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Leverage Microsoft Teams for Digital Transformation: Best Practices for Provisioning & Governance

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Boosting Collaboration While Maintaining
Governance with Microsoft Teams

Prosperoware Best Practices

Over a span of only a few months, firms experienced a rapid digital transformation. Microsoft Teams went from a "nice to have" collaboration software to a "must have." As a result, the application experienced a [200% increase in meeting time](#) between March and April, and [a 10 times increase in messages within Teams meetings](#) from March to June.

Whether your firm is just getting on board with deploying Microsoft Teams, is planning to do so, or has been using it for a while, the need for processes and governance is evident. In this article, Prosperoware shares best practices to help firms provision and govern Microsoft Teams to optimize real-time collaboration.

Targeted at improving organizational collaboration, Microsoft Teams has now become a foundational technology for collaboration and productivity, boasting more than [44 million daily users](#). Its capabilities extend into a hub for other applications by connecting hundreds of bots, connectors, and tabs, revamping Teams into an irreplaceable collaboration platform for firms.

However, rolling out Teams for an entire firm requires alignment with the firm's data governance policies and various laws and regulations on privacy & cybersecurity. For firms that create hundreds to thousands of matters, projects, opportunities, or engagements per month, the scale of governing a Microsoft Teams deployment requires an investment in personnel and/or software.

Deploying Microsoft Teams with Governance in Mind

Firms are subject to privacy regulations with most having agreed to Outside Counsel Guidelines (OCG) requiring proper management of client data. Without good governance, Microsoft Teams can easily spiral into a digital nightmare when client data is not managed appropriately.

To resolve this challenge, firms are encouraged to adopt a matter-centric approach to Microsoft Teams. For example, firms should provision a Team for each active matter. The Channels within the Team can represent different phases or processes within each matter, with some representing external collaboration with clients, vendors, or suppliers. Firms should also have designated Teams for firm and department-wide collaboration. As a best practice, we recommend not having more than 10 firm and departmental Teams for enhanced productivity.

Firms can also use Microsoft Teams tabs to link to website, their Document Management System (DMS), litigation software, docketing, court, or billing systems.

Private chat in Microsoft Teams should be limited to private-only communication between employees with no matter-related discussions. Sharing matter information over private chat deprives new team members of collaboration and weakens governance. Locating content becomes difficult. This process becomes even more challenging when someone leaves the organization and their private chat is either deleted or the sender cannot be identified.

To get firms started with their Microsoft Teams adoption, here is a recommended structure of Teams you need to provision.
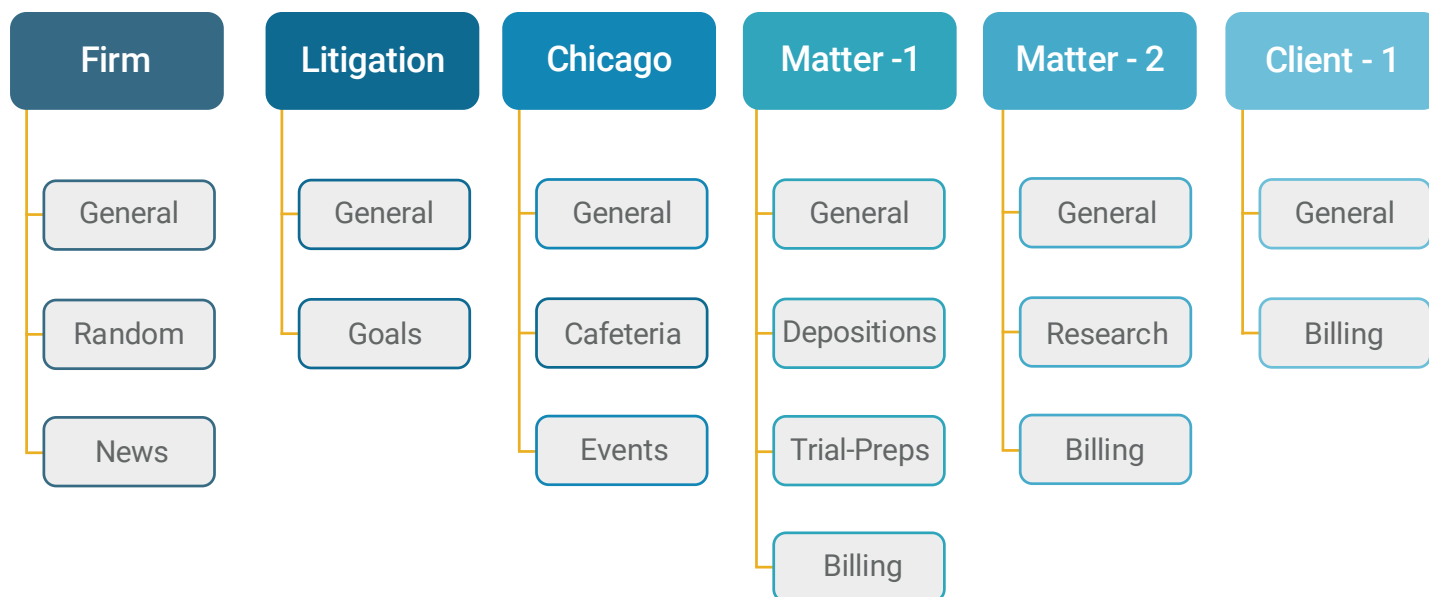
Firm	Litigation	Chicago	Matter -1	Matter - 2	Client - 1
General	General	General	General	General	General
Random	Goals	Cafeteria	Depositions	Research	Billing
News		Events	Trial-Preps	Billing	
			Billing		

