



# 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



Remote  
working



Improved efficiency  
& profitability



Get more from the  
tech you already own



Avoid/better  
defend claims



# Word



# Word



## Formatting Shortcuts & Tips

- 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

# Word



## Formatting Shortcuts & Tips

- 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

# Word



## Formatting Shortcuts & Tips

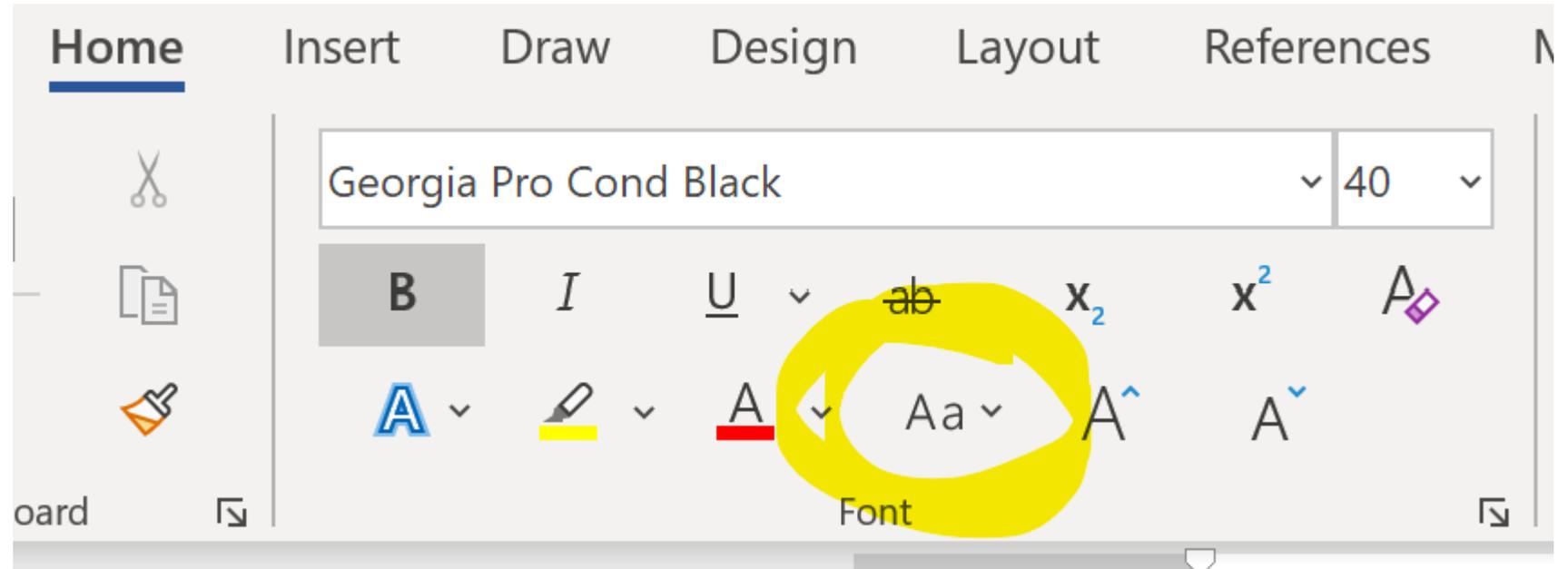
Maximising the use of:

