

LAW FIRMS AND CORPORATE LEGAL DEPARTMENTS RUSH TO MICROSOFT 365:

TAKE THE LAST STEP ON THE MICROSOFT 365 JOURNEY TO A UNIFIED LEGAL ENTERPRISE SOLUTION



epona



SUMMARY

For law firms and corporate legal departments, quick and safe access to information is the key to their success. Microsoft 365 offers them the tools to accomplish their goals, but often the already available tools are overlooked or misused. This means they don't fully benefit from all the amazing features Microsoft 365 has, and they are not fully utilizing their investment in the Microsoft 365 platform. This whitepaper explains the next steps organisations can take to start using Microsoft 365 as a unified legal enterprise solution.

THE VALUE OF MICROSOFT 365

For most modern law firms and corporate legal departments, access to critical information can determine the success or failure of a project or a matter. The relevant information regarding a case needs to be available to the key knowledge workers on the matter, whether they are at home, on the road, or in the office. It also needs to be easy to access, and totally secure. And it would be great if the worker could access those files from any device, computer desktop or mobile.

Law Firms face tough security requirements by way of their chosen profession, as well as from compliance laws and security standards driven by their clients. Law firms also need to be more cognizant of their technology expenses as profitability during challenging times such as these can turn quickly. Many institutions, including law firms, are finding that overlapping technology spending is no longer a luxury worth affording. Microsoft 365 has crystallized these challenges by making it easier to choose a single platform to resolve all these challenging issues, and lower technology infrastructure costs at the same time.

Firms are finding it harder to justify the spend, and more difficult to maintain and support multiple tech solutions for interrelated tech functionality. Law Firms are now starting to realize that the cloud as an infrastructure solution, especially as provided by Microsoft is the future.

THE FIRST STEP: E-MAIL - MICROSOFT EXCHANGE

In 2017, when Office 365 was exploding, and the largest corporations were moving in enmasse to it, law firms took a more conservative wait and see attitude towards the platform. By 2018, the debates surrounding the security of the Microsoft Cloud had given way to the rush of firms dumping 'in house' Microsoft Exchange servers for Microsoft 365 Exchange Online. The benefits were immediate and immense. No more hard drives that are filled up, no more updates, no more expensive hardware, and finally, no more IT maintenance. Less work, less cost, and more reliability without any change to how users work, was the value proposition.

Nearly every firm we talk to has Exchange Online now. I cannot recall the last time I spoke to a firm that did not. What this means is that the fundamental big picture question of Cloud based security in general had been answered. The cloud was secure. However, this does not relieve the firm from executing the myriad of security elements to make their cloud truly secure. And henceforth, the issue of Cloud Security was in the rear-view mirror because once your email is in the cloud, so are your documents, as most documents are now emailed.

