



**Using Microsoft 365 to build  
a modern legal matter management  
solution for enhanced collaboration,  
information management,  
and compliance**







## Introduction

Managing legal matters requires more than just a solid grasp of the law and attention to detail. It also requires you to effectively handle dozens, if not hundreds, of complex workflows and pieces of information at the same time. That's why so many legal firms and corporate legal departments invest in bespoke legal matter management solutions.

However, law firms and corporate legal departments could be missing significant opportunities for efficiency gains and cost savings by not considering their existing Microsoft 365 platform. Leveraging the platform can save on software licensing costs, improve the way firms manage legal matters, and deliver greater governance and visibility over documents across matters.

This eBook explores how law firms and corporate legal departments can efficiently use Microsoft 365 for more effective document management, email management, and collaboration on legal matters.

To learn more about how to build a legal matter management SharePoint solution on Microsoft 365, read our blog.

<https://www.oneplacesolutions.com/how-to-build-a-legal-matter-management-sharepoint-solution-on-microsoft-365.html>



## CHAPTER 1

# Why Microsoft 365 for modern legal matter management

Successful legal matter management requires lawyers, paralegals, and administrative staff to effortlessly engage with their company's legal matter solution to effectively capture, classify, and access content from where they work, including in applications like Microsoft Outlook, Microsoft Office, Adobe Acrobat, and Windows File Explorer. Using a bespoke third-party solution for legal matter management can be cumbersome and expensive, requiring significant time and resource investment as well as change management. It also creates the risk of not effectively integrating with existing technology stacks.

However, if your firm or business already uses Microsoft 365 and other Office applications, such as Microsoft Teams, then it's likely you already have a comprehensive, reliable, and secure platform for legal matter management.



There are seven reasons you should consider Microsoft 365 for your legal matter management:

- 1 Users are already familiar with the Microsoft platform:** Microsoft 365 is the most widely used enterprise software suite, and most law firms and corporate legal departments are well-versed in the use of Microsoft Word, Excel, PowerPoint, and Outlook, with many also using Microsoft Teams, SharePoint, and even Power Automate for workflows.
- 2 Collaboration and automation are second to none:** Microsoft 365 is, at its heart, a collaboration and information management platform. Microsoft Teams builds on this, empowering legal teams to easily work together through a virtual interface that best meets the demands of modern legal matter management.
- 3 Microsoft 365 security backed by Azure AD puts you in control:** business continuity relies on securely managing information in the cloud. Microsoft Azure and Microsoft 365 are enterprise-ready platforms with security at the core to protect data and maintain compliance.
- 4 License and ongoing administration costs can be streamlined:** if you're already licensed and using elements of Microsoft 365, then you already have someone administering it, and handling your identity management, security, devices, support, and more.
- 5 Vendor investment in an enterprise-ready platform:** Microsoft continually invests in Microsoft 365, delivering a consistent approach enterprise-wide for information management, governance, and records compliance. This means information and records compliance for legal matters is managed in a consistent and effective manner alongside other enterprise-wide content.
- 6 Upgrades are delivered automatically:** Microsoft 365 is a cloud-based platform that's automatically upgraded, giving users access to the latest security updates and most modern features without the risk or cost of on-premises upgrades.
- 7 Integration with Microsoft Outlook:** using the Microsoft 365 platform to manage legal matters means lawyers, paralegals, and other team members can benefit from all the Microsoft 365 capabilities while tightly integrating with Microsoft Outlook and Teams.





## CHAPTER 2

# The benefits of a single, unified legal matter management solution

Microsoft 365 is a powerful platform, delivering enterprise-wide consistency for better collaboration, information management and governance; however, it's not an out-of-the-box, dedicated legal matter management solution.

For most law firms and corporate legal departments, the key barrier to using Microsoft 365 as a legal matter management platform is that they believe they lack the requisite know-how. However, unlike when integrating a new piece of technology into the technology stack, once users understand how Microsoft 365 can be leveraged as a legal matter management platform, there's minimal education required around how to use or navigate the applications themselves.

While most users across law firms and corporate legal departments are already familiar with the Microsoft platform and its varied applications, it's important for users to understand exactly how these different applications can be used explicitly for legal matter management. This is where OnePlace Solutions can help through solutions such as:





ORGANIZATIONS  
CAN STREAMLINE THE  
PROVISIONING OF  
NEW LEGAL MATTERS.



**OnePlaceMail** lets organizations capitalize on existing SharePoint and Office 365 investments. Users can save emails to SharePoint using a seamless, intuitive, and familiar filing experience while capturing valuable email attributes, including a complete record of an email message. Once successfully transferred, these emails are highlighted within the individual's and the team's inbox, saving time, improving visibility, and reducing duplication. Importantly, users can access content from SharePoint without leaving the familiar interface of Microsoft Outlook.