Format painter

Redo

Find/Replace

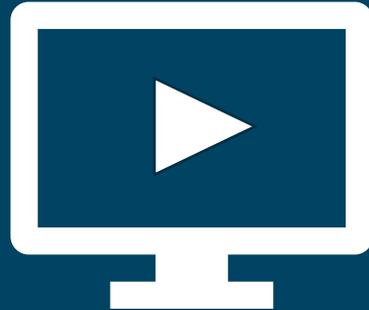
Case



Word



# Formatting Shortcuts & Tips



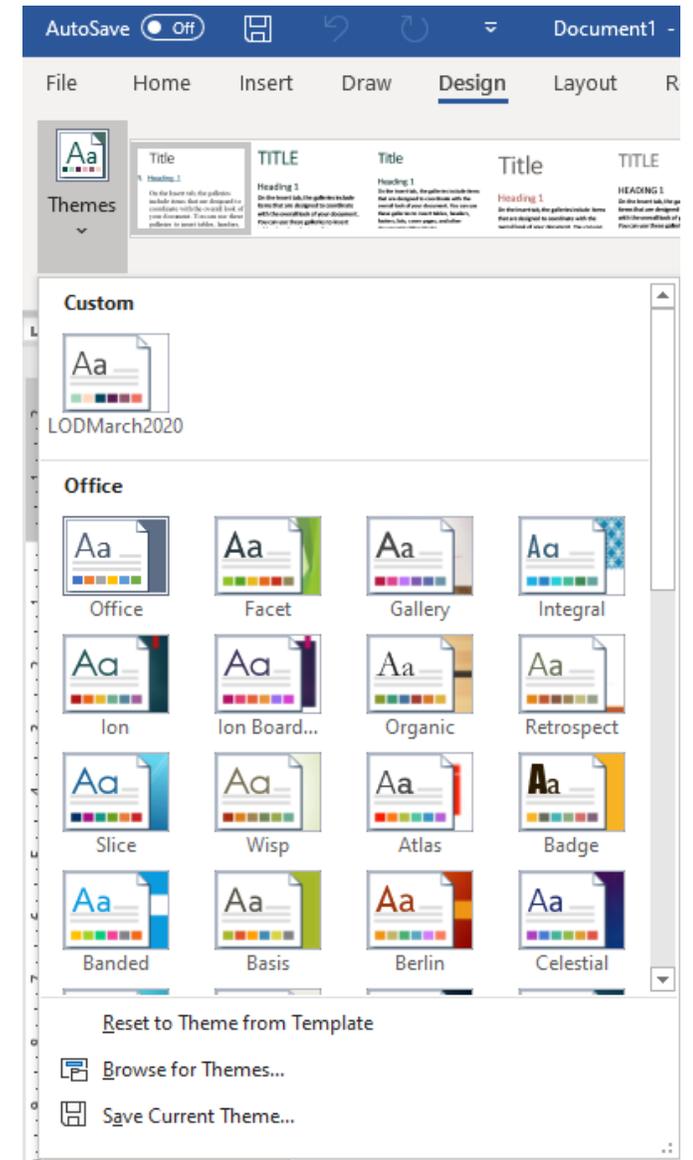
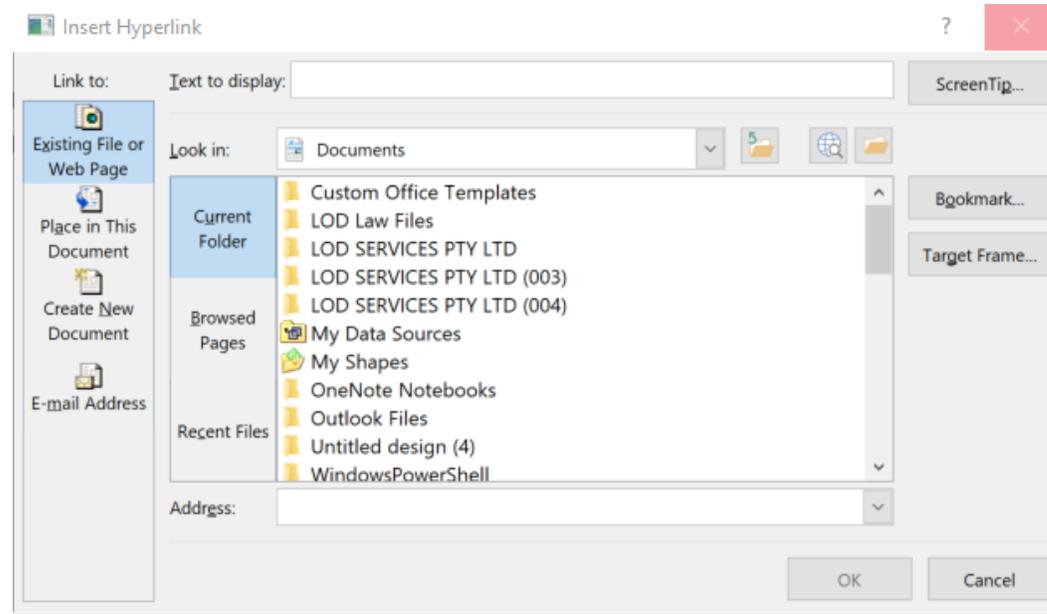
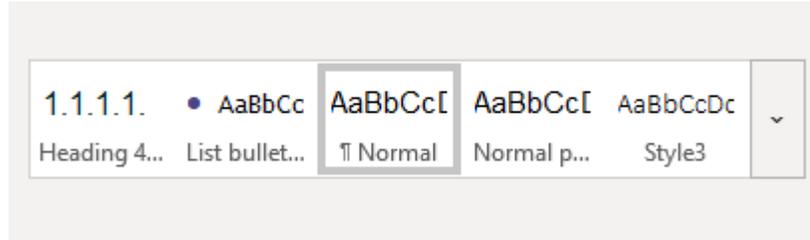
DEMO

