

TRANSCRIPT:

Mary: Welcome to today's episode of Vandennack Weaver Truhlsen legal visionaries, a weekly podcast discussing updated legal news, evolving methods of providing legal service and law practice issues. My name is Mary Vandennack founder and managing partner at Vandennack Weaver, LLC. I'll be your host as we talk to experts from around the country about closely held business tax trusts and estates, legal technology, law firm, leadership and wellbeing.

Mary: This episode is on Microsoft 365 for lawyers. My guest is Ben Shore, senior content designer at Microsoft. We're going to talk about making the best use of an amazing product. While Ben's focuses currently significantly on security and just before we recorded this, he shared some great tips and we're going to talk about those in another episode, but today we're going to talk a little bit about Microsoft 365 for lawyers personally, we absolutely love the product and appreciate that Ben introduced us to it when Microsoft 365 started looking at the legal market. I originally connected with Ben in the early 2000 when he had his own consulting practice and would show up at the ABA tech show in Hawaiian clothes from Hawaii and drag us all out for Hawaiian food. It wasn't actually a dragging, I should say it was a, a lot of fun, but thanks for joining us today, Ben.

Ben: It's so great to be with you Mary.

Mary: So, one of the common questions, what are the, what's the most common question that lawyers ask you about Microsoft 365?

Ben: Probably the most common question is what the heck is Microsoft 365.

Mary: And so what's the answer

Ben: So the simple answer to that is it's our collection of software and services available by subscription. We've also confused people a little bit, because we all, we have office 365 and we have Microsoft 365. Most of the office 365 plans got renamed to Microsoft 365, but there are still a couple of office 365 plans for enterprise the key difference is that the enterprise Microsoft 365 plans include windows. So for most of, for most people listening to this, they're going to want Microsoft 365.

Mary: So before we dig into software and services, let's talk about that subscription part. Lots of software's going that way. Not all lawyers are comfortable with it.

Ben: I understand that, you know, when back way back when subscriptions started to take off, you know I was a little resistant or uncomfortable about it myself. I was so familiar with the old model of you write one check and you've got the software for as long as you've got it. I think we've done a lot of things to help, ease that move to subscription and to make subscription valuable. I had attorney one time who said to me that the thing they liked about Microsoft 365 and that subscription when I was at let him convert CapEx to OPEX and from a, from a budgeting and accounting standpoint, that was a big help for him. There was also another firm and think you may have heard me tell this story before, but, when I was in private practice, before I joined Microsoft, I had a firm from Phoenix call me and they had, they were a hundred user firm in Phoenix and they had an exchange server on site like a lot of firms that are that size and their exchange server was getting pretty old and it was about time to replace it and so they had called, one of the big vendors. I won't say who, but it rhymes with Dell and asked for a quote on a new exchange server. The Dell folks had quoted them for licenses and hardware and everything they needed for their replacement exchange server about \$24,000, which at the time was actually a very fair price that was not unreasonable. So he called me and he used the managing partner called me and said, I'm just curious, could we move just our exchange server into Microsoft 365? I don't want to move our documents. I don't want to move our accounting system. I don't want to move anything else. Could we just move our exchange into Microsoft365? I said, sure and he said, okay, well what would that cost me? I said, a hundred users. He said, yeah, I said \$400 a month he said, \$400 a month per user. I said, no, \$400 a month for the whole firm and he thought about it for a few. He paused and he said would take me a long time to spend \$24,000 at \$400 a month I said, yeah, it would and so just an example of you can really spread that out over a much longer period. You don't have to write those big painful checks at the beginning. You get all that value. The other nice advantage to it is that our subscription plans in Microsoft 365, you can install the licenses on a five devices per user. We're gonna talk more about devices here shortly. Whereas the old model, the old perpetual software, you could only install it on two. So being able to install it on five is nice, because you probably have

people in your firm who have a, you know, they have a windows PC on their desks Mac at home. They have at that same license on three. Then finally it simplifies licensing and deployment just makes it a lot easier to manage.

Mary: Yes, and I'd be one of those who has a computer at the office, one at home I haven't installed on my iPhone and iPad and a travel laptop. So, could we get that like up to like maybe seven devices would be helpful to me? All right, Ben, let's talk about software.

Ben: Sure so with the software that comes with Microsoft 365, it's familiar Microsoft office suite that we all know pretty well, which is word Excel, PowerPoint, outlook, and so forth. One of the common misunderstandings though, is that people think that Microsoft 365 is kind of like Google docs. You know, it's just in the cloud, it's just the window, the browser version, but that's not true. Actually most of the Microsoft 365 plans include the local install version that you're always had that, that local version of word that installs on your local machine. By the way you mentioned having, you know, up to seven, you can actually have it active on up to five at a time, but you can install a lot more machines than that and so you can install it on seven. It's just that you can only have an active on up to five of the times. You'd have to deactivate the other two, which is a lot easier than it sounds.