Figure 1: Sample Teams for a Firm

Why Firms Need Automatic Provisioning for Microsoft Teams

Firms use a variety of systems of records, including Document Management Systems (DMS). They provision matters in those systems, including Microsoft Teams. As most firms provision manually, it can take up to 15 minutes to provision each matter, depending on matter complexity. Only a few automate this process. Automation increases organizational efficiency and structural consistency between the DMS, Microsoft Teams, and other content and collaboration systems.

The first reason for encouraging automatic provisioning within the firm comes down to being able to locate a Team or Channel for a matter. When firms create workspaces in their DMS, a client or matter number/ID is assigned to it from a lookup list, enabling content location. Microsoft Teams does not currently provide the ability to automatically assign a client or matter number to a Team. The difficulty to locate content in Teams decreases efficiency and governance.

With automatic provisioning, firms can have a Team and respective Channels, together with OneNote and Planner tabs, as well as OneDrive folders, created whenever a matter is provisioned in their DMS, within seconds. As a result, firms can locate content quicker and easier due to consistent client and matter numbers.

The importance of automatic provisioning is emphasized when a client or matter number changes. For example, if the firm provisioned a matter in the wrong practice area, the matter name change must be reflected in all firm records, including the DMS and Microsoft Teams.

When a firm automatically provisions matters, consistency in document naming is obtained. Good naming convention practices are paired with rich metadata to add context and understanding of business purposes for end-users and the risk management team. In the event of a client data request related to a matter, risk management teams can easily identify appropriate content for transfer. Firms can also apply legal hold based on clients and matters, eliminating the need to call the matter team or partners to find where data is located.

When a Team contains the correct client or matter number, ethical walls or information barriers can be automatically applied. This enables need-to-know security and keeping security in sync across various systems, including Microsoft Teams.

In addition to internal collaboration, Microsoft Teams also fosters external collaboration with clients, vendors, and suppliers. To enable this, it is important to integrate Microsoft Teams with the DMS for easier access management. It becomes particularly relevant when expert witnesses and other third parties are given access to multiple matters from different clients. When a Team is identifiable with its client or matter number, firms can efficiently decrease the likelihood of inappropriate access for guest and internal users. Learn how MS Teams can become a secure and governed extranet from our session [here.](#)

If an organization has a template in the DMS through which they provision matters of a certain type, they can carry it over to Microsoft Teams. Having a Tab linked to the appropriate workspace in the DMS becomes helpful.

To allow for DMS integration, the folder structure of the DMS and Microsoft Teams needs to be parallel. This allows for smoother content movement between Microsoft Teams and the DMS with effortless data transfers to the client. Such a parallel structure supports consistent security between folders and documents. For example, if your firm is using Microsoft Teams as an extranet, folders in the Files tab may have different security. Typically, external users will have more limited access in line with zero-trust practices.

