

Best Practices for Matter-Centric Collaboration in Microsoft Teams for Legal Professionals



As law firms' use of Microsoft Teams continues to grow exponentially, so does the need for secure and compliant matter-centric workspaces. Using Microsoft Teams safely and effectively requires firms ensure their usage adheres to security and compliance policies, and that integrations with the firm's core systems of record are available.

Realizing the Benefits of Microsoft Teams

It's no coincidence that use of Microsoft Teams within law firms and corporate legal departments has increased significantly during the past few years. The software provides a secure, centralized hub for all kinds of routine communications, including conferencing and information sharing – both internally and externally – with clients and business partners.

Increasing Productivity

Microsoft Teams consolidates information from disparate applications so users can view and collaborate using a centralized, secure hub and a single interface for chat, meetings, calls, planning, and task management. Intuitive and easy to use, Microsoft Teams seamlessly integrates with the Microsoft 365 applications law firms use every day for creating documents, scheduling meetings, and managing email.

Solutions that natively integrate with Microsoft Teams – like OnePlace Collaboration & Content – help law firms create a matter-centric Microsoft Teams hub where lawyers can access a single source of truth for client and matter data. The combined power of Microsoft Teams and OnePlace Collaboration & Content makes it possible to surface information from your project or document management system, your customer relationship management platform, and other applications within a single interface.



According to recent Microsoft estimates, **250 million people** use Microsoft Teams monthly – and that number is growing steadily.

Legal users, like other information workers, have embraced Microsoft Teams with enthusiasm, defaulting to the software for collaboration around projects, practice areas, and client matters.

Streamlining Common Workflows

Experts agree that the appeal of Microsoft Teams lies in its ability to address several common workplace priorities.

- **Streamlined workflow:** A common user interface across Microsoft 365 applications improves efficiencies, prevents frustration, and bolsters user adoption.
- **Effective meetings:** Videoconferencing and information-sharing capabilities enable real-time collaboration for dispersed teams.
- **Expedited resolution:** Open chat features provide opportunities to communicate quickly and effectively and support faster project cycles.
- **Clearer context:** Consolidated threads for communications foster clarity and prevent confusion among team members.
- **Better decision-making:** Firmwide access to a centralized data repository and task management tools informs thoughtful, well-reasoned decisions.

Microsoft Teams offers a single user interface across a range of information sources, such as matter-related materials stored in a firm's document management system and time-recording and billing data captured in practice management or financial systems. Because the solution provides powerful at-a-glance status updates, it helps legal professionals save significant administrative time.

Prior to using Microsoft Teams, organizations found that employees frequently switched between applications throughout the workday, using separate programs for email, instant messaging, and other daily tasks. According to a recent Forrester [report](#), this fragmented approach cost individual employees on average 15 to 20 minutes per day. Further, the report shows experts estimating that increased productivity attributable to the use of the Microsoft Teams platform ranges from \$8.8 million to \$21.7 million in labor-cost savings during a 3-year period.

Further, Microsoft Teams seamlessly connects with Microsoft Power BI business analytics reporting capabilities, offering operations managers smarter business insights to improve productivity monitoring and financial management.

Avoiding Pitfalls with Microsoft Teams

Although professionals readily embrace Microsoft Teams for everyday collaboration, the solution presents challenges for IT departments and information compliance officers who have invested significant time and budget into optimizing data management and regulatory compliance.

When professionals share sensitive and confidential matter data too freely – or when they lose track of where information resides – IT loses critical control over data security

and regulatory requirements. Subsequently, IT and information compliance officers need to establish protocols to prevent individual users from setting up their own Microsoft Teams instances in the rush to deploy collaboration tools. Setting up a Microsoft Teams instance manually is both time consuming and error prone, which is why it's important to automate team creation.

If firms don't implement security, governance, and lifecycle management controls for Microsoft Teams — such as applying appropriate security at creation, ownership rules, using agreed-upon file formats, naming conventions and renewal policies — users won't be able to keep track of information flow and matter status; without structure and rules, they'll soon become frustrated.

