



Practice Primer:

Microsoft 365

Microsoft 365 In Depth – What is Microsoft 365?

In 2011, Microsoft announced their Office 365 cloud-based product suite (as it was known then – it was only in April 2020 that Office 365 became Microsoft 365).

The hosted email server, Exchange Online, was a core product of this new service, made available through subscription-based licences, guaranteeing you would always be able to access the latest features on a platform with built-in resilience well beyond any on-site resources.

That was a very compelling offer indeed. No longer did we need to worry about failed servers, running out of disk space or huge licence costs when it came to upgrading to the latest version.

For that reason, a significant number of law firms migrated their on-premise email systems across to Exchange Online and switched off the bulky email server stowed away in their office server room (or cupboard in some cases!) for good.

Other firms simply saw Office 365 as a new licencing model enabling them to undertake Office suite upgrades on a per user per month basis whilst retaining their on-site Exchange platform.

However, we've noticed that the foray into Microsoft 365 for many law firms ended there. There is an abundance of applications in Microsoft 365 (besides email) that have the potential to transform business operations.

What is Microsoft 365 exactly?

Put simply, Microsoft 365 is the collective name for Microsoft's "software as a service" application set that features a range of distinct applications. There are the familiar products you may have heard of such as Outlook, Word, Excel, and Teams.

There are also other products that you may not have heard of such as Power Automate, Power BI, Stream, Forms and Bookings. As well as the user application products there are also products which are platforms in their own right, such as SharePoint and Dynamics.

These products are generally purchased together in bundles, available as an annual or monthly subscription.

If you have a subscription TV package, it's a bit like that. You start with your standard package, offering a number of channels for a set price per month, however, before long you decide you want to access the sports channels too.

You therefore upgrade your package to include these channels and pay a little more each month for it.

Microsoft 365 works the same way. You may start with the email only subscription, Exchange Online.

At a later date, you are keen to provide your staff with the ability to make video calls and access some file sharing capabilities. The Microsoft Teams and OneDrive applications facilitate these requirements, so you decide to upgrade to the Microsoft Business Basic subscription that provides access to the applications.

This slightly increases the per user per month cost.

In fact, with a little exploration, the Microsoft 365 cloud offering provides an eco-system that allows firms to collaborate, automate and secure their business across multiple products bundled into various subscription packages.

For example, use Microsoft Planner to manage your business projects and assign tasks to team members. You could use Microsoft Stream as your own private, corporate YouTube streaming service.

On the automation side, you can use the Microsoft Power Platform to create your own applications for staff which can also automate your business processes.

What has really struck us about the Microsoft 365 applications is how they provide a compelling alternative to expensive third-party products. For example, I've seen law firms ready to spend tens of thousands on a new intranet. When they have seen how easy it is to create an intranet using Microsoft SharePoint (which is likely to already be included in their Microsoft 365 subscription), they have quickly changed their technology strategy and ended up saving a tidy sum.

We have recommended this approach to several clients who have successfully implemented their Intranet in this way.

In the highly regulated legal sector, the data protection tools and commitments made by Microsoft around its 365 offering provide a high degree of assurance. Specifically, Microsoft has added a range of GDPR tools to the platform to help deal with things such as subject access requests and data retention.

Earlier on, we referred to Microsoft 365 as an eco-system. The reason for this is that Microsoft 365 products do not work in isolation to each other. They can integrate and provide a rich user experience.

During this Practice Primer, we will focus on the three pillars of Microsoft 365 – security, collaboration and automation.

We will take a look at the product set in more detail and hope to provide you with an appreciation of how to use Microsoft 365 in your business.



Collaborating Effectively in Microsoft 365

We take a closer look at the collaboration tools available on the platform. In the current situation, with workforces spread geographically whilst working from their homes, the ability to effectively collaborate remotely has never been so important.

Perhaps the best-known collaboration tool in Microsoft 365 right now is Microsoft Teams. Teams is commonly compared to the video meeting application Zoom. However, there is so much more to help organisations collaborate, with video conferencing being just a small part of the available toolset.

A 'team' within Microsoft Teams can be created around any group or sub-group in your organisation. For example, you may create a Team for each legal and business support department within your firm. Within each Team, you can then create 'channels' to establish separate topic areas. For example, the HR team may decide to create channels for appraisals, training and pay reviews.

