

Collaboration Technologies: A Toolkit for Legal Aid

Submitted by [GravityWorks](#) on Thu, 02/13/2025 - 3:08 PM



This toolkit provides an overview of collaboration technologies that are commonly used across legal aid organizations. Included within are best practices and practical resources to support effective collaboration and communication.

This Toolkit Will Be Particularly Helpful to Those Who:

- Are unfamiliar with the common tools, use cases, and terms,
- Are unfamiliar with the common tools, use cases, and terms, of collaboration,
- Want to explore other collaboration tools within the legal aid community; and/or
- Need a starting point for streamlining internal workflows or developing policies/guidance.

This toolkit covers a variety of currently available collaboration and communication applications. The technological landscape is ever-changing and expanding—the absence of or modest reference to a specific tool or application in this toolkit should not be interpreted to mean that the authors do not support its use; rather, with limited space, only a certain number of applications may be discussed. This toolkit does not provide in-depth information, such as pricing or pros/cons, for any tool or application.

Disclaimer

Firms must evaluate and research each platform as technology and features (and associated costs) change. This toolkit should be considered a starting point on the journey to discover the best tools for the firm and not a definitive be-all-end-all guide.

Preface: An Attorney's Ethical Duties

Before getting into the details of technological collaboration, it is important to note that all technology used in a law office must be used competently. For every type of technology used in the office, firms must ensure that lawyers— via Rule of Professional Conduct 1.1— are maintaining competence by keeping “abreast of changes in the law and its practice, including the benefits and risks associated with relevant technology....”¹ Further, especially when communicating with or about clients, attorneys and their supervisees must ensure that technology is used to competently protect confidential client information.² Attorneys are responsible for ensuring that non-lawyer legal professionals and other third-party employees are using technology competently.

Failure to use technology competently may result in disastrous consequences for clients and firms. Attorneys who fail to do their due diligence when selecting technology and third-party service providers may suffer bar complaints, sanctions, and/or malpractice claims.

Firms should thoroughly research all technology tools before beginning to use them, especially if staff will be using the tools to discuss confidential client information. Free tools are not recommended, as there are often significant risks to confidential client information. At a minimum, when reviewing terms of service, leadership should review the company’s privacy and confidentiality practices, who owns the data stored using the technology, and where the data is being stored.

Introduction

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1. First Steps: Purposeful Collaboration

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What is “Purposeful Collaboration”?

The COVID-19 pandemic threw most organizations into “chaotic collaboration;” organizations were mostly unprepared to transition away from in-person collaborative work into using remote collaboration tools. This unplanned, fast pivot led to ad hoc jumbles of communication and collaboration tools because work had to get done and clients had to be represented. Now, as those software contracts come up for renewal, firms are able to make informed decisions based on usage and needs. This toolkit aims to assist organizations in both refining and structuring existing collaboration ecosystems, while also providing guidance for future planning.

Before discussing any collaboration tools, we want to introduce the concept of purposeful collaboration. Purposeful collaboration refers to a deliberate and intentional effort by people who work together in a coordinated manner towards a common goal or shared objective. This collaboration is not accidental or haphazard; instead, it is driven by a clear intention to achieve specific outcomes or solve particular problems.

There is no one-size-fits-all path towards purposeful collaboration. Regardless of the task or team, intentional planning on collaborative projects must take place before determining what technological tools are right for the project and the organization. Teams must understand what tools they have, what those tools do, and how to best use them effectively.

For example, let’s say that an organization has subscriptions to both Microsoft Teams and SharePoint. These are powerful tools that have a lot of overlapping functionality. If the organization provides accounts to its staff without any training and guidance, the organization is likely to end up with a collaboration mess. If these tools are not deployed purposefully, staff will likely be left with a number of questions, such as “Should all collaboration be done through Teams? Should Teams channels be created and documents and other information shared there? Or should SharePoint libraries be created and used to store documents instead?” Leaving staff with minimal guidance on best practices often leads to a hodgepodge of systems that will be hard to manage.

This section focuses on the different kinds of collaboration circumstances that an organization might find itself in, along with considerations on how to move forward, followed by a list of questions that an organization should ask before choosing a collaboration tool or starting a collaboration project. Even if a team is midway through a project or already using a tool, everyone will be well served by reviewing how the team is collaborating. This review serves to ensure efficiency and effectiveness, promote clarity of expectations, and avoid redundancy.

Where Are We and Where are We Headed?

Users of this toolkit may find themselves in any number of the following situations:

- The team or organization knows that there is a problem that needs to be addressed, or has a goal in mind, and is ready to intentionally plan collaboration strategies to solve the problem or reach the goal.

For example, LSC now encourages organizations to provide board members with a repository where they can access and collaborate on documents, view upcoming events, and get other information. Perhaps an organization knows that a better way to share board materials is needed but is unsure how to make this information easy to access while also maintaining appropriate security. How could this best be accomplished?

- The organization does not have a specific problem or goal in mind but has not planned intentionally for the use of collaboration technology and needs to get a handle on the tools it has and how to best use them effectively.

Similar to the illustration provided by the Teams and SharePoint example earlier, it is highly likely that staff have begun using tools without proper guidance regarding their most effective use by the organization.

- The team or organization is already using collaboration technology, but it is not working effectively.

For example, attorneys and paralegals work on pleadings together but have not been directed to the best way to collaborate on these documents. Some teams email copies of documents back and forth, while others use one shared document to make comments and changes. What is the best way to go forward?

- Finally, the organization may be curious about what tools other organizations are using for collaboration and innovative ways those tools are being used.

Readers in each of these groups will find useful information throughout this toolkit regarding how purposeful collaboration, collaborative technology, and best practices.

A Word of Advice: Define Collaboration Policies

Organizations are encouraged to write out discrete policies regarding what tools should be used, in what manner, and by whom.⁴ Organizations should define how different applications are used for specific collaboration goals. For example, if an organization is adopting the collaborative editing tools of applications like Microsoft Office 365 or Google Docs, the organization should define a policy that requires staff to edit and comment using those collaboration features in a shared document instead of editing separate copies that need to later be combined. Allowing the use of multiple approaches while collaborating may lead to confusion, duplication of work, and staff frustration.

When dealing with overlapping functionalities across systems, it is crucial to establish a clear rationale and effectively communicate it to staff, especially when staff cannot be prevented from using certain features of the software. Consequently, organizations must delineate the permissible scope of system use.

