# The directory submission workflow kit

**Microsoft 365 copilot edition** *Don't just write. Use AI to safely audit, evidence, and "red team" your submission against the strict rules of Chambers and Partners and Legal 500.*

# How to set up your "submission coach" notebook

*Follow these five steps to turn Copilot into a secure, private auditor for your directory submission.*

**Step 1: Open the secure interface**

Do not use the public web version (Bing) or the sidebar in Edge. You need the full-screen notebook view for deep analysis.

1. Go to [m365copilot.com](m365copilot.com) or open the **Copilot app** in Microsoft Teams.
2. Ensure you are signed in with your **work account** (look for the "enterprise" or "commercial" data protection badge, often a green shield).
3. Crucial step: switch the toggle above the chat box from "chat" to "notebook" (or look for the notebook icon on the left rail).
    - *Why notebooks?* Unlike standard chat, notebooks allow for longer prompts (up to 18,000 characters) and let you iterate on the output without losing the context of your uploaded files.

**Step 2: Prepare your "grounding" files**

Copilot needs context to give you a tier 1 audit. Gather these four files.

- **File A: The draft submission:** your current Word document (including the work highlights section).
- **File B: The "rules of the game":** guidance, hints and tips from the source (e.g., Chambers and Partners or Legal 500)
- **File C: The team sheet:** a simple list of the team members involved in the deals with the bios you use for tenders.
- **File D: Sanitised referee data:** an Excel sheet containing only job titles, industry sectors, and jurisdictions.

**Step 3: Feed the machine**

1. In the notebook interface, type **"/"** (forward slash) or click the **"add a file"** (paperclip) icon.
2. Select and attach the files you prepared. Your files are processed within your firm's "service boundary" and Microsoft does not view them or use them to train public AI models.

**Step 4: The "system instruction" (copy and paste)**

Paste the following block into the prompt box. This tells Copilot exactly how to behave so it doesn't act like a generic chatbot.

**Instruction block:** "You are a specialised **legal directory auditor** acting as a red team reviewer. Your role is to create a submission that ranks highly for complexity and sophistication.

**Your constraints:**

1. **Grounding:** Base all analysis *strictly* on the attached files. Do not invent facts or use outside web data that is not provided.
2. **Tone:** Be critical, objective, and evidence-based. flag 'marketing fluff' (e.g., 'unique', 'unrivalled') as weak evidence.
3. **Format rule:** Enforce the 'goldilocks rule': flag any work highlight shorter than three sentences or longer than three paragraphs.
4. **Privacy:** Never output PII (names/emails) in your response. refer to clients by generic industry descriptors (e.g., 'a leading UK bank'). **Goal:** You must first determine the user's specific ranking objective.

   **If "New Entry":** Focus critique on establishing a baseline of "publishable" matters and proving market presence.

   **If "Promotion":** Focus critique on "sophistication" and comparison against firms in the tier above

   **If "Maintenance":** Focus on demonstrating consistency and continued market leadership.

**Step 5: Run your first audit**

**The "Context Injection" (Run this first)**

Before running the audit, paste this command to set the strategy:

*"I have attached my draft. Before we begin, here is my context:*

1. *Target Directory: [Chambers / Legal 500]*

2. *Current Ranking: [e.g., Unranked / Tier 3]*

3. *Target Goal: [e.g., New Entry / Promotion to Tier 2]*

*Confirm you understand this goal and adjust your critique strictness accordingly."*

**"Pro tip" for risk teams**

If you are nervous about uploading a file, you can use the **OneDrive method**:

1. Save your submission draft in your secure OneDrive or SharePoint folder.
2. In Copilot, instead of uploading, type **"/"** and type the filename (e.g., *"/draft_submission_v1"*).
3. Copilot will link to the file *where it lives*, respecting all existing access permissions and encryption labels.

# Phase 1: The "anti-rejection" drafting workflow

Run these prompts one at a time.

**Step 1: The "goldilocks" length auditor (Word)**

*Chambers researchers typically spend only **10–15 minutes** reading a submission. It rejects text that is "impenetrable" or "fine technical detail".*

- **The rule:** a work highlight must be **2–3 paragraphs** max.
- **The prompt:** "Review the 'work highlights' section against these strict Chambers rules:
    1. **Time check:** the text must be scannable in seconds. rewrite any sentences over 25 words to be punchy.
    2. **Volume check:** flag any highlight that is shorter than 3 sentences (too thin) or longer than 3 paragraphs (too long).
    3. **Jargon check:** flag 'impenetrable' technical detail. rephrase for a lay business researcher."

**Step 2: The "hype spotter" (Word)**

*Researchers are trained to ignore "marketing speak" and superlatives like "one of the best".*

- **The rule:** if you claim it is unique, you must prove it.
- **The prompt:** "Audit the narrative for 'hyperbolic language'. remove phrases like 'unique', 'unrivalled', or 'extremely significant'. replace them with the specific fact, deal value, or precedent set. If no hard fact exists, flag this as 'weak evidence'.

**Step 3: The "unsung hero" analysis (Word/Excel)**

*Firms often fail to credit the wider team, which hurts their bench strength ranking.*

- **The rule:** list all lawyers involved in a highlight, not just the lead partner.
- **The prompt:** "Cross-reference my 'team list' file with the 'work highlights' descriptions. identify which senior associates are *not* currently named in any work highlight. suggest where I can add their names to specific matters to demonstrate our team's depth."

**Step 4: The competitor clean-up**

**The logic:** Chambers researchers explicitly state notes about rankings in other directories are usually disregarded. As such, quoting your Legal 500 success in a Chambers submission is a waste of space.
The prompt (adapt depending on the directory): Search the document for mentions of ‘Legal 500’ or [insert words] that refer to other directories. List every instance where we quote a competitor directory as evidence. Draft a suggestion to replace the ranking with a specific client testimonial or hard fact from the file.

