



# Briefing

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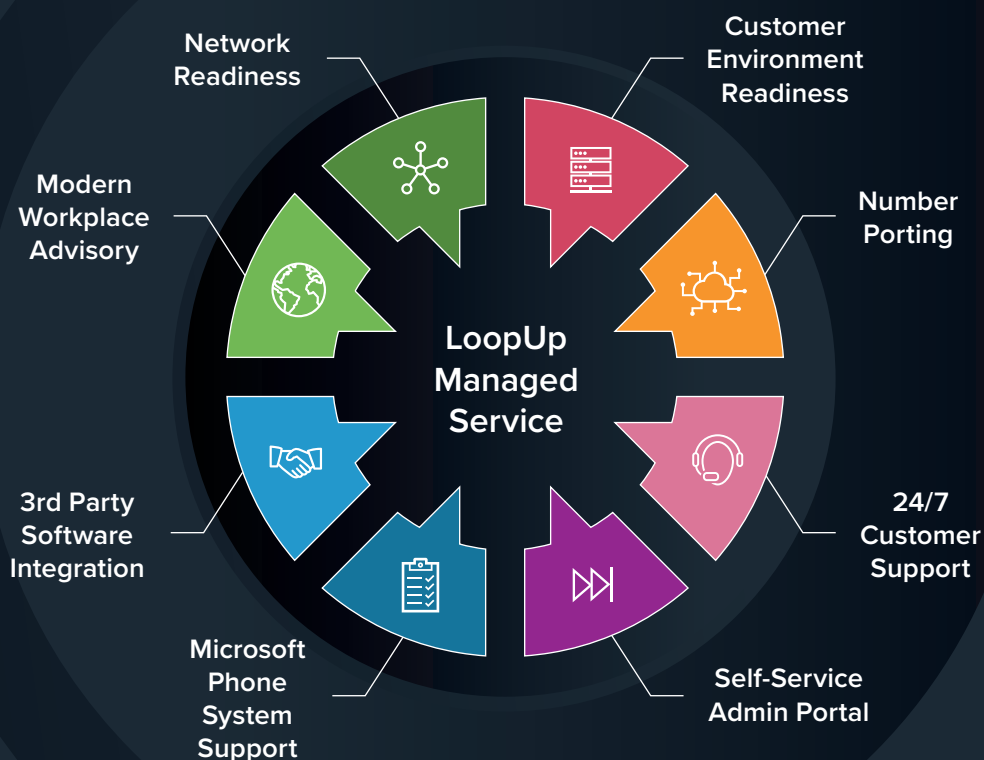


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# The transition to Teams work

Earlier this year our **Briefing** Frontiers Legal IT landscapes research 2021 found Microsoft Teams had carved out quite a comfortable place for itself as the dominant tool for internal collaboration at leading law firms during the pandemic. And, time and again in our activities over the last 12 months, we've heard how aspects of what's possible are beckoning to support people to work on projects together more effectively, to prioritise actions, and to become more individually productive.

So it was certainly time for one of our deep dives into the changes really being delivered on the ground at firms like yours. Are we indeed seeing the formation of a new 'centre of gravity' for the working day, as one technology leader spoken to for this publication puts it? And, if so, how can you balance the appetite for more business systems and information to be pulled into the evolving ecosystem – ready for all to surface on demand – and the essential oversight of effective risk management to guard against 'collaboration chaos', or worse?

As well as law firms weighing up how far and fast they may go here, we also hear from 11 different businesses that have all adapted their own strategies and products with an eye on the spectrum of possibilities opening for another level of smarter working.

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FEATURE

# Teams work a dream for legal?

Microsoft Teams is a toolset that has been at the very core of law firms' responses to remote working through the global pandemic. But will it succeed in transforming how and where professionals spend their time, share management information, knowledge, documents and data longer term? Josh Adcock asks how several firms have applied Teams in the past year and what they envisage for any new world of work in future

O

n 23 March 2020, UK prime minister Boris Johnson announced the country's first Covid-19 lockdown, which legally came into force three days later. If they hadn't gone already, at that time, huge swathes of the UK workforce went home, stayed home, and worked remotely – similar lockdowns came into effect across the globe both before and after.

Just over three years earlier, Microsoft had debuted its new communication platform to the world, which emerged from an internal

hackathon. Although it had seen use since as part of the Office 365 family of tools, the Covid-19 pandemic took the priority of communications and videoconferencing tools to dizzying new heights.

The legal industry has been no exception in its dependency on a communication and collaboration platform. Some firms rolled out, or accelerated rollout, of Microsoft Teams, directly in response – that was the case at HFW, for instance, where global director of information technology Mark Parr says Teams was initially used as a straightforward

messaging and chat tool. “We created a load of channels but didn’t see much traffic. Then, after about eight weeks, we saw video calls take off – that was a confidence and a competency issue,” he says.

But particular attention has been paid to Microsoft’s platform because of its ubiquity as part of the 365 stack, and because of its potential to integrate with other tools, including document management systems (DMS), practice management systems (PMS), chatbots, automation tools, and a host of other technologies. Many firms interviewed for this article told a similar story to Parr’s around the initial appearance of Teams – but moving many interactions into an evolving digital platform has touched on a huge swathe of other business areas and priorities as well.

A changed landscape of working practices is beginning to emerge from beneath the waves of Covid-19 lockdowns. The potential for Teams to change more, as well as business functions and information-sharing processes already touched on, is clear.

### Platform one

One topic of discussion is whether Teams will ever replace Outlook as the place where lawyers and business services professionals spend so much of their time – both as a place where communication happens and where tasks and productive work can spring from. Eleanor Windsor, director of knowledge management at Irwin Mitchell, says use of Teams at her previous organisation enabled an 80% drop in internal emails, and similar changes at law firms could have dramatic impacts on productivity and how time is spent. “That’s significant when you think about a lawyer’s inbox. It could mean use of email focuses more on client work, rather than internal comms,” she says. However, a cultural shift will be needed first, Windsor adds.

That’s part of the direction in which Microsoft intends to take Teams, according to Paul Barlow, legal technology strategist at the tech company. “It’s been well understood

**“We have clients included in Teams channels for communication and document sharing and collaboration with them, which has been beneficial for us. Having Teams as a ‘launchpad’ where people spend most of their days would be a brilliant place to get to.”**

*David Halliwell, director of client solutions, Pinsent Masons*

for years that living in email and using it as a task list isn’t the most productive way to operate. Teams is part of the drive to make you as productive as possible.”

So, could Teams eclipse Outlook as the place to go for daily communication, and therefore become the premier app in which lawyers spend their time? It’s certainly touching on more areas of work and consuming more time than ever before. With Pinsent Masons moving to Exchange 365, client solutions partner David Halliwell says closer integration of Teams with other tools in that stack, including the Outlook calendar, is driving people to use Teams as a jumping-off point.

Halliwell is seeing fewer emails coming into his inbox in favour of Teams messages – although he adds that Teams messaging has also now become part of client-facing communications, suggesting firms will continue to find different ways to use Teams that suits them. “We have clients included in Teams channels for communication and document sharing and collaboration with them, which has been beneficial for us. Having Teams as a ‘launchpad’ where people spend most of their days would be a brilliant place to get to – the problem will be people continuing to rely on emails and working in Outlook,” he explains.

