vector search, data chunking, ML, NLP, and security trimming to index, enrich, and display knowledge from all connected sources to supercharge enterprise AI.

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