



CHAPTER 1

Introduction

Possibly no book I've ever written was as loudly demanded as this one. When Microsoft launched Office 365 in June of 2011, lawyers were curious. Today solo, small, and midsize firms are flocking to it in droves and even many of the larger firms are giving it a look as their legacy systems age.

In this book, I'm going to explain to you what Office 365 is today and answer some of the common questions that lawyers ask me when they're considering whether to move to Office 365. I'll also offer some guidance on how to properly set up and manage Office 365 and even offer an entire chapter with information on how to migrate to Office 365.

At the end of each chapter, I'll sum up with a "What You Need to Know" section. If you don't want to bother with the entire chapter, you can always just skip to that section.

Office 365 is a very wide and very deep topic and it changes so quickly that it's not really practical for me to write a comprehensive 800-page book. By the time I got to page 240, half of the features would have changed. So I've opted to make this book timelier by getting it out to you quickly and focusing on what I think is important. The trade-off is that I can't cover every Office 365 topic in depth. Fortunately, there are a number of excellent online resources you can turn to for more information if you feel you need it.

So What the Heck Is Office 365?



Well, that seems to be the magic question and, unfortunately, the answer takes more than a paragraph. At a very basic level, Office 365 is a subscription-based service from Microsoft that offers access to a variety of software and services. Office 365 evolved out of an older product called Business Productivity Online Suite, which was rather tragically abbreviated to BPOS.

◆ There are both Professional and Home versions of Office 365. Since this book is written for attorneys and law firms, we focus on the Professional versions here.

The software ranges from tools you're very familiar with, such as Microsoft Office 2016, which includes Word, Outlook, Excel, and PowerPoint, to things you may not be as familiar with, such as Microsoft Visio. The services include industry powerhouses like Microsoft Exchange and SharePoint alongside lesser-known offerings like Microsoft Dynamics CRM and Yammer. There are also mobile versions of almost all of the client software for almost every mobile platform—most notably, iOS and Android.

The desktop software is installed as a Click-to-Run installation, which means that rather than installing from a DVD, or even a traditional download, in most cases the software is installed by streaming it from the Internet. One common misunderstanding about this is that people think that means the software is web-based (like Google Docs) or that you have to be always connected to the Internet in order to use it. Office 2016 via Office 365 (yes, I know it gets confusing) is installed on your local hard drive just like your previous versions of Microsoft Office probably were. The differences are that Office software installed through Office 365 will periodically check in to make sure your subscription is still active and Microsoft will frequently push updates and even new features to you. This also means that you don't have to worry about keeping track of installation DVDs in case you ever need to reinstall the software. As long as the Internet is available, your installation files are available.

That said, there *are* browser-based versions of all the major apps, including Outlook, Word, Excel, PowerPoint, and OneNote. So if you find yourself at a machine that doesn't have Office installed, you can still edit your documents and check your email as long as you have Internet connectivity. We'll talk more about Microsoft Office in Chapter 3.

The services are hosted in "the cloud" at Microsoft's data centers. We'll talk more about the main services in detail in later chapters, but here's a quick summary:

- **Exchange Server (Chapter 4)**—This is Microsoft's enterprise-class groupware server for email, calendar, contacts, tasks, and more. In addition to syncing to Microsoft Outlook for PC or Mac, it also syncs to virtually every mobile device (smartphones or tablets) and has a very good webmail client too. Most of the Fortune 500, and virtually all of the AmLaw 100, use Microsoft Exchange server. Thanks to Office 365, it's no longer out of reach for even solo firms and it's one of the best reasons to choose Office 365.
- **SharePoint (Chapter 5)**—SharePoint is Microsoft's collaboration, document, and workflow platform. With SharePoint, firms can create document libraries, shared

calendars, project lists, and more. SharePoint “team sites” can be shared within your firm or even used to create extranets that you share with clients, co-counsel, experts, or others.

- **Groups and Teams (Chapter 6)—Groups and Teams are all about collaboration.** Not just collaboration within your firm—among attorneys, paralegals, professionals, and staff—but potentially collaboration with people outside your firm, such as co-counsel, experts, and maybe even the client. There are several different tools in Office 365 to enable that collaboration and allow you to securely share email mailboxes, calendars, files, and more.
- **Planner (Chapter 7)—Planner is a relatively new offering that lets you create plans to organize and delegate tasks to be done.** Law firms frequently use Planner to manage the workflow of a matter, breaking the matter down into typical tasks (“File petition” or “Identify documents for review”) and then assigning those tasks to members of the firm or even outside counsel or experts. The responsible attorney for the case can easily see a dashboard that indicates which tasks have been completed and if any are behind schedule.
- **Dynamics CRM—Customer Relationship Management (CRM) is a hot topic in business and certainly in law.** While many firms use their practice management software as a CRM tool, others prefer to use a dedicated CRM platform. Microsoft offers Dynamics CRM as a way for companies to keep track of their marketing efforts, plan and track communications with customers or potential customers, and try to coordinate the entire client lifecycle.