One of the core features of messaging in Teams, however, has implications for security. Kevin Harris, chief information officer at Norton Rose Fulbright, says this



# Distracted by irrelevant client matter data and information?

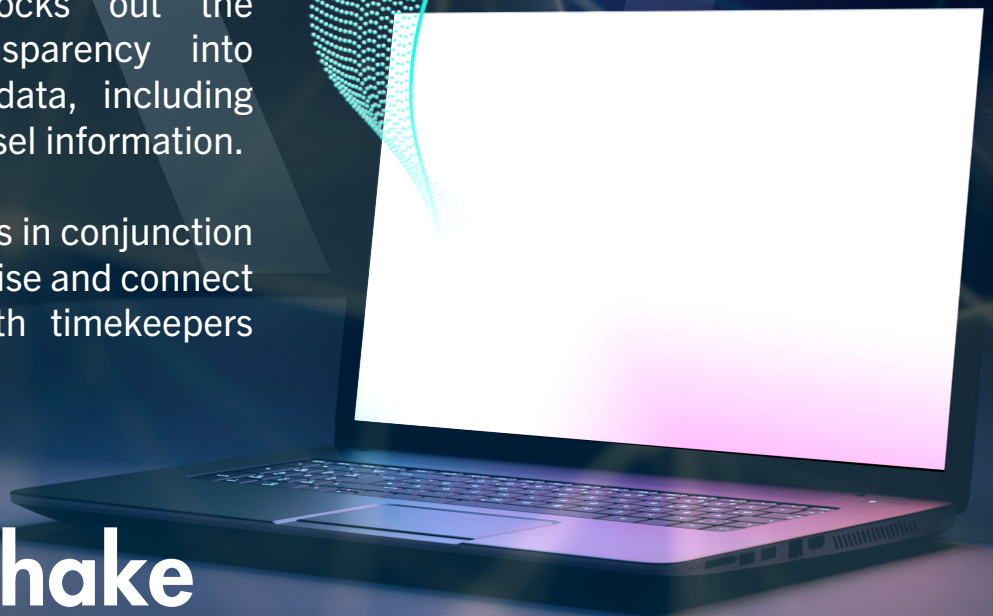
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**“Our client matter structures, as they reside in the DMS, can be reflected in Teams channels, specific to those clients – and our lawyers can share relevant documents with the clients through that conduit.”**

*Bill Koch, chief knowledge officer,  
Womble Bond Dickinson US*

needs serious consideration when it comes to corresponding and collaborating with clients – namely, that it basically retains messages forever. “We generally don’t keep a history of those messages. They’re seen as ‘instant’, as if they vanish into the ether – but they don’t. Alongside our risk function, we’re looking at policies around that issue. We need to get it right before we can discuss legal advice on the platform.”

While this fact presents a governance risk, he adds that it’s more a matter of managing that risk, rather than trying to eliminate all saved messages, as the creation of that record is part of the tool’s appeal: “If we don’t have that feature, people will ask: what’s the point of this tool?”

### **Collaboration promises**

Another aspect of work Teams is touted as revolutionising is collaboration. At Pinsent Masons, Halliwell says simultaneous editing of documents, both internally and externally, has indeed been an exceptional benefit. “To have internal and external people able to comment and work on documents simultaneously outside the document management system is fantastic.”

That urge to bring clients closer into the firm’s systems is present at HFW too, where Parr says sharing information and documents with clients through Teams and other technology in the MS stack, like OneDrive, is a boon that’s just over the horizon. “Collaboration is the watchword. We’re

considering how we can bring our clients into our ecosystem, using OneDrive as a file-transfer mechanism to support clients – and Teams has the same feel and logic as other MS Office products, which makes that uptake easier to manage.”

Taking that integration a step further, Bill Koch, chief knowledge officer at Womble Bond Dickinson US, says the firm is positioning Teams as a hub, integrated with the whole Microsoft suite, but also the firm’s intranet, personalised dashboards and DMS: “Our client matter structures, as they reside in the DMS, can be reflected in Teams channels, specific to those clients – and our lawyers can share relevant documents with the clients through that conduit.”

However, integrating Teams with document management systems also comes with concerns. Harris at NRF says clients are pushing for a more ‘locked down’ DMS that preserves ethical walls: “We have to ensure people only see what they’re entitled to see, so we’re suddenly looking at how we integrate that security profile directly into Teams.”

He is aware of conversations between Microsoft and iManage, and would prefer to wait for that to play out than take on the overheads and maintenance of creating something bespoke, he adds.

### **Surfacing information**

Another use of Teams is the surfacing of legal knowledge, business information and data. Sarah Mitten, head of finance and deputy COFA at Wiggin, says a couple of integrations have generated a massive shift in the way people are using Teams, where they previously used it purely for messaging.

She explains that integrating a third-party chatbot app into Teams, while initially used only for HR and training queries, has evolved to support a self-service model that includes surfacing financial data. “As we’re not in the office to go and ask things in person, much more of our data is all in one place, and people are using Teams as a one-stop-shop to

do everything. So the app has been expanded to include the intranet, key financial information and people directories. And there's still some development to come," she adds, which may eventually include BI dashboards that pull information from the firm's PMS.

Womble Bond Dickinson chief information officer, Bradley Bragg, says the firm has been exploring possible synergies and applications of tools across the Microsoft stack, including the surfacing of reports and dashboards for financial and HR systems – areas that will fall under the remit of a recently appointed director of application services. And Teams will pull it all together: "Over the next three years we are implementing projects focused on the Microsoft Power platform, including Power Automate, Power BI, and Power Apps. We feel Power Apps can pull information from across systems and into SharePoint, delivering information to dashboards in Teams."

However, the view that Teams will absolutely prove more help than hindrance when it comes to knowledge-sharing is not universal. Claire McNamara, head of knowledge management at Farrer & Co, says she's being very cautious about Teams: "I don't want to create alternative, unmanaged, silos of information that aren't also recorded in our processes and our DMS – we want to preserve a single source of truth. We're working on how best to achieve that."

And that risk is echoed by Windsor at Irwin Mitchell, who flags the need to find processes to address the issue. "Where does this knowledge sit? How do you capture it? The honest answer is that everyone is still working on that – including Microsoft. They are developing more tools to help, including search and AI, which will be really important in future."

The question of how to use Teams to share and surface information better is not, however, purely a technical one – it's an operational and commercial one as well,

**"Where does the knowledge sit? How do you capture it? The honest answer is that everyone is still working on that."**

*Eleanor Windsor, director of knowledge management, Irwin Mitchell*

which may affect the way tech leaders consider Microsoft's constellation of tech. At HFW, Mark Parr notes any attempt to make the most of Teams and its potential has to consider how the full Office 365 suite of tools are interacting together. Currently on the E3 enterprise package and considering the additional capabilities in E5, Parr says ensuring this investment is well leveraged, and how the firm's various stakeholders are included, is a key part of the puzzle: "There's a raft of ways we can integrate all these tools, and I want people to pull the information they need from them – which means we also have to consider our internal comms strategy, our corporate responsibility and cybersecurity strategy, plus how these tools support those areas. It involves a step change in the way that we think about these areas. How do we combine all of these things?"

In a similar vein, Harris at Norton Rose Fulbright says Teams has provided a core platform to build on, and around, integrating with other software – so much so that it may change the nature of the internal-facing IT team: "I can see our workloads changing – it's not going to be about building servers and running backups, it's going to be exploiting tools like iManage, Teams and Power BI."

### Update time

And yet, not everyone has been using Teams – despite our own **Briefing** Frontiers Legal IT landscapes 2021 report finding it was the dominant internal comms and collaboration tool for 52% of respondents, and second to Zoom for external comms (Zoom on 42%, Teams 32%), in the course of reaching out to



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**“It has actually nudged us towards accelerating change, accepting that sometimes tech can be ‘good enough for now’ and ‘better’ is coming later.”**

*Matt Haynes, global IT director, Kennedys*

people for this article we found it wasn't inevitable that firms were using Teams in a significant way – or even at all. For example, Bragg says the US-side of WBD has only recently begun seriously rolling out Teams, and the change has in part been because of the tool's increasing ubiquity among clients, as well as the potential for integration with other systems. “Teams is a big part of our forward-thinking in terms of other integrations now, because it can be a central hub,” adds Bill Koch, chief knowledge officer at the firm.

And Microsoft is also thinking ahead – Teams has seen the launch of over 300 new features in the past 12 months across chat, collaboration, calling, apps, workflow and security.

But that can be a challenge in itself, making daily use of the tool feel like a moving target: “Two years ago, a constantly changing application would have driven most IT directors batty – ‘where is that button today and why is that over there now?’,” explains Matt Haynes, global IT director at Kennedys. He has chosen to hold back on some features and possible integrations with Teams to ensure users can keep up. “Lawyers are very intelligent people who don't want to be embarrassed in front of their clients. We're taking a measured approach and making sure the systems we have already rolled out into Teams are embedded properly first,” he says.

