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repstor 

Indisputable reasons
to use Office 365 for
matter management

Making your existing Microsoft investment
go even further



Office 365 is so integral to everyday business activity, including routine content management and collaboration, that it is the obvious platform for legal matter management in the digital age.

Microsoft's fastest-selling product since SharePoint, Office 365 is used much more extensively than niche legal document management tools to manage content. It is an existing resource most firms have already invested in, and many of its capabilities are inherently superior to those of dedicated matter management systems. This is largely due to the huge investment Microsoft has made in Office 365, added to the vast ecosystem of Microsoft software partners which are enhancing Office 365 all the time with new, specialist features and integration options.

Setting out seven points of evidence, the following e-book makes the case for defaulting to Microsoft Office 365 for complete matter lifecycle management - a move that law firms ranging from large international practices like Eversheds Sutherland to smaller challenger firms like gunnercooke have already made.

A photograph of a man in a blue suit and tie, sitting at a desk and holding a large document. The image is partially obscured by a red box on the left containing text.

Eversheds
Sutherland shows
how it's done

After transforming its own matter management, international law firm Eversheds Sutherland is using its experience to help corporate legal teams meet rising digital expectations

After realising just how easy it is to get legal teams to work systematically if they can use tools already familiar to them, international law firm Eversheds Sutherland is using its matter management transformation experience to show corporate legal teams what's possible, via its consulting arm.

It is now promoting an easy-to-use matter lifecycle management solution, ES/Unity, in collaboration with its software provider Repstor, which works with firms' existing Microsoft Office 365 software. Because ES/Unity was conceived by lawyers for lawyers, it is tailored to the way legal teams already work, encouraging them to store and share content systematically and more closely monitor progress.

1 The phenomenal momentum around Office 365

According to the **latest statistics**, one in five corporate employees now has Office 365, making it the most widely used enterprise cloud service. People trust it too. Over half (58.4 per cent) of all sensitive data entrusted to the cloud is stored in Office 365 - from Excel spreadsheets and Word documents, to Outlook email content. Meanwhile OneDrive for Business, Exchange Online and SharePoint Online have become the accepted way for dispersed teams and remote workers to access and share resources and content wherever they are.

The cloud is central to Microsoft's software strategy now, which means this is where its investment and security efforts are concentrated. In 2016, Microsoft **more than doubled its cloud capacity in Europe**, where it has now invested over \$3 billion (£2.3 billion) in cloud facilities. As a result more sensitive data can be stored within regional boundaries, aiding compliance. Microsoft now has UK data centres in London, Durham and Cardiff.

With **Office 365 user numbers expected to exceed 100 million by the end of 2017**, uptake of the platform continues to accelerate. It isn't just Microsoft investing heavily either. Estimates suggest that **Microsoft's cloud partner ecosystem is 10 times larger than Google's**, comprising 42,000 software developers, systems integrators, value-added resellers and service partners at the last count - which together are delivering training, consulting, support and applications to help organisations get the most from Office 365. These partners include specialist legal solution providers, whose products cement Office 365's role as a robust matter management platform.

Basing legal processes and content management around a robust, mainstream platform will also set firms in good stead for the future - as automated personal assistants (artificial intelligence and machine learning solutions) and alternative user interfaces (such as voice) rise in prominence as a means of searching and interacting with content, and of completing routine processes.

2 Office 365's broad (and growing) functionality

Already a richly-featured productivity and content management platform, Office 365 is being added to all the time. And because it is cloud-based, users can benefit readily from the new functionality.

Standard capabilities today include:

- Secure, shareable content storage
 - Cloud-based personal storage in the form of OneDrive, for access from anywhere
 - Controlled internal and external content sharing, via SharePoint
 - Intelligent prioritisation of the most popular/relevant information, via Delve
- A range of collaboration options
 - Team collaboration using SharePoint, Yammer and Microsoft Teams
 - Integrated voice and web conference facilities via Skype
- Workflow & productivity measurement
 - Microsoft Flow keeps the pipeline moving
 - PowerBI enables sophisticated analytics to fulfil client reporting and management information needs, and providing useful insight - e.g. to improve task allocation.

Meanwhile PowerApps and LogicApps provide simple business application development capabilities.



3 SharePoint: a matter management powerhouse!

Despite its status as the world's leading document management system, SharePoint's role among legal teams has traditionally been confined to portal and search-related applications. Although it could so easily be used as the default content platform for matter management, many legal organisations have opted to introduce separate, specialist systems for storing and managing legal matters. Yet most of these organisations also use Office 365!

By choosing to buy a distinct content management system for legal matters, these firms are incurring unnecessary cost and complexity – especially given that the functionality they are buying is primarily storage of legal documents. If they also want intelligent workflow, analytics, reporting and secure external content sharing, they will typically need to buy third-party add-ons and blend everything together, at further cost. Given that Office 365 provides these capabilities out of the box - and that most legal teams already have the software - investing in specialist software that does only part of the job doesn't make sense.

Office 365 and SharePoint also combine this functionality with a rich metadata model – i.e. one that isn't limited to a fixed number, and rigid definitions, of document types and properties. This advanced metadata is key to fast and efficient enterprise search (and a key attraction of SharePoint, even to legal teams using other systems!). The more that SharePoint becomes the default place to store matter-related information, the more value this powerful enterprise search capability can add. Metadata is also increasingly critical in enabling the range and depth of legal analytics now being demanded.

All of this is in addition to SharePoint's robust version control, full records management, compliance and security which, with enhanced Outlook integration and document management options from specialist Microsoft partners, could form the basis for comprehensive matter management.

