

The Beginner's Guide to Microsoft 365 for Law Firms



rocket matter

What You Need to Know about Microsoft 365

You might have heard a lot of talk about Microsoft® 365 recently. But what is it? And how is it different from regular Microsoft Office? Here, we'll break it down for you so you can get a better idea of what's included with this powerful software and how you can apply it to your law practice:

What is Microsoft Office?

Microsoft Office is the original collection of productivity software published by Microsoft way back in 1988. The bundled suite of applications originally included Microsoft Word, Microsoft PowerPoint, and Microsoft Excel. The collection has since grown to include Microsoft Outlook, Access, OneNote, Publisher, Project, Visio, and other applications.

This software was initially designed to be installed locally on PCs. Eventually, Microsoft built a Mac version, too. Locally-installed applications are not automatically updated, meaning you have to keep purchasing the latest package every time a new version becomes available.

What is Microsoft 365?

Microsoft 365 (formerly known as Office 365) differs from regular Microsoft Office in two ways. First, instead of a one-time fee, you pay a subscription to license the software. Second, Microsoft 365 is cloud-based and accessible on every one of your desktop and mobile devices.

Many Microsoft 365 plans also include the desktop versions of the latest Microsoft Office applications so that you can still work while not connected to the Internet. You can install these programs on multiple devices (up to 5 PCs or Macs.) If you have a plan that includes both cloud-based and desktop software, you'll receive automatic updates for each application (even those on your local machine) so that you'll always stay up to date.

 Microsoft 365

vs.

 Office

How is Microsoft 365 Cloud-Enabled?

When you use the cloud-based services of Microsoft 365, your documents and files are located on servers owned by Microsoft and managed remotely by them. (You can alternately store things locally on your computer if you choose.) Microsoft's online storage is called OneDrive, and it competes with similar services such as Google Drive, Dropbox, and Box.

Storage in the cloud means less IT costs for you because you won't have to maintain a server at your home or office. Because this infrastructure is located in the cloud, you can access it from any computer or mobile device with an Internet connection.

The setup is incredibly easy, and Microsoft 365 offers you step-by-step guidance to get your law firm up and running. Microsoft 365 is also highly scalable and can support everything from a one-person business to companies with tens of thousands of users. There are even plans that cater to schools and non-profits. Most law firms would fall under a [Microsoft 365 Business Standard](#) plan.

With Microsoft 365, you'll save your firm a great deal of time and money. And just think about the benefits of having it integrate with a legal practice management system like Rocket Matter! With such powerful capabilities, you'll wonder why you didn't start sooner.



What's So Great About Microsoft 365?

There are lots of reasons you should consider using Microsoft 365. In fact, Tom Lambotte, CEO of the legal technology consulting firm GlobalMac IT, says every attorney should use it just for the email alone.

Microsoft 365 makes it easy to get set up with professional-grade email services. It provides high reliability and 50GB of email storage, and it lets you send attachments up to 150MB. You also get access to Outlook and to all of your data from any device. The email service boasts one of the best SPAM filters, and it has very high uptime as it has many redundant servers.

For \$12.50 per user per month (with annual commitment), you can get the Microsoft 365 Business Standard plan—and it certainly packs a mighty punch. In fact, it includes so much that you need to determine which features you'll take the time to learn and implement in your practice. Here are just a few of those features:

Access to the Full Microsoft Office Suite

Of course, everyone is familiar with the Microsoft Suite: Outlook, Word, PowerPoint, and Excel. With the Business Standard plan, you are able to install these applications on up to five devices per user.

Tons of Storage

The plan includes OneDrive for Business, which gives each user 1TB of personal cloud storage that they can access from anywhere. This is enough to hold 5 billion typical office documents! You can also easily share documents with others inside and outside your organization and control who can see and edit each file. You can also create a hub of documents that gets shared throughout your organization through Microsoft SharePoint.