Throughout the client-matter lifecycle, law firms store and manage large quantities of important client data in intake, financial, practice management, and document management systems. Any system focused on client-matter collaboration must be able to connect to these core systems and respect their placement as the firm's systems of record.

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Applying Best Practices for Success with Microsoft Teams

Proactive planning for your firm's Microsoft Teams implementation ensures that you're anticipating and preventing pitfalls. Read on to learn more about best practices your firm can employ to ensure success with Microsoft Teams as a collaboration and content management tool.

Best Practice

Identify the Types of Microsoft Teams Workspaces Required to Support Collaboration

Start by identifying the appropriate Microsoft Teams information architecture within your firm to establish the use cases. Although cross-team commonalities will surface – things like chat, files tab, or wikis – specific teams will have unique requirements.

Next, establish the different categories of teams present in your firm's environment, document those types, and capture the information in the overall Microsoft Teams information architecture. For example, your firm may have teams that collaborate on administrative functions – things like IT, HR, and finance – as well as teams that enable collaboration with clients and other third parties.

Your firm will likely have teams focused on specific practice areas and geographies, and matter-centric teams where Microsoft Teams serves as the forum for a diverse set of stakeholders. For matter-centric teams, you'll find that there's no one-size-fits-all approach, as each matter commands its own set of unique requirements.

Not all matters require Microsoft Teams workspaces, and various types of matters will warrant different approaches. For example, a complex M&A matter – which will likely require protocols to ensure confidentiality and prevent privacy and compliance breaches – presents an elevated level of complexity compared to a corporate advice matter, where your firm works with clients on corporate compliance strategies and measures to mitigate risk.

Best Practice

Establish Naming Conventions and Classifications

Standardizing document naming and classifications within Microsoft Teams lets teams access data quickly and easily. Applying controls related to information privacy and data retention protocols — how long data should be stored before archiving or deletion — helps protect the firm from data breaches and regulatory exposure.

For example, your firm can incorporate client or matter codes in corresponding Microsoft Teams names and denote teams that share information externally with an “EXT” prefix.

Solutions like OnePlace Collaboration & Content that automate and enforce the use of standardized names and team properties make it easy to locate and link related teams and apply discrete controls. Your stakeholders will also appreciate intuitive navigation and applied hierarchies within Microsoft Teams — such as subteams for linked matters and their dependent elements — along with customizable stylized dashboards for easy access to information and data.

Best Practice

Implement Security Policies for Your Teams

In the connected firm, centralized control over security measures managed across information sources — including intake, FMS, PMS, DMS, and more — helps protect your firm from liability.

The same level of rigor must also apply to Microsoft Teams, particularly matter-centric teams. When you create a team, access to that team should, at most, be limited to a subset of users who have access to the matter. Also, you should consider retroactive updates to security measures, and — for teams that communicate externally — external user management protocols. OnePlace Collaboration & Content provides external-user onboarding and integrates with Azure B2B.

If your firm has deployed Intapp Walls alongside OnePlace Collaboration & Content, you can extend centrally managed security policies into Microsoft Teams to protect sensitive data. This ensures that your firm’s Microsoft Teams membership remains in line with security policies and that all chats, files, and folders shared are protected.

Best Practice

Integrate with the Firm’s Document Management System

For teams to collaborate efficiently, effectively, and safely, their members need to be able to access and share data and documents across multiple systems. To preserve data security and compliance, firms need to be able to track activity and document changes to their systems of record.

The solution your firm selects should link with document management systems — connecting with the legal organization’s main systems of record — to allow for the free flow of documents and information between existing data repositories and linked teams. The system should also provide a complete audit of changes within systems of record.

Using a solution like OnePlace Collaboration & Content, your teams will enjoy the benefits of automated email filing capabilities, tracked email-based matter activity, and centralized storage of matter-related correspondence and attachments — all of which can be easily linked to Microsoft Teams collaboration spaces while observing existing privacy and compliance controls.



Best Practice

Build Out Data Sets and Analytics

When collaborating on client matters, teams need not only the flexibility to incorporate diverse data sets – including information from external sources – but also actionable insights into team activities.