# Word



# Templates

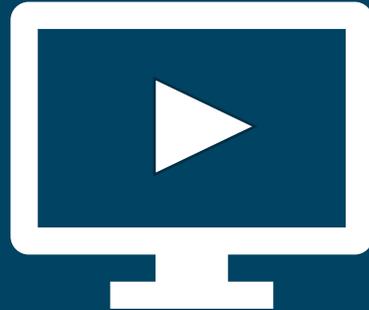
- Docx – pros and cons
- Letters
- References
- Styles
- Colours
- Themes
- Unformatting
- Hyperlinks



Word



Templates



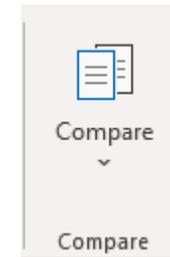
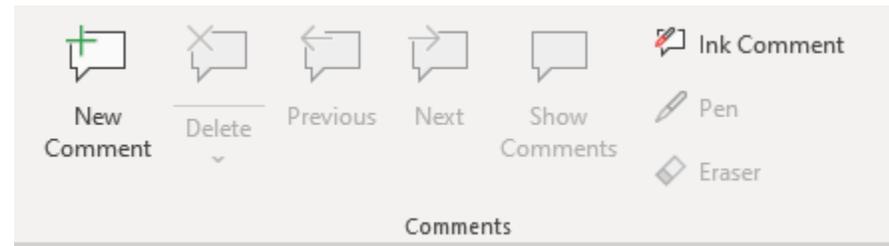
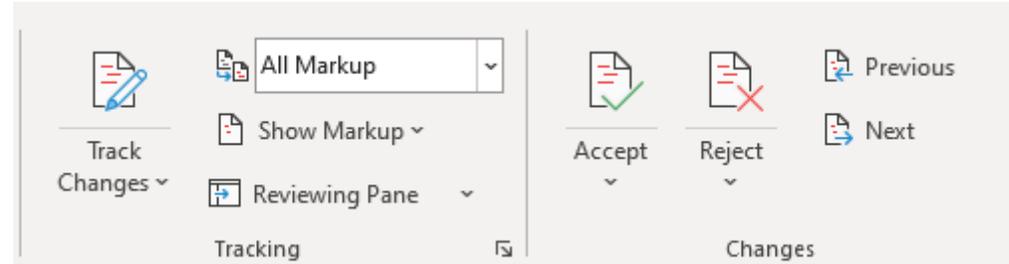
DEMO

# Word



# Collaboration

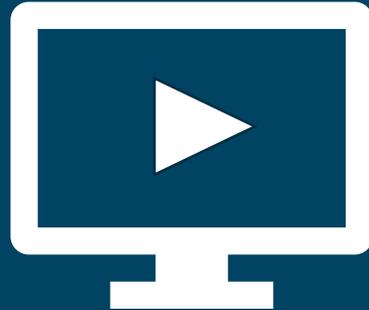
- Review settings
- Comments
- Track changes
- Compare & Combine



