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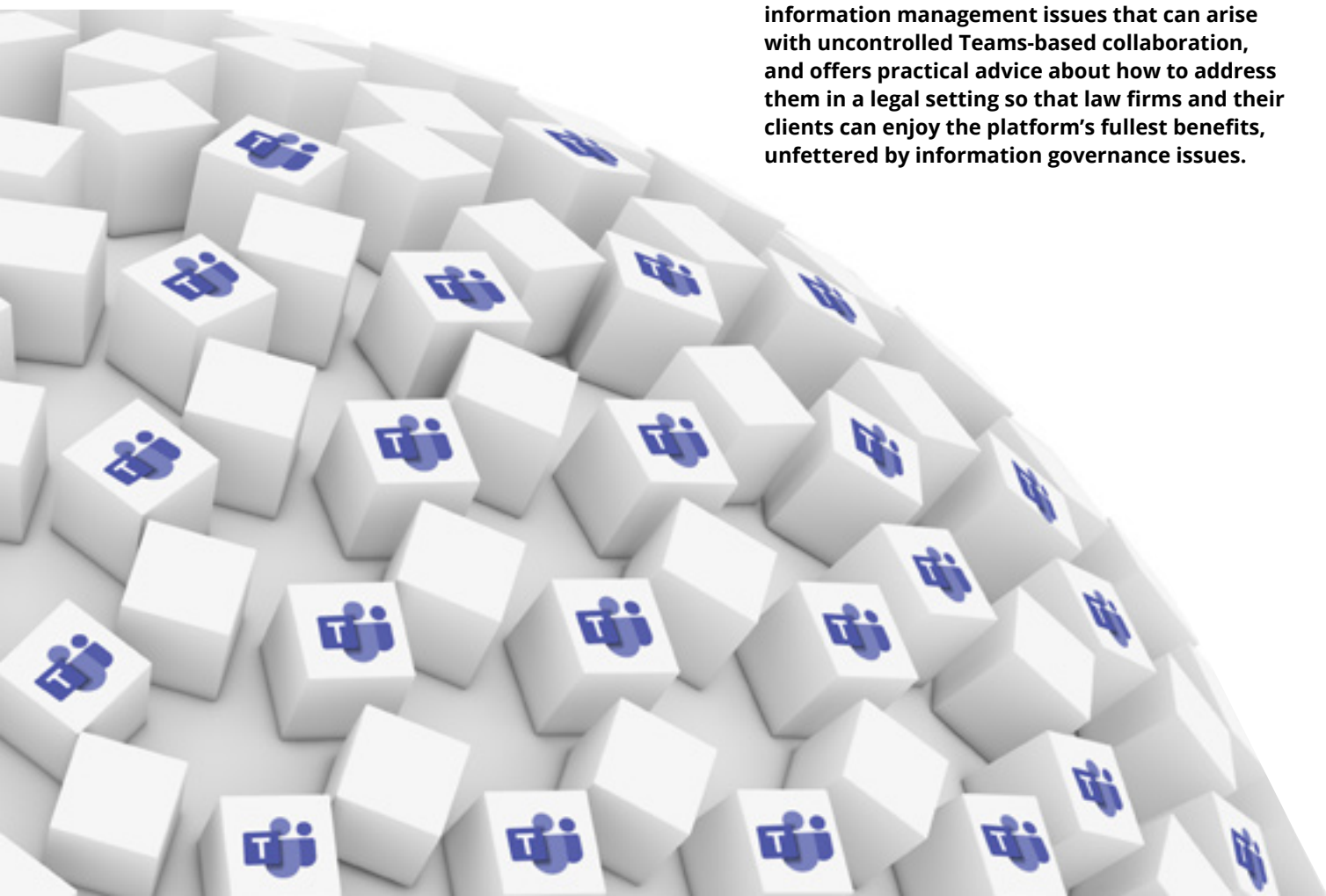
**5** **ways** to keep control of matter management as **Microsoft Teams** becomes the default collaboration platform for legal professionals

Microsoft has made no secret of its ambitions for Teams as the default platform for workplace collaboration. Teams now replaces Skype for Business, for instance, providing a secure central hub for all kinds of routine communications, conferencing and information sharing - both internally, and externally with clients and business partners.