In **Briefing** June, all about cloud tech, Mark Parr at HFW expressed concern around the level of detail in the conversations between Microsoft and third-party tech

vendors. That concern about potentially overlooking some of the functionality details runs through Harris's thinking as well. He says the constant addition of features to Teams could also pose a problem if that flow were reversed. “There might come a point where there's a ‘showstopper’ function that is switched off. As the real value in Teams is having everything in one place, it could make adoption across the firm much harder,” he says.

Haynes adds, however, that there have been some adoption advantages: “It has actually nudged us towards accelerating change, accepting that sometimes tech can be ‘good enough for now’ and ‘better’ is coming later. It has forced people to accept a faster pace of change – which is a very positive move for legal.”

### **Video calls time on phones**

One of the best-known features is, of course, the Teams video-calling functionality – by all accounts a very useful function in the pandemic. Among the firms that we spoke to for this spotlight focus, the majority had either already moved over to Teams telephony, or were planning to do so at some point in the near future. Haynes says Kennedys is piloting Teams telephony in the coming months: “It should help to untether our people from desks and foster a more digital workspace,” he says. “But another driver is the potential to have more information about a caller surfaced, perhaps by linking Teams to our CRM or with time recording.” Both of these are still just a possibility, however.

Video calling is about more than one-to-one video calls, of course, and future meetings are a major area of interest considering the hybrid workspace model likely to emerge post-pandemic. Teams has sometimes been found wanting here – at the start of the pandemic, says Katharine Greenfield, senior learning and development manager at Farrer & Co, Teams wasn't as well-positioned as Zoom to enable external

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trainers to conduct sessions. And Halliwell adds that it still isn't Pinsent Masons' default option when it comes to large presentations. "Teams isn't so good at fitting people on the screen or allowing the presenter to manage other people's video and audio. That's probably where it reaches its limit, and in those circumstances we use Webex or Zoom," he says.

Things have progressed, however. McNamara says that internal use of Teams for training sessions at Farrer & Co has also evolved to become more interactive, replicating many in-person event features such as breakout rooms and voting sessions – and she says that the platform has forced a more creative approach as well. "We're thinking much more about preparing short-form videos – almost training on demand. That was something we always wanted to do, but it has been too difficult to get people to record themselves," she says. Greenfield adds: "This has enabled people who wouldn't necessarily have relished presenting face-to-face in a live environment to feel much more comfortable speaking to groups." Features like PowerPoint integration have made presenting far easier and more inclusive, she says – although Zoom is currently still the go-to platform for many types of live training sessions at Farrer & Co.

This seems to be an area Microsoft is keen to work on as well, as Paul Barlow points to recent developments for the platform, including new presentation modes and PowerPoint integration. "We've had some interesting conversations with law firms around pivoting towards using Teams for very large-scale events, such as webinars and client outreach meetings. They give the presenter a gravitas within the presentation, instead of just stepping through a load of slides," he says.

And on the topic of hybrid meetings, Barlow says the shift he expects to see is away from large, client boardroom-style meetings towards smaller, more immersive room layouts that give in-room participants a

**"The practical security elements are all manageable – we'll have policies to guide us, we'll teach people how to use the platform – but it's what you don't measure that I worry about."**

*Mark Parr, global director of IT, HFW*

greater sense of connection to remote participants – which may entail a shift in hardware as well.

### **No time in Teams?**

However, while it can easily sound like a very positive development to have Teams replace Outlook, or sit at the heart of many integrated systems, many law firm leaders interviewed pointed out another risk – that it simply becomes another all-consuming system, with ramifications for people's wellbeing. "Teams is worse than Outlook in this respect, because it's ever-present. Even when you're trying to focus on something else, the chat functionality relentlessly pops up – you can't ignore it," says Greenfield at Farrer & Co.

Indeed, for Mark Parr at HFW, risk like this is a greater challenge for the firm to manage than any cybersecurity risks. "The practical security elements are all manageable – we'll have policies to guide us, we'll teach people how to use the platform – but it's what you don't measure that I worry about. How does Teams play into our people's wellbeing?" That's increasingly part of his focus, he adds, both as a tech leader and as one of the firm's mental health champions.

Microsoft itself is seemingly aware of the potential for 'Teams fatigue' as well. Barlow says: "The demand for meetings is insatiable in some respects. But we don't want people to live in video or audio calls – it can place a lot of demands on their time. We're thinking about how people can also optimise their time in the platform to be more productive." ▀





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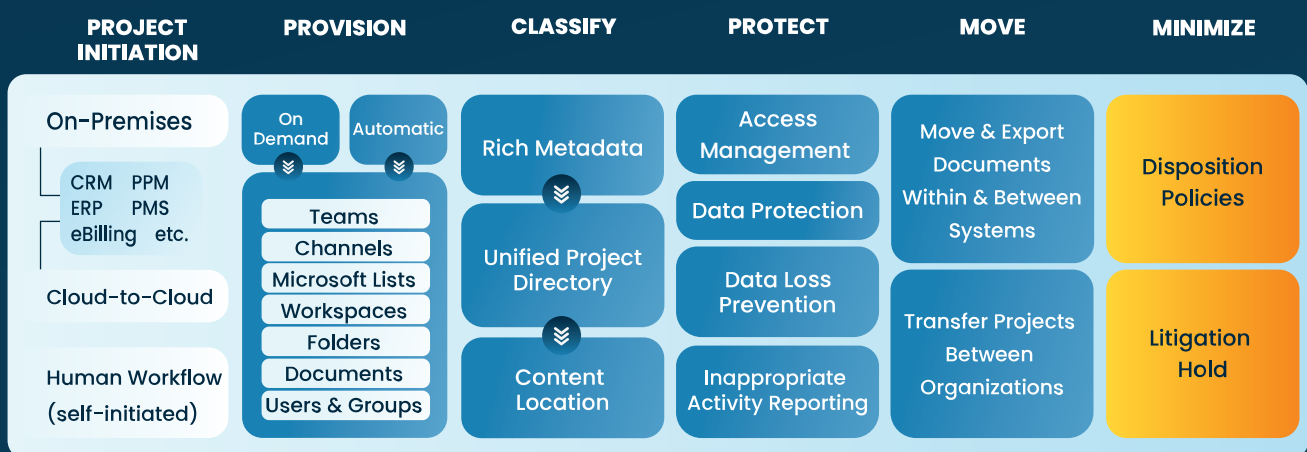


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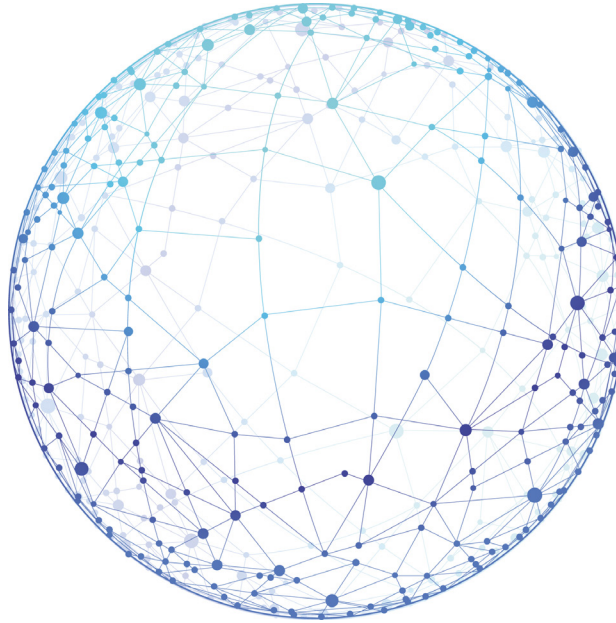


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## INDUSTRY INTERVIEW

# Talking global transformation

Firms are embracing new process and productivity opportunities with game-changing platforms such as Microsoft Teams. It's time they also addressed the consistency and efficiency of their ageing telephony – and the only way is cloud, argues

Rob Jardine, chief marketing officer at LoopUp

**B**

riefing's research with LoopUp in November 2020, Cloud calling, saw almost two-fifths of law firm technology and operational

leaders reporting that they were actively considering migrating their telephony system across to the cloud – and a fifth had already selected Microsoft Teams for that purpose. Of course, many of these firms had taken a serious turn toward Teams early in 2020 (if they hadn't done so even earlier) to enable the effective collaboration of their widely dispersed employees on all manner of legal and business projects. Now, with the vast increase seen in video meetings, instant messaging, and more, it made strategic sense to bring calling into the fold as well from both an individual productivity and a cost management perspective.