Stability for Macs

The suite of Microsoft Mac apps is excellent. In fact, the current version is by far Microsoft's best release of the applications, and it shows their commitment to bringing parity between the Mac and Windows versions of their applications. There are no stability issues between the Microsoft apps on Macs versions. These apps are modern and easy to work with.

Online Capabilities

In addition to the five local versions of the Microsoft 365 applications that you can access, you also get access to browser-based versions of the software as well. This provides further flexibility in your ability to use the tools you need from anywhere.

If you have the local apps, you may be wondering why you would even use these online versions. This biggest reason is that it provides a better experience for multi-user editing. When a file is stored in OneDrive, you can share access to outside users, choosing to allow them to edit or not. There is also improved version control, which allows you to see which team members made which changes and when.

On the flip side, when you use these features locally, the sync can be delayed which, in turn, can impede the flow of working with others on a document. Opting to work in the online application provides a much more responsive experience. This is very useful in Word and OneNote.

Advanced Threat Protection

The Microsoft 365 Business Premium plan (\$20 user/month) comes with Microsoft Defender, which helps protect against threats hidden in email attachments and links. It also helps protect you from ransomware and other malware attempts. With the Business Premium plan you also have the ability to remotely wipe company data from lost or stolen devices, as well as apply restrictions like “do not copy” and “do not forward”.

Microsoft Teams

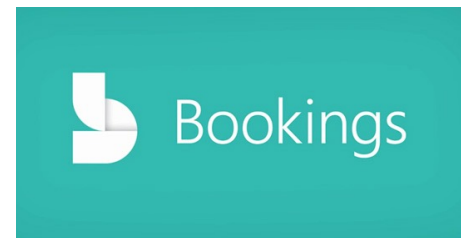
Microsoft Teams is a Slack-like application that helps teams collaborate on their own private channels. It is a very well-developed solution that is feature-rich and included with each Microsoft 365 subscription. The price of a Slack account ranges from \$6.67/month for the Standard account to \$12.50/month for the Plus. So if your firm is currently using Slack, switch to Microsoft Teams and immediately reduce costs.



Microsoft Bookings

Bookings is Microsoft's answer to the popular meeting scheduling solutions out there such as Calendly and Doodle. This solution aims to reduce the endless string of emails it usually takes to find a time for a meeting.

Calendly is \$8-\$12 per month, and most other solutions are priced within this range. If you are currently paying for one of these solutions, you may want to test out Bookings and see if it does what you need. If you're not using this type of solution at all, definitely check out Bookings as a quantifiable time saver, available on Microsoft 365 Business Plans.