**OnePlaceDocs** delivers enriched document management, including saving, managing, and accessing matter content in a single interface. Users can easily and seamlessly complete metadata when saving files to SharePoint. This encourages greater information management and means users can also search by the lawyer responsible for the case as well as all documents for that client. Individuals can also open documents and compare different versions within Word.

**OnePlaceLive** delivers the legal matter management system, personalized to both the individual user and their job function. This means a user can access those matters they are currently working on or that are relevant to their needs. The simplified view reduces complexity and empowers users to engage more effectively with the system, leading to greater productivity. Streamlining the employee experience with personalization lets employees focus on what's important. They can get straight to the documents and information they need, share, and collaborate effectively, and maintain accurate records.

Law firms and corporate legal departments can benefit by leveraging Microsoft Teams throughout their operation for enhanced collaboration. Organizations can streamline the provisioning of new legal matters, creating matters with all associated artifacts in a consistent manner. Content such as emails, attachments, and critical documents can be managed in a structured way to enable greater information management and employee productivity. Saving documents to SharePoint and Teams enables real-time collaboration on a single copy of a document, eliminating duplicate copies and version control issues. An easy-to-use legal matter management system, personalized to the individual with simplified capture and access to content means information is not locked in personal inboxes and local drives where the wider team can't securely access.

## CHAPTER 3

# Enabling compliance through Microsoft 365 for modern legal management

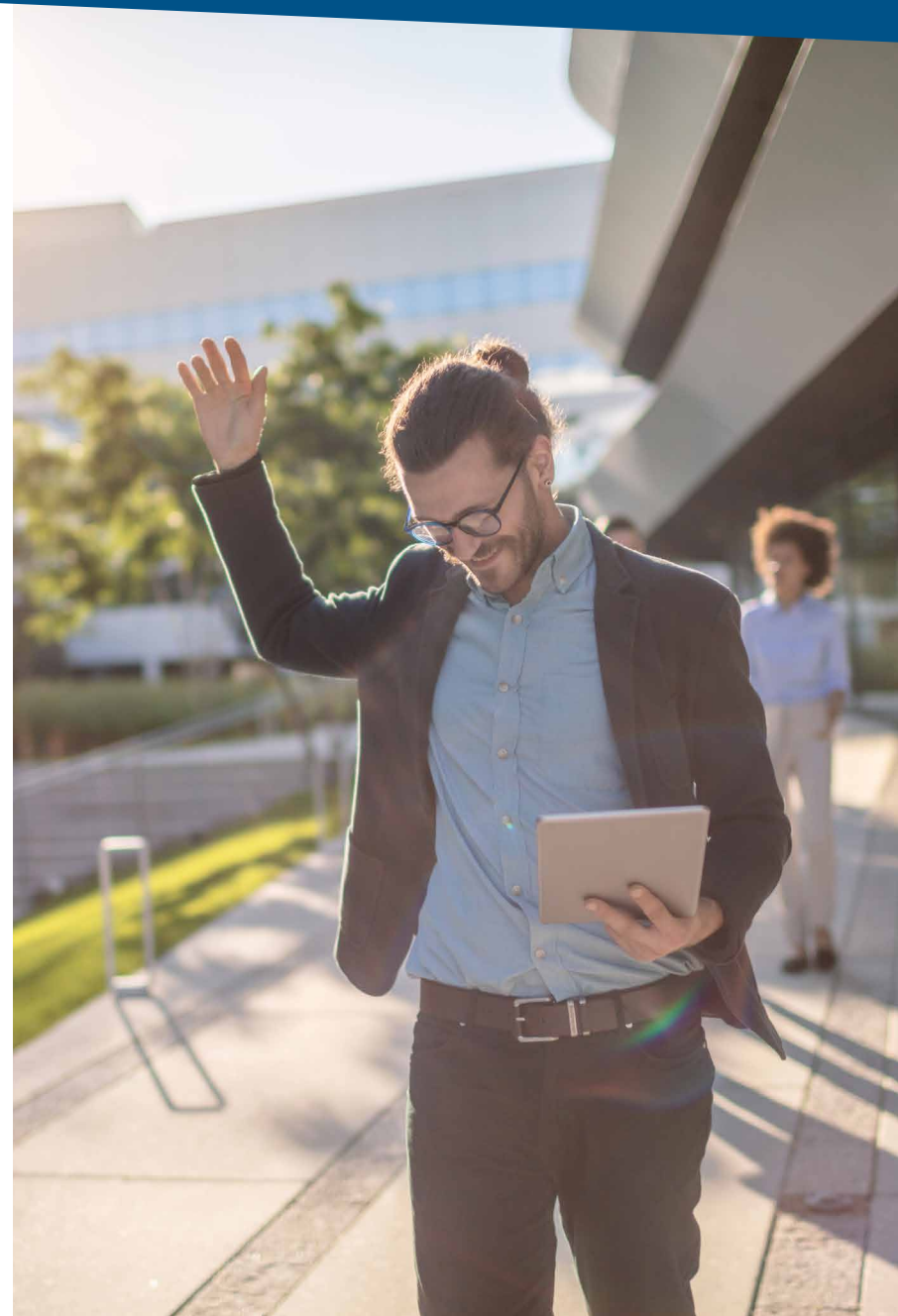
More effective collaboration and time savings are only two benefits of using Microsoft 365 as a modern legal management solution. While these can deliver significant cost savings for law firms and corporate legal departments in terms of saved resources, even more value can be delivered by leveraging the platform to maintain greater levels of compliance.