Rob Jardine, chief marketing officer at the cloud voice specialist LoopUp – a certified

Microsoft Gold partner, and with deep domain expertise in its solutions developed over more than a decade – says the argument for the unification of cloud communications should be particularly compelling for law firms that are already based in multiple jurisdictions, or with plans to expand internationally. "There's one big difference between the rapidly converging IT ecosystem in general and the telecoms world," he says. "Telecoms is really highly regulated. Service providers must undertake a highly complex process of obtaining regulatory approval to establish a presence in each country they want to operate in."

The process of doing this is often not only onerous, but also really expensive, he explains. Providers have therefore tended to restrict themselves to a few, mostly large countries. And for international law firms, that means negotiating arrangements on a

**“Traditional call flows around the firm – comprising reception, PAs and hunt groups – can all be reimagined to improve both efficiency and client experience in the age of agile working ahead.”**

*Rob Jardine, chief marketing officer, LoopUp*

country-by-country basis – a recipe for inconsistency as well as inefficiency.

As dispersed working suddenly became the norm through the disruption wrought by Covid-19, LoopUp was quick to see an opportunity here. It has been busily establishing itself as a regulated telephony provider in some 60 countries, says Jardine. “In countries where we don’t have a presence, we can partner with local carriers to offer Teams Calling. And that means, however dispersed the employees, we’re always able to support a global law firm with a single managed services contract.” Combined with deep expertise in the evolving set of Microsoft Teams collaboration opportunities, he says LoopUp is in an unparalleled position as a Microsoft Direct Routing partner to help future-proof firms’ global business communication needs as new ways of working now continue to roll out.

“We now have a unique combination to offer the market, blending the best of both worlds – our expertise in Microsoft voice with the global infrastructure to provide firms’ voice services. Most other Microsoft voice specialists can manage the setup, but not the service provision, while most carriers don’t have the depth of Microsoft voice expertise to advise on strategy.” By building out a managed services offering, LoopUp has effectively set itself up as a “one-stop shop” for this move, he explains – encompassing needs assessment, solution design, implementation and ongoing support. And with the global law firm’s user base all on a

single contract, there is only one bill to manage and pay.

### Answering the call of agility

The fundamentals of the case for a cloud telephony experience of some description are solid to say the least. Why continue to maintain cumbersome, office-based equipment for making and receiving phone calls, when people have shown just how well they can work at their laptops from almost anywhere? And why not enable all the aspects of unified communications within the same environment, with appropriate control, visibility and access to other systems? Different firms may now set down different approaches for reviving ‘office life’ when vaccination success allows, but it’s clear how far the past 18 months have moved the dial on the potential inventiveness of agile working.

Now that law firms are exploring other avenues for making more effective management choices with Teams, Jardine says the time is ripe to consider whether calling could benefit from more creative thinking.

“Firms often question whether cloud telephony can replicate the processes of the old system – but another worth asking is: What could it do differently?”

For example, he explains, a user no longer needs to be sat at their desk to answer any incoming call. “This means traditional call flows around the firm – comprising reception, PAs and hunt groups – can all be analysed and reimagined to improve both efficiency and client experience in the age of agile working ahead.” ▀

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## INDUSTRY CASE STUDY

# Teams spirit

A trio of transformation experts at law firm DWF outline the rationale for a collaboration with the team at Peppermint Technology that's leading development of the Peppermint platform – with the goal of helping people to work more effectively on all matters in Microsoft Teams

W

hen Covid-19 accelerated the need for firms to find new ways for their people to collaborate in early 2020, DWF was perhaps more prepared than most.

Its group CIO Daniel Pollick, and head of strategic programmes David Eaglesfield, had both previously worked together on landmark change projects involving the precursor to Microsoft Teams at the law firm DLA Piper – introducing instant messaging via Skype for Business and ditching the traditional desk phone setup, for example. “We had wondered even then about the prospects for ideas such as ambient news feeds within collaboration methods in a legal context, and kicked off a project to explore it,” recalls Pollick.

“We were excited about finding something that would replace email, and that’s also my particular excitement here and now. For the first time we can see a new centre of gravity building in terms of how people will work, which makes it really important to invest wisely to get the experience of that right.”

## Case considerations

He is referring specifically to the roadmap for how DWF will manage its work differently in the near future thanks to this early appreciation for MS Teams – something that also connects to another strand of technology change for the firm. When Pollick took up his role in 2018, his new firm was also in the market for a new case management system to make itself more efficient generally.

Head of applications and development Sam Charman says: “We’d spent a couple of years reviewing our options.” The challenge, she explains, was to find something that could satisfy the needs of a wide range of work types within DWF – the high-volume, highly automated end, but also commercial and the firm’s expanding managed services offering. “A platform that also enabled movement on collaboration was certainly not just the next ‘shiny toy’, but critical to the firm’s overall strategy.”

Pollick adds: “The hope was that case management would become matter management – and then we realised there was a potential golden point of convergence whereby we could push all this effort and focus in the same direction.”

## Mario and Luigi

The final piece of the puzzle in this endeavour – code-named ‘Project Mario’ – was the choice of platform to facilitate it. The job went to the cloud-based legal tech business Peppermint Technology. There was a synergy here, as DWF had already carried out substantial work in terms of readiness for the Microsoft Azure cloud, while as a Microsoft independent software vendor, Peppermint was also understandably focused on further exploration of what was possible with Teams.

Pollick says: “We could see that Peppermint was capable of being a matter management platform for all our work, but another big factor was that it wouldn’t turn us into an isolated technology island. It’s



based on the tech stack that our users are already largely living in, and the one we believe they will increasingly live in.”

Unless a communication is purposefully formal, or perhaps transporting a file, it’s now very likely that it will be a Teams exchange at DWF, he explains. “And we also know people want to be able to interact with our other tech by clicking a button in an email – or a channel – rather than entering a separate system for it.

“The pandemic has really accelerated our users into a relatively vanilla Teams world, which has now become its own driver of further change – they want to be there, and they want more.”

### Fellow travellers

That’s where Mario morphs into associate ‘Project Luigi’ – a collaboration between DWF and Peppermint to transform the Teams experience (and yes indeed, named after the pair of notoriously colourful plumbers).

Eaglesfield explains: “The challenge for firms now is surfacing more useful information and functionality in Teams. Peppermint has that vision, and we believe in it.” There are already weekly meetings of a joint project team – with Mike Walker, chief technology officer at Peppermint – on developing a lawyer-focused Teams application that delivers this. And DWF has assembled a user group to incorporate feedback and ensure relevance.

He continues: “The goal is to pull all the data a legal team could require surrounding a

**“I can honestly say I’ve not experienced as collaborative a partnership with a provider in my career. Peppermint’s depth of knowledge here is helping to inform our future technology strategy.”**

*David Eaglesfield, head of strategic programmes, DWF*

matter into that new day-to-day environment, and then to give that rich conversation greater permanence rather than risk losing the detail in multiple inboxes.”

Pollick expands: “You could envisage having a dedicated channel for a given matter, private access for everyone involved, and where all are simultaneously notified when a bill status changes or a new version of a document is created.”

Charman adds: “The team has already developed a supervision feature, which gives the flexibility of working directly within either the Teams or Outlook environments using the Microsoft Teams Approvals app – and the opportunity to federate could also transform the way we engage with our clients in future.”

The first case management integration is now on the cards for later this year as well – a “super-exciting moment”, but Pollick stresses that all eyes here are very much open as to the challenges on the road ahead. “It has to be said that the platform isn’t perfect, it needs work to make it more scalable, and we also need to be very careful not to sink user experience under the weight of too many integrations.”

But it’s a journey that DWF and Peppermint are better on together, all agree. “I can honestly say I’ve not experienced as collaborative a partnership with a provider in my career,” says Eaglesfield. “Peppermint’s depth of knowledge here is helping to inform our future technology strategy.”