From there, functionality within each channel allows you to establish discussion threads, groups of files, a knowledge base etc.

However, collaboration does not stop with Teams. Microsoft 365 contains other tools that allow the collaboration with others, depending on the situation.

Document management is a hot topic for law firms and there is a wealth of specialist document management platforms available.

However, some firms do not wish to go to the expense of a best of breed approach. SharePoint Online is another Microsoft 365 product that may suit some firms with straightforward document management requirements.

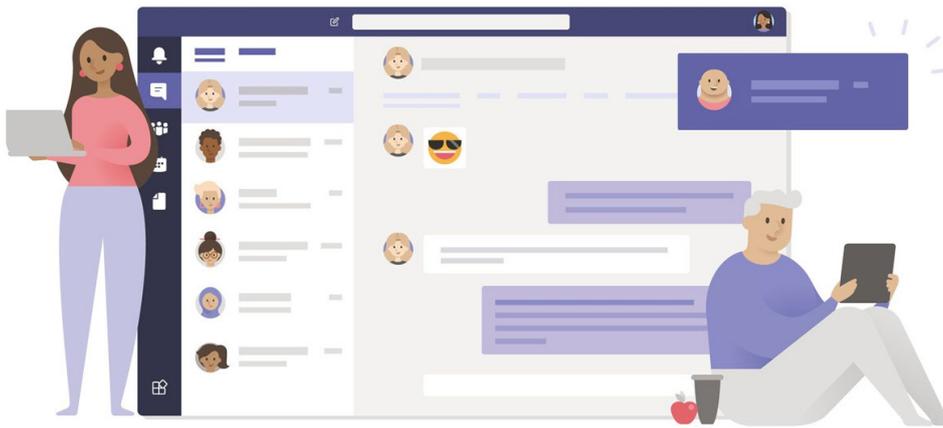
SharePoint was originally created as a web-based document collaboration platform, but its use varies from firm to firm. For those seeking to utilise its document management capabilities, you can expect advanced versioning, security and workflow as part of the standard functionality.

Many firms have taken the capabilities of SharePoint to use it as an information portal for staff – like the traditional intranet with SharePoint pages easily built by anyone. It's like a basic website builder but comes bundled with easy-to-add components that allow anyone with the appropriate permissions to insert forms, reports, videos and other types of content directly into a page.

Alongside document management comes the necessity to share documents and other files, which is where Microsoft 365 OneDrive steps up to the plate and is simply a cloud-based file storage and sharing application. However, the security and collaboration capabilities of the system make it a suitable tool for firms that need to securely share files with clients and third parties without falling foul of the General Data Protection Regulation (GDPR).

Once a file or set of files has been uploaded to OneDrive, its capabilities allow the user to create a secure link which can then be sent to individuals inside or outside of the firm.

The security options allow for a password to be added to open the file and an expiry date can also be applied to the link rendering it unusable after



that date has passed. If the link is sent to a named email address, then the recipient will be required to verify their identity by entering a passcode sent to their email address before being able to access any shared file.

For firms that may be worried about a lack of visibility around what their staff are sharing, Microsoft 365 provides administrators the capability to audit what has been shared and even restrict the type of sharing options available.

Sharing files is great but there are also situations where individuals in separate locations will need to collaborate on document drafts, PowerPoint slides and Excel spreadsheets in real-time.

Microsoft 365 has catered for collaboration by introducing real-time co-authoring. For example, anyone that has permission to access and edit a Word document stored in OneDrive can make changes to that document at the same time as their colleagues. You'll even be able to see the presence of other colleagues in the document and the changes they are making. To further enhance the co-authoring experience, features such as comments in Word can be used to draw the attention of colleagues to certain sections of a document.

When it comes to project collaboration, the Planner app can

help firms manage internal projects. Planner is a hub for team members to create plans, organise and assign tasks to different users and to check updates on progress through dashboards.

Planner allows easy integration with Outlook, the attaching and viewing of task documentation by linking to SharePoint and the discussion of projects within Teams while having a Plan open.

Finally, there is Whiteboard. A very simple application that replicates the traditional whiteboard but on your PC, laptop or whichever device you happen to be using. This is great for virtual 'brainstorming' sessions where each participant is sent a link by the host to add their own scrawling. This works great if you have a drawing tablet connected!