Manual provisioning makes an employee a Team owner, presenting several challenges with ownerless Teams, such as:

- The employee can change security in violation with ethical walls and Outside Counsel Guidelines

- If the employee leaves the firm, the Team is orphaned

Firms can mitigate this challenge by setting a System Account as the Team owner. For example, Prosperoware CAM enables firms to have automatic provisioning across systems, including Microsoft Teams, eliminating this problem by making a System Account the Team owner.

Setting the System Account as the Team owner also tackles the problem of storing data in diverse geo-locations. This is a problem for multi-national organizations that need to comply with privacy laws, requiring data for a particular client or matter to be stored in the appropriate geo-location (e.g GDPR in the EU or UK, appropriately). Microsoft provides the ability to have different locations to store data for larger organizations. But the information is stored based on the home location of the user provisioning the Team.
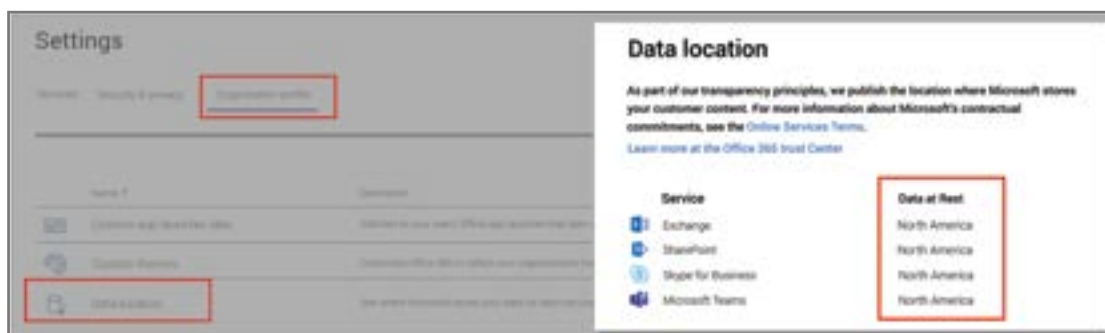

Figure 2: Geo-Location Setup in Microsoft Teams

With automatic provisioning, the systems account provisions all Teams and Channels, and organizations can set up the location to comply with relevant privacy requirements. To learn more about the challenges and best practices of provisioning and governing MS Teams, look through the Prosperoware and ILTA virtual roadshow on the topic [here.](#)

Boosting Digital Transformation While Applying Governance in Microsoft Teams

The pressure to comply with Outside Counsel Guidelines and privacy regulations is making waves in the legal industry and beyond. [Hundreds of millions of dollars](#) in fines have already been levied by GDPR enforcers alone, and the onslaught of new privacy and cybersecurity regulations – CCPA, NY Shield Act, NIST Cybersecurity Framework, and more - show no sign of stopping. These privacy requirements extend to all systems of record within a firm, including Microsoft Teams.

Most firms are currently attempting to govern their systems, such as Microsoft Teams, manually. However, such manual processes are inefficient and prone to human error. The risks are too high. And the right governance software can make the process of privacy compliance efficient, secure, and automatic, enhancing firm-wide collaboration.

With the ability to automatically provision matters and locate content, firms also obtain a layer of governance over Microsoft Teams. Since Microsoft Teams does not have a function for assigning metadata, there is no way to link Teams, Channels or documents back to specific matters. Data is spread everywhere in Microsoft Teams, making governance challenging.

Governance for Teams starts with assigned client or matter numbers. As a result, content can be tracked, and the necessary information barriers and other security measures can be applied automatically. Adding governance to Microsoft Teams ensures that a firm knows what & where content is stored to effectively protect confidential and sensitive information.

Type	Location
Private Chat	A Hidden Folder in User's Mailbox
Team Conversations	Shared Mailbox
Private Chat Files	One Drive
Teams Files	SharePoint Site / Document Library
Private Channel	A Separate Site Collection
Voice Mails	User's Mailbox
Meeting Recordings	Microsoft Stream

Figure 3: Data Stored in Microsoft Teams

Without software, firms manually track the URL of a Team or Channel to a Matter through spreadsheets. Changes to client or matter names or numbers are also tracked manually. As a result, firms expose themselves to the possibility of high human error and increased cost implications.

The right technology would take these changes from Practice Management, Time & Billing, CRM, HRIS, or practically any system of record and push automatic updates for all content and collaboration systems, including Microsoft Teams. The benefit for firms is that no critical data is lost during the process.