To support your teams effectively, you need a solution that provides rapid access to client matters and lets users add links to external information as needed. The solution should also support integration with advanced reporting and analytics platforms like Microsoft Power BI, which provides an interactive reporting portal to glean proactive insights from Microsoft Teams activity.

Further, a solution that offers these capabilities – like OnePlace Collaboration & Content – empowers operations managers to streamline billing, hone resource management, and demonstrate teams’ performance and business contributions.

Best Practice

Manage the Data Lifecycle

From a data hygiene perspective, and to maintain regulatory compliance, Microsoft Teams workspaces and the information stored within them should not store data indefinitely on servers or in archives.

Your firm should select a solution that builds in highly structured classification capabilities and automated rules-based lifecycle management to ensure compliance and that teams are archived or deleted at the appropriate time.

Solutions like OnePlace Collaboration & Content that issue automated reminders for a given matter’s point person to update a team’s classification or move it to the next lifecycle action if a team becomes redundant helps ensure that your teams stay on top of data lifecycle management.

Best Practice

Leverage the Platform for Secure External Client Collaboration

To preserve business agility, legal teams need to be able to collaborate freely with not only their internal colleagues but also clients and other external parties. However, without proper safeguards in place to protect sensitive matter data, this practice introduces privacy and security risks. Further, when team members use private channels to share content, legal organizations need to secure sensitive matter-related information, documents, and data protected by regulatory mandates.

Using a solution like OnePlace Collaboration & Content, your firm can apply structure via approvals and strict classifications, giving legal teams the freedom to collaborate productively without risking information leakage.

Best Practice

Expand the Solution to Deliver Visibility into Matters

The effectiveness of Microsoft Teams is dependent on a connected-firm approach where Microsoft Teams is properly integrated with core systems of record across the firm. At a minimum, core systems will likely include intake and client-onboarding solutions, the firm's legal document management solutions, and time-entry and billing systems.

This integration helps firms deliver on the vision of Microsoft Teams as the single pane of glass into a matter, potentially offering the ability to complete time entry and surface experience and knowledge in the context of the current matter.

OnePlace Collaboration & Content incorporates in-context content from other firm systems; things like budget and outside counsel guideline information from business intake systems, client documents from the document management system, contact information from customer relationship management systems are all accessible via Microsoft Teams. The solution also integrates with the wider Microsoft 365 stack, including Microsoft Planner for kanban-style task management, Power Automate for workflow, and Power BI for advanced reporting and analytics.

Finding Freedom Through Structure and Control

When legal organizations and their IT teams maintain proper safeguards to protect data security and maintain regulatory compliance, they can confidently promote Microsoft Teams as a powerful and flexible tool for matter-based collaboration, supporting teams in the ways that they prefer to work.

Purpose-built to integrate with Microsoft Teams, OnePlace Collaboration & Content supports firms throughout the implementation, adoption, and ongoing management of the solution, providing the protocols and safeguards required to maintain data security and ensure that teams are successful.

Moving Forward with Microsoft Teams

As firms move forward on implementing Microsoft Teams, proactively managing the risks introduced becomes vitally important. Beyond data security and compliance requirements, firms need a plan and documented protocols in place to ensure a successful user rollout – which requires tools that work seamlessly with Microsoft 365.

OnePlace Collaboration & Content integrates natively with Microsoft 365, providing the necessary protocols for data security and regulatory compliance. The solution combines the power of Intapp OnePlace and Microsoft 365, helping teams streamline collaboration and work smarter by enabling client-centered collaboration that wins business and delivers successful matter outcomes.



Learn more about how OnePlace Collaboration & Content can help your firm boost collaboration and preserve data security.

Intapp makes the connected firm possible. We provide cloud software solutions that address the unique operating challenges and regulatory requirements of the global professional and financial services industry. Our solutions help more than 1,600 of the premier private capital, investment banking, legal, accounting, and consulting firms connect their most important assets: people, processes, and data. As part of a connected firm, professionals gain easy access to the information they need to win more business, increase investment returns, streamline deal and engagement execution, and strengthen risk management and compliance.