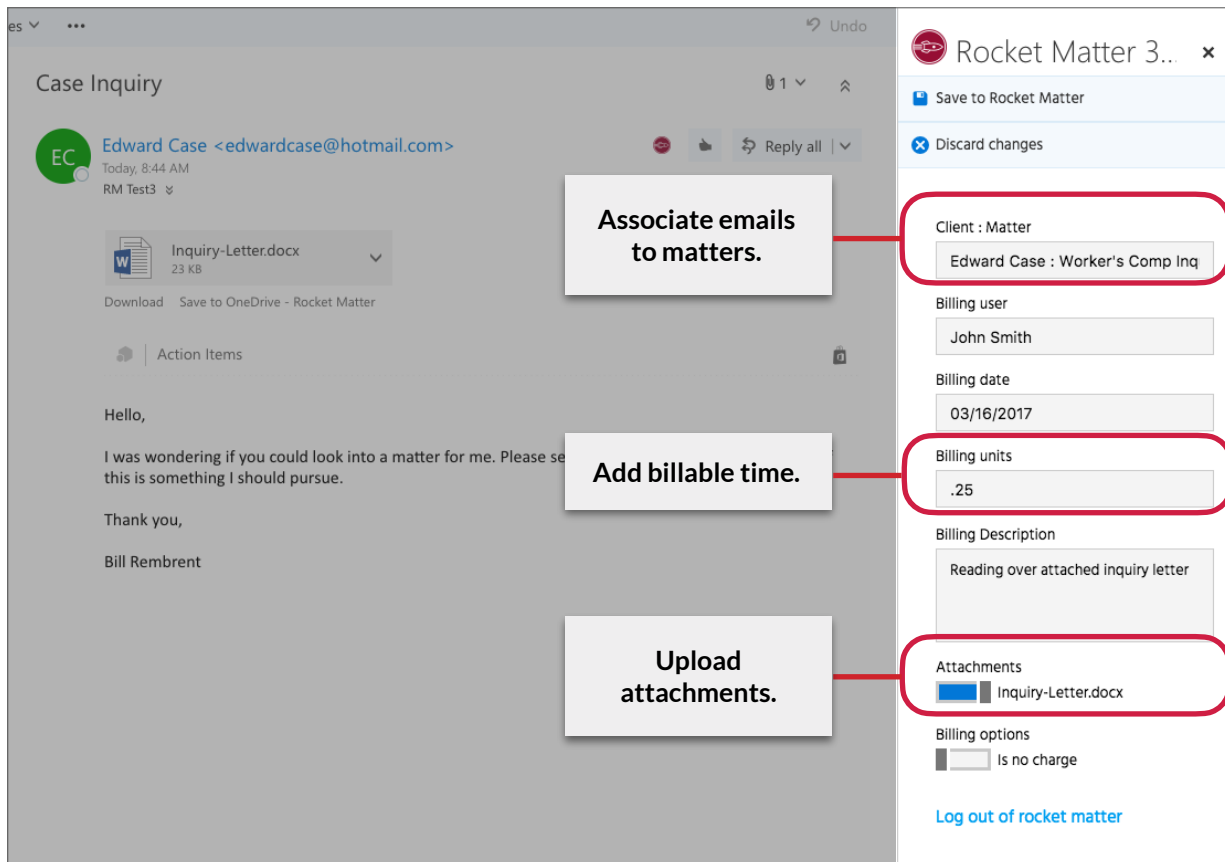
Using Microsoft 365 with a Legal Practice Management Solution

In 2017, Rocket Matter—a leader in the legal practice management software industry—announced their robust new integration with (then) Office 365. Because of the cloud-based nature of both software platforms, legal professionals can use the Rocket Matter Office 365 Integration from anywhere on nearly any machine.

Here are just some of the things that this powerful combination lets you do:

Track Emails

Upload your emails from Outlook on a Mac or PC directly into a matter. You can also track billable time and, if you'd like, import your attachments as well. This is an extremely helpful way to organize all of the information in your matters.



Associate emails to matters.

Add billable time.

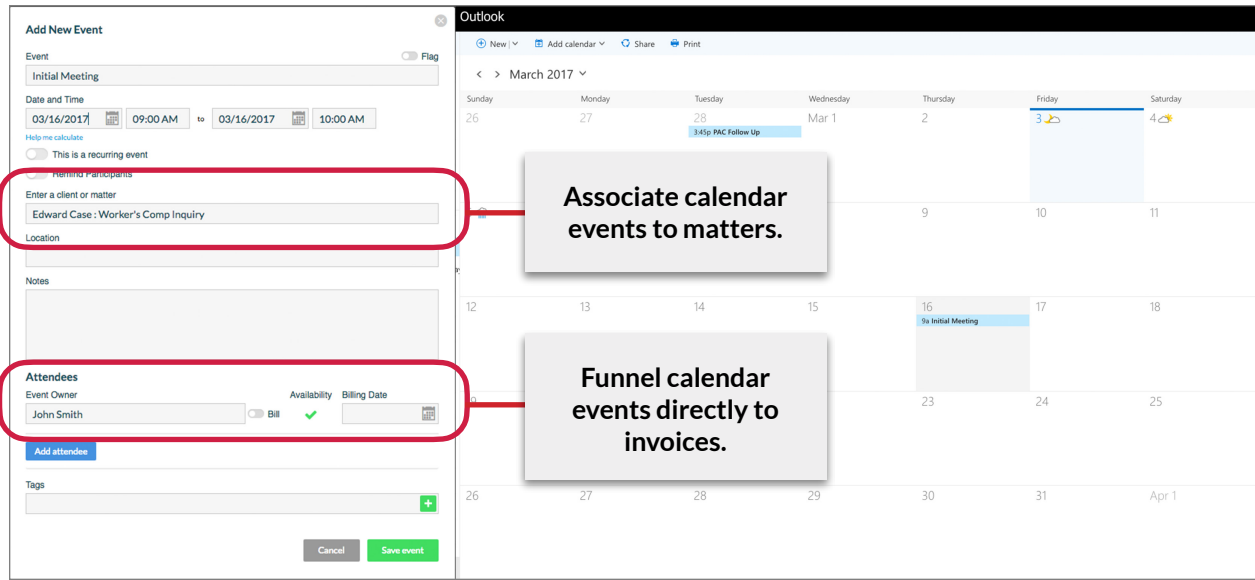
Upload attachments.