Word



Collaboration



DEMO



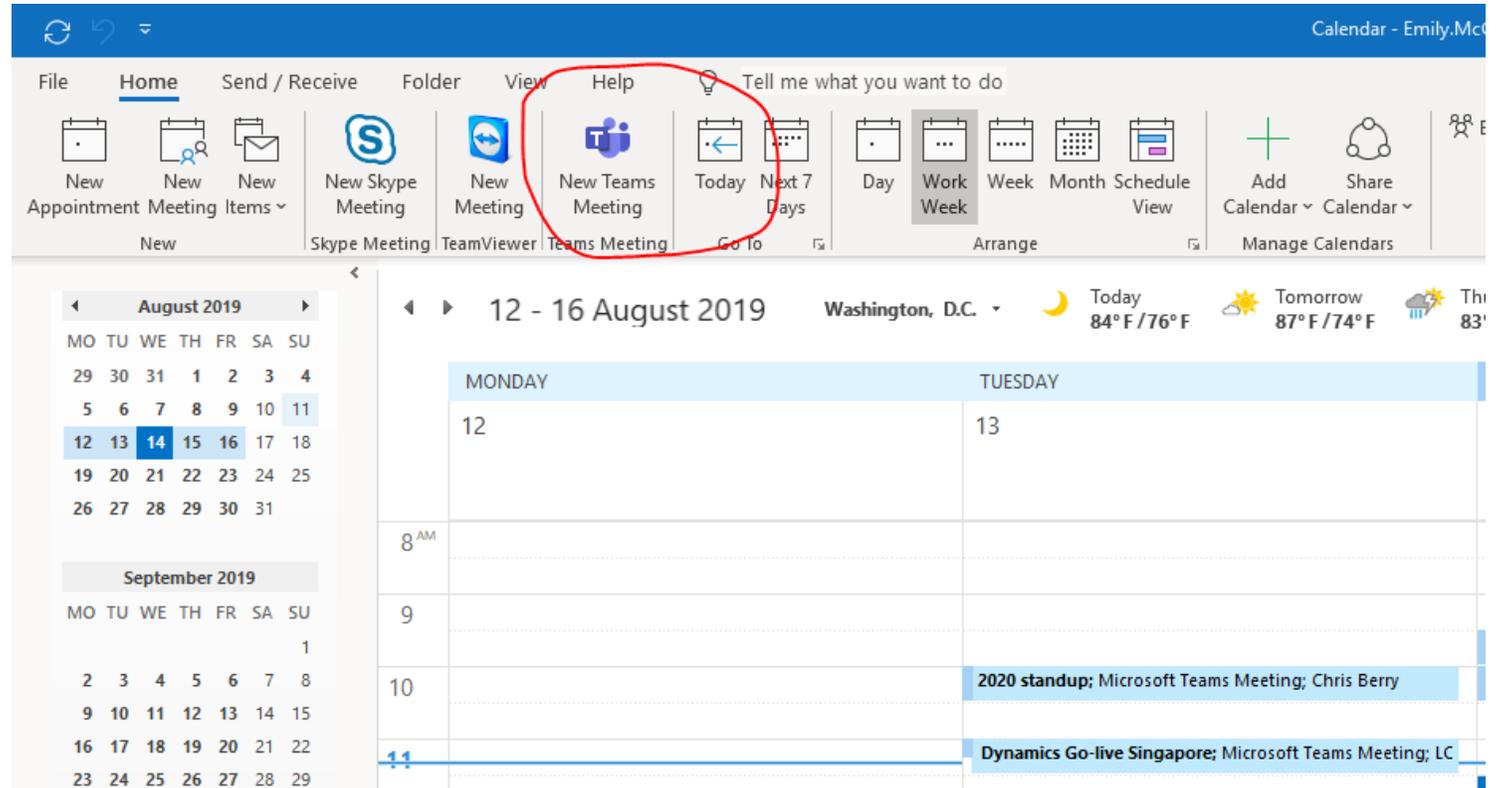
# Teams





# Setting up Teams Meetings from Outlook

- Option 1
- 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.





# 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.

The screenshot shows the Outlook ribbon with the 'Appointment' tab selected. The 'Teams Meeting' option is highlighted with a red circle. Other options visible include 'Skype Meeting', 'Online Meeting', 'Meeting Notes', and 'Attendees'.