Since very few of the Office 365 plans that attorneys care about include Dynamics CRM, and I don’t want this to book to be 600 pages, I’m not going to devote much space to it here.

A Subscription Model?

There is a lot of push-back from folks on the subscription model for software. Most of us were used to paying \$399, one time, and just using that software for years. Sometimes we didn't even realize we were paying the \$399 because we bought our software bundled with our computer and the cost of the software was just quietly rolled in. I'll admit that at first I wasn't too keen on the subscription idea, either. But Microsoft has done a couple of things to sweeten the deal.

First of all, they've kept the pricing relatively low. For most of the plans, it'll be two years or more on the subscription plan before you'll have spent as much as you would have spent for that box of software. Secondly, many of the plans bundle in some valuable services, such as OneDrive for Business, Groups, Delve, and more. When you consider what those services are worth, the package becomes considerably better. Third, they've been quite liberal with the licensing. You may be paying \$8.50 a month for Microsoft Office, but that \$8.50 a month lets you install Office not just on the PC on your desk, but also on the laptop in your bag, on the Mac at your house, and on the iPad you're carrying around . . . and pretty soon you're effectively paying just \$2 or \$3 per month per device. At that price, it could be eight or ten *years* before you'll have spent as much money in the subscription plan as you would have with the boxed software. And, finally, you get a lot more for your money: Microsoft upgrades and updates the subscription software on a monthly basis, so you're continually getting new and better features. You don't get that with the boxed software.

We'll talk more about Microsoft's licensing model in the next chapter, but one thing that's important to know is that with the Office 365 plans, you can generally add or remove users one at a time and whenever you need to. That means that you don't have to buy a "ten-pack" of licenses if you only need eight today. Buy eight. When you hire an additional person, you can add one more. If somebody leaves your firm and you're not immediately replacing them, you can reduce your license count and reduce your monthly expenses.

Do I Really Need to Upgrade?

Well, “need” is a strong word. When it comes to Office 2016, I answer that question this way:

- If you have Office 2013, you probably don’t need to upgrade to 2016 right away unless there are some new features in Office 2016 that appeal to you (and there might be!).
- If you have Office 2010 (or an older version), you should definitely upgrade to 2016.
- If you’re a Mac user, you should upgrade to Office 2016 for Mac in almost every case.

One of the better reasons to upgrade to the newest version is that Microsoft is continually upgrading and improving Office 2016. You’re not as likely to get any new capabilities with Office 2013, and big parts of Office 2010 are no longer supported with Office 365.

As for the services, Microsoft Exchange is the crown jewel in the Office 365 services suite, and if you’re currently using a POP3 or IMAP-based email system (especially if you’re using an @yahoo.com or @gmail.com address for your firm) then you should definitely step up to a professional email system with hosted Exchange.

Whether you’re going to use SharePoint or Skype for Business is a question that used to be more difficult, but with the release of Office 365 Groups (as you’ll see in Chapter 6), it’s become somewhat easier to answer. Most firms *will* want to at least have SharePoint in their Office 365 subscription.

Is It Safe?

We could do an entire chapter on the security and privacy features of Office 365, but instead I’m going to point you to the Office 365 Trust Center (<https://www.microsoft.com/en-us/trustcenter/cloudservices/office365>). It has the latest up-to-date information on what Microsoft does to protect the data of its customers in the Microsoft Cloud.

If you'd like the short version, here it goes:

- Office 365 is HIPAA and FISMA certified and meets both ISO 27001 and the EU Model Clauses.
- Data is stored in data centers in your local region, whenever possible, and replicated to multiple servers and data centers within that region. That means that there are always multiple copies of your data (for safety) and, whenever possible, that data is stored in your home country or region for compliance reasons. If you're curious to see where Microsoft is currently operating data centers, visit: <http://o365datacentermap.azurewebsites.net/>.
- For European customers, Microsoft maintains data centers in the UK, Ireland, the Netherlands, and Germany, among other places.
- For Canadian customers, Microsoft maintains data centers (as of this writing) in Quebec City and Toronto.
- All data is encrypted during transmission to and from the Microsoft data center and when it's at rest in the Microsoft data center.
- *Microsoft v United States* is a solid example of how hard Microsoft will fight to keep customer data private.

What You Need to Know

With Microsoft Office 365, you select a set of software products and services and you pay a monthly subscription fee that ranges from \$4 to \$24 or more per mailbox or user. The services are delivered to you via the cloud and the software is locally installed, just as your software traditionally has been. This is the direction that Microsoft is heading toward for all of its software distribution.

Security and privacy are mission critical for Microsoft Office 365. Thousands of companies, big and small, from all over the world, rely on Office 365 and trust Microsoft with their data. Microsoft has implemented enterprise-class data security and redundancy to

ensure that your data is always there, and always safe, when you need it.

The other thing you really need to know is that this is a book about a very dynamic software product. By the time I've finished typing this sentence, it's possible that Microsoft will have changed something about it. So you may want to say "as of this writing" in your head before reading most of the paragraphs in this book.