Mary: Okay. Well, so then I checked actually I was thinking I was going to have to buy another subscription under a different email address or something.

Ben: Not unless you are using all the same time.

Mary: No I don't, not quite that skilled. Well, let's talk about services.

Ben: Sure, So the services are where things get really interesting, I think primarily it's all those cloud-based services on the backend, like exchange and SharePoint and teams. It's also some lesser known services like bookings and planner and stream and power automate. Those all come as part of those Microsoft 365 subscriptions. They really give your firm a lot of capability. I mean, if you think about just thinking about exchange, for example pretty much the entire fortune 500 users exchange as their email and group calendaring software the backend pretty much all of the 100 does and for it to be available even to a solo at such a low price is kind of amazing to have that capability.

Mary: There are different plan options?

Ben: There are, there's a bunch of different plan and subscription plans for Microsoft 365. That does confuse people sometimes because they look at all the offerings and they go, oh my gosh, how should I pick? You know, there's, there's a dozen different things here. So I'd like to narrow it down to, there's really only a couple that I think lawyers should care about and think about the first one is called business premium. That's for up to 300 users currently I believe I'm not in sales, so the pricing is not always top of mind for me, but I think it's \$20 a month per user for most firms, that's exactly what you want. Okay. It's all those backend services like exchange and teams and SharePoint and everything else. Plus it's all the local installed software Word, Excel, PowerPoint, and so forth all in that same package at \$20 a month. It also gives you some really good security and management capabilities. The second plan that some firms, should think about if they want more than the business premium, or if they're a big firm and they have more than 300 users, is our E plan is an enterprise plan could be five. I believe it's \$35 a month. Last time I looked. That gives you a lot more capabilities. It gives you all the same stuff as this premium does. Plus it gives you, I believe it's got a phone system included with it. If you want to use office 365 is your phone system. You can and some more advanced data loss prevention management tools, so E five is kind of the big brother if you wanted to go there.

Mary: Okay, let's continue our episode. What do you think are the most underused features of Microsoft 365 that have the potential to make life easier for users?

Ben: Oh, there's so many I've, you know, one of the things about, about office 365 and Microsoft 365, that is it. You know, most people don't realize everything they get in that adage. I did a presentation one time. That was the whole theme of the presentation was all those features you don't know, you have and I was showing stuff at the, you know, at the front of the podium and the lady in the front row who had her laptop open and was following along at one point, she exclaimed out loud. Oh my gosh and I, paused, I looked down, I said everything. Okay. She said, I already have this. I said, yeah, I know she was so excited, because we just showed her this feature and it's like, she didn't even know she had it as part of her subscription. It was like opening a Christmas present. So there's a whole bunch of features that I think are in there, SharePoint one drive, storing documents and being

able to share links to them rather than sending attachments is so powerful once you've done it and not had to manage that back and forth of trying to reconcile 40 different attachments. Especially if you're to have, if it's more than two people collaborating, that's such a big thing and I realized that for some firms, you may have a document management system that, that conflicts there a little bit, but a lot of the document management systems now, like Worldox for example, have integrations to SharePoint and one drive. So, you may be able to still use your document management system and you should put in the one drive. The other granted by there was SharePoint and one drive is built in ransomware protection and that it can help detect and recover from ransomware. If you get, hit Microsoft 365 groups is another thing that's in Microsoft certified. Everybody has it. If you've got M - 365 with exchange on the back end, you've got groups. You can create a group around a practice area around a big client or a big matter for example. Then you assign the people in your firm who are working on that practice area client or matter or whatever the area is. It creates a shared inbox, a shared calendar, shared files, library, a shared one note, notebook, just for that, for that topic or that matter, or that client and you can also invite guests and guests or people outside of your tenant. So expert witnesses or co-counsel, or even the client themselves, if you want it to, and they would only have access to Wednesday in that group. Present your pitch in PowerPoint. If you're a PowerPoint user presenter coach is a, cool AI tool that we've added where you can actually rehearse your presentation in front of your laptop. A presenter coach will give you feedback. Like you're speaking a little fast or a little slow. You 're using a lot of filler words like, um, where you are reading your slides a little too much. It's got a whole bunch of capability in there to give you tips on how you can be a better presenter and that's included in PowerPoint, styles and word is not new. We've had that forever, but we still have a lot of trouble getting people to use them, but they are the most important thing people can do in style in word the, to do bar in outlook, if you've never used outlook, or if you're an outlook user, you've never turned the to-do bar on, it puts your calendar and your tasks list along the side of your inbox. So, you can see it all the time. So, you know what your next meeting is, your next appointment. Those are, oh, I almost forgot Microsoft search in all the office apps. Now you have the search box at the top, all the queues. A lot of people ignore that cause they think it's just the old search feature. This is the new Microsoft search, which can give you not

only can it find things like in your file there and your document, but he can find commands. So, if you're not sure how to do something or where the button is for a certain feature, if you press all to you or clicking that search box and just type the name of the feature, it'll probably surface the feature right there in the search result, which is amazing. It's an amazing shortcut to be faster. I guess the last thing I'd point out is our site support.microsoft.com, has a ton of free training materials, video articles, and more, that I definitely credit people to check out. Because it's a great way to just learn new stuff. You know, you watch a five-minute video on Excel and if it saves you an hour a month, that is awesome.