STEP 1

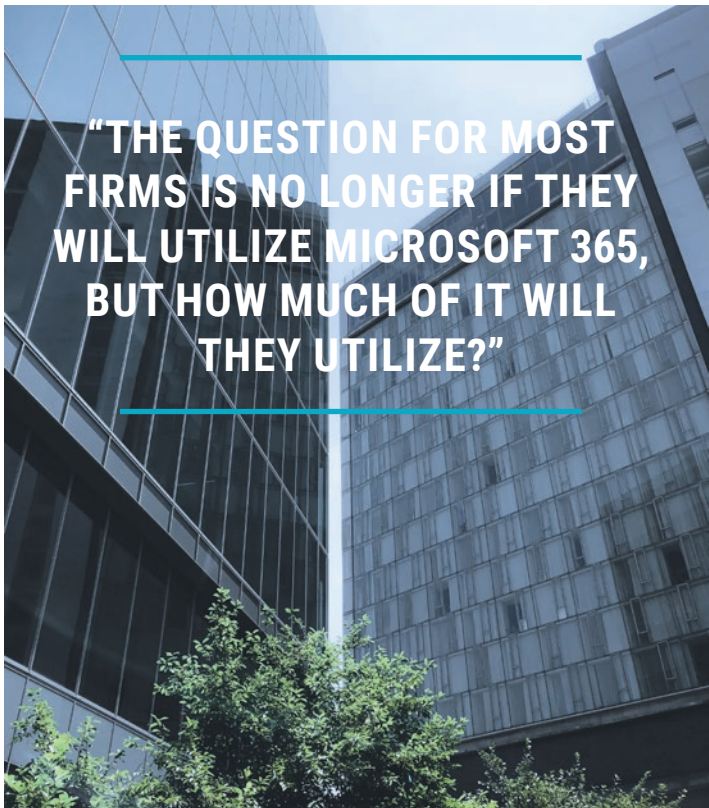
THE SECOND STEP: INTUNE

Larger firms have used VDI (Virtual Desktops) for ages. Smaller firms have had the desire, but not the ability, or the means. What does having a Virtual Desktop mean? It means that the Firm or the Enterprise can fully control 'what' software is installed on each user's computer. It also means that IT has centralized control over security, software updates, usernames/ passwords, and more. Lastly, it means that Firm IT can simply 'end' a computer or laptop if it is breached or stolen, since the hard drives are encrypted, the security is maintained.

When Microsoft 365 offered Intune, the adoption rate was slow. But now, firms of all sizes (the very large to the small) are now taking advantage of Intune, as they can have centralized control over nearly every aspect of their user's computers, including what software is installed, what mobile device apps are deployed, and the integrations and other functionally useful apps. All of this can be done from a single Microsoft 365 user interface. The utilization of Intune being seen across the industry is eye-opening. It is especially critical during COVID-19 times when individual users are using remote network connections from home. And, the risk of data loss or capture from external threats has increased due to the fact that not everyone has an IT security team at their home.

The implication of this is a 20 user firm can now deploy a cost effective, standardized, and unified desktop with world-class, billion dollar grade security for a fraction of the cost that AMLAW 100 firms paid to deploy back in the early 00's. And for the large firms, having a single location where all the desktop elements can be controlled has lowered costs, and increased reliability of the security models for the firm.

STEP 2



“THE QUESTION FOR MOST FIRMS IS NO LONGER IF THEY WILL UTILIZE MICROSOFT 365, BUT HOW MUCH OF IT WILL THEY UTILIZE?”

THE THIRD STEP: TEAMS

At the 2019 ILTA Conference, the most attended sessions were the Office 365 tracks. Granted, it is anecdotal, but from an interested observer's perspective [mine], users of Microsoft 365 were now starting to drive their firm's innovation. From the questions asked of the speakers, to the comments made by attendees, instead of the traditional "IT or Management" dictates of new tech solutions being rolled out, end-users were simply clicking buttons for apps in the App Launcher of Microsoft 365.



This was creating anxiety for IT. While simultaneously, the firm's end-users were generating new collaboration and work models organically, utilizing the capabilities that the Microsoft Teams application provides. What started as a cool idea, with lots of powerful uses, was now over running the firm IT departments.

What can Microsoft Teams do for your organization or law firm? The single most loved feature set for users is the notion of a "Team" having "all" the work product (Documents, Tasks, Video Calls, and Chat) in one place. With chat also being searchable and persistent (it does not delete itself), added to the massive increase in collaboration, while reducing email, the old-style way of collaborating. Once COVID-19 arrived, Teams adoption skyrocketed. I recall reading a blog post from Microsoft in May of 2020 stating they had hosted three (3) billion "video" call minutes in a single day.

Getting back to ILTACON 2019, with a myriad of questions being asked of the speakers, one IT Director leaned over to me and said: "This is the classic case of the not seeing the forest for the trees." I turned my head sideways like a dog does when he sees something that is perplexing. What my colleague was pointing out was that Teams is built-on top of SharePoint. Large firms that have let Microsoft Teams expand throughout their enterprise are now grappling with the fact that lawyers are using the easy to use, built into Teams, SharePoint document storage to save matter related information in Microsoft 365.

This is in lieu of going out of their way to store them in what is becoming another data silo of unintegrated software, a/k/a, the legacy document management system. Microsoft probably already knew this would happen, but the fact that large and small firms are now seeing the value of Teams, and are investing more heavily into that solution. This will eventually mean they will want their documents in the same place as they are already working. In other words, the next big step is coming, and the end-users are driving it.