Take the example of document storage across multiple platforms. Due to ease of use or permissions issues, Dropbox or Google Drive might be used for external file sharing, while internal storage might be mandated on a platform like SharePoint. The logic behind this division must be articulated in order to avoid inadvertent misuse by the staff. Failing to set these boundaries can lead to unauthorized internal document storage on Dropbox or Google Drive if those tools are introduced without these limitations.

As another example, numerous calendaring systems— such as Teams, Outlook, and the firm’s case management system— can complicate collaborative scheduling. Without clear guidance, staff may have calendars in any one or more of those systems. It is important to note that malpractice carriers may recommend or require duplicate calendars to avoid calendaring errors and to ensure a back-up in case one system fails.⁵ An organization might have a policy that all court dates must be kept in their case management system for the protection of the client and to ensure coverage in case of attorney illness or emergency. To prevent confusion, organizations should clearly define their calendaring policy and the reasons behind the policy.

Preliminary Considerations

When implementing purposeful collaboration, organizations must keep in mind who will be using the system and why they will be using it. Systems must have a low entry barrier for most staff and clients to use them effectively. That said, there are many competing priorities when choosing a collaboration strategy: cost, critical features, ease of administration, and security concerns may have to take priority over the user interface and experience. Regardless, organizations must carefully consider the needs of users as part of the purposeful collaboration process – otherwise, adopting a new system may be needlessly difficult, or the implementation may fail completely.

4. A sample policy is included here.

5. SBA Mutual Insurance. (2022). The Fundamentals of Loss Prevention for Lawyers:[Calendaring and Time Management](#).



***“We’ve been collaborating
since before you
were alive”***
—Ash

1.1. Questions to Ask to Optimize Purposeful Collaboration

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Below are several questions that an organization should answer when planning purposeful collaboration. The questions are listed together here and will provide further explanation below.

1. What is the problem that the organization is trying to solve?
2. Are there ways that staff are collaborating already? What is working and what is not working?
3. Who will need to use the system? What is their level of technological proficiency?
4. Will implementing a collaboration project or tools require a lot of change on the part of the staff? Does the organization have the ability to support the staff in that change?
5. What are the cost constraints for the project or tool?
6. What are the security constraints for the project or tool?
7. What group is driving this change? Management, clients, board members, a funder?
8. What collaboration policies are already in place and what policies will need to be implemented?
9. What other organizations have faced similar problems or challenges and what solutions have they tried?

1. What is the problem that the organization is trying to solve?

As discussed in LSNTAP's [Project Management Toolkit](#) and [Data and Evaluation Toolkit](#), defining the problem that the organization is trying to solve is a critical first step in any collaborative endeavor. A clear, well-defined problem statement sets the direction and purpose of the collaboration, ensuring that all team members are working towards a common goal. Review the problem statement with all project stakeholders to ensure that everyone is on the same page about what must be accomplished.

The project team will likely need to revisit a problem statement throughout the project lifecycle, whether the project is choosing which collaboration software to implement, or the project requires the use of collaboration software.

Consider This Scenario:

A legal aid firm's management tasks the technology team with creating an intranet. During a meeting to develop the intranet project, the technology team delves into a discussion about document management system (DMS) challenges.

Before beginning the project, it is important for the team to pinpoint the issue the firm is facing and clarify with management what problem they are trying to solve. Here, management wanted the intranet for internal information sharing and a firm calendar which is a very different problem than a document management system.

It is important to ensure that the proposed technology solution aligns with the specific needs and requirements of the firm or project.

2. Are there ways that staff are collaborating already? What is working and what is not working?

Staff are likely already collaborating with one another using existing tools at their disposal. Before going further, organizations should carefully consider what tools staff are already using, how these tools are being used, and what is and is not working.

Surveying staff about collaboration needs is a simple and cost-effective way to gather information about existing collaboration practices. Organizations can task their technology committees with gathering information about what is working well and what could be done better to collaborate purposefully. The team should ask staff about pain points and knowledge gaps with current tools in order to better draft the problem statement.

The team should gather a list of the tools the staff are using, and how staff are using them. This discovery process enables organizations to identify patterns and trends in how different teams are collaborating.

Questions to Consider

- What tools are staff using on a daily basis to collaborate?
- What tools are staff using less frequently to collaborate?
- Are staff using unsanctioned (by the organization) tools to collaborate? That is, are they using their own personal accounts (e.g., Dropbox, Google Workspace, etc.) to collaborate? Why?
- What challenges do staff face while using tools to collaborate?
- What features do staff find are most or least useful?
- Is there redundancy in tool use? That is, are staff using more than one tool to do the same thing (e.g., Zoom and Teams for internal meetings)?
- What non-digital tools are teams using to collaborate?
- What problems do staff have collaborating?
- How well do the collaboration tools integrate with each other and other required applications (e.g., how well does SharePoint integrate with the LegalServer [a case management system])?
- Do staff feel like they have the capacity or desire to learn to use more tools if those tools will make them more efficient?
- What support do staff feel like they would need to transition to different tools?

3. Who will need to use the system? What is their level of technological proficiency?

Successful collaboration hinges not only on the technology employed, but also on the willingness and ability of users to effectively use the systems. When thinking about who will be using the new system, consider the following:

- Will people outside of the organization be using the tool? Consider whether clients, board members, or volunteers will be using the tool to collaborate. Outside users pose special problems because they will be accessing the tool from outside of the organization's own secure network. For example, does the organization have a plan for IT support if a board member is unable to log in to the new board extranet site?
- What is the users' level of technological proficiency? A tool that works well for a technologically savvy staff member may not work well for those with limited technical abilities.
- What is the user experience like when using the tool or collaboration strategy? Optimally, tools will be user-friendly and intuitive to reduce the learning curve and increase overall adoption.⁶
- How accessible is the tool? Does the organization have team members who have special needs that must be accommodated? Users may require technology that provides features to accommodate different ways of accessing information, such as compatibility with a screen reader or high contrast for visibility.
- How many staff will be using the tool? How scalable is the tool? Smaller groups may collaborate better using different tools than bigger groups. Further, collaboration tools that require multiple licenses may be cost-prohibitive for the organization.
- Will implementing a collaboration project or tools require a lot of change on the part of the staff? Does the organization have the ability to support the staff in that change?