Mary: So, what are some of the newest features that we should be looking for in Microsoft 365?

Ben: I think it has been the new features that everybody's aware of Microsoft forms is a good one. That's actually the one that made that lady exclaim and that presentation, Microsoft forms lets you create custom forms for just about anything I've seen firms are using it for client intake, information gathering, client satisfaction surveys, it's a web based form. You can obviously put anything on it. You want multi choice, multiple choice questions, true false questions, free text input, all sorts of questions and so you can create these custom forms that you can put on your website or include in email signature or whatever, or just send out to people and they can fill them out online. They don't need anything installed. They just sold them out in the browser and then the results come back to you. You can even open the results in Excel if you want to do that, but they just come back to in the browser. It's a super good way just to get, to do custom forms. Microsoft bookings is another one that lawyers love, but you set up my webpage that clients or prospects can use to book appointments with you. It synchronizes to your calendar, and you can specify what times you want to be available. So you can say I'm only going to allow these people to schedule me on Wednesdays and Thursdays between two and five or whatever. You can set it up, however you like, so it doesn't let them just schedule any block of time anywhere or see what's on your calendar, but just a great way to get that automated scheduling. Another one that we provide is called learning pathways. A lot of people don't know about that. It's available to all Microsoft 365 customers, and it lets you set up in a learning portal inside your firm for things like word Excel, SharePoint, whatever, but your own internal learning portal with content that we provide

and that's included in 365, it's called learning pathways. If you, if you just search for it, I guess the last one I'd point out here is something called it has been called project mocha. It's also known as it's now called Microsoft boards. It's an outlook in the web plant, both, both in the, in exchange for business, but also if you're an outlook.com user for home personal use, you'll find it there too, It's basically like a personal project board where you can, you can pin tasks and notes and things and that's a pretty handy little project management tool called project mocha.

Mary: I thought I was a pretty good user of Microsoft 365 until we just had this conversation, and I was like, okay, I don't have my pen with me to take notes, but fortunately I'll have the recording to go back to. But you know, one of the things that you talked about was the integration and that's one of the things we as a firm really love because when I open up anything in Microsoft 365, I have to, so we actually do use share file and Worldox, and the integration has gotten to be amazing. So that we can is clients really want that, you know, the port and we use the share file in different ways to communicate with clients. But it's definitely correct. Do you have a favorite integration that you described as extremely useful that we haven't talked about yet?

Ben: You know, I think, probably the most powerful integration that I can recommend is a power automate. If you haven't used that yet power automates built into Microsoft 365, it takes a little bit of learning to get going, but once you figured out how to use it, how our automate lets you do all these amazing tasks, to automate repetitive workflows. So for example, if a document gets saved in a particular folder, let's say you have a folder for a particular matter. If a document gets saved in that matter of power automate can notify the responsible partner for that matter that this documents been saved there and it's ready for review or something like that. I used to use it to automatically create items from received emails. So if I got an email about a brief, a topic, I could flag that and power automate would step in and automatically create items for me, other documents or files for me and know our sealer group here at Microsoft uses it to automate document gration even where it can take an input, which can be an email message or an Excel file or anything like that or forms and then they go get a word document and pre-populate a lot of content in it. So, power automate I'd say would be one of

those kinds of integrations that, comes with Microsoft 365 and just kind of amazing.

Mary: So, if you were to offer a vision of best use of Microsoft 365, what would that look like?

Ben: I think one of the things we learned in the last year and a half, when everybody got scattered to a hybrid workplace, you know, Microsoft 365 makes it really easy to kind of thrive in that environment, because you can access it from anywhere, because it's accessible because we've got mobile apps, we've got web apps. And so, you know, if you've been scattered to your dining room table as your new workplace, you don't lose your email, you don't lose your calendar, you don't lose your documents. All of that is still available to you, at any time and securely. So, I think diving into it and leaning into exchange teams and SharePoint, I feel like that's probably where I would try to go, if you're not already.

Mary: Any last tips or thoughts.

Ben: I say never stop learning if that's a big one. I've been at Microsoft now five years, I've worked with Microsoft for 25 years. Every day I learned something new that our products can do. Sometimes it's stuff we've been able to do a long time and I didn't know it sometimes it's new. It's amazing what you'll discover. If you just, you know, dedicate a little bit of time, doesn't have to be a lot. You've got to just 10 minutes every day, every week to just try to learn something new. It can really pay off with product productivity. So keep learning.