TAKE THE NEXT STEP

The rush to Microsoft 365 started with reducing costs by getting rid of the local Exchange Server. Then IT realized they could get a much better handle on every machine in the enterprise, and control the mobile apps, security, and their data by using Intune. This led to lawyers and knowledge workers discovering new, useful



capabilities within Microsoft 365 that aided in their productivity and required little to no training on its use or deployment. Microsoft Teams is the most popular of the Microsoft Apps that end-users are using without being prompted or pushed into. Other popular Microsoft Apps that are being adopted on a large scale by end-user driven adoption are the Planner (soon to be renamed "Tasks") and Todo apps. With Todo, users can flag an email in Outlook, and it will become a task item in Todo, which can be renamed and assigned to others. Cross-platform, native integration is happening within the entire Microsoft spectrum of Apps. The rush to Microsoft 365 is real, and the number of firms adopting these solutions is unprecedented.

THE NEXT OBVIOUS STEP IS INTEGRATING TEAMS USAGE WITH TRUE LEGAL DOCUMENT MANAGEMENT SOLUTIONS

And yet, the rush is only just getting started. The next obvious step is integrating Teams usage with true Legal Document Management solutions built right into the law firm's Microsoft 365 Tenant. Why? Firm's IT are now seeing documents being stored in Teams (SharePoint), or the lawyers "Personal" [for Business] OneDrive's (ostensibly SharePoint), or worse, back on the desktop since users are spending most of their time in Teams. Emails are still stored in Exchange, but now legal professionals want their emails, their chats, and their documents, each accessed in different Microsoft Applications, integrated into one dashboard-like experience.

Companies like Epona have risen to meet that demand and fill in the gaps between a native Microsoft environment, and one designed to work as a Document Management System. Epona has developed full on Legal DMS solutions (as well as Enterprise DMS Solutions) that integrate natively with Teams and are built on SharePoint, giving firms a way to take even more advantage of their investments in Microsoft 365.



As of today, firms can use their tenant to deploy a Legal DMS that includes Records Management, Litigation Hold, Workflows, Intranets and Extranets, AI/Machine Learning for Automatic Document Metadata profiling, predictive email filing, automatic OCRing of PDFs, and have the entire DMS for a fraction of the cost of the old legacy systems, all under the same roof of Microsoft 365.

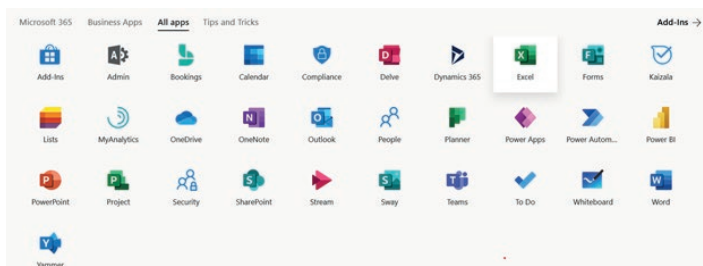
Since the 4th Quarter of 2020, large and midsized firms can utilize Microsoft 365 SharePoint Syntex to have the system “read” their documents, find the correct words in the document, and use the learned machine process to automagically apply metadata properties to the documents with no profiling required by a user. Corporate Legal departments can utilize Microsoft Power Automate (Workflow) to create contract execution processes, as well as Microsoft 365 Business Information to deploy fully capable, flexible, and custom Contract Management systems.

The next step begins by storing all your documents in your Microsoft 365 tenant, and then creating dashboards, or AI/Machine Learning/Business Information models to make your firm or business even more productive. Microsoft has leveled the playing field and simplified the process for deploying World Class, Enterprise Grade IT Solutions. It has done this while also lowering the costs for law firms and businesses, both large and small. We are merely at the beginning of this next wave of capabilities, and they are being deployed by firms of all sizes as well as by Fortune 500 companies. The only question that remains is will your firm be the last to adopt the future, or amongst the leaders?

TAKE THE LAST STEP ON THE MICROSOFT 365 JOURNEY TO A UNIFIED LEGAL ENTERPRISE SOLUTION

If you think through what Microsoft 365 is, you will eventually arrive at the conclusion that it is a single platform with nearly all the key digital solutions that businesses and firms require. The entire solution set of Microsoft 365 works best, when all digital documents and emails are stored in it. Once you have done this, you can begin the process of knowledge management and extraction of information, workflow process development, and reporting.