When choosing a collaboration method or tool, organizations must always consider what kinds of IT support users will need and whether existing staff will be available to provide support and training. If a new tool requires significant training, an organization may decide to accomplish the same goals with a tool staff are already using.

For example, if an organization is already using Gmail for email and Google Drive for saving individual files, it may end up using Google Drive as a document management system to make adoption easier for staff, instead of introducing a completely new DMS.

Questions to Consider

- Has the organization articulated the purpose and benefits of the new tool or process?
- Does the organization have support of the Executive Director/CEO and upper management?
- Beyond management, has the organization involved all of the key stakeholders in the decision-making process? How will the organization communicate updates, expectations, and new policies?
- How will the organization pay for the cost of adoption (training, staff time, etc.) while staff are learning a new tool or process?
- How will the organization roll out these new or changed systems? In phases? All at once?
- How will the organization measure success?
- How will the organization determine what changes need to be made in the future?
- How will the organization address resistance to change?
- What is the organization's plan for continuous improvement?

4. Will implementing a collaboration project or tools require a lot of change on the part of the staff?

Organizations must consider whether the organization will have the ability to support the staff in that change. When choosing a collaboration method or tool, organizations must always consider what kinds of IT support users will need and whether existing staff will be available to provide support and training. If a new tool requires significant training, an organization may decide to accomplish the same goals with a tool staff are already using.

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5. What are the cost constraints for the project or tool?

Legal aid providers face cost constraints and therefore decision-makers must take into account the cost of new tools or processes.

Questions to Consider

- Will the organization have to purchase multiple licenses for the tool? Are there discounts for multiple licenses?
- Are there lower-cost options available? While free tools often run the risk of violating a lawyer's duty to keep client information confidential⁷, many platforms offer software at reduced rates to non-profits. The team also may not need all of the features of more expensive tools and may be able to continue with successful and intentional collaboration with bare-bones software.
- Can the organization accomplish its goal with software it already has? What are the downsides of using software it already has?
- Can the organization negotiate with the vendor? Most vendors will negotiate, especially when the organization plans to purchase multiple licenses or will contract for an extended period of time.
- Can the organization use grant funding or donations? Organizations may be able to secure funding for planning for purposeful collaboration and/or new collaboration tools via grants or donations. Organizations should check with board members to see whether anyone is willing or able to donate to the use of collaboration tools.
- How many tools does the organization need? Duplicative and inefficient use of tools costs the firm money. Consider that it may be more cost effective to pay more for a single tool while removing duplicative or inefficient tools, even if it would require some staff to learn a new system or change their processes.
- What is the cost to maintain the software long-term? Most collaboration software is cloud-based requiring monthly subscriptions; be mindful that the price may increase and that many vendors require contracts, particularly if negotiating a non-profit discount.
- What is the cost to train the users? Keep in mind that users likely will need regular training and support in order to continue to use the tools efficiently. Depending on the type of user (internal staff, external board members, clients, etc.), the organization likely will have to have different types of training and support available.

6. What are the security constraints for the project or tool?

Every law firm must act diligently to protect the sensitive and confidential information it collects from clients and staff. Before choosing a new tool, consider the security implications of how the tool will be used.

Questions to Consider

- How will confidential and sensitive information be protected by the software vendor? Management must read the Terms of Service, End User Agreement, and/or Privacy Statement for any software being purchased or used by the firm.
- How does the tool encrypt user data, both while being transmitted and while being stored? How is data protected from interception?
- What access controls are available and are user permissions sufficient to protect the firm's data and allow for the right level of access for appropriate staff? Ensure that funding and trained staff

- are available to maintain and administer those access permissions. The more complex the permissions schema, the higher the administrative costs of the system.
- Does the tool allow for multi-factor authentication (MFA) and/or single sign on (SSO)? Tools that do not offer these standard security features should not be considered.
- Are audit logs and activity monitoring available to track use and potential misuse of the tool? If available, review the format and accessibility of those logs to determine whether specific technical capacity or support are needed in order to make use of those features.
- How can staff and outside users securely share data, documents, and other files while using the tool? How will the organization support external users, who will be accessing the tool outside of the firm's system, in the use of the tools?
- Where is the data stored? Be wary of companies that store data outside of the United States, as most other countries have different data protections.

7. What group is driving this change? Management, staff, clients, board members, a funder?

Addressing collaboration challenges requires a nuanced approach that adapts to the specific group responsible for the need. For example, management and staff have different internal communication needs than the external communication needs of clients, board members, and funders.

Consider the different needs of management and staff. While both share the goal of bolstering effectiveness and efficiency through collaboration tools, management's impetus often stems from the need to improve oversight over an organization's communications and work product. Introducing policies and procedures to enhance managerial oversight might inadvertently burden staff with added requirements that seem less efficient or beneficial to them. Navigating these different needs calls for adept change management—the organization must clearly clarify the rationale behind the changes, acknowledging the shift in established workflows, and emphasize the collective advantages inherent in an organization with improved oversight.

Within the organizational context, it is imperative to recognize that certain policies and procedures, instituted with the intent of enhancing managerial oversight, may inadvertently impose additional requirements or changes on staff which may not be embraced due to perceived inefficiencies or a lack of perceived utility. Therefore, a change management approach becomes imperative, necessitating effective communication regarding the rationale behind these changes. Acknowledging that such changes may disrupt established routines or potentially render certain tasks less convenient, it is essential to convey the collective advantages gained by the organization through heightened oversight and enhanced managerial capabilities.

8. What collaboration policies are already in place and what policies need to be put into place?

A large part of planning for purposeful collaboration is policy training and reminding users about how the tools the organization provides are supposed to be used. Staff need very clear guidance regarding which tool should be used for what type of collaboration, especially if the organization has tools with duplicative functions. For example, both SharePoint and OneDrive are used to store documents, but staff may not understand the differences between the two. The firm should enact clear policies around where different types of files should be stored and make sure that staff are regularly reminded of the policies and why the policies exist.

It is crucial to underscore that the mere presence of software does not inherently signify the existence of a corresponding use policy. Firms are tasked with the responsibility of not only formulating these policies in written form but also ensuring adherence by their staff. These policies should be in place regardless of whether the firm has adopted tools for their designated collaboration functions.

While deploying collaboration tools can certainly facilitate policy compliance and streamline administrative tasks, the introduction of collaboration software without well-defined policies often results in staff confusion and duplication of effort. In essence, having clear policies and a proper change management plan are the linchpins to effective software implementation, mitigating confusion, and promoting efficiency.