The most powerful reason to use Microsoft 365 collaboration tools is due to the way they seamlessly integrate with each other. For example, documents saved in OneDrive can be shown in Teams and Planner, allowing users to collaborate in those spaces, rather than having to return to the OneDrive app.

Every day, Microsoft is enhancing the capabilities of its collaboration tools and we look forward to sharing more with you as the product improves further over the coming months.



Microsoft 365 Security

In the next section of our Microsoft 365 Practice Primer, we talk about the security features available as part of your subscription

I remember a time where law firms were a little suspicious of the “cloud”. How could entrusting your data to a third party be more secure than having it stored on your own servers, held in your own premises?

I was once told by a board member that he gained a degree of comfort seeing the little lights on the servers twinkling away whilst they processed the firm’s information.

Indeed there is, what I hope is an urban myth, that one firm left old kit running just to give comfort to the managing partner who liked to check in on the “flashing lights” as he walked past each day.

Ten years ago, a law firm IT Director would be faced with a slew of challenges keeping those servers running within the four walls of law firm offices. Local power cuts, air conditioning failure, hardware failure and concerns about break-ins were always just around the corner.

When Microsoft finally gave me a platform that allowed me to move my firm’s email to the security of their multi-million pound highly resilient datacentres, I gasped a sigh of relief.

Microsoft takes security seriously and is investing accordingly. In 2017, Microsoft CEO Satya Nadella announced that his company was going to invest \$1 billion on cyber security every year.

Microsoft 365 provides an eco-system that by design meets the security criteria needed by the highly regulated legal sector. Simply put it is a level of security and assurance that no law firm could hope to match. A good starting point to understand their approach is the Service Trust Portal. (<https://servicetrust.microsoft.com>)

The Service Trust Portal provides access to each security related certification held by Microsoft and it’s here you can find anything from their ISO 27001 and PCI DSS security certifications to their penetration test results. There is a certain peace of mind when a company provides access to this type of information in a totally transparent manner.

Admittedly, you will need to be a customer to view the content of these documents but sign up for a free trial of one of their cloud products and you will be able to view these documents at will.

If you are currently using an on-premises or Exchange platform hosted by any other MSP we would recommend you ask them for access to their certification, audit results and penetration tests.

Within Microsoft 365 though, there is an array of security related applications and features that provide a level of protection and assurance useful for law firms.

A great example of this is multi-factor authentication (MFA) technology. MFA is as a must-have for most firms. Used ubiquitously to protect individual's online accounts, it provides an extra level of protection beyond the usual username and password. MFA is provided as standard on all Microsoft 365 business subscriptions and can be switched on for all users.

MFA is most commonly used in conjunction with the Microsoft Authenticator app that can be easily downloaded to a smartphone.

The user will logon to the system as normal but before access is granted, the Authenticator app will prompt the user to approve an access attempt on their smartphone. This minimises the risk of unauthorised access to their data even if their username and password have been breached.

Auditing also plays a key role in the management of Microsoft 365. Once firms have migrated to Microsoft 365 and start to use applications such as OneDrive alongside email, there can be a significant amount of data transferring in and out of the firm via these online services. Firms should take some reassurance that they can automatically log key events in Microsoft 365 to an audit file, which can then be easily searched from the main interface.

For example, we can check who has shared documents from OneDrive with external parties and the type of link they have used to do this, to ensure it meets with internal security policies.



Microsoft 365 Automation

What is particularly interesting about this set of tools, known as the Power Platform, is the low code/no-code approach Microsoft has taken.

In theory, users with little or no coding experience can create their own applications and publish them for their colleagues. The traditional barriers around skills, experience and resource that prevented firms from automating their processes can be effectively removed.

We're now in an era where the FD can be given the capability to create their own reports, instead of waiting for these to be delivered by internal teams or consultants. The training on the technology is freely available from Microsoft and they even supply templates that allow you to deliver useful business tools in minutes.

Of course, traditional developers (not looking at anyone here, David) will say the new tools are in some ways actually harder than writing "direct code" as they remove the ease/power of writing code to do exactly what you want – but that is the point. The simplification of development into business terms rather than technical knowledge.

What exactly is the Power Platform?

First up is Power Automate, a tool that allows you to automate the mundane repetitive processes you undertake every day. That could be anything from sending a document for manager approval through to populating a spreadsheet from responses submitted via a survey.

Power Automate integrates with other software through a range of connectors. These are hooks into popular applications that allow you to pull and push data between them.