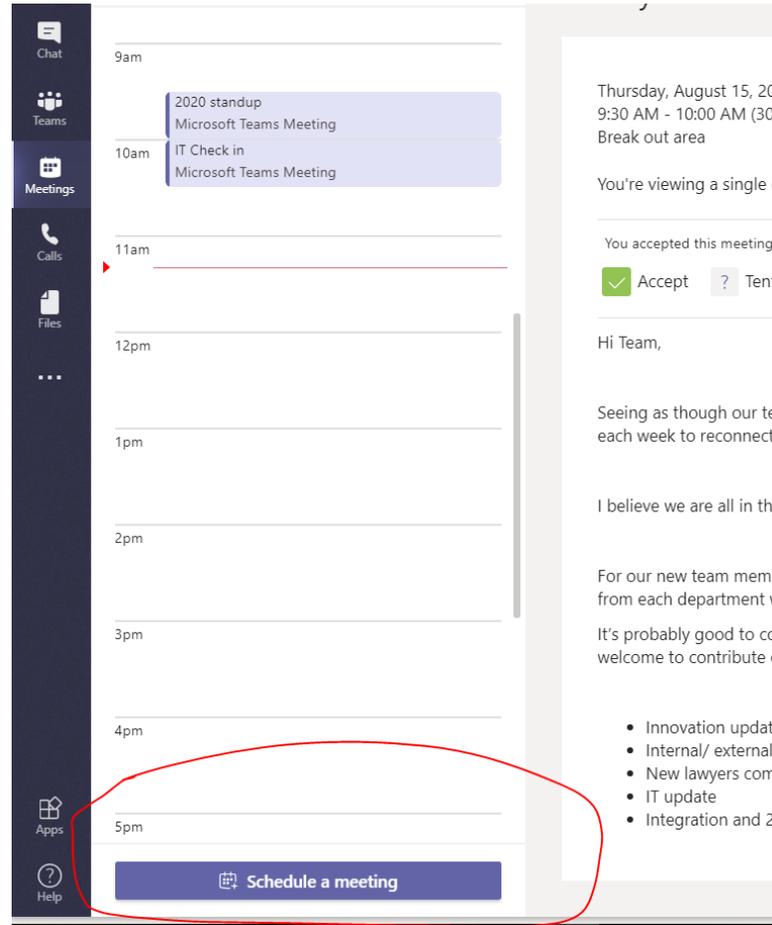
The screenshot shows the meeting creation form in Outlook. The 'Location' field is set to 'Microsoft Teams Meeting'. The 'Send' button is visible. The 'Join Microsoft Teams Meeting' link is highlighted with a red circle.

Join Microsoft Teams Meeting  
Learn more about Teams | Meeting options



# Setting up Teams Meetings from Teams

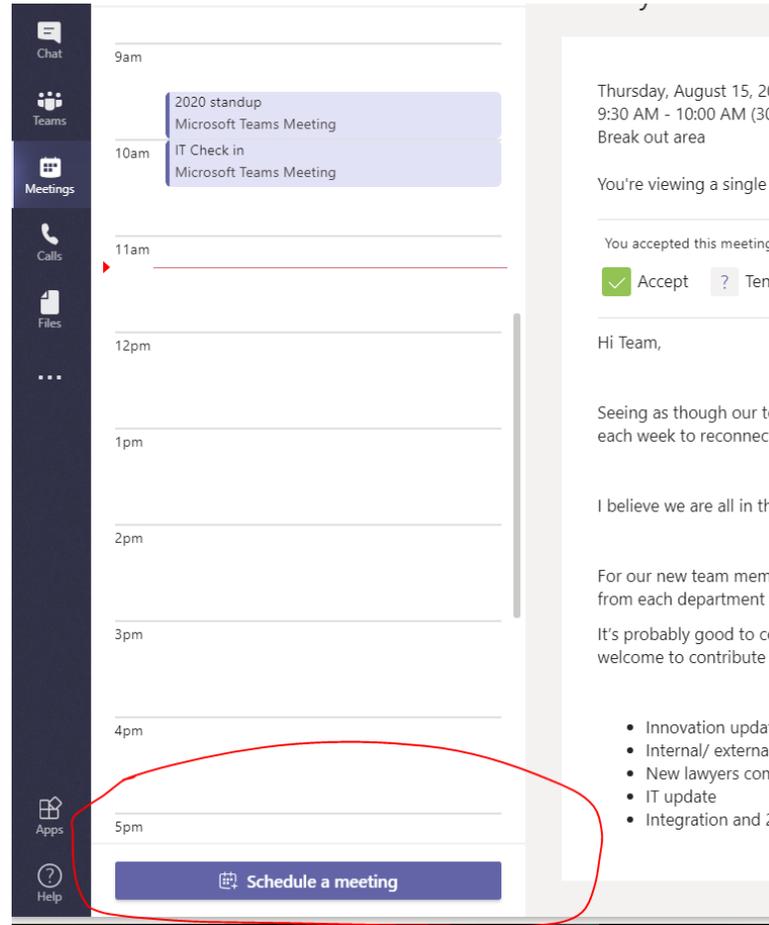
- Open Teams
- Use the left-hand banner for navigation through Teams
- Go to 'Meetings' tab
- Schedule a meeting. This is automatically create a Teams meeting.
- When it comes time for the meeting, join by clicking the link.