Examples of Policies to Implement

- Document management, retention, and destruction policies
- Communications policies (internal and external)
- Case handling policies and procedures
- Scheduling and calendaring policies
- Operations policies (for example, how to reserve the one office Zoom account)
- Acceptable use policies

9. What other organizations have faced similar problems or challenges and what solutions have they tried?

- Organizations with similar missions and staff sizes likely have similar collaboration problems. The LSNTAP listserv is an excellent resource to use to reach out to other organizations to collaborate about the art of purposeful collaboration.
- Bear in mind that making things user-friendly may increase the overall cost. Configuring software for easy and intuitive use will take more time and work to define customizations and configurations.
- Model Rule of Professional Conduct 1.6
- Although regions, like the European Union, have much better protection than the United States. See the GDPR at <https://gdpr-info.eu/>.

2. Collaboration Technologies: Types of Collaboration Tools

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The evolution of collaborative technology has opened the door to new and unprecedented methods of communication, within the physical office and well beyond. Organizations have been given the opportunity to expand their operations far beyond the constraints of physical location. Hiring qualified candidates, providing excellent client services, and collaborating with other agencies have become easier than ever before. Teams of providers composed of people located all over the country can work together efficiently towards a common goal. This efficiency is not a given, however, and organizations must ensure that collaborative software is used effectively and consistently.

This section discusses various collaboration tools, including virtual meetings, chat and texting, cloud storage, document collaboration, and project management. The types of software will be defined, along with a discussion of best practices and policy considerations when using these tools.

Virtual Meetings

Introduction

With the shift towards remote collaboration and the reliance on technology for effective communication, these phrases have become part of our shared experience:

"You're on mute."

"Can you hear me now?"

"I am not a cat."

Perhaps one of the most significant pandemic-influenced changes in law firm communication is the way that virtual meeting software is used with co-workers, clients, third parties, opposing counsel, and, importantly, the courts. Law firms that traditionally relied on in-person meetings to communicate with clients were forced to embrace this technology. Using video conference software to communicate can help advocates overcome geographical limitations, improve time management, and deliver legal services more efficiently. We will discuss the benefits and considerations of using virtual meeting software and how using this technology in a legal aid firm can improve productivity while maintaining the lawyers' duty of technological competence.

Here we are defining "virtual meeting" software as that which allows for a synchronous meeting experience with video, text chatting, and screensharing capabilities. The key distinction between this and a telephone call or conference call is the ability to see the participants and to share a screen view. For this toolkit's purposes, webinar-specific software is considered separately from collaboration software and will be discussed in turn.

Key Features and Requirements for Virtual Meeting Tools in Legal Aid

9. YouTube. "I'm not a cat': lawyer gets stuck on Zoom kitten filter during court case" YouTube video, 0:48. Published 2021[https://www.youtube.com/watch?v=IGoofzZOyl8 sp:](https://www.youtube.com/watch?v=IGoofzZOyl8 sp;)

2.1. Collaboration Technologies: Common Virtual Meeting Tools

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Common Virtual Meeting Tools

There are several virtual meeting tools available. In this section, we will discuss the tools most used by legal aid firms, some best practices, and policy considerations when using these tools.

In general, firms have either chosen to use the Google suite of products or the Microsoft suite of products and often adopt the included meeting tool. Some firms use both suites of products and find that this increases training and support requirements.¹⁰ Still other firms use their suite provided tool internally and use a different platform such as Zoom for external meetings.

Google Meet

The business and enterprise versions of Google Workspace allow users to meet virtually using Google Meet.¹¹ Depending on the plan purchased, organizations can host between 150-1000 participants, record and transcribe meetings, track attendance, and live stream meetings. With Google Meet, meetings can last as long as 24 hours and offer US and international dial-in phone numbers for participants. A noise cancellation feature to filter out background noises from meetings may be set as a default feature for the whole organization or left to individual selection.¹²

Users find Google Meet's interface easy to use for both hosts and participants.¹³ Google states that Google Meet meetings are encrypted in transit and at rest.

Teams

If a firm is already integrated into the Microsoft landscape (using Microsoft 365 products), using the included Teams application is a cost-effective option for virtual meetings. Teams has been designed to work smoothly with Microsoft's other products, including Outlook, PowerPoint, SharePoint, and OneDrive. However, end-to-end encryption requires a subscription to Teams Premium. Like Google Meet, the number of participants that a meeting can accommodate depends on the subscription the organization has chosen. Microsoft distinguishes between "webinars," "meetings," and "live events." Webinars accommodate up to 1,000 participants; organizers can specify presenters to give those participants access to meeting controls such as screen sharing. Meetings accommodate up to 20,000 participants but only 1,000 will have access to the full interactive capabilities; the remaining attendees may "view-only". Live events accommodate up to 20,000 participants with moderated Q&A and more advanced production capabilities.

Recording and transcription of meetings is available in Teams. Microsoft recently announced that Teams would be integrating artificial intelligence (AI) into its transcription capabilities allowing Teams to create automatic meeting summaries and suggested tasks. Firms should proceed with caution when using AI with confidential client information.¹⁴

Users already on the Microsoft system find that Teams integrates fairly easily into their work and allows straightforward collaboration. However, some users find Teams to be complicated and overwhelming due to the number of notifications and presentation options.

Zoom

During the pandemic, Zoom rocketed to the forefront of online meeting tools. Because many courts use Zoom for virtual court hearings, every firm needs to be prepared to use Zoom competently.¹⁵

Like many products, the number of features available on Zoom and the number of attendees allowed in a meeting is plan dependent. The "Zoom One" product has added a number of collaboration tool features to the traditional Zoom virtual meeting platform.¹⁶ At the time of publication, the free plan limits attendees to 100 while some paid plans extend those limits up to 1,000 attendees. Meetings with end-to-end encryption are limited to 1000 participants.¹⁷ Like the other platforms, Zoom provides call-in numbers for phone participation.