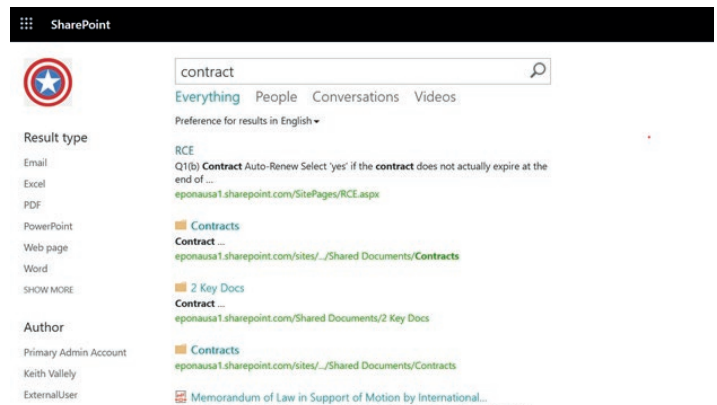
Getting it all to come together begins by fully utilizing Microsoft Exchange/Active Directory and SharePoint. As I mentioned in my earlier article, firms began moving forward on deployment and utilization of Exchange and Active Directory in 2017. The deployment of these two Microsoft solution components mean firms are now



MICROSOFT 365 CONTAINS A WIDE REACH OF APPS

using Microsoft Security settings (through Active Directory, and Intune/Endpoint) and at the same time, nearly 70% of their work product (or communication & correspondence) is being hosted by Microsoft Exchange by way of email utilization.

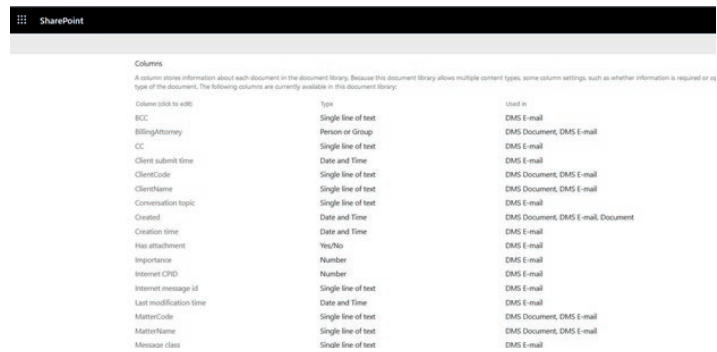
When you take the next step, and deploy SharePoint Online which must include configuring (with the help of companies like Epona www.epona.com) it to function as a legal or non-legal document management / content management system with email management included, your company/department/firm will be in a position to begin to use all the data that your firm stores in the Microsoft 365 platform.



PROPER CONFIGURATION LEADS TO BETTER CONTENT FINDABILITY

Why is proper configuration of SharePoint so critical for utilization of Business Information, or Workflow, or Records Management, and so on? Documents and Emails are structured internally but not stored in structures. SharePoint is a structure where documents and emails can be stored. The act of storing content in SharePoint can be a productive task for the content, or an unproductive task, but in either case, the time it takes to store the content in SharePoint will be the same for the enduser.

Out of the Box SharePoint Search is powerful when correctly setup. However, giving documents and emails tags and metadata properties makes search significantly more useful. SharePoint Search will give users a means to search and find any document or email based on content within the email or document. However, if what you know about the content is just a shred of its content, being able to filter the search becomes more important than the search results themselves. Tags and Metadata properties help with this.



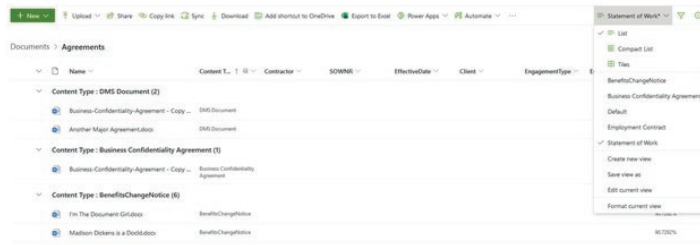
PROVIDE CUSTOM TAGS AND METADATA PROPERTIES FOR BETTER DOCUMENT CLASSIFICATION ABILITIES

THE FINAL STEP

SharePoint can be configured in a myriad of ways. For example, if Retention Policies for content are critical to your enterprise, then SharePoint sites can have default or flexible policies that can be established on the SharePoint Site Level or on a Folder or Document level. Setting these configuration settings prior to storing content into SharePoint would be the best practice.

Another configuration setting that is critical is the SharePoint concept known as views. A view in SharePoint is useful, because it can filter what is visible to a user so that the content in a Matter or Workspace can be displayed in ways that are helpful to the users. As an example, let's pretend you are working on a class action litigation process where 1000's of pleadings are submitted to the court. Let's assume you have made the organizational decision to have a folder in your matter or workspace site titled: Pleadings. The users in your firm have put all 2000 pleadings in that folder.