For more information, visit:  
[www.pepperminttechnology.co.uk](http://www.pepperminttechnology.co.uk)



## INDUSTRY ANALYSIS

# A need for noise control

Derek Schutz, product manager at Aderant, says efficient digital collaboration needs data management integrations

**W**ith many firms now using intranets, Microsoft Teams, and other remote collaboration tools, having the right legal knowledge management software is increasingly vital. In the February/March 2021 issue of **Briefing**, we discussed the abrupt shift to ‘self-served’ information for remote timekeepers during the Covid-19 pandemic. We hypothesised that the practice of timekeepers serving themselves with matter-relevant information, while necessary, was not sustainable without the right mindset and tools. When coupled with a firm’s extensive collection of disparate data and line-of-business systems, intranets and Microsoft Teams appear to be dream products. However, once you begin the integration process and understand the difficulties in managing such an endeavour at

scale, this dream can rapidly devolve into a nightmare. Attempting to provision sites, to navigate across the platform, and to manage the huge amount of content, can quickly become overwhelming. The convenience of real-time, digital access is then called into question. What good is digital access if it requires considerable effort and knowledge of navigation to find what you need?

One common consequence of ineffective legal knowledge management is a costly decrease in timekeeper productivity. Although knowledge workers have relied on digital documents for decades, addressing productivity in digital data management has not been prioritised. A popular 2001 IDC briefing, *The High Cost of Not Finding Information*, discovered that workers spend an average of 2.5 hours a day searching for

**Like a pair of noise-cancelling headphones, good data management surfaces the data you do need – your music – while muting out the data you don’t. Timekeepers can rely on Handshake to block out the noise of irrelevant data and provide a transparent status on all client matters**

documents. While we would not usually rely on an article from two decades ago, more recent research indicates that the problem not only still exists but is steadily growing. Timekeepers inexperienced with knowledge management, and accustomed to relying on in-person support staff to locate documents, now find themselves responsible for the effort as they work remotely. The recurring practice of storing one document in numerous places (for example, a document management system and Microsoft Teams) intensifies the issue.

Firms with homegrown intranets do not always have the capability to feed data from their numerous sites and systems into one secure and accessible location; they are using intranets almost solely for company news. Documents and data are everywhere except the right location, and billable time is minimised in the neverending search for data. To solve this, firms need a centralised location for their data that is accessible to timekeepers. Software, including Aderant Handshake, enables firms to improve their legal knowledge management system and increase overall efficiency. Connecting to almost any type of internal or external data source to create a single repository of information, Handshake arranges a firm’s data to explain the entirety of a matter, client, person, and so on, allowing users to find what they need in the context they need it.

Like a pair of noise-cancelling headphones, good data management surfaces the data you do need – your music – while

muting out the data you don’t (background noise). Handshake acts as those headphones, filtering data to individual user preferences. Timekeepers can rely on Handshake to block out the noise of irrelevant data and provide a transparent status on all client matters, including budgets, filings, and counsel information. Firms can use various platforms, such as SharePoint, Microsoft Teams, Outlook, or any web service, in conjunction with Handshake, to centralise and connect information with lawyers and staff. Whether the information is built into a web page, or uses knowledge search engines, Handshake recognises the user and automatically identifies the most impactful data for them. They don’t have to sift through dozens of similar files to find the most relevant information. Handshake essentially creates a predictive playlist that makes selections from your full music library based on the genre that you want to listen to. Like your data, your entire music library is still available on your device, but the player is only queuing the type of songs you are in the mood for.

When it comes to sifting through the mountain of data at your firm, you need more than a magnifying glass. Internal and external collaboration channels are both widely available, but there is still a need to truly integrate disparate sources, rather than simply use them all side by side. An investment in the right solution can enable you to increase timekeepers’ efficiency – enable them to bring what they need to their fingertips, and you can separate the signal from the noise. ▀



For more information, visit:  
[www.aderant.com/solutions-handshake-overview](https://www.aderant.com/solutions-handshake-overview)

## INDUSTRY ANALYSIS

# Keep control of the conversation

Dan Carmel, chief product officer at iManage, says just as with email before it, maximising your law firm's new productivity with Microsoft Teams relies on a matter-centric-world

**P**icture this: new technology enters the legal market creating a new way of communicating and collaborating, which changes how lawyers work, and further fragments the matter file, requiring extra work and creating confusion. The industry initially resists it, but as the benefits and enhanced collaboration become apparent, and users demand it, firms relent, introducing a whole new wave of requirements and governance challenges. Sound familiar? It is the challenge we faced with email in 2001.

And, like email, the adoption of Microsoft Teams will create a valuable new communications channel. But realising that value will involve information management changes, the evolution of current best practices, and new policies and processes.

## A considered approach

The adoption of Microsoft Teams is enticing. Accelerated by the pandemic, it has gained velocity inside law firms. It is frictionless for the user, easy for IT to deploy, and has become an essential tool for many organisations as they rapidly transitioned to remote work. For law firms however, adopting Teams requires a considered approach.

## A new content silo?

Threaded conversations have now entered the legal industry, and, like email, they are fragmenting a lawyer's view of the matter. For example, several lawyers may chat about edits to a contract over Teams, before

revisions are made. Documents and links will be circulated as part of online meetings. It's simple to do, but puts valuable and sensitive matter-related information into a new system – fragmenting the matter file for the purposes of security, governance and knowledge-sharing. And adding cost, user change and complexity that needs to be managed. It also adds another system that forward-looking firms will want to search and manage as part of their broader knowledge initiatives.

## People and information management

When emails were first stored in document management systems (DMS), ushering in an era of matter-centricity, email volumes swelled. Based on our research, over two-thirds of the content in a law firm DMS today is emails. However, it took the industry several years, and millions of empty folders, to develop a set of information management best practices for how to organise the integrated matter file. Organisations adopting Teams have quickly encountered issues like 'channel overload' and 'Teams confusion'. Finding information becomes harder as things are spread across multiple teams and channels.

## Manage security, risk and governance

In addition to fragmenting content, Teams is an additional system to be governed and secured. The potential to accidentally expose team space names, or even document titles in search or the Teams directory, are all risks that need to be mitigated. Firms recognise that 'need to know' security and support for ethical walls respected by search, are key to



## Guidance needs to be provided on how Teams should be used, just as with email. The context of the work will need to define the processes and policies governing it, and that needs to span retention, security and governance rules to be applied

making Teams a safe place to work for legal. Add to this the realisation that Teams use can extend beyond the firm's four walls, and the need to protect key firm information dramatically increases.

In spite of the pressure from users, many law firms have been forced to delay their Microsoft Teams deployment until they can adequately address these governance issues.

### Learning the lessons from email

Law firms encountered these challenges decades ago when they adopted email. It took the industry years to solve them, but the lessons learned then can shortcut the process of creating best practices around Teams today.

### Integrate Teams into a matter-centric view

Today, matter-centric document management enables a lawyer to view all the information related to a matter, regardless of whether it's in a document or an email. When a lawyer searches for something, they don't need to know if the information was shared in an email or a document to know where to look for it. The resulting productivity benefits are widely acknowledged. To maintain those benefits, a similar approach needs to be taken with the communications flowing through Microsoft Teams, with conversations managed alongside email and documents, searchable in a system of record.

For more information, visit:  
[www.imanage.com/blog/the-best-of-both-worlds-with-imanage-and-microsoft](http://www.imanage.com/blog/the-best-of-both-worlds-with-imanage-and-microsoft)

### People, process and policy

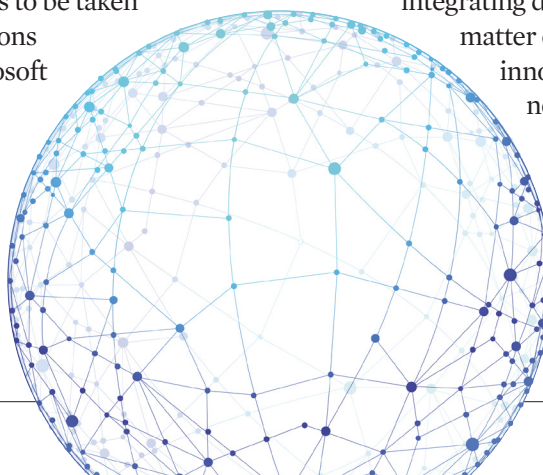
Like email, everything in Teams won't be appropriate for the matter file. Firms will need to be clear about what is 'work', and therefore needs to be part of the matter file. Guidance needs to be provided on how Teams should be used, just as with email and other systems. The context of the work will need to define the processes and policies governing it, and that needs to span retention, security and governance rules to be applied.