Rocket Matter 3.0

- Save to Rocket Matter
- Discard changes
- Client : Matter
- Edward Case : Worker's Comp Inq
- Billing user
- John Smith
- Billing date
- 03/16/2017
- Billing units
- .25
- Billing Description
- Reading over attached inquiry letter
- Attachments
- Inquiry-Letter.docx
- Billing options
- Is no charge
- [Log out of rocket matter](#)

Sync Calendars

Track your calendars as you normally do in Outlook and sync them effortlessly with Rocket Matter. This integration allows you to keep track of your calendar events inside your matters. And for hourly billers, your Rocket Matter calendar appointments can be funneled automatically to your invoices.



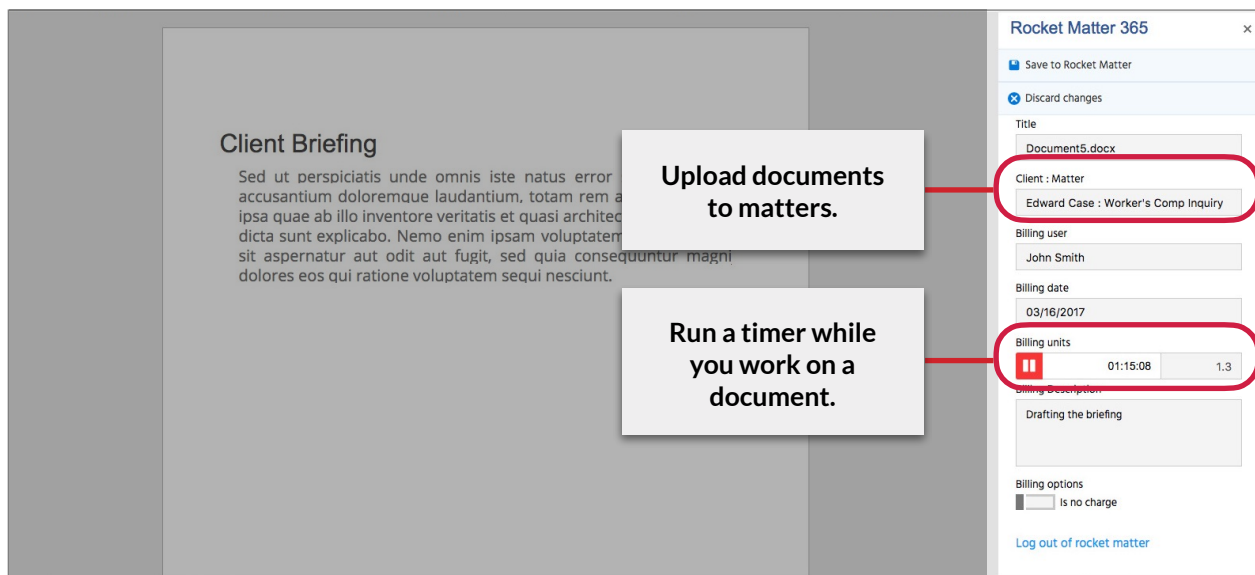
The screenshot shows the Outlook 'Add New Event' form on the left and a calendar view on the right. Two red boxes highlight specific fields in the form:

- Associate calendar events to matters.** This annotation points to the 'Enter a client or matter' field, which contains the text 'Edward Case : Worker's Comp Inquiry'.
- Funnel calendar events directly to invoices.** This annotation points to the 'Attendees' section, specifically the 'Event Owner' field which contains 'John Smith'.

The calendar view on the right shows a monthly view for March 2017, with a callout for '3:45p PAC Follow Up' on March 3rd.

Upload Documents

You can upload and save your documents directly to Rocket Matter from within Word and PowerPoint. You can also associate the documents with matters and bill for the time you work on them.



The screenshot shows the 'Client Briefing' document in the background and the 'Rocket Matter 365' sidebar on the right. Two red boxes highlight specific features in the sidebar:

- Upload documents to matters.** This annotation points to the 'Save to Rocket Matter' button and the 'Document5.docx' file name.
- Run a timer while you work on a document.** This annotation points to the 'Billing units' section, which shows a timer set to '01:15:08' and a value of '1.3'.

The sidebar also shows the 'Client : Matter' field with the text 'Edward Case : Worker's Comp Inquiry' and the 'Billing user' field with the text 'John Smith'.





Sync Contacts

Leverage the bidirectional contact sync so that your Rocket Matter account has all of the same contacts that you have in Outlook, and vice versa.

Take Advantage of Full Document Versioning

To allow lawyers to work collaboratively with the Rocket Matter Office 365 Integration, any documents uploaded from Office are versioned. Those versions include the data, the user, and any comments.

Document Versions

Date	User	Comment	
03/03/2017 09:02 am	John Smith	Completed the first draft	
03/03/2017 09:02 am	John Smith	Completed the segway	
03/03/2017 09:01 am	John Smith	Made edits to intro	
03/03/2017 09:01 am	John Smith		