It is no coincidence that use of Teams by law firms and corporate legal departments has risen sharply. These users, along with all sorts of other information workers, have embraced the platform with enthusiasm - in this case defaulting to Teams for project, practice area and client/matter-related collaboration. Around the world 13 million people now use Teams daily, according to recent Microsoft estimates<sup>1</sup>, and those numbers are growing daily.

But with this exploding Teams-based productivity come some risks from an information and document management perspective. In a legal context, it is important that firm-related communications and interaction with content are still coordinated with consistency, so that the latest outcomes and versions of documents are easy to pinpoint. There also needs to be robust security provision, to ensure that sensitive materials and related communications cannot be circulated to unauthorised recipients, within or beyond the organisation's boundaries.

**This paper sets out some of the most common information management issues that can arise with uncontrolled Teams-based collaboration, and offers practical advice about how to address them in a legal setting so that law firms and their clients can enjoy the platform's fullest benefits, unfettered by information governance issues.**





## Why has Microsoft Teams been such a hit with users?

Microsoft Teams dispenses with the need to use multiple disparate applications to view and work on projects such as legal matters. It provides a single, protected hub and a single coordination point for everything legal teams need - including chat, meetings and calling, as well as customisable planning and task management. It's also very easy and intuitive to use, and connects directly with the Microsoft Office 365 tools people use every day, for creating and editing documents, and for managing email.

More and more vendors are providing Teams integration now too, realising the vision of a Team 'hub' where lawyers can access a single logical view of their client/matter. Imagine being able to surface information from your project or document management system, your customer relationship management platform, and/or from other applications, all via a single viewpoint. Teams makes that possible.

A study<sup>2</sup> conducted for Microsoft in early 2019 found that the appeal of Teams spans five workplace priorities, with fairly equal weighting:

- 1** Saving time, because all solutions are in one place
- 2** Improving the efficiency and effectiveness of meetings
- 3** Making it easier to understand conversation context, via persistent/open chat
- 4** Creating more clarity and removing confusion from collaboration and communication
- 5** Enabling better, smarter and more informed decisions.

Teams' powerful planning and task management tools are particularly attractive in a legal context, especially for driving high-volume, task-oriented matters such as conveyancing, where there is a pressure to deliver work efficiently and cost-competitively.

Offering a single point of coordination across a whole range of information sources - from matter-related documents stored in a firm's document management system, to time recording and billing information captured in practice management or financial systems - Teams can be a huge time saver for legal professionals. It provides powerful at-a-glance status updates, without the need to switch between different applications.

Office 365's Power BI business analytics/reporting capabilities offer operations managers smarter 'business' insight, too, boosting productivity monitoring and financial management.

<sup>1</sup>Microsoft Teams Reaches 13 Million Daily Users: Microsoft reveals daily user numbers for the first time, UC Today, July 2019

<sup>2</sup>The Total Economic Impact™ Of Microsoft Teams: Improved Employee And Company Performance - A Forrester Total Economic Impact™ Study Commissioned By Microsoft, Forrester, April 2019