### Security and governance naturally follows

Extending a consistent governance and security scheme over this new form of content is essential for many law firms and other legal organisations struggling with cybersecurity and risk. We see bringing Microsoft Teams communications under a policy-based, need-to-know security and governance regime as a best-practice path that firms and legal departments will both want to consider.

### Final thoughts

While it's difficult to predict adoption patterns, we see tremendous parallels between Teams and email. Like email before it, Microsoft Teams is a natural extension of content and communications that need to be managed in a matter-centric way, consistently with the firm's policy on governance and security. The importance of integrating documents and email by matter or project was a key innovation for us. We are now taking the same approach to Teams, while continuing the evolving discussion around the people and process issues that its use raises. ▀



## INDUSTRY ANALYSIS

# Teams better together

Sarah Smithline, senior director of platform and solutions marketing at Intapp, describes the connected firm approach to collaboration, content and controls with Microsoft Teams

**W**hen Intapp's AJ Ratnaparkhi opened his product request queue one day in October 2020, he thought there must be some mistake. As an experienced product management director, he rarely came across a sudden influx of similar client requests for any one product feature, and immediately sent a message to the head of Intapp Risk products, Warren Knowles: "We're going to need to build out our Microsoft Teams capabilities — ASAP."

With last year's sudden shift to remote work and virtual collaboration, the professional services firms that Intapp serves sought deeper integrations with Microsoft 365 applications, and especially with Microsoft Teams, the collaboration solution of choice in the legal world, according to the ILTA 2020 tech survey. However, as firms implement new systems to facilitate virtual communication and document sharing, they now face greater associated risk of sensitive client documents falling into the wrong hands. As a result, law firm IT professionals now seek to manage that risk.

Firms around the world have long relied on Intapp Walls to enforce confidentiality and ethical screens, with centrally-managed information policies that extend to data wherever it resides in the firm. As it isn't unusual for large firms to establish and maintain thousands of policies, these firms

leverage native Intapp Walls extensions to all their critical firm systems.

"Securing Microsoft Teams was a logical addition to the Intapp Walls roadmap," Knowles said. "We value our clients' feedback and consistently look for ways to improve connected firm management."

## Meanwhile, across the Atlantic

As the Intapp product team were heads-down developing an Intapp Walls integration with Microsoft Teams, they were also acutely aware that Intapp client firms required a purpose-built, client-centric enterprise content management solution that would seamlessly integrate with Microsoft 365 and leverage existing firm policies — including those established with Intapp Walls.

That exact type of seamless Microsoft 365 integration happens to be the speciality of the Belfast-based information management software provider Repstor, which offers Microsoft integrations that work across any document management or other firm system. For firms using Microsoft 365, Repstor enables consistent client- and matter-centric solutions for document and email management, Microsoft Teams governance and internal collaboration, and external collaboration with clients and other third parties. As fee earners and others in firms have accelerated their use of Microsoft Teams, users are creating more teams to

collaborate on matters and related documents. Using Repstor, firms are now also capturing and categorising those documents and discussions within the firm's systems of record, respecting the ethical walls in place with Intapp Walls.

"The number one thing that law firms are asking us for today is functionality around Microsoft Teams," said Sheila Gormley, co-founder and executive vice president of Repstor. "Firms leverage Microsoft Teams to connect colleagues and enable collaboration, but that's when security, risk, and compliance starts to become a concern."

### A better-together solution

An Intapp and Repstor partnership was a natural fit, given both companies were solving challenges facing professional services firms and both are reputable software leaders in the space. In May 2021, Intapp announced its acquisition of Repstor. The teams have joined forces to deliver a best-in-class, purpose-built collaboration and content solution for professional services firms.

To help firms maximise their Microsoft Office 365 investments, Repstor and Intapp capabilities automate a firm's client-centric information structure while extending existing ethical walls and access controls to all client-matter data within Microsoft Teams and other systems of record across the firm. The combined solution establishes automatic workspace provisioning at the point of new business intake — a function especially valuable to law firm risk leaders, who can potentially lose business due to slow intake processes or, worse yet, face liabilities and damage to client relationships because of mismanaged information. The new OnePlace Collaboration & Content suite will offer solutions for integrated desktop workspaces,

**"Firms leverage Microsoft Teams to connect colleagues and enable collaboration, but that's when security, risk and compliance starts to become a concern"**

*Sheila Gormley, co-founder, Repstor*

secure client collaboration, and advanced and secure enterprise content management.

### Purpose-built collaboration

"We're big believers in Microsoft 365 as a key enabler of firm-wide collaboration and document sharing," said Fergus Wilson, chief technology officer at Repstor. "Combining the power of the Microsoft platform with Intapp capabilities — which are so specific to legal and professional services — we're introducing a very compelling reason for firms to use Microsoft Teams."

Leading firms are already experiencing the benefits offered by a combined Intapp and Repstor solution. US-based law firm Nelson Mullins Riley & Scarborough deployed Repstor to support its transition to Microsoft Teams as its firm's primary workspace. The firm already relied on Intapp Walls for privacy and information access controls and can now leverage Repstor to support its client- and matter-centric content management.

"This is a chance to transform knowledge sharing across our 26 offices," said David Worth, CIO at Nelson Mullins. "I see Microsoft Teams, optimised by Repstor and secured by Intapp Walls, as the first true collaboration platform for law firms." ▀

For more information, visit:  
[www.intapp.com/collaboration](https://www.intapp.com/collaboration)





## INDUSTRY ANALYSIS

# Context in collaboration

Dani McCormick, director of solutions at LexisNexis, says recent increases in opportunities to collaborate need to be considered alongside the drawbacks of constant context switching

**I**n an increasingly connected world, the distractions and demands on lawyers' time are increasing. With just one click, lawyers have effortless access to relevant legal intelligence and guidance. As team and client interactions start to include Microsoft Teams, small issues can be quickly resolved through instant messaging. But at what cost in time and distraction?

Incessant 'context switching' can be a drag on a lawyer's time and, according to a University of California Irvine study, it takes an average of 23 minutes and 15 seconds to get back to a task that has been interrupted.

There are various ways to reduce the time-drain that results from context switching. These include:

- **Notifications** Unless you're expecting an urgent email, switch off all alerts and notifications when you're working on a matter that requires focus, such as drafting a bespoke contract.
- **Phone** Smartphones are designed to sap attention. According to one study, phone users tap, swipe and click on their touch screens an average of 2,617 times each day. Try out the 'Do Not Disturb' mode for a period of respite.
- **Embrace technology** Software such as Lexis Create can help lawyers to work more effectively. By putting LexisNexis legal intelligence directly into the Microsoft

environment, users can access the practical content they need without opening multiple windows, or having to search through folders. It helps lawyers to manage and reuse their own existing work through the powerful snippets function. With forensic checking, citation tools, legal calculators and access to content, it puts everything they need at their fingertips.

## Supercharge legal drafting with Lexis Create

Lexis Create is a brand new product released by LexisNexis. It has been designed to reduce the pain of context-switching by providing LexisNexis legal intelligence and tools to users within the Microsoft environment.

Mirroring user workflows with a clean user interface, Lexis Create offers rapid search of relevant Lexis content with fast, precision-checking of documents. It allows users to share and reuse knowledge, redact terms and access legal intelligence without switching windows. It also includes proofreading capabilities and legal citation-checking to ensure documents are immediately client-ready. ▀

For more information, visit:  
[www.lexisnexis.co.uk/lexis-create](http://www.lexisnexis.co.uk/lexis-create)



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## INDUSTRY ANALYSIS

# The call of transformation

Bernadette Bennett, head of the legal sector at Moneypenny, explains how the business is using Microsoft Teams to build solutions to the agile-call conundrum

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n an increasingly agile age, law firms must consider how they will manage both internal and external communications.