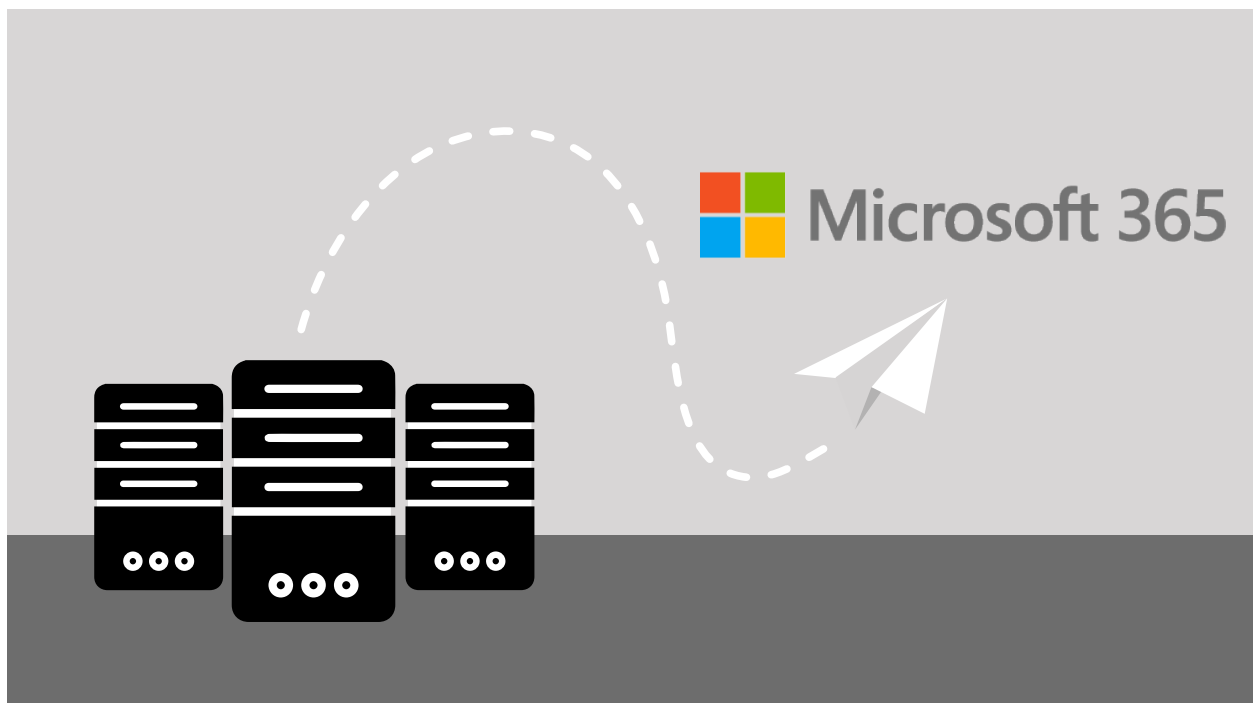
Ok

Migrating to Microsoft 365

A Microsoft migration consists of a transfer of email, contacts, calendar, tasks, and notes from an older Microsoft version to the new Microsoft 365 platform.

If you're *not* looking to upgrade Outlook—which is the part of the Microsoft suite that handles email, calendaring, and other features—then you or your office administrator may be able to do the migration on your own. However, if you and your team rely on Outlook for your day-to-day communications and operations, then you may want to consider hiring a professional to manage it. (Depending, of course, on the level of technical expertise you have at the office.) That's because it's the email and calendaring where you can run into problems: You don't want to mess up this critical information.

If you don't have an IT consultant you trust to handle the migration for you, solicit at least two and ideally three quotes for service. Don't just consider cost: Going through a formal quote process will reveal a lot about the professionalism and responsiveness of the consultants. Accuracy and speed, in addition to cost, are critical factors. Additionally, you shouldn't worry about finding a good local contractor as the person you hire can migrate Microsoft 365 remotely.



Bottom Line

If you're not using Microsoft 365 already, you should definitely consider making the switch. There are so many benefits, and with the robust Rocket Matter Integration, you'll have every tool you need to run a successful, efficient law practice.

To learn more about the Rocket Matter Microsoft 365 Integration, go to rocketmatter.com/rocket-matter-365.

Contributors

We'd like to thank the following people for providing content for this whitepaper:

Tom Lambotte, CEO of [GlobalMac IT](#), a national company providing complete end-to-end legal technology consulting services to Mac-based law firms.

Allan Mackenzie, founder of [Mackenzie Consulting](#) and a 30-year veteran of the legal technology world.

Larry Port, CEO of [Rocket Matter](#).

Lisa Hendrickson, Microsoft Outlook and Office 365 expert.



About Rocket Matter

Rocket Matter helps law firms offer better client service and also increase revenues by more than 20%. Founded in 2008 as the first cloud-based product on the market, Rocket Matter offers an all-in-one legal practice management platform with the most powerful, easy-to-use time and billing software in the industry. When law firms want to make more money, go paperless, or increase confidence in their trust accounting, Rocket Matter helps them achieve those goals. With award-winning customer service based in the United States, it's no wonder thousands of law firms swear by Rocket Matter.

Practice Management for Office 365[®]



**You're in Outlook and Word all day long.
Why not use practice management
software designed to work with them?**

With Rocket Matter's Microsoft 365 add-ins, you'll never lose a billable minute. Your contacts and calendars stay perfectly in sync. And you can upload documents and emails directly into your matters.



Book a personalized
demo today! Visit
rocketmatter.com/o365
or call 866.710.1845