If users have taken the extra step of identifying a status to these pleadings, then a view can be utilized to filter out rejected pleadings, as well as pleadings in the draft state. Moreover, these metadata properties that are set on documents in the Pleadings folder can also be utilized by dashboard technologies, and Business Information processes to make other assessments that are of value to the firm.



FILTER AND ORGANISE ALL AVAILABLE CONTENT IN A MATTER

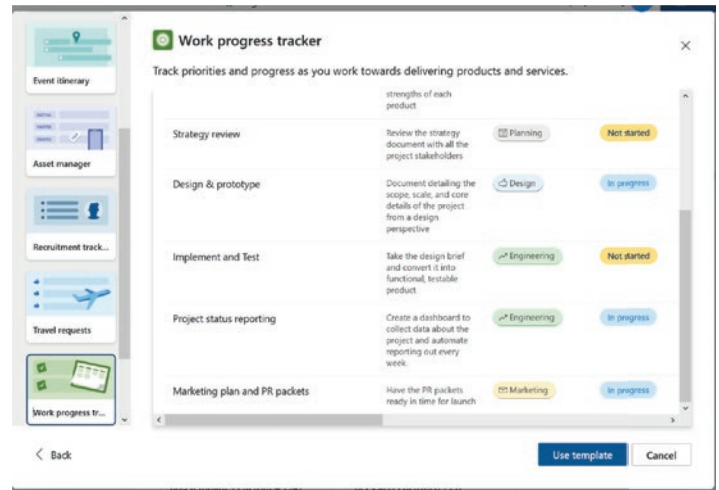
The point here is that a properly configured SharePoint instance can yield reporting and other elements of enterprise or firm knowledge that only can be accessed if SharePoint is configured to apply tags (metadata) that can then be of use to reporting systems in Microsoft 365. Below is an example of a Contract Management system that has been deployed in SharePoint wherein every "Contract" in the entire DMS can be found in a single interface if the document is tagged as a Contract.

Contract	Matter	ExpirationDate	ContractType	ContractStatus
Interim Order Granting Motion to Approve Debtor in Possession	CVS Health / Merger Control and M&A (2020-0124)	5/12/2022 10:00:00 AM	Confidentiality Agreement, Non-Disclosure Agreement	Executed Agreement
Letter to Ford Motor Company - Copy	CVS Health / Merger Control and M&A (2020-0124)	5/12/2022 10:00:00 AM	Confidentiality Agreement, Non-Disclosure Agreement	Executed Agreement
Interim Order Authorizing Employment of Weil, Gotshal & Manges LLP as att...	CVS Health / Merger Control and M&A (2020-0124)	5/12/2022 10:00:00 AM	Confidentiality Agreement, Non-Disclosure Agreement	Executed Agreement
Interim Order Granting Application to Employ Andrew & Kurth LLP as CVS Health / Merger Control and M&A (2020-0124)	CVS Health / Merger Control and M&A (2020-0124)	5/12/2022 10:00:00 AM	Confidentiality Agreement, Non-Disclosure Agreement	Executed Agreement
Agreement and SOW for Object KKKK	Qualcomm / Real Estate (2020-0158)	1/1/2022 10:00:00 AM	Distributor agreement	In Draft
KiaXa Image Products Inc. Asset Purchase Agreement	Qualcomm / Real Estate (2020-0158)	1/1/2022 10:00:00 AM	Distributor agreement	In Draft
M&G Western Aircraft Systems Inc. Aircraft Purchase	Wal-Mart / Treasury matters (2020-0114)	6/06/2021 10:00:00 AM	Lease Agreement	Executed Agreement
Alkerm Corp. Acquisition Agreement	AIG / Reorganization (2020-0142)	5/12/2021 10:00:00 AM	Confidentiality agreement	Executed Agreement
Office 365 for Mac Installation Guide	Bank of America Reorganization (2019-0111)	2/5/2021 8:00:00 AM	Confidentiality agreement	Executed Agreement
General Media Automotive Group Inc. Asset Purchase Agreement	Public Super Markets / Real Estate (2020-0148)	12/19/2020 10:00:00 AM	Master Services Agreement	Executed Agreement
Arco Company and Argusnet Inc. Acquisition Agreement	Bechtel Highway / Global Mobility Assignments (2020-0118)	12/17/2020 10:00:00 AM	Endorsement Agreement	Executed Agreement
BC Vancouver 250 Howe Street Lease - Onesa Inc. and Electronic Arts Canada In...	Bechtel Highway / Global Mobility Assignments (2020-0118)	12/17/2020 10:00:00 AM	Amendment	Executed Agreement
Motion to Authorize for Order Establishing Procedures for the Rejection Southern Merger (2020-0177)				

