Speaker 1 (00:03):

Welcome to the Vandenack Weaver legal visionaries broadcast brought to you by interactive legal here's your host Mary Vandenack.

Speaker 2 (00:12):

Welcome to today's episode of Vandenack Weaver, legal visionaries, a weekly broadcast discussing updated legal news, evolving methods of providing legal service and law practice issues. My name is Mary Vandenack founder and managing partner at Vandenack 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. First of all, I want to thank our sponsors, interactive, legal and Carson private client. Here's the message from interactive legal.

Speaker 3 (00:52):

There's always a resistance to change, particularly with attorneys, attorneys like to look back at what's worked in the past, and that makes a lot of sense. But when you realize that with a good automated drafting system, you can do a better job for your clients. Deliver documents on a more timely fashion in a more consistent, in a more costly manner. If you're not a subscriber to interactive legal, I urge you to go to interactive legal.com and click on requested demo. And you'll be contacted about having a demonstration of interactive legal for you, which can be done right over the Internet. Don't have to leave your office. No sales person will call. We can arrange it at a time and convenient for you. So please go to interactive legal.com and click on request a demo today

Speaker 2 (01:42):

He's 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. Oh, 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 two thousands 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, it's so

Speaker 4 (02:35):

Great to be with you.

Speaker 2 (02:36):

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

Speaker 4 (02:45):

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

Speaker 2 (02:49):

And so what's the answer.

Speaker 4 (02:51):

So the simple answer to that is it's our collection of software and services available by subscription. We've we've also confused people a little bit, cause 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. Um, 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.

Speaker 2 (03:22):

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.

Speaker 4 (03:32):

 I understand that, you know, when back way back when subscriptions started to take off, you know, my, I was a little resistant or uncomfortable about it myself.   I was so familiar with the old model of you. You write one check and you 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 I 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.

Speaker 4 (04:20):

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 runs 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, which at the time was actually a very fair price that 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.

Speaker 4 (04:59):

Could we just move our exchange into Microsoft 365? I said, sure. And he said, okay, well what would that cost me? And I said, a hundred users. He said, yeah, I said $400 a month. And he said, $400 a month per user. I said, no, $400 a month for the whole firm. And he thought about it for you. He'll pause. And he said would take me a long time to spend $24,000 at $400 a month. And I said, yeah, it would. Um, 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 those value, 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, cause you probably have people in your firm who have a, you know, they have a windows PC on their desk. They have a laptop in their bag and maybe they've got a Mac at home. Now they can install

that same license on three. Then finally it simplifies licensing and deployment just makes it a lot easier to manage.

Speaker 2 (06:01):

Yeah. 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.

Speaker 4 (06:19):

Sure so with the software that comes with Microsoft 365, it's, it's familiar the 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 it on 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.

Speaker 2 (07:02):

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.

Speaker 4 (07:11):

Using all the same time. Yeah. No,

Speaker 2 (07:13):

And I don't not quite that skilled. Well, let's talk about services. Sure.

Speaker 4 (07:18):

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 envelope 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

Speaker 2 (07:58):

And there's different plan options. There

Speaker 4 (08:00):

Are, there's a, 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.

Speaker 4 (08:42):

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 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 five is kind of the big brother. if you wanted to go there,

Speaker 2 (09:20):

We are going to take a brief break from our episode for a word from one of our sponsors, Carson, private client

Speaker 5 (09:27):

Planning focuses on liquidity management and charges you a fee based on a percentage of your assets. But entrepreneurs typically invest in their business resulting in light liquidity. That requires a unique strategy at Carson private client. We provide a proactive and holistic strategy for building and protecting your wealth. Our mission is to alleviate the stresses and the burdens of coordinating all of those financial strategies. Carson, private client will work with your current team of advisors to customize a strategy that manages all aspects of your life and wealth, giving you back the time to focus on what matters most complex needs require sophisticated solutions. Reach out to our office at 4 0 2 7 7 9 8 9 8 9 to schedule your consultation. Investment advisory services offered through CWM LLC, an sec, registered investment advisor.

Speaker 2 (10:27):

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?

Speaker 4 (10:38):

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, I paused, I looked down, I said everything. Okay. She said, I already have this. I said,

yeah, I know she was so excited. Cause 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 so 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, 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're 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 our point, 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 T 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 queue. 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. Cause 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, no, that's awesome.

Speaker 2 (14:17):
So what are some of the newest features that we should be looking for in Microsoft 365?

Speaker 4 (14:23):
 I think it's 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.

Speaker 4 (15:02):
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.

Speaker 4 (15:48):
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 was been called project mocha.   It's also known as it's now called Microsoft boards. Its an outlook in the wet 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.

Speaker 2 (16:20):
So 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 weekend 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? Or,

Speaker 4 ([17:01](#)):

You know, I think, probably the most powerful integration that I can recommend is a power automate. If you haven't used that yet her 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 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 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.

Speaker 4 ([18:00](#)):

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

Speaker 2 ([18:11](#)):

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

Speaker 4 ([18:17](#)):

No, 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 cause 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
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

Speaker 2 ([18:58](#)):

Any last tips or thoughts,

Speaker 4 ([19:00](#)):

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.

Speaker 2 ([19:28](#)):

So as we get to the end of our episode, I want to thank our sponsors, interactive, legal and Carson, private client. Ben, thanks for joining us today. That's all for now. Thanks for listening to this week's episode and stay tuned for weekly releases,

Speaker 6 ([19:48](#)):

Hurrdat media production.