Emails are an essential form of communication surrounding legal matters; however, sharing attachments can create challenges from a compliance perspective, especially if documents or emails are converted into different file types, which can compromise the accuracy of the record. OnePlaceMail allows users to save a true and accurate record of emails into SharePoint, maintaining critical attributes of the email itself. Users can classify emails from within Outlook on any device, including from Outlook on the phone or web browser.

Specific metadata columns can be established and used throughout Microsoft 365 applications to facilitate more comprehensive filing and discovery. For example, users can set up columns including client

name, matter name, matter number, matter status, and even matter site to better manage the progression of legal matters through the internal system. This can be reflected throughout SharePoint to help with better management of legal matters. Metadata such as email attributes travel with the email, meaning this explicit information can be promoted to SharePoint columns for rich classification, complementing the implicit insights and metadata derived through the context of where the content is saved.

This approach significantly enhances the user experience while driving better information management and a more intelligent digital workplace. As metadata is saved with emails and documents, e-Discovery can be easily leveraged throughout the Microsoft 365 platform for users to find relevant communication and documents directly relating to legal matters they're attached to. This ensures legal matter management is delivered to the right users when and where they need it, which supports greater levels of productivity and accuracy in case management.



# Microsoft 365 facilitates simplified provisioning and management of legal matters

The Microsoft 365 platform provides law firms and corporate legal departments with a powerful modern legal matter management tool with automation at its core. Beyond the benefits already outlined in this eBook, law firms and corporate legal departments can take this one step further by implementing the provisioning capabilities inherent within the Microsoft 365 solution.

When a new legal matter arises or a project is commissioned, legal organizations need processes in place that let them create a repository for all the documents, correspondence, and other information relating to the matter. While there's no single one-size-fits-all process, the Microsoft 365 platform with Power Automate provides the capability to implement the workflows based on each business requirement, saving significant amounts of time, and delivering a consistent approach to legal matter management.

This will typically include a central repository to save content associated with the matter. Earlier in this eBook, we touched on the use of Teams sites as a repository for information.

However, there are other possible information architectures that can be established through the Microsoft 365 platform within SharePoint, depending on the organization's need.

**Creating a Microsoft SharePoint site (subsite) per legal matter:** this is a common design approach for legal matter management and can be beneficial in large legal firms where many matters are created. It provides a clean boundary for security and can easily be archived for records and compliance requirements when a matter is closed.

**Creating a SharePoint document set per legal matter:** this approach often makes sense to end-users as the familiar hierarchical folder layout can assist with end-user adoption of a new system. Document sets allow metadata for legal matters (e.g., matter number, type, and status) to be set at the document set level and, where appropriate, for this metadata to be automatically pushed down to relevant items or content stored within the document set.

**Creating a SharePoint library per legal matter:** using a dedicated SharePoint library per matter lets users manage matter correspondence and documents in a secure and logical way. Like document sets, metadata can be applied at a library or folder location level as defaults to capture metadata when saving content, reducing the need for manual input when saving individual items.

**Creating a SharePoint folder per legal matter:** folders created within a SharePoint library provide another alternative to create structure for legal matters. While this approach is becoming less common, especially as customers apply automated metadata capture capabilities within document sets, folders provide simplicity and a familiar user experience.



When information management, governance, and records compliance are critical, it is reassuring to know these elements are core to the fabric of the Microsoft 365 platform. An organization can easily achieve a standard information management and compliance approach for legal matters alongside other services and solutions provided.

Microsoft 365 provides a robust platform to deliver a modern legal matter management system with critical capabilities for document management, collaboration, security, and compliance to meet the diverse needs of corporate legal departments and legal practices.

OnePlace Solutions helps legal firms and corporate legal departments fast-track these capabilities through the OnePlace Solutions suite of products. To learn more about how OnePlace Solutions can help your law firm or legal department leverage Microsoft 365 as a platform for legal matter management, contact the team today.

And, to learn more about how to build a legal matter management SharePoint solution on Microsoft 365, read our blog.

<https://www.oneplacesolutions.com/how-to-build-a-legal-matter-management-sharepoint-solution-on-microsoft-365.html>

