

## Maximising Microsoft365 to manage your practice

AKA "how to use all those features no one ever explained"



4 September, 2020

## Agenda



## Why are we focusing on Microsoft?





## Common challenges



Document management



Better client experience





Improved efficiency & profitability



Get more from the tech you already own



Avoid/better defend claims

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## Word







- Ctrl-X Cut
- Ctrl-C Copy
- Ctrl-V Paste
- Ctrl-A Select all
- Ctrl-Z Undo
- Ctrl-Y Redo
- Page up will move you up
- Page down will move you down

- Ctrl-S Save
- Shift select selects a group
- Ctrl select selects individual items



- Ctrl-B Bold
- Ctrl-I Italic
- Ctrl-U Underline
- Home will move you to the very left of a line (Word, Outlook)
- End will move you to the very end of a line (Word, Outlook)
- Ctrl-Home will move you to the very top of a document (Word, Outlook)

- Ctrl-End will move you to the very end of a document (Word, Outlook)
- Ctrl-F Find
- Ctrl-H Replace
- Ctrl-Shift-> Increase Font Size
- Ctrl-Shift-< Decrease Font Size











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- Docx pros and cons
- Letters
- References
- Styles
- Colours
- Themes
- Unformatting
- Hyperlinks













- Review settings
- Comments
- Track changes
- Compare & Combine



















### Teams





Setting up Teams Meetings from Outlook

• Option 1

Teams

- Go to your Outlook calendar
- Select New Teams Meeting from top ribbon
- Create meeting as usual. This will ensure it is a Teams meeting and creates a unique link to that Teams meeting.
- When it comes time for the meeting, simply Click on that unique link to join the meeting.



## Teams **Setting up Teams Meetings from Outlook**

- Option 2
- Go to Outlook calendar.
- Create a meeting as normal (selecting time in your calendar that suits)
- Click 'Teams Meeting' in top ribbon to ensure it is a Teams Meeting. This will add a unique link to that Teams meeting.

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							End time Mon 12/08/2019 🔂 10:30 AM 👻 🔿 Make Recurring
							Location Microsoft Teams Meeting
							Join Microsoft Teams Meeting Learn more about Teams   Meeting options

## Teams **Setting up Teams Meetings from Teams**

- Open Teams
- Use the left-hand banner for navigation through Teams
- Go to 'Meetings' tab
- Schedule a meeting. This is automatically create a Teams meeting.
- When it comes time for the meeting, join by clicking the link.

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Chat	9am	
Teams	2020 standup Microsoft Teams Meeting	Thursday, August 15, 201 9:30 AM - 10:00 AM (30 r Break out area
iii Meetings	10am II Check in Microsoft Teams Meeting	You're viewing a single or
<b>C</b> alls	11am	You accepted this meeting.
<b>↓</b> Files		Accept ? Tenta
	12pm	Hi Team,
	1pm	Seeing as though our tea each week to reconnect a
		I believe we are all in the
	2pm	
		For our new team member from each department we
	3pm	It's probably good to con welcome to contribute ea
	4pm	<ul> <li>Innovation update</li> <li>Internal/ external e</li> </ul>
Apps	Spm	<ul> <li>New lawyers comn</li> <li>IT update</li> <li>Integration and 20</li> </ul>
? Help	e Schedule a meeting	



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Apps	5pm	• IT update • Integration and 20
? Help	曲、Schedule a meeting	











- Open the Share tray
- Chose from options, note headings pros and cons of each
- Include computer audio

O Include computer sound								
Desktop	Window	PowerPoint	Browse	Whiteboard				
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Screen #1	Ellen/Leanne   Microsoft LPLC presentation_v1 - P Microsoft learns Sharepoint learns trainin Legal Ops and lech - Kef 2 Keminder(s)	Sharepoint leams trainin	LPLC presentation_v1.potx	Microsoft Whiteboard				
Screen #2	Inbox - Ellen.Connor@lo Upcoming gift costs Mel	LPLC presentation_v1-D	2007 Melbourne Team					





- Being aware "red box"
- View options to maximise screen share
- Request control
- Collaborative documents













- See who attends a meeting
- Download attendee list
- Add others to meetings







- See who attends a meeting
- Download attendee list
- Add others to meetings











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- Chat within a "Team"
- Chat with an individual or group
  - Type person's name in the top search bar.
  - Then use either Camera icon or the Phone icon to call that person.
  - To add in others, click the People+ icon.
- Share documents pros and cons
- Share links options



• Where you see this button it means it will use the camera.



 Where you see this button, it means it will just use audio. (person will not be able to see you, but you may be able to see them).



• This button allows you to add others into the conversation.



• This button always means share your screen.









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- Chat & calls
- Video and screen share
- Join and schedule meetings
- Document share & collaboration
- Safe store sensitive info

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# Other ways you can use Microsoft to improve practice management



#### Practice Management

- Work intake, triage & allocation
- Progress & tracking
- Dashboards & reporting
- Analysis, trends & insights
- Invoicing

#### Knowledge Management

- Templates & precedents
- "How to" guides etc
- Team portal

### **Document Management**

- Automation & negotiation
- Approval & execution
- Storage, notifications & reporting



Automation can sometimes be thought of as complex and costly.

But Microsoft provides lots of automation options that are simple to implement.

Templates – consider templates not just for your documents but emails, workflows

You can combine Mail Merge, Microsoft Forms and Microsoft Power-Automate (formerly known as Flow) to perform many practice management tasks automatically, e.g. sending engagement letters, reminders to lawyers to update a client etc

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### **Other questions?** Feel free to get in touch

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