4 External sharing via secure client extranets

To maximise productivity, efficiency and traceability, legal teams increasingly need to be able to collaborate and share content with external contributors– whether these are clients or self-employed experts brought in for a specific skill set. As a mainstream software platform used widely across numerous industries and business functions, Office 365 is the ideal foundation for extending collaboration securely across company boundaries.

Via SharePoint Online, Office 365 offers the facility to set up virtual data rooms or **client-specific extranets** as an external sharing option, allowing information suitable for external sharing to be separated and opened up to additional parties in a controlled manner. By defaulting to Office 365 capabilities, firms can make substantial savings compared with using third-party services in this area

At challenger law firm **gunnercooke**, cloud-based matter management is the key to agility

gunnercooke llp is one of the UK's fastest-growing challenger law firms, with experts working in diverse locations across the country to provide corporate and commercial legal services to businesses, banks and financial institutions.

To support remote access and collaboration, the firm uses cloud-based software – in particular Office 365. Recently it made it easier to manage matter-related emails and other content through Outlook, through the addition of Repstor software. Because this hasn't changed the way people work, user acceptance has exceeded expectations.



5 Integration & end-to-end visibility

Because of the rich analytics and reporting capabilities included as part of the Office 365 platform, it is very easy to monitor, search and report on the status of projects, content and communications. This naturally lends the platform to matter management - as a means of providing detailed insights into use of time, for instance, which could inform future task assignment.

PowerBI, part of Office 365, provides **advanced analytics** around all types of content and information – a facility that dedicated matter management systems usually have to add on separately.

Office 365 offers impressive integration options too, so that matters, activities and workflow can be tracked and analysed right across all of the firm's information, whether it be in a practice management system, CRM system, or other diverse applications and platforms that may contribute to matter management. This includes the extensive range of solutions and tools from Microsoft's third-party application partners.

Unsurprisingly Office 365 also offers the best integration with Office desktop (i.e.. non cloud-based) applications too, enabling advanced functionality such as co-authoring, where multiple people can collaborate on the same document at the same time. Ironically, specialist matter management platforms typically rely on Office 365 to provide these capabilities – just another reason to question the sense of investing in separate legal document systems.

A further big benefit is that Office 365 applications are automatically kept up to date, giving fee-earning users access to the latest software without creating extra work for internal IT teams.

6 Security & GDPR compliance

The security implications of managing data are a serious concern for legal teams. With regulatory requirements increasing all the time, they need to be able to count on their matter management platform to provide full and demonstrable compliance. In the run-up to EU General Data Protection Regulation (GDPR) being introduced across Europe, firms will need additional assurance that their IT systems and cloud services do not leave them open to risk of breaches to personal data.

Records management and compliance capabilities, which are typically sold at a premium with other matter management systems, come as standard with Office 365 and SharePoint. And in June 2017, Microsoft introduced a number of important **Office 365 updates** to improve threat protection, enable better oversight of employee communications and streamline the compliance process.

Already deemed to have the most secure cloud platform with the most certifications, Microsoft includes compliance auditing and tracking of unusual activities (e.g. unusual login patterns), and provides information rights management, as part of its cloud services. It has also pledged that its cloud services - across Office 365 and beyond - will be **fully compliant with new GDPR requirements** by their introduction in May 2018, a commitment it has backed up contractually.



7 Unrivalled user acceptance

In Office 365 and SharePoint, Microsoft already provides for comprehensive matter management. But there are also numerous powerful enhancements that legal teams can introduce to maximise their Office 365 and SharePoint investments, increasing the benefits of this software and negating additional spending on specialist legal systems that simply aren't needed.

Optimised options for legal teams that put the user experience right at the forefront of matter management include:

- Repstor affinity - a powerful content management tool for Office 365, integrated natively with Microsoft Outlook - for intuitive, high-speed file, share and search:
 - affinity HighQ Connector provides users with easy access to HighQ repositories through the Microsoft Outlook interface, so firms can unify internal and external collaboration in one secure space that can be accessed from anywhere
 - legal users can quickly find and access matter information, file emails and take advantage of document collaboration by defaulting to SharePoint to find and store content – instinctively, from within Outlook
- Repstor custodian – enabling Office 365 to be used as a complete matter management system:
 - brings legal case management and email management capabilities directly within Office 365
 - teams can use SharePoint sites and lists to store matter content, applying structure, metadata, workflow processes and policy to each matter type easily and consistently
 - integrates with common legal practice management systems, time and billing applications and workflow management applications, for end-to-end process visibility and management

Why digital matter management matters

Budget issues can be a barrier to effective digital content management in the legal profession.

Raising the bar: Digital technology and the enhancement of legal services – The Looking Glass Report (winmark, 2016), a survey of 200 senior legal leaders, found that 64 per cent of legal teams are held back by the cost of investment. Other hurdles include system integration complexity (cited by 59 per cent), and a lack of capacity for adapting to change (mentioned by 56 per cent). This is despite the increased pressure to demonstrate productivity, efficiency and maintain a clear sight across matters when legal teams may span different geographies and working patterns.



As a Microsoft legal industry software specialist, Repstor has a deep understanding not only of Microsoft software but also the matter management lifecycle. This helps ensure an intuitive user experience. The more instinctive it is for legal teams to standardise their content management as part of the way they already work, the greater the take-up and the bigger the impact.

Repstor specialises in delivering a complete Office 365-driven legal matter management solution which doesn't require big change, big investment or big upheaval, yet improves the ROI of existing software investments and provides the results and supporting analytics that are expected now.



Find out more about Repstor's Office 365 matter management capabilities at www.repstor.com