ALL AVAILABLE CONTENT SORTED BY A SPECIFIC TAG

If the documents tagged as Contract also have other elements that are part of the Contracts "tag" like value of the contract, the contract expiration, and so on, those fields that are stored on documents, can be utilized to generate workflows that identify users to be notified when the contract is up for renewal, or if above a certain value, the contracts can be routed to specific users for signature. Having properly configured documents also means workflow utilization through Sharepoint lists also becomes possible.

The screen shot below is a simple but powerful set of templates that can be utilized to setup a number of tasks, with notifications, review, and progress tracking that can be driven by web forms, and more. These lists with commensurate workflows can be deployed with active document tags for content stored within your DMS.



USE THE WORK PROGRESS TRACKER TO ORGANISE AND TRACK TASKS ASSIGNED TO DOCUMENTS

As an example, a progress tracker can be built where a form is accessed by a potential client. They fill out the form, and data in the form is inserted directly into the workflow you see below. The workflow then takes over and sends out an email with a letter of engagement. The letter of engagement has form fields within it so that all parts of the engagement letter are filled in. This is done directly from the form the prospect filled in.

New item

Content Type:

Work item *

Enter value here

Description

Enter value here

Work to be done

Status

Type of work

Progress

Not started

Current state of the work item

Priority

Add the priority of the work

Start date

BUILD CUSTOM WORKFLOWS FOR DIFFERENT CONTENT TYPES

Once the letter of engagement is sent, an email will be sent internally, to a specific intake person who then calls to confirm the prospect is interested in the engagement and has received the email. Date confirmed by the agent, she can check a box, and that will automatically create a matter in the system and send an email to the billing department to create an account. All you need to get all of this capability is a \$20 per month user license. Oh, and the skills and desire to build the workflow. Or the website address of www.epona.com to name one of many companies who are ready to assist you.

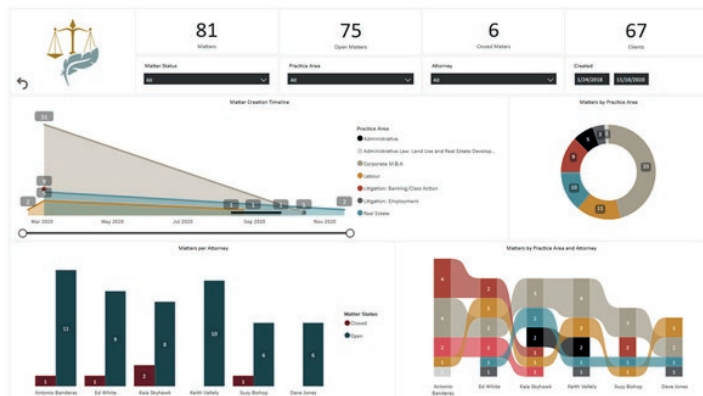
Matter Progress Tracking

Work Item	Description	Status	Progress	Priority	Start date	Due date	Assigned to	Notes
Collect Opposing Counsel Data	External Contacts Gathering	Contract Review	Progress	Medium	December 1, 2020	December 31, 2020	John Dzwonk	
Get the task done		Planning of Cal.	Progress	1 Step	November 9, 2020	December 24, 2020	Kate Skyhawk	
Review Contracts	Contracts need to be reviewed	Contract Review	Progress	1 Step	November 8, 2020	December 28, 2020	Kate Skyhawk	Please Follow Up with Client
Sales Research Data for Providers	External Provider Data Site research	Review of M.E.	Review	Low	October 2, 2020	December 11, 2020	Kate Skyhawk	Take Office time changing Area for client meeting

GET A QUICK OVERVIEW OF CURRENTLY ACTIVE WORKFLOWS

Next level Business Information can be garnered from the already in place data that is used (or pulled from an Accounting or Practice Management software) when creating matters or workspaces. This information can tell Firm or Department Managers what is actually happening in the business, and how many projects are being managed by whom for what practice or business units. In the screen shot below, you can see how a manager of a department or division, or a practice lead or firm administrator can tell management who is working on what, and to what extent personnel resources are being utilized.