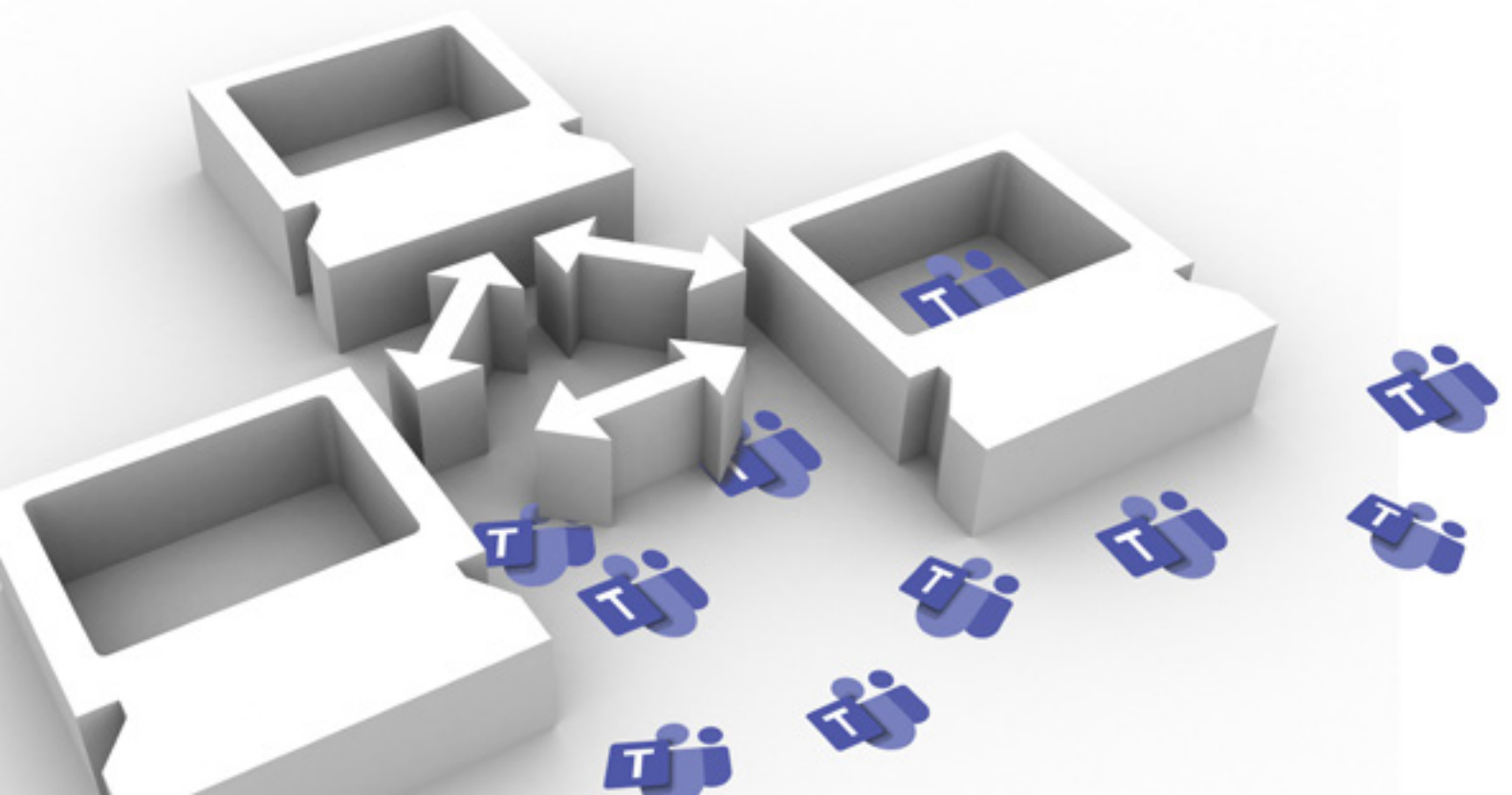
## The flipside of fast adoption: **loss of control**

However enthusiastic knowledge workers might be about using Teams for everyday collaboration, for IT departments and information compliance officers, the proliferation of Teams is a mixed blessing. After years of perfecting information policies and adhering to the latest Data Protection requirements, the last thing they want is to undermine those efforts - by allowing employees to start sharing sensitive matter content too freely, or losing track of where everything is. Over time, Microsoft will add more discrete functionality to take care of this, but in the rush to default to Teams, there is a risk that users could create chaos initially.

Certainly, it is not advisable to give individuals free rein to set up Teams as they see fit. If there are no controls around Team lifecycle management, including agreed formats or naming conventions, it will be difficult to keep track of information flow and matter status. Eventually, without structure and rules, legal professionals themselves will become frustrated if they cannot readily locate the information they need.

Where law firms have existing legacy document stores, it is important that Teams are able to point to and publish updated documents back to that primary repository. This will prevent errors, as well as time lost to tracking down the right files and information when legal professionals are working on a particular matter.