For example, besides the standard Microsoft connectors, there are connectors for Adobe Sign, Google Drive and Twitter.

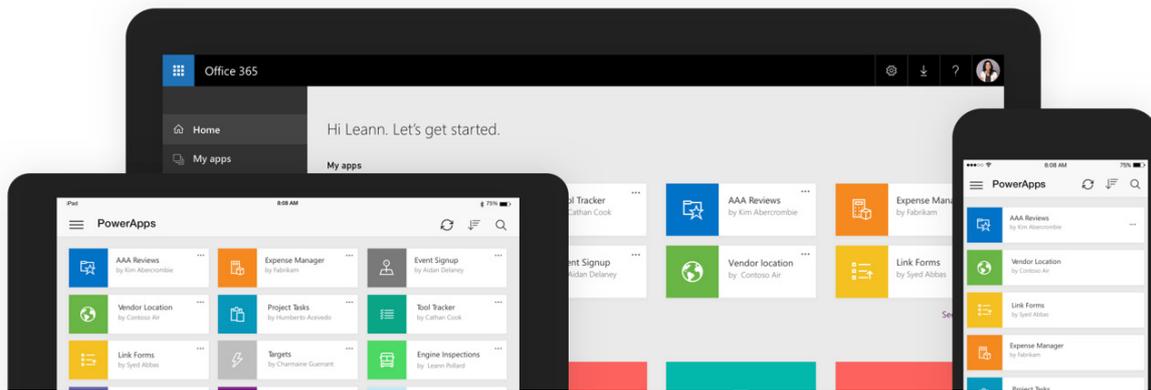
Getting started with Power Automate couldn't be simpler, as Microsoft provides hundreds of pre-configured workflow templates for you to use.

Sitting alongside Power Automate is Power Apps. With Power Apps, firms can deliver custom-built software applications to desktops and mobile devices. The quality of the applications that can be built means that Power Apps is a viable alternative for firms to traditional applications for managing expenses, booking meeting rooms and hot desks, or even creating your own automated response "chatbot" for your website.

Going a step further, Microsoft has introduced an Artificial Intelligence (AI) tool in Power Apps that can be used to analyse documents and extract pre-defined data types. A good example of this is identifying invoice fields to extract data for financial systems. It can even be used to detect key talking points within a document.

As noted above, Microsoft also provides templates for Power Apps which means that firms can quickly build their first application or learn more about the process of building one by dissecting how these templates have been put together.

The final part of the Power Platform suite is Power BI. In all honesty, I don't class Power BI as an automation tool in the same way as Power Automate and Power Apps, but it is certainly worth a mention.



Power BI is the business analytics/intelligence look which we've seen used to create dashboards for reporting key metrics such as time recorded, or fees billed. The real strength in Power BI is its ability to visualise this kind of data with minimal coding. Once a data visualisation has been created, these reports can be easily deployed not only to the desktop or smart devices in the Power BI app, they can also be embedded in other Microsoft 365 products such as SharePoint and Microsoft Teams.

I do think that some knowledge of data modelling and querying is useful to make Power BI work but the hard work is taken out of creating the visual front end.

When all these elements are combined, the Power Platform is a compelling proposition. However, there are two major things to consider.

1. Licensing & Costs

While it is easy to access and start using these tools, there can be significant costs involved in deploying them to staff or using some of the tools to interface with clients. When considering the use of the Power Platform it is always worth undertaking a cost-benefit analysis before committing time to development.

2. "Wild West"

Given the ease in which applications can be deployed (and the lack of technical skills/ traditional change management processes) of those developing them, it may become hard to maintain and support the application environment. Especially when considering these applications/processes can be automated responses to data events (receipt of email/change of a value in a database).

For example, one process may automate one process which then inadvertently triggers another process created by another user.

This concludes our series on Microsoft 365 and I hope you found it useful. If you missed our earlier articles these can be found below.

It is worth keeping in mind that Microsoft never stands still with their development of the technology and I am sure we will see some interesting developments over the coming months and years.

Where a significant development arises for the legal sector, we will be sure to keep you informed.

Getting the best out of Microsoft 365

Business Review

In order to identify how M365 can be best used in a firm, we need to look at the way the firm works. This will be focused more on day to day operations rather than any aspects of legal workflow, though there are opportunities to enhance both. The firm may already be using M365 or considering doing so.