Unlike Teams and Google Meet, Zoom is a standalone product that does not integrate with the Microsoft and Google products. Although attendees may attend a Zoom meeting via their web browser, participants must download the Zoom application on their device for full functionality. Zoom now separates the virtual meeting product from the virtual conference and event product and has diversified their product offerings to include a team chat, VoIP phone service, and even email and calendar options. Many users find that sharing their screen on Zoom is easier in Zoom than in other virtual meeting platforms, although doing so while continuing to see other participants can be tricky. Some users find Zoom's interactive features like breakout rooms, live polling, and co-annotation of shared documents easier than those in other products. Meeting hosts should exercise caution when posting public links to meetings online or on social media to avoid "Zoom-bombing," a practice where someone logs into a meeting and is disruptive. Zoom has introduced features to minimize these intrusions¹⁸ but the meeting host must be aware of the practice and proactive in adjusting the Zoom meeting settings.

Best Practices and Policy Considerations

Firms should draft virtual meeting policies and best practices and incorporate them into their technology policy. A firm may want to consider the following issues when drafting such policies:

Security and Privacy: Firms must choose a platform with robust security features, especially if those platforms will be used to communicate with or about clients or share other sensitive information (e.g., human resources issues). The firm should disseminate a best practice guide to all staff regarding how to use the software competently in order to minimize the risk of disclosure of confidential information.

Hacking Risks: The firm's best practices guide should include measures to prevent "Zoom-bombing" and what to do if a video conference is attacked. Staff must be reminded to regularly update all software in order to minimize the risk of hacking and other security breaches.

Access Controls: Firms should limit administrative controls to virtual meeting software and carefully track who is using firm accounts (e.g., a shared Zoom account) in order to prevent misuse and double-booking. Staff should be required to implement at least the minimum standards of security for meetings. These minimum standards include requiring unique meeting IDs, password protection, and enforced waiting rooms. For further protection, firms can lock events once all attendees have joined, manage file and screen sharing options (e.g., not allowing any .exe files to be shared), and ensure that users are connecting to meetings securely through Wi-Fi networks with wireless WPA2 or WPA3 encryption.¹⁹

User Support: Staff should know whom to contact if they are having issues with virtual meeting technology. Should staff contact internal IT first or go directly to the software provider's support team?

Employee Training: Employees must be trained regularly on how to use applications safely and efficiently.

Internal Communication Using Virtual Meetings

For firms that allow hybrid (office/outside the office) work, internal virtual video meetings have become a daily occurrence. While risks here are lower than with communicating with clients, firms should still make sure to provide clear guidance to staff on how to best use virtual meeting software within the firm.

Consider "Zoom fatigue"²⁰, whereby people suffer a number of psychological and physical symptoms if they spend hours on virtual meetings each day or week. Frequent eye contact with others may cause stress and social anxiety in some staff. Requiring staff to regularly be on camera can limit their mobility, leading to a host of physical and cognitive symptoms. Regular virtual meetings can also increase cognitive load, as it is more difficult to observe and react to non-verbal communication on video.

Firms should consider limiting the number of video conference meetings each week and allow staff to participate off-camera occasionally. While working virtually without visual contact can lead to feelings of isolation, on-camera participation is often not necessary and can allow staff to give their eyes, minds, and bodies a break.²¹

Communication with Clients Using Virtual Meetings

Virtual meeting technology has provided many benefits to clients. For clients who struggle with transportation or childcare, virtual meeting technology has allowed them to attend appointments or court hearings more easily. On the other hand, for clients who struggle with technology or lack the required technology to participate, virtual meeting software has put up new barriers to accessibility.

When using virtual meeting software, firms should ensure that clients are not required to create an account to access the meeting, as this could potentially impede accessibility. Firms should choose mobile-friendly platforms, as many clients have access to cell phones but may not have access to laptop or desktop computers. A final consideration is how much mobile data such a meeting will consume. Clients may be using prepaid data plans and it may be more cost-effective for clients to meet over the phone instead of a data-heavy video meeting.

When meeting with a client over video, firms must keep in mind that conversations will include confidential client communications and that information must be protected. When selecting a platform, firms must confirm that the client's information will be protected by the software vendor while using the virtual meeting system.²² When meeting with clients virtually, attorneys and support staff must ensure that confidential information is not overheard or observed on either end of the meeting. It is best practice to not meet with clients while they are in public places; this may include someone's home if third parties are present. Clients should be instructed to meet in a location where they will not be observed or overheard.

Before meeting with a client over video, staff should confirm that the client has access to the technology needed to meet and that the client understands how to use that technology. If the client is uncomfortable, a phone call or in-person meeting may be more appropriate. Take particular caution when a virtual court hearing is required; if the client will not be with the attorney physically during the court appearance, the attorney needs to make sure to practice using the technology with the client ahead of time. For important virtual court appearances, such as final hearings, best practices dictate that the attorney be physically present with the client to fix any technological issues that may arise.

Third-Party Communication Using Virtual Meetings

Be cautious when using virtual meeting software with third parties, especially when discussing or sharing confidential client information. Staff should ask that third party meeting hosts ensure that their systems are protected and secure. If not convinced of that security, staff should host the meeting using the firm's platform. Third parties should be asked to also follow the best practices mentioned previously in order to avoid inadvertently disclosing confidential or sensitive information.

10. Using tools from too many duplicative systems (e.g. allowing users to use Outlook or Gmail, or both; allowing users to save things in SharePoint or Google Drive, or both) can complicate onboarding, training, and daily workflows for users. Supporting multiple systems is a significant challenge for firms, as lack of clarity around which tool to use can lead to confusion. Firms should make organization-wide decisions regarding standard tools for internal and external collaboration and enforce them.

11. The application is called Google Meet at the time of publication (Jan 2024). Google sometimes changes the names of their conferencing products and it may be called something else now.

12. [Google Meet Help: Filter out noise from your meeting on Google Meet](#)

13. PCMag. "Readers' Choice 2022: Video Conferencing and Online Meeting Services." PCMag <https://www.pcmag.com/news/readers-choice-2022-video-conferencing-and-online-meeting-services>.

14. ABA House of Delegates Resolution on the Use of Artificial Intelligence, August 12-13, 2019

15. Gizmodo. "Zoom's AI 'Privacy Policy': Train on Your Data." Gizmodo, January 15, 2019 <https://gizmodo.com/zoom-ai-privacy-policy-train-on-your-data-1850712655>. Zoom recently changed its Terms of Service (TOS) to allow for training its artificial intelligence (AI) model on client data. Although Zoom claims to have walked this change back, as of publication, the TOS still allow for training of the AI. Firms must carefully review the TOS of any program being used and make a judgment regarding whether use of the program meets the lawyers' duties under the state's rules of professional conduct.