To ensure optimal productivity via Teams, but without any of the risks of poor information hygiene, there are some proactive measures legal teams can take to avoid content management anarchy and get the most out of the platform:



# 1 Cohesive matter management & visibility

If legal organisations give their professionals and support staff unlimited freedom in their ability to set up and manage new Teams, the overarching risk will be that of potential overlap and/or a lack of easy navigation and search-ability between diverse matter-related discussions and content sharing. One Team might be discussing one aspect of a matter, while another might be concerned with time/resource allocation and billing, some other aspect of the case or a separate or new requirement for the same client.

To avoid random, uncoordinated creation of Teams around particular clients or client matters, those with control need to ensure three things: (1) the creation of Teams that are linked to existing client or matter content stores and information; (2) that there is clear visibility of, and linkage between, existing Teams that may be related; and (3) that there is some level of control over who can create new Teams and the parameters used to define and format them (to make light work of search/navigation). Reducing the scope for ad-hoc Team creation should also reduce the risk of sensitive information being shared carelessly, potentially breaching information policy or regulated data protection measures.

**All of these controls can be set within our Repstor Custodian for Legal product suite, which provides robust governance of collaboration and information management natively within Office 365, across Microsoft Teams and any linked content repositories.**



## 2 Naming conventions and classifications

Applying standard names and classifications to Teams is an important aid to navigating Teams, finding the latest status information quickly, and applying any controls related to information privacy or retention (e.g. how long content should be kept for, before it is archived or deleted).

Custodian for Legal encourages the use of agreed/standardised names and details of Team properties, making it easy to locate and link related Teams and apply these kinds of discrete controls. It provides easy, intuitive navigation using a hierarchical approach to related Teams - such as sub-Teams for linked matters or their dependent elements - and uses customisable graphical dashboards to present these to legal professionals or finance teams, for easy at-a-glance viewing.

Benefits of this structured approach include rapid access to client matters, and scope to add links to external information as needed. Custodian for Legal also supports integration with Power BI reporting to provide an interactive reporting portal, driving proactive insights from Team activity where beneficial. Operations managers may find this facility particularly useful for billing, honing resource management, and for demonstrating legal teams' performance and 'business' contribution.

## 3 Content coordination across platforms maximising DMS compliance

Importantly, Custodian for Legal can provide links to document management systems, where these constitute the organisation's main systems of record. This allows for the free flow of documents between existing systems and Teams, with a complete audit of changes within the system of record.

In conjunction with its Repstor Affinity automated email filing capability, managed natively from within Outlook, Custodian for Legal also keeps control of email-based matter activity. It ensures that matter-related correspondence and attachments are stored in the main content repository, yet can be linked easily to Team collaboration spaces, while observing any privacy/compliance controls that have been set.



## 4 Security and sharing

Increasingly legal professionals need to be able to collaborate routinely or in ad-hoc ways with clients and other external parties, as well as across their own department or organisation. But this could introduce additional privacy and security implications without the right safeguards in place to lock down sensitive matter content. Even when professionals are using private channels to share content, it is necessary to secure sensitive matter-related documents or information, or GDPR-protected data.

By applying structure and governance, whether via approvals and/or strict classifications, it is possible for firms to give legal professionals the freedom to collaborate productively across boundaries, without risk of information leakage.

## 5 Lifecycle management/ classification continued

Whether from an IT/Teams decluttering perspective, or for regulatory reasons, it's important that Team workspaces and the information within them are not allowed to linger indefinitely on servers or in archives.

Strong, structured classification and automated, rules-based lifecycle management, as available through Repstor Custodian for Legal, ensure that nothing is left to chance and that Teams are archived or deleted at the right time. There is even the facility to issue timely, automated reminders to the matter's primary handler to update a Team's classification or move to the next lifecycle action if a Team is now redundant.

## Freedom through control

The more control and peace of mind that legal organisations and their IT support teams have with Teams, the more they can promote the platform as an aid to matter-based collaboration, harnessing users' instinctive preference to use its many features to support the way they like to work.

Ultimately, the goal should be to allow legal professionals the freedom to communicate and collaborate spontaneously - as well as systematically - supported by a structure that will serve them well in the future.

Repstor Custodian for Legal has all of this covered, natively within Office 365. We add the controls that matter, and can help legal teams cut to the chase with pre-populated Team task planners for different legal matters, all linked back to preferred document management systems.





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