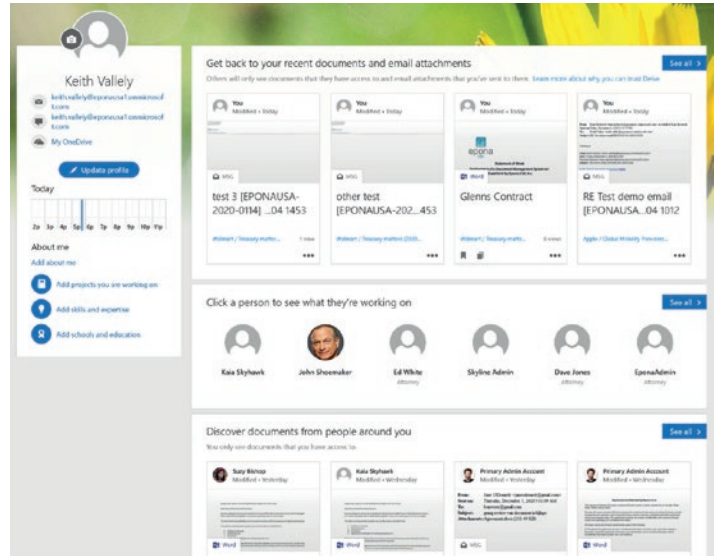
Matter Center Dashboard



CUSTOMISABLE DASHBOARDS CONTAIN IMPORTANT KPI'S AND MANAGEMENT INFORMATION

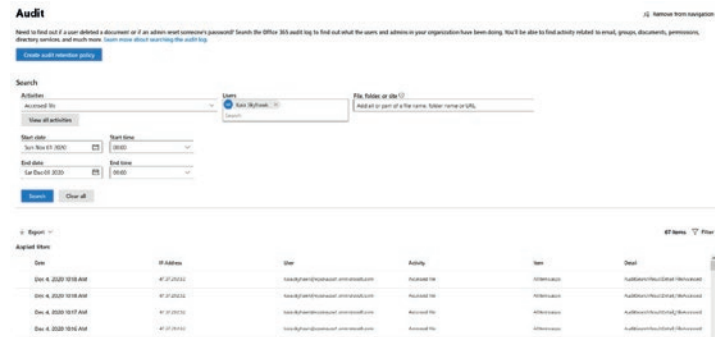
The final step begins when you have completed the step of full utilization of SharePoint as your content storage and email management platform because you have taken the time to make all your documents and emails part of a larger data picture that incorporates Business Information and Workflow processes.

Microsoft 365 has also given power to the users to be able to identify what their teams are working on, and what they themselves are working on so that each user can have a consistent and useful overview of their work tasks, the documents they are working on, and where they spend their time all day. Utilization of Delve assists users in better understanding what they and their teammates are working on.



MICROSOFT 365 HELPS USERS IDENTIFY THEIR MOST IMPORTANT TASKS AND AREAS OF ATTENTION

And finally, what good is all this capability if the system does not give Administrators the ability to analyze who is logging in, what documents have been deleted by whom, and when? Comprehensive dashboard auditing and logging are yet one more thing that makes Microsoft 365 the platform that answers nearly every firm or business platform requirements. As you can see below, the power of the audit screen is obvious from just a simple screen shot.



AUDITING INFO HELPS ADMINISTRATORS ANALYSE THE USE OF THE PLATFORM

MICROSOFT 365 IS THE CURRENT AND FUTURE OF BUSINESS ENTERPRISE, LAW FIRM, AND LEGAL DEPARTMENTS

The rush to the platform is real. The reasons for it are simple and straightforward. There is no "answer" for the Microsoft 365 solution set from any other solution provider if you are seeking world class, best of breed solutions and nominal costs. The fact that on premises Exchange Servers are rarer by the week proves it. What many can see already is that if your Firm or Enterprise is willing to properly configure the lego set of options that is Microsoft 365, your costs will go down on IT and your efficiencies and capabilities will go up.

Take the next step with Microsoft 365 and visit www.epona.com to help you make your final steps on Microsoft 365 a snap.



Take the next step