16. Zoom Video Communications. "Zoom Collaboration Tools." Zoom <https://www.zoom.com/en/products/collaboration-tools/>.

17. Zoom Video Communications. "Title of the Article." Zoom Support, Accessed [insert the date you accessed the page] https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0065408. End-to-end-E2EE-encryption-for-meetings – requires a Large Meeting License

18. The Washington Post. "Zoom bombing prevention tips" The Washington Post, January 24, 2023 <https://www.washingtonpost.com/technology/2023/01/24/zoom-bombing-prevention-tips/>

19. Cybersecurity and Infrastructure Security Agency (CISA). CISA Guidance for Securing Video Conferencing. https://www.cisa.gov/sites/default/files/publications/CISA_Guidance_for_Securing_Video_Conferencing_S508C.pdf

20. RAMACHANDRAN, VIGNESH. "Stanford researchers identify four causes for 'Zoom fatigue' and their simple fixes" Stanford News, February 23, 2021 <https://news.stanford.edu/2021/02/23/four-causes-zoom-fatigue-solutions/>

2.2. Collaboration Technologies: Instant Messaging and Email Applications

Submitted by [GravityWorks](#) on Fri, 02/14/2025 - 8:30 AM

Instant Messaging and Email Applications

Introduction

Instant messaging applications²³, such as online chat functions that allow for real-time written communication, have become indispensable tools to enhance collaboration, boost efficiency, and improve communication within a law firm. In this section, commonly used messaging tools like SMS texting, Google Meet, Microsoft Teams, Slack, and Discord will be discussed, along with points to consider when using these tools. There will also be a discussion of when it makes sense to rely on email for communications.

Unlike email, messaging collaboration allows for real-time communication. Users can more efficiently exchange information and collaborate within documents and other work products. Messaging programs often allow users to organize their communications in ways that make sense to them and typically provide search capabilities for users to refer back to previous communications.

There are, however, drawbacks with messaging tools. Some find message notifications distracting when focusing on other, unrelated work. Messaging applications can encourage more informal communication which can cause problems if staff do not respect business communication guidelines. Staff may also feel like they are "always on" if using their mobile devices to stay in communication with co-workers or clients.

There are times when limiting communication to email is appropriate and desired. Often, formal communication and traceability are important. Formal communications that once were sent via physical mail are often now sent through email, yet registered/certified mail remains in use in great part due to the weight afforded to it by the legal system.

As always, it is essential for organizations to clearly define policies regarding which type of communication staff should use for different purposes. Staff need to be regularly trained on these policies and given reminders regarding why certain tools are used the way they are throughout the organization.

Instant Messaging/Chats vs. Channels

Within such applications, a distinction should be made between instant messaging/chats (IM) and posting messages in "channels". IM serves as a primary tool for synchronous and immediate communication. IM communication is particularly useful for addressing urgent matters and facilitating rapid decision-making.

Channel posts, on the other hand, may be asynchronous, meaning users can engage in discussions at their convenience. This is beneficial for accommodating distributed teams and varying time zones. Further, channel posts are typically organized around specific topics, projects, or teams. This structure promotes the efficient categorization and retrieval of information, enhancing overall productivity.

Channel posts are designed to maintain a historical record of conversations, ensuring that important information is not lost over time. This feature contributes to knowledge retention and accountability. Channel posts also allow for threaded discussions, enabling users to respond to specific messages in a thread. This feature promotes focused and organized conversations, especially in large teams. Finally, channel posts are generally better suited for longer-form content, as they provide text formatting options and support various media types. This makes them ideal for sharing detailed updates, reports, and multimedia content.

Structuring channels in such platforms effectively is essential for maintaining clarity and preventing the proliferation of channels which can lead to confusion. Here are some best practices for structuring channels in a way that balances organization and simplicity:

- **Establish clear naming conventions**

Create a standardized naming convention for the channels that reflects their purpose and content. Use descriptive names that make it easy for team members to understand the channel's focus. For example, use "Family Law Unit" for a channel dedicated to family law discussions.

- **Limit the number of channels**

Avoid creating channels for every topic or discussion. Instead, aim to consolidate related topics or teams into broader channels. Having too many channels can overwhelm users and make it challenging to find the right place to post.

- **Use Hierarchical Structures**

For instance, use a department channel (e.g. "Family Law Unit") and then create subchannels or threads within them for specific projects or topics (e.g. "Family Law Unit > Case Law Updates").

- **Group by Department or Function**

Organize channels based on departments, teams, or functions within the firm. This simplifies navigation and ensures that discussions are relevant to the channel's purpose.

- **Archive or Remove Inactive Channels**

Regularly review channels that are no longer active or relevant. This helps keep the channel list clean and prevents clutter.

- **Promote Channel Descriptions**

Encourage channel owners to provide concise descriptions for each channel. These descriptions should explain the channel's purpose, guidelines, and what type of content is appropriate.

- **Train Staff**

Ensure that staff understand where to post specific types of messages and encourage them to use the search function when looking for information instead of creating a new post.

Common Messaging and Email Tools

SMS Texting

Short Message/Messaging Service (SMS) is a way of sending short written messages from one mobile phone to another.²⁴ These messages are transmitted through cellular networks to mobile devices.

More and more frequently, law firm staff are texting clients and co-workers using their personal cell phones. Perhaps staff found that a client who never answers the phone would respond to a text messages, or that clients prefer to send pictures of documents via text rather than drop them off to be copied at the office, or that pictures needed for a case are easily transferred via text.

Texting, although a great way to stay in contact and collaborate, has some drawbacks:

1. Out-of-Band Communications

When staff use personal devices to communicate with each other or with clients, the communications are considered "out-of-band" communications because they happen outside of the firm's technical environment. This makes it difficult for the firm to secure and track the communications. Because the personal devices of staff and clients may not be adequately protected, those devices pose risks to confidential client information.

If texting a client is necessary, staff should be encouraged to do so in a way that preserves a record of that communication; for example, by using an integration with the firm's case management system. If staff must text each other about client matters, they should be encouraged to do so using the texting feature of the firm's cloud-based phone provider or consider using the firm messaging software instead. Doing so helps protect the firm in case of a legal challenge, provides a more complete client record, and protects staff from having their personal devices becoming part of a discovery request.²⁵

2. Cost

Many SMS services charge a nominal fee per text message which can be expensive both for the firm and for the client, particularly if these messages are on a limited or "pay as you go" cellular plan. When considering the cost of SMS, firms should take into account messaging volume, pricing models (e.g., non-profit pricing, bulk messaging plans, monthly subscriptions), message length, and any additional costs.