Specifically, we're looking for opportunities to automate business process, strengthen security and introduce tools to enhance collaboration. Over 2-3 days we would speak with individuals across the firm to understand how they go about their work on a daily basis.

Some of the key areas we would pay attention to are:

- ◆ How is the firm sharing information and knowledge? This would look at all aspects of information sharing from firm-wide announcements to knowledge bases. We would also look at how forms had assembled their precedent banks and how accessible these were.
- ◆ A deep dive look at business process. For example, is the firm still using paper forms or Word documents to fill in forms for things like expenses and travel requests? We would also examine any approval processes in place and how approvals are provided. A significant part of this work is to assess whether timescales for processing standard requests take longer due to bottlenecks in the process.
- ◆ An assessment of areas where M365 could be used to deliver solutions at a lower cost in place of other third-party applications. For example, using PowerApps firms have the capability to implement their own expenses application or hot desk booking system.
- ◆ An assessment of security risks that could be mitigated by implementing M365 security features to minimise those risks. For example, this may include an analysis of how security auditing is used, email encryption methods, opportunities to use multi-factor authentication and the use of other data protection and compliance features.

At the end of this review, we will produce a report showing in detail, how Microsoft 365 technologies can be used to further enhance the way the firm uses M365 or how it will provide value if the firm is looking at implementing it.

The licensing options around M365 can be quite confusing so recommendations on the best approach to licencing will also be offered.

Implementation

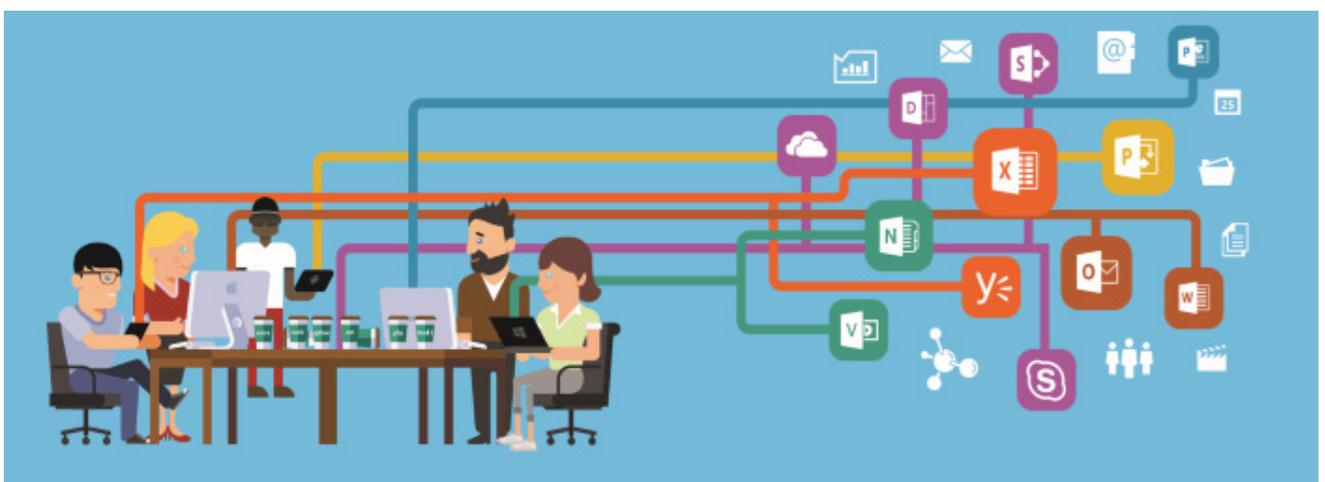
The report produced will have detailed action points and a proposed project plan that demonstrates in which order M365 functionality should be implemented. Generally speaking, firms that don't already use M365 will be advised to migrate their email into M365 as a starting point. As other functionality may depend on access to email accounts to function properly (such as PowerAutomate)