Handling calls professionally and efficiently continues to be integral to client care. But with people working different hours, from different locations – and potentially using a wide variety of tools and collaboration technologies – it can be difficult to know who's available and when.

It is these challenges that provided the catalyst for a Microsoft Teams integration with our telephone answering service. At Moneypenny we handle more than two million legal calls and live chats each year, for more than 1,000 law firms in the UK – so we understand just how critical it is to get it right, every time.

The integration has made the business closer to firms' employees and the detail of their working day. It means that our team has complete round-the-clock visibility of our clients' Microsoft Teams status, so we always know when employees are able to receive calls. Plus it can help to avoid unnecessary interruptions for busy legal teams when they're in meetings or away from their desk – while also protecting the client experience.

If a solicitor's status is set to busy, our PAs will explain to callers they're on another call

and send a message immediately. Similarly, if someone's status is set to any of the other unavailable options, we'll tell callers they're away from their desk and send a message. Whenever someone is available, calls are simply transferred straight through.

While the last year has required firms to adopt a variety of new technologies, it's still important to streamline the tools, processes and technologies so that employees can be as efficient as possible. This integration leverages the quick uptake of Teams by the sector and increases its value further.

Firms with Microsoft licenses that include a phone system can also have Moneypenny transfer calls directly to the number assigned to an individual employee, which makes for fewer devices and a smarter way of working.

In the midst of all this change, this integration is helping firms to build on the learnings of the last year. Critically, it helps law firms to protect the client experience and ensures employees have the intuitive tools they need to be efficient and contactable in this new agile age. ▀



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## INDUSTRY ANALYSIS

# Space of change

David Malkinson, managing director at Morae, says the productivity gains of working with Microsoft Teams will require the right information governance structure to transform the legal workplace for the future effectively

O

utlook is dead, long live Teams. Well not quite, but thanks in part to the pandemic, we now have a modern collaboration

platform that's in common use across a sizeable proportion of the world's devices. The wider its adoption, the more powerful MS Teams becomes. Its universality is what makes it so attractive.

Cross-organisation collaboration that doesn't require separate credentials, matter-centric chat and real-time collaboration inside Office apps, are all extremely attractive to firms who want to work more efficiently, get closer to their clients and reduce reliance on email.

Despite its many shortcomings, email isn't ready to die just yet – it does one thing that Teams doesn't. All parties have an immutable copy of what was sent to those parties. As it stands, Teams chat resides only in the host's tenant, meaning a lawyer providing advice over chat on another firm's tenant wouldn't necessarily have a record of it – problematic in the event of a malpractice claim or investigation.

The other challenge is how data is stored. Teams was created during an internal hackathon at Microsoft and pulled together various pre-existing technologies. As a result, client content can be stored in a combination of SharePoint, OneDrive, Stream and Exchange mailboxes. Add the DMS into the mix and it makes for a witch's brew in terms of recordkeeping.

Legal tech vendors are filling this governance gap. Most products tend to focus on provisioning – ensuring governed Team creation, with metadata, retention and ethical walls. Firms have used these tools to

deliver channels as a matter portal, with task lists, dashboards, and links to systems such as finance, legal project management and CRM.

As it stands, there's little appetite in legal to go 'all in' and swap out the DMS for SharePoint, so there's a lot of interest in bi-directional sync of content from iManage to Teams. Two primary use cases for this are the publishing of content to external parties and 'Teams as a meeting space' where, to use an analogy, documents are pulled (checked out) from the filing cabinet (DMS) to be worked on in the 'meeting area' (Teams) and put back (checked in) when done. This enables firms to leverage the collaboration functions of Teams without compromising the system of record.

The modern workplace has been so thoroughly disrupted that it is almost unrecognisable from 18 months ago. The evolution of technologies like Teams to meet the needs of a distributed workforce is also serving to break down barriers between firms and their clients. It's not perfect by any means, but Teams has become a key enabler for modern work with the Microsoft development juggernaut behind it. You wouldn't bet against it, but keeping up with the fast-evolving changes is both a great challenge and an opportunity for legal.

To learn more about recommended best practices for deployment of Teams, I encourage you to read my recent white paper on the subject. ▀

For more information, visit:  
[www.moraeglobal.com/white-paper-teams-usage-in-legal](http://www.moraeglobal.com/white-paper-teams-usage-in-legal)



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## INDUSTRY ANALYSIS

# Discover new ways to work

Corey Tomlinson, head of content at Nuix and Martin Bonney, head of eDiscovery and managed services at Panoram, outline how Panoram Digital Project Management pairs well with Nuix Discover to deliver powerful e-discovery project collaboration

Over the last year we've all grown increasingly familiar with running meetings on screen, sometimes wearily so. It's a relief that we can begin to meet in person again soon.

We should, however, remember the lessons we've learned during the pandemic. It's remarkable how much we've been able to get done online (launching our business in lockdown, for example), and how collaborating in Microsoft Teams has proved so much richer than just being a place for online meetings. At Panoram we firmly believe in empowering lawyers through digital – and we have applied our practical experience to the e-discovery process.

Project management in e-discovery has always been crucial, but it has often occurred in silos, with lawyers only seeing the end-product of e-discovery specialists, and conversely the e-discovery team not fully understanding the time pressures and deadlines driving the legal team. Collaboration is the key to success. Part of that comes down to people, but a common collaboration platform makes everything easier, encouraging consistency, accuracy and transparency.

The art lies in building sufficient structure to get things done consistently, but not being overly prescriptive. We have done this by building the Panoram Digital Project Management (PDPM) platform in Teams. Tools like OneNote easily memorialise meetings. MS Planner enables allocation and tracking of tasks. And of course, documents

can be shared securely. Key process steps, such as data mapping, collection and evidence-tracking, can be automated and reported on via a centralised dashboard and cross-referenced against project milestones.

In parallel, Nuix has integrated with the MS Graph API for accessing MS O365 data, including MS Teams chat. This means senior lawyers can monitor the progress of a document review without having to chase busy litigation support managers constantly.

All lawyers want the best project managers working on their cases – alas, we cannot clone them. By using MS Teams for project management, we help lawyers to leverage the best project managers across more cases while (through experience) preparing them to think about impending data challenges.

The truth is that key evidence is now as likely to be held in a chat record as an email exchange, and the record of when a document has been shared might be a more useful source of evidence than an email attachment.

By using MS Teams with a powerful e-discovery platform like Nuix, we are able to deliver both project efficiency and quality while handling all these new data sources. ▀

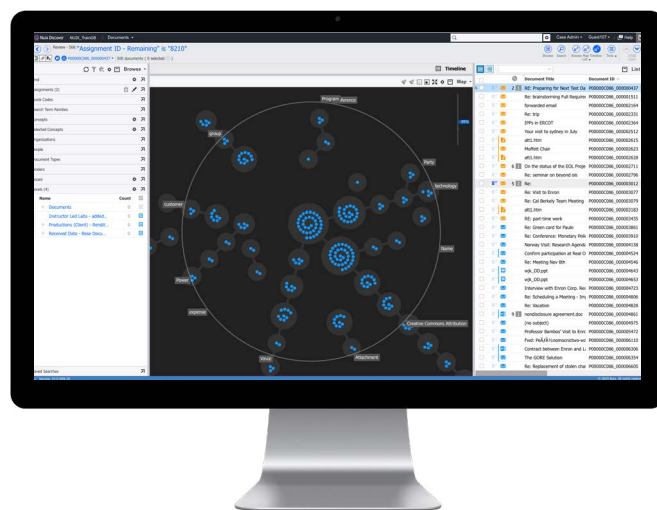
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## INDUSTRY ANALYSIS

# Provision and govern Teams for digital transformation

Keith Lipman, CEO and co-founder at Prosperoware, discusses how to mitigate the risk of data chaos when adopting Microsoft Teams to drive the next phase of law firm digital transformation

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his past year, the legal industry digitised at an accelerated rate as the pandemic required firms to adapt to life without an office.