# Use Teams scheduling assist

- 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.



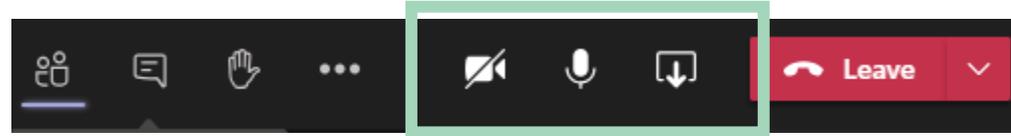


# Setting up Teams meetings

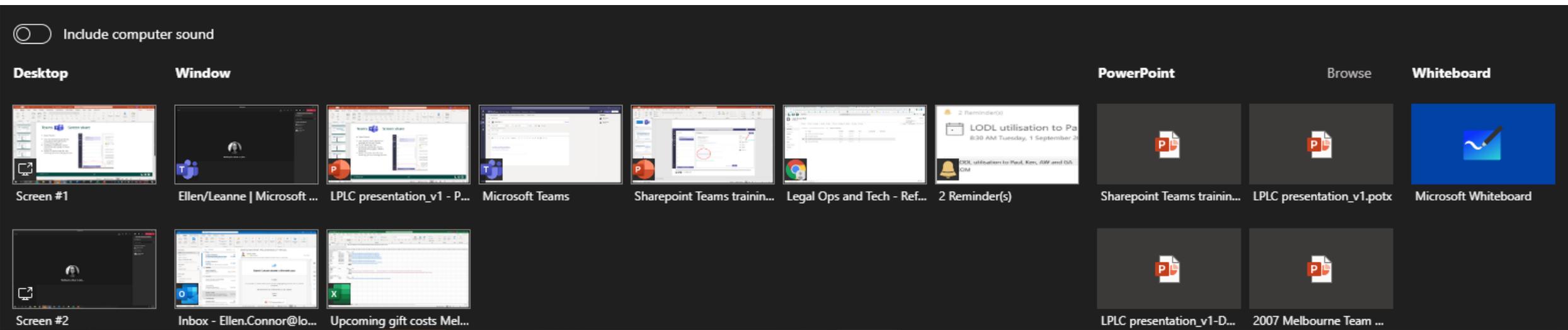




# Video, Audio (un/mute), Screen share



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



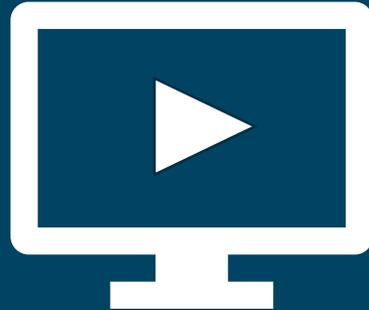


# Screen share cont

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



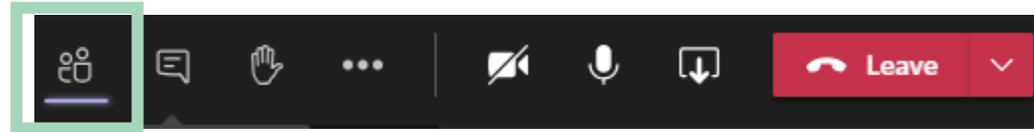
Video, Audio, Screen Share