3. Security

Staff should be aware that SMS texting is typically not the most secure method of communication with clients because SMS text messages are typically sent without encryption and may potentially be intercepted and read by third parties. Further, client devices may not be properly secured and may be monitored by third parties, which is a significant concern for clients affected by domestic or intimate partner violence.

Mobile devices also can easily be lost or stolen. A lost or stolen mobile device that was not properly encrypted and password protected allows those text messages to be accessed by malicious actors. Finally, SMS phishing (or "smishing"), whereby attackers attempt to deceive SMS recipients to obtain confidential information is on the rise and is a risk to disclosure of confidential information.

Google Chat

Google Workspace's messaging product is called Google Chat²⁶ and is included with all Google business plans. One large benefit to Google Chat is that it uses Google's search engine to help users search through old chat messages and emails when trying to find a particular conversation, though users report Google Chat's search is not as good as Slack's.²⁷ Google also offers a number of third-party integrations that expand the capabilities of Chat; for example, the integration with Salesforce (customer relationship management software) allows users to search and share Salesforce records in the chat,²⁸ and the integration with Jira (project management software) allows users to assign and track tasks within Google Chat.²⁹ Organizations should use caution, of course, when integrating third party applications and ensure that those apps are secure and that client information will be protected.

Microsoft Teams

In addition to its other features as noted above, Microsoft has incorporated a messaging feature into Teams. Teams' functions are also integrated into other Microsoft applications like Outlook, OneNote, and SharePoint, and a number of third-party integrations are also available. One of the benefits of Teams is that if a message is missed, Microsoft will send an email alert.

Slack

Slack is another popular communication platform that has been particularly adopted by the tech sector. Users tend to find Slack more user-friendly than other products, with an interface that is clean and intuitive.³⁰ Like the other products discussed above, Slack allows for a number of third-party integrations, including most of the Google and Microsoft products. Because Slack is a standalone product, firms should consider whether there is value in purchasing Slack subscriptions.

Slack does not have robust document collaboration or co-authoring features. Although Slack allows for audio and video call "huddles," these features are not nearly as well developed as those offered by other platforms.

"As an organization, we use Slack for all kinds of conversations, resource shares, and even flexible feedback or decision-making polls. Since we have a distributed team across six states, staff are always in different time zones, even if they aren't traveling. Using our organizational tools well enables us to keep conversations moving without the need for a meeting or until it is clear what the meeting agenda would be. Project updates can be shared in real-time, and feedback can get added by anyone, wherever they are. It's been valuable for us to continue supporting adoption and training over time because even if our use of the tools doesn't change, the tools themselves change with updates and upgrades."-- Amy Sample Ward, NTEN

Discord

Discord is a communication platform originally designed for the gaming community. While the interface is not as sleek as other products, the platform does provide robust voice and text communication for real-time collaboration. Discord also allows for document sharing, notifications and announcements, integration with other applications, and the ability to organize teams or projects into channels.

Discord is not as widely used in legal aid offices as the platforms discussed above, as firms may find that the privacy and security features are not sufficient for their use.³¹ Some users also find Discord particularly "noisy" due to the platform's lively and interactive notifications.³² For those accustomed to Microsoft or Google platforms, there may be a higher learning curve to effective and efficient use of Discord.

Email

Email can be a better choice than messaging applications for certain communications. While communication within a firm is often done via a messaging application, external parties do not have access to internal systems and are therefore unable to use these applications for communication.

When formal legal documents must be sent, messaging applications are typically not an acceptable form of transmission. Further, if it is important to record and document sending and the receipt of a particular document, and where traditional mailing is not available or desired, email may be the best choice. It can be much easier to attach files to emails than in messaging applications. Email also allows asynchronous communication and more thoughtful responses, particularly for complex matters.

Email can also be easier to organize—all major email providers allow for threaded conversations about a particular topic, which can be useful if someone needs to refer to older conversations. For readers who require accessibility applications, email may be an easier form of communication, as it is often more standardized than most messaging applications.

Whats App

Whats App is a private SMS text messaging application that allows users to send and receive messages, largely for free, all over the globe. Unlike SMS text messaging via cell phones, Whats App allows users to communicate internationally for no extra charge. Security features include end-to-end encryption, chat lock, disappearing messages, and spam screening.

Whats App is often utilized by farm worker and rural programs due to its accessibility and relatively low cost. Most features of the desktop and mobile app are available to users free of charge.

Common Messaging and Email Tools: Feature Breakdown

	Account required?	Collaborative Features	Third-Party Integration?	Security
Google Chat	Yes	Yes	Yes	Data is encrypted in-transit and at-rest.
Microsoft Teams	Yes	Yes	Yes	End-to-end encryption requires a subscription to Teams Premium. If end-to-end encryption is not enabled, Teams still secures meetings using encryption based on industry standards.
Slack	Yes	Yes	Yes	Data is encrypted in-transit and at-rest.
Discord	Yes	Yes	Yes	Discord as a platform is not intended for encrypted communications. It does use standard encryption, but does not provide end-to-end encryption of its video chats.
Email	Yes	Most providers do not but Office365 recently introduced an option to allow for this.	Most email clients allow of integration	Refer to providers details
WhatsApp	Yes	Some (chats/messaging)	Yes	End-to-end encryption

Best Practices and Policy Considerations

Firms must consider how messaging software fits into an overall technology plan, what policies are required, and what training is needed for staff. Some things to consider:

1. Usage policies
- Firms should set clear policies regarding the appropriate use of messaging and email applications. Communicate expectations regarding professional conduct, data security, client confidentiality, and sensitive information. Ensure that staff know that all communications may be monitored by the firm at any time. Clearly outline whether personal devices may be used for firm business.
2. Effective use
- Consider training staff on the effective and efficient use of messaging and email applications. Review with staff how to archive and search old conversations. Discuss with staff which communications are best suited for messaging, email, or virtual meetings.
3. Archiving and destruction/deletion
- Keep in mind that instant messaging communications are discoverable in litigation just like other types of business communications. Be sure to include messaging application files in the data archiving and destruction policies and adhere to those policies.
4. Responsiveness
- Expectations regarding responsiveness to messages in the company chat messaging application should be clearly communicated to staff. Requiring immediate responses can be harmful and increase staff anxiety.³³ Some questions to consider include the following:
- Does the organization require that staff be logged on and available during work hours?
 - Is the messaging application available to all staff?
 - Are staff allowed or required to have the application on their mobile devices?
 - Must staff respond outside of business hours?