**Step 5: The “So what?” check (Word)**

**The prompt:** Review the work highlights section. Flag any matter description that explains the legal process (eg “advised on the acquisition”) but fails to explicitly state the commercial outcome (e.g. allowing them to enter the x or y market). Action — insert the placeholder text [MISSING OUTCOME] at the end of any highlight that lacks a result.

# Phase 2: Evidence and bios (the detail work)

**Step 1: the "bio architect" (Word)**

*A common mistake is cutting and pasting website CVs. directories want "headline achievements".*

- **The prompt:** "Using the attached 'partner CV', write a 150-word bio for the submission. **Do not** copy the website profile. Focus strictly on 'particular strengths' and list three 'headline achievements' from the last 12 months." Do not list specific matter or deal descriptions here.

**Step 2: The "deal value" agent (Excel)**

*Researchers will conclude you lack significant work if you don't provide hard metrics.*

- **The workflow:** open your matter list in Excel and use Copilot.

- **The prompt:**"Group these matters by 'industry sector' (column C). Calculate the total 'deal value' (column E) for each sector. create a chart showing our top three performing sectors to include in the 'department overview'."

**Step 3: The "confidentiality consistency" sweep (Word)**

*A common error is marking a deal value confidential in one section but public in another.*

- **The prompt:** "Scan the document for inconsistent confidentiality labeling. check if 'client X' or 'deal Y' is marked 'confidential' in the matter list but 'publishable' in the overview. list any contradictions."

**Step 4: The feedback fixer (Word)**

- **The logic:** Firms can misuse the feedback sections to express frustration about not being promoted. This is a missed opportunity. The section should be used to provide constructive market analysis or comparisons to firms in higher bands.
- **The prompt:** “Review section [Feedback on our ranking]. Carry out a tone check. Highlight any sentences that express frustration, disappointment, or complain about previous rankings. Rewrite — suggest edits to this section to provide constructive market analysis. Compare our practice specifically to the firms currently in [tier/band you aspire to] [list examples] using objective data from our matter list to show where we have equivalent capability.”

**Step 5: The referee coverage auditor (Excel)**

- **The rule:** Quality over quantity. A referee list full of junior legal personnel is weaker than a shorter list of senior industry professionals.
- **First prompt:** Analyse the sanitised referee list against the team list. Create a table showing the number of referees allocated to each partner and associate. Flag any unranked partner or senior associate who has fewer than five referees. Flag any lawyer with more than 10 referees, as this is surplus that should be allocated to junior team members to build bench strength.
- **Second prompt:** Review the job titles column in the referee list. Group referees into partners/directors/senior associates vs associates and other personnel. Calculate the percentage of our referees that are senior decision makers. If the senior percentage is below 50% suggest which sectors we may need to target for higher quality feedback.

**Step 6: The “warm up” email drafter (Outlook)**

- **The logic:** One of the main reasons submissions fail is low referee response rates.
- **The prompt:** Draft a short, polite email to a client explaining they have been selected as a referee. Explain that a researcher from [directory name] may contact them for a short call in the next few weeks. Ask them to look out for an email and ensure [sender] is on their safe sender list. The tone should reflect appreciation, not pressure, and emphasise

the feedback supports the whole team’s recognition. Please ensure the tone is warm and professional, not robotic. Plain English and active phrasing are essential.

# Phase 3: The "critical" partner podcast

*Standard audio overviews just summarise. To get a critique, use this two-step workflow.*

**Step 1: Generate the critique (Word)**

- **Prompt:** "Act as a hostile directory researcher. review my submission draft and write a one-page memo listing the three biggest reasons you would *refuse* to upgrade this firm's ranking. Focus on gaps in evidence and vague descriptions."

**Step 2: Generate the audio (OneDrive)**

- **Action:** save that "critique memo" to OneDrive. Select the file and click on the Copilot icon then choose **"audio overview"**.
- **The result:** if it defaults to one person speaking, click on the three dots to the right of the pause option and you can opt to switch to podcast mode where you will hear two AI voices discussing *why your submission might fail*.
- **The use case:** send the audio file (saved on OneDrive) to the partner to listen to while driving. It is often less painful to hear a "neutral AI" critique the work than to read it from a colleague.

**Phase 4: The dual submission strategy**

**The "recycle" prompt**

"Take the 'work highlights' from this Chambers submission. reformat them to fit the *Legal 500* submission template. Ensure we still meet the Legal 500 requirement for 20 matters, and highlight any gaps where Legal 500 requires distinct emphasis. Please ensure you follow best practice for the relevant directories at all times, including matter wordcounts etc.”

# The "safe harbour" protocol

*This workflow is designed to keep client data within your firm’s secure boundary while automating the admin grind.*

**1. The "walled garden" rule (why it’s safe)**

- **The technology:** unlike public AI tools, Microsoft 365 copilot operates entirely within your firm’s **"service boundary"**. Your prompts and client data are **not** used to train the public AI models.

- **The protocol:** treat Copilot like a confidential internal colleague. it respects your existing file permissions, if you can’t see a file, Copilot can’t see it either.

**2. The duty of verification**

- **The rule:** Copilot is a drafter, not a solicitor. You must verify its output.
- **The workflow:** never copy-paste blindly. use the "verification prompt" (phase 3) to force Copilot to cite specific file paths for every claim it makes.

**3. Commercial warning**

- **The reality:** Directory submissions are non-billable time. Do not bill clients for the time spent setting up this notebook or learning prompts.
- **The Copilot ROI:** The goal is to compress a 10-hour drafting process into a two-hour review process. Use the pre-tested prompts below to ensure efficiency from day one.