Firms and timekeepers work on multiple matters. For example, a lawyer can work on anywhere between 10 to 500 matters a year. When everyone creates workspaces and stores data differently, content location becomes highly arduous. Inability to locate content coupled with inconsistencies in folder design lead to further governance challenges.

The ideal solution is a piece of software that enables a consistent folder structure across systems, integrating Microsoft Teams and the DMS. The solution also needs to enable effective collaboration without risking inappropriate access from internal and external parties. Integrating Microsoft Teams with the DMS provides access management on a need-to-know basis.

But governance for Microsoft Teams does not end here. Risk management teams need to easily identify appropriate content for transfer to clients and meet increasing reporting requirements. With a governance layer, firms can rapidly locate data to prove conformity, respond to DSARs, and fulfill client requests for content movement. Watch our session with ILTA on **best practices for moving content from MS Teams to the DMS** to learn more.

Many firms have policies in place to ensure data disposition after a matter is closed. To diminish privacy risks, firms need to know what data they have, where this data is stored, and what the suitable disposition periods are. This encompasses data stored and shared through Microsoft Teams too.

Governing Microsoft Teams content ensures that organizations can securely transfer content from Teams to their Document Management System (DMS) or any other system and minimize risks by applying data disposition policies. For example, Prosperoware CAM enables integration of a firm's DMS and Microsoft Teams to provide automatic provisioning of Teams and Channels, OneNote and Planner tabs, and OneDrive folders, and a governance layer across them all.

Real-time Collaboration Across Firms and Departments

The new normal caused a shift of working environments. To ensure competitiveness, firms across the globe need to adapt to an increase in remote collaboration and virtual teams. The surge in remote work, powered by Microsoft Teams, is propelling firms' digital transformation initiatives. In designing these initiatives, firms need to think about governance as a core strategic element. To maintain client trust, reputation, and avoid hefty privacy fines, firms need to balance short-term efforts with long-term outlooks.

Building long term resiliency to reduce threats – cyber, pandemics, or others - will position firms as victorious under any unforeseen circumstance. Strategies that link processes and governance with the right technology, will help firms best optimize firm-wide and departmental collaboration with Microsoft Teams.

How Prosperoware Helps with Provisioning & Governing MS Teams

Prosperoware CAM enables organizations to leverage their content & collaboration systems for digital transformation while improving governance.

Our unique approach relies on adding context by applying rich metadata to identify projects, matters, engagements, etc. to workspaces, Teams, Channels, and folders in systems. This approach benefits end users and the risk management team. Users can leverage critical metadata to easily locate content, while risk professionals can focus on the security and disposition of data instead of trying to determine its context.

Key features of CAM for Microsoft Teams, OneDrive, OneNote, & Planner, include:

- Automatic provisioning of Teams & Channels from Practice Management, Time & Billing, CRM and other source systems, or through an approval-based workflow using templates

- Provisioning of SharePoint Online sites & folders to OneDrive

- Provisioning of OneNote and Planner as Tabs in Channels

- Ability to provision web page tabs

- Support for creating pre-defined folder structure in the files tab

- Ability for the end user to add additional folders as needed from a pre-defined list

- Provision internal & external users, manage permissions, and generate reports

- Automatic & consistent naming of Teams and Channels

- Support for integration with leading ethical wall systems

- Scheduled & manual document movement between MS Teams & DMS

To learn more about how CAM can enhance your MS Teams experience, watch our **3-min ONLY demo**, or read our **CAM Microsoft Teams datasheet**.

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About Us

Our core competency is our expert understanding of enterprise systems, data and processes in organizations, and developing technology geared towards digital transformation. We develop software for improving processes & governance for content & collaboration systems and financial matter management. Our unique approach enables organizations to place content in the right place while applying governance.

We empower organizations to better compete through:

- *Significant increases in profitability*
- *Meaningful improvements to client experiences*
- *Higher user adoption of systems*
- *Reliable organizational and client risk reduction*

Our technology takes clients through a journey to organizational maturity, resulting in an enterprise-wide digital transformation. This is evident from our 300+ customers including 50% of G20 and AmLaw 200, 64% of the AmLaw 100, many global corporations, and the Big Four.