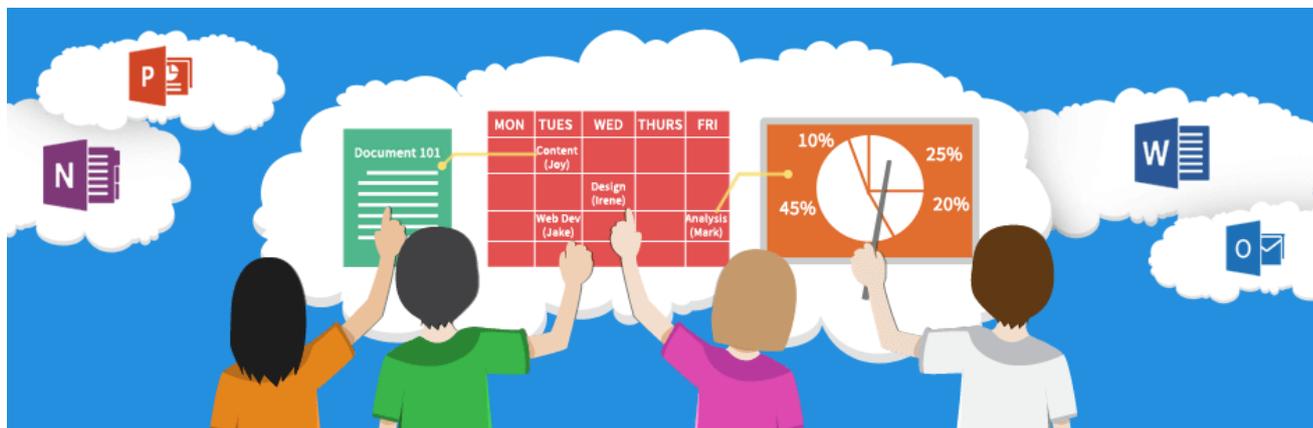
The implementation of these recommendations may involve a number of parties. For example, we would always recommend that the firm's managed service provider takes responsibility for the migration of email from the existing email platform into M365. Depending on the complexity involved around other areas the firm may decide to train their own staff to develop the appropriate functionality or use a third-party developer. BDC will provide recommendations on the best approach depending on the situation.

Regardless of the approach taken, we will assist the firm in project managing the implementation of M365 functionality. Firms should see this as a change management project that should be treated accordingly. We are able to assist firms with the change management process and adopt some key change principles:

- ◆ Form a guiding coalition: Put a steering group in place that have responsibility for overseeing and championing the use of M365 in the firm;
- ◆ Create a vision: Create an inspirational vision that will help colleagues understand how the project will help them work for the better;
- ◆ Collaborate: Involve others across the firm in the project to create a shared sense of ownership;
- ◆ Create a sense of urgency: Make clear how the business will suffer if it does not start to implement the M365 technology.

It is also important to put some measurements in place. For example, if the firm wants to decrease the amount of time it takes to approve travel requests then a measure using the current "as is" process should be taken and compared against the time taken by the new process once it has bedded in.





Optimisation

Once the firm has implemented its project it is useful to revisit around 8 weeks after to ensure it is realising the looked-for benefits. At this point, we would come back into the business and speak to staff to discuss their experiences and make recommendations. We are keen to ensure firms realise their investment and also find further opportunities from an ever-evolving product.

Microsoft regularly release new features for M365, and we will work with firms to identify updates that may be particularly useful for them.

Microsoft 365 Implementation Tips

Migration to M365 has an array of significant benefits for firms. However, if it isn't managed properly, it can cause disruption. Here are some of our top 'lessons learned' tips on dealing with key aspects of an M365 implementation:

- ◆ Only buy the licences you need for the stage you're at. For example, if you're only implementing M365 email and have no need for other
- ◆ M365 features and desktop versions of Microsoft Office you can buy the Exchange Online for email licences only.
- ◆ Another tip around email licensing is to closely examine the types of mailboxes you have before purchasing licensing. It's highly likely that you'll have a number of mailboxes that are no longer in use for various reasons. It's important to identify these and determine whether they should be archived or re-provisioned in the new environment.
- ◆ If your firm operates any kind of calendar sharing this will need to be re-implemented in the new M365 environment.
- ◆ Some firms use OneDrive file sharing. Ensure you have implemented policies around the use of OneDrive to ensure that links are shared securely and that links to files and documents are not left actively any longer than needed.
- ◆ Set up compliance policies that scan emails and flag when account numbers or credit card numbers are being shared.
- ◆ Set up alerts so that administrators or compliance personnel are alerted when documents are shared externally to the business.
- ◆ Do run regular training for all staff on M365 applications. As the products are always changing it is important that staff understand how to use new features and ensure they are getting maximum value from the old ones.

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