DEMO



## Participants



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



# Chat, Raise Hand



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



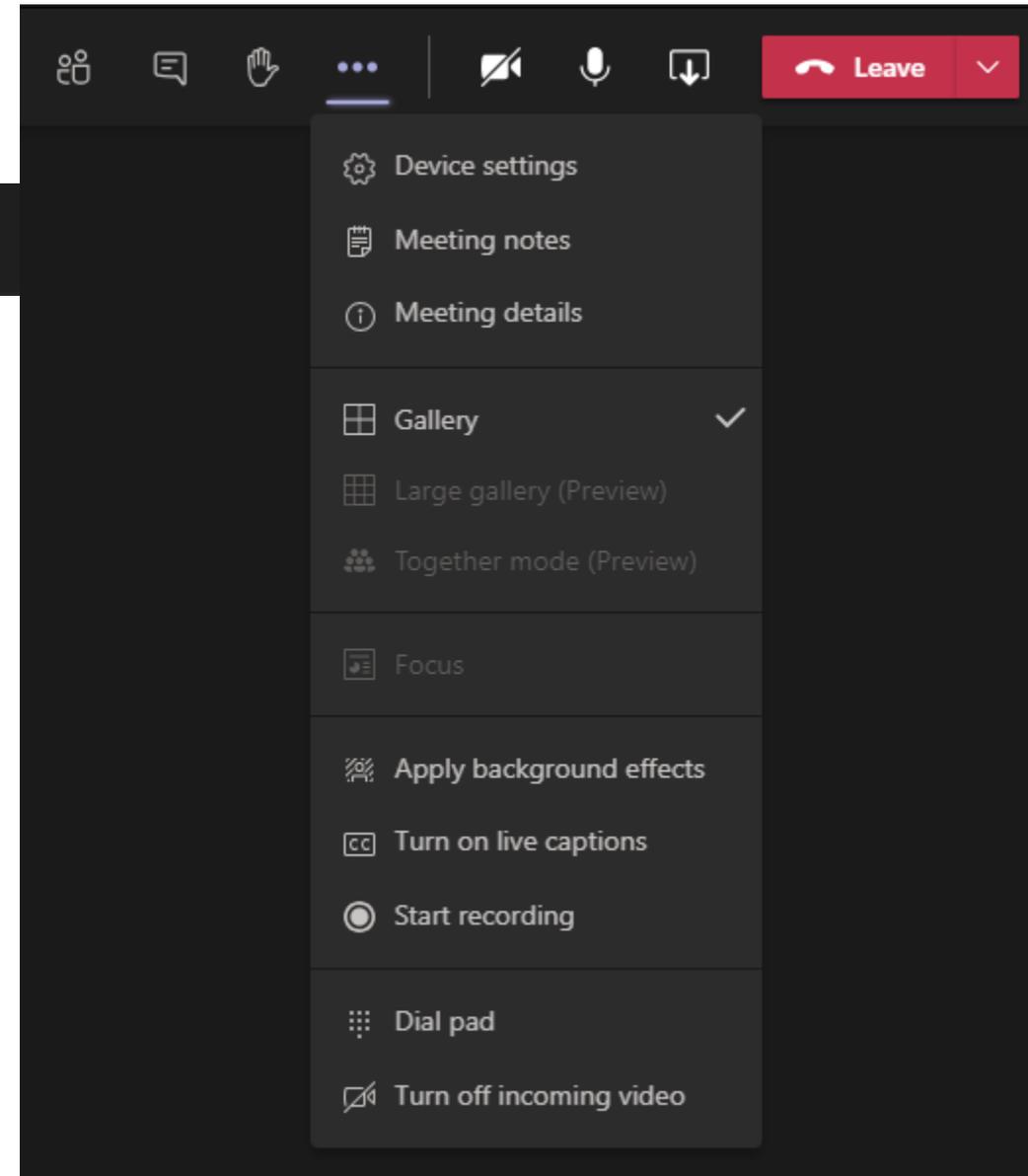
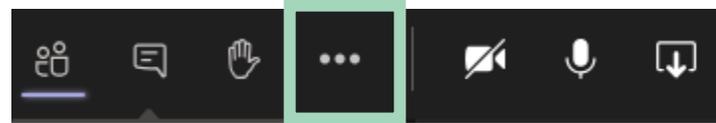
Video, Audio, Screen Share





## Record, Other

- Recordings
- Backgrounds
- View settings



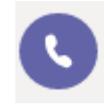


# “Teams”, Non-meeting functions

- 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.