Gone are the needs for in-office support staff, secretaries out at the front of every office door, and in-person client briefs. Firms instead went through a period of rapid digital transformation that continues to shape the way we work and collaborate.

## Microsoft Teams at the centre of collaboration for hybrid workplaces

At the start of the pandemic everyone scrambled to deploy technology that supports virtual collaboration, with Microsoft Teams being the most popular platform. As of April 2021, Teams has grown

to over 145 million daily active users globally – a meteoric rise from the 32 million users prior to the pandemic – making it Microsoft's fastest growing platform.

Teams provides rich collaboration capabilities designed to improve matter delivery. Law firms can organise their matters with Teams and Channels, and co-author documents in real time with both internal and external users. This improves the client experience and transparency, making Teams an ideal intranet and extranet. Teams also integrates across the Microsoft 365 suite and gives firms the ability to work with third-party apps like OneNote, Planner, Lists, Dataverse and more, as tabs in Teams and Channels.

But while Teams has the functionality to



do wonders for collaboration, it can quickly become chaotic if not managed and governed properly.

Imagine a firm that allowed end users to create their own Teams. Within a week, hundreds will pop up left and right. Users will create numerous Teams for one matter, with names and Channel structures that are most convenient to them. It's easy to see how this practice quickly spirals into chaos and becomes an absolute nightmare for the firm's risk professionals.

To fight data chaos properly, users need logical locations in which to place their data, so provisioning for Teams is necessary. But manual provisioning of Teams could take from 15 to 30 minutes. When scaled across hundreds or thousands of matters, it becomes inefficient and poses privacy risks.

Firms need the right technology, such as Prosperoware CAM – a cloud-based enterprise platform for adoption and governance across collaboration systems. CAM enables automatic and on-demand provisioning of Teams, Channels, SharePoint sites, OneDrive folders, OneNote, Planner, Lists, internal and external users and groups, and more, with standardised naming conventions and templates to fit simple and complex use cases.

Firms can then add rich custom metadata, which helps users to locate content and risk professionals to understand context so they can set security and minimisation policies. Even simple metadata, like a matter start/end date, makes governance easier.

Integrating the document management system (DMS) as a dynamic tab that links the Team with client/matter IDs to the DMS enables the two systems to communicate. The ability to copy and sync content from Teams to the DMS – and vice versa – enhances collaboration and governance.

When properly provisioned and governed,

Microsoft Teams isn't just a communication tool. It's a platform for total business enablement, boosting efficiency and collaboration.

### **Governing Teams: Privacy and cybersecurity more important than ever**

The rapid deployment of new technology, such as Microsoft Teams, increased our collective vulnerability to damaging hacks. While firms operated in chaos and tried to figure out Teams governance, hackers were preparing en masse to copy and delete sensitive data and intellectual property.

Recent examples include the SolarWinds hack, where around 1,000 hackers, backed by Russia, accessed some of the most sensitive US government data. It was one of the biggest nation-state attacks to date, suggesting that any company can be hacked, or fall victim to what we call the 'bad day'. Firms should be conscious that it is not a question of whether their data will be breached, but when. Preparing for this 'bad day' through Zero-Trust security is critical.

Firms should aim to protect the data they need and minimise what they don't. By tackling data chaos and setting proper provisioning across systems, like Microsoft 365, the DMS, and any other systems, Zero-Trust security becomes consistent and efficient, reducing the risk of cyberthreats or cyberespionage.

As we move into hybrid workplaces, platforms like Teams will be paramount to enabling collaboration and business success. This shift will also emphasise concerns over cybersecurity, making technology that tackles these challenges as important as the virtual collaboration platforms themselves.

Last-mile solutions that offer advanced provisioning capabilities, like Prosperoware CAM, provide effective adoption and governance, mitigating data chaos and reducing risks related to privacy and cybersecurity. CAM enables firms to provision, classify, protect, move and minimise data for Microsoft Teams, SharePoint Online, OneDrive, OneNote, Planner, Lists, iManage, NetDocuments, file shares, HighQ, and more to come. ▀

For more information, visit:  
[www.prosperoware.com](http://www.prosperoware.com)

## INDUSTRY ANALYSIS

# Template for a collaboration

Chris Kitchener, VP product management at HighQ, Thomson Reuters, says the platform and the Microsoft toolset are productive partners in the quest for more responsive client service today

**D**o you remember when we used to say things like ‘I’ll post it first class’, or the more sophisticated ‘I’ll fax it to you’? Paper ruled, and progress was measured in weeks, or perhaps days, but certainly not hours and minutes. We’ve come a long way since then in terms of speed, security and the ability for parties to collaborate on projects effectively. Now even the most unsophisticated clients expect legal professionals not just to share files immediately and securely, but also to message, videoconference, collaborate, and provide insights on matters in near real time.

The post-pandemic market is crowded with simple consumer collaboration tools like Dropbox and Zoom. However, the more sophisticated platforms like Microsoft 365 provide a much richer set of capabilities that go far beyond those of their consumer cousins. In addition, there are specialised legal platforms such as Thomson Reuters HighQ that focus on the things that make the practice of law different from other forms of business.

Law firms and corporate legal teams need more than generic file-sharing or videoconferencing if they want to provide a differentiated client experience to win and retain business. Specialised legal tools are purposely built for law firms, using the language of the law and legal professionals, ensuring that only the right people can share, see, or collaborate on content, even in the most complex or sophisticated projects. These tools provide specialised legal

collaboration capabilities, including out-of-the-box data visualisation, workflow automation, and legal-specific AI, while still making sure that every step of a matter is audited and tracked.

So it’s interesting to see that companies like Thomson Reuters, with its flagship legal collaboration tool HighQ, describe it as a perfect partner to Microsoft’s 365 offering. It takes the best that the ubiquitous Microsoft tools can offer and further builds on them to provide capabilities that empower firms and corporate legal teams to be more efficient, agile and competitive. By using HighQ and Microsoft 365 together, firms work more intelligently and collaboratively with internal colleagues, while delivering more responsive, transparent and valuable services to clients.

What is it that makes Microsoft 365, and more specifically Microsoft Teams, a perfect tool to use with HighQ? Teams is a tool designed to make it easy to connect people through chat and videoconferencing. It’s incredibly easy for anyone within a legal team or organisation to create as many channels as they like, enabling them to quickly share information, ideas and files across large or small groups. It’s the perfect tool for mass communication within a law firm or corporate legal team, where easy access is everything.

However, when it’s time to start working on confidential or complex matters, law firms and corporate legal teams need extra layers of security, control and auditing. They need to ensure that, on a group or individual basis,

only the right people can see the right files and folders, and that only the right people can see charts or specific data for a particular case. While some of this could be achieved through specialised development of the Microsoft 365 platform, solutions like HighQ offer this kind of security and an additional set of rich, legal-specific capabilities out of the box. Using HighQ, powerful templated solutions can be deployed within minutes to suit specific practice areas or types of legal matter, all without the need for specialised developers or IT infrastructure.

Thomson Reuters continues to make HighQ work seamlessly with Microsoft 365, integrating with Word and the other Microsoft productivity solutions, and making it simple to view, edit, comment on, and version existing Word, Excel and PowerPoint files. The HighQ solution also offers an Outlook plugin, making it easy for Outlook users either to file incoming emails or attachments within HighQ, or to share files from HighQ. Most recently HighQ has delivered a new integration with Teams, which allows a HighQ user not only to see the status of a user in Teams via the HighQ

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user profile, but also to offer a quick and easy way to initiate a chat, call or videoconference with that user. Looking further ahead, Thomson Reuters is working on a native Teams app for HighQ that will enable Teams users to upload or share HighQ files securely from within Teams.

As we look forward to a post-pandemic world in which client expectations and demands continue to grow, now is the time to start thinking about how Thomson Reuters and Microsoft together provide the perfect solution for you and your clients. Together, they help to connect your legal professionals, boost productivity, enable you to seamlessly collaborate with others, share valuable insights, and engage with clients and colleagues to deliver world-class legal services. ▴

For more information, visit:  
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