Teams 

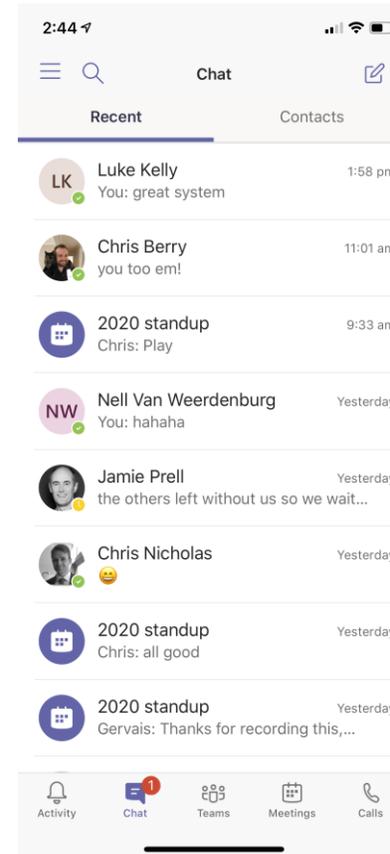
Other



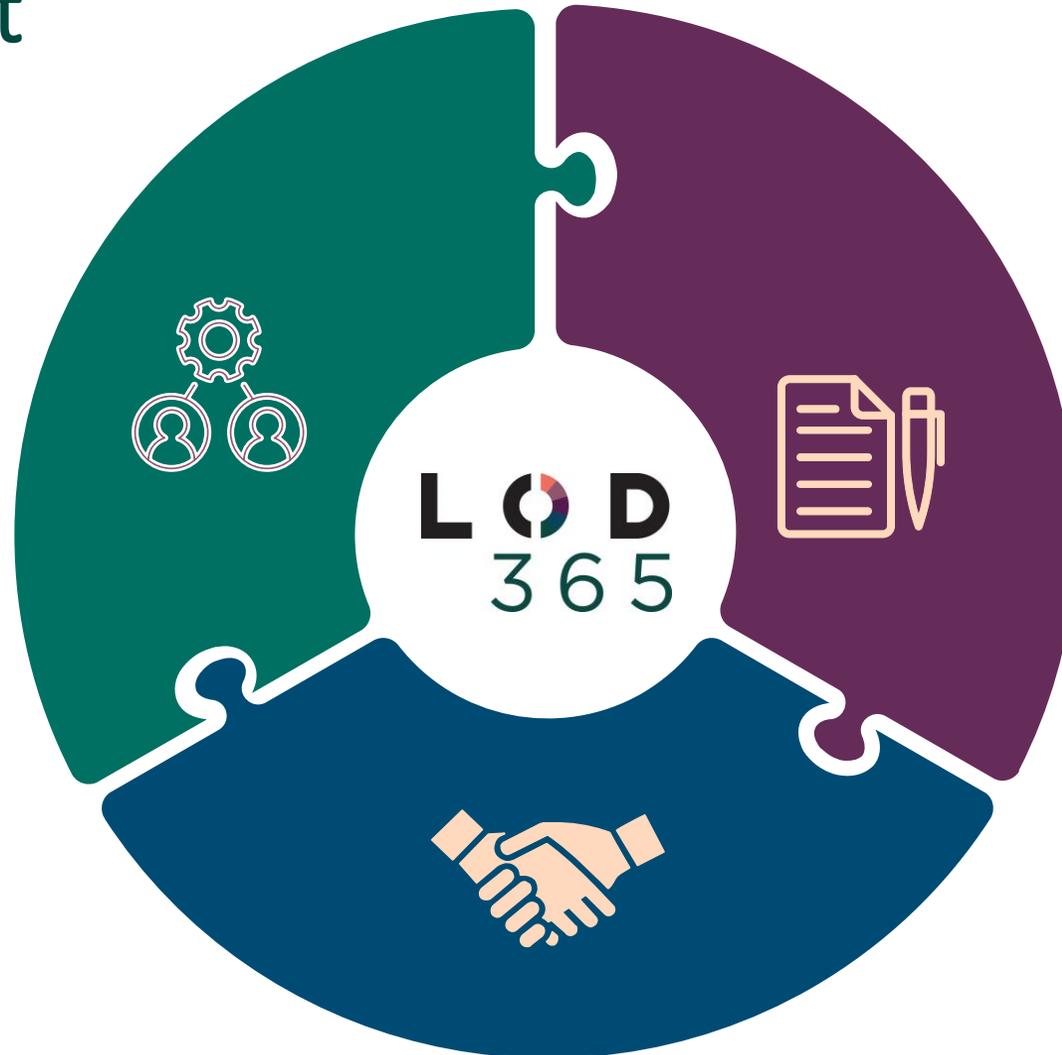
DEMO

# Teams Mobile App

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



# 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



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



## Other questions?

Feel free to get in touch

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