Internal Communication

Using Messaging and Email Applications

Keep in mind that staff will not be able to work productively when constantly being interrupted by message notifications³⁴ and may prefer to communicate in other ways (phone, email). Some staff are more sensitive to interruptions than others (for example, if a staff member has health conditions that make notifications obtrusive to work, like Attention Deficit Hyperactivity Disorder³⁵).

Sending an instant message lets the user communicate clearly and get the point across much faster than via email. Additionally, direct messages help build more personal workplace relationships, which increases co-workers' motivation and engagement, and all of which positively affects productivity and quality of work.³⁶ Clear expectations regarding staff communication preferences can allow for better and more productive collaboration. Staff should be reminded of professionalism obligations and should always use caution when discussing confidential client information on any available technology. Staff should also be trained on email courtesy and timeliness expectations and how to best keep these communications organized.

Communication with Clients

Using Messaging and Email Applications

If using internal messaging applications with clients is inconvenient for staff and difficult for clients to access, staff may resort to using personal devices to text clients instead. Firms must ensure that client communications are kept confidential and documented in the case management system. Many case management systems allow for integrations that permit SMS text messages to be sent to and from and recorded to a client file.

These steps ensure that the client file is complete and accessible in the event that the information or communication must be referenced later. Staff should take steps to ensure that client SMS texts and emails are not being observed by third parties. As many clients use free unencrypted email to communicate, it is strongly recommended that firms do not allow email communication with clients regarding confidential information and instead require staff to use a secure encrypted client portal.³⁷

- Encyclopædia Britannica. "[Instant Messaging](#)."
- Encyclopædia Britannica. "[Text Messaging](#)."
- For example, if the firm is sued for malpractice, the existence and content of text messages may become an evidentiary issue and need to be preserved.
- Again, Google likes to change names of its products. This used to be called Google Hangouts.
- The New York Times Wirecutter. "[The Best Team Messaging App](#)."
- Google Workspace Marketplace. "[Salesforce for Google Chat](#)."
- Google Workspace Marketplace. "[Jira for Google Chat](#)."
- Capterra. "[Slack Reviews](#)."
- Business Insider. "[Video call conference security, ranked from best to worst for Houseparty, Zoom, Discord, Skype, BlueJeans, and more](#)"
- Discords are sometimes set to mention everyone in a chat whenever there is a new message, which some users find distracting. See, e.g., Hebda, Samuel"[How to Stay Sane Using Discord for Business](#)," [White Rabbit Enterprises](#).
- Karbon. "[The Harm of Immediate Response Expectations](#)."
- Bloomberg. "[Tech Fatigue Has Employees Zooming In and Zoning Out](#)"
- Entrepreneur. "[Notifications Are Killing Your Productivity. Here's What to Do](#)"
- Inflow. "[How to Support ADHD Coworkers](#)"
- ActiveCollab. "[Ways Instant Messaging at Work Boosts Workplace Productivity](#)."

2.3. Collaboration Technologies: Document Collaboration and Cloud Storage

Submitted by [GravityWorks](#) on Fri, 02/14/2025 - 8:53 AM

Document Collaboration and Cloud Storage

Introduction

Collaborative writing and editing of documents and other types of files— spreadsheets, presentations, etc.— are cornerstones of legal practice. Luckily, there are numerous applications available to help effectively, efficiently, and securely collaborate with coworkers, third parties, clients, and opposing counsel on legal matters. Cloud storage repositories serve as a centralized location to store, edit, and share files with others, regardless of physical location.

Using document collaboration software instead of emailing files back and forth, or exchanging physical copies of documents, comes with many advantages. Document collaboration platforms allow for collaboration on documents in real time, revision tracking, and maintenance and review of historic document versions. Document collaboration saves time and server space by collecting and storing edits in one digital file, instead of passing multiple versions of files back and forth.

Most cloud storage providers offer robust security measures, including limited permissions options and other access controls, encryption, and other confidentiality protections. These measures are

crucial to ensure that confidential client documents and other sensitive information are protected. Firms must review the data ownership and privacy provisions of any system's terms of service (TOS) or end user agreement (EUA or EULA) to ensure that client data remains the property of the firm, that data is being stored inside the United States, and that sufficient security protections are in place to protect client data.

On-premises servers are no longer the safest, nor most efficient, option for storage of firm documents. The LSC Baselines³⁹ advise that firms transition their file storage to cloud-based solutions, with backups and redundancy in case of a service disruption.

Common Document Collaboration and Cloud Storage Tools

Google Drive

Firms using Google Workspace will have access to the document collaboration tools available through Google Drive. As with the other applications listed in this section, Google Drive allows for real-time collaboration on:

- documents via Google Docs,
- spreadsheets via Google Sheets,
- presentations via Google Slides,
- collaboration via Google Forms, Google Drawings, Google My Maps, Google Sites (a web page creation tool), Google Apps Scripts (a rapid application development platform), and Google Jamboard (a digital whiteboard).

Using these Google products allows staff to collaborate in the Google Workspace environment and allows for sharing of files in multiple file-formats, such as .docx, .rtf, .pdf, .xls, and .ppt.

Google Drive's real time collaboration seems to be faster and works more smoothly than Microsoft's⁴⁰, has better search capabilities, and has an excellent interface for reviewing changes in a document. However, formatting from files created with Microsoft products does not always display correctly. Further, file sharing permissions do not always work as intended. Users outside of Google Workspace sometimes find that files are not always accessible. Consequently, staff may inadvertently (or intentionally) subvert attempts to limit file access by sharing direct links to files.

Microsoft 365, SharePoint, and OneDrive

If a firm already subscribes to Microsoft 365, it may be easier to use Microsoft's document collaboration and cloud storage tools. All of Microsoft's traditional applications (Word, PowerPoint, Excel, etc.) allow for real-time collaboration, though users attempting to collaborate using the desktop version (as opposed to the web-based applications) may find that the system lags during collaboration. Using the web-based applications can improve the lag, but still does not seem to work as seamlessly as the Google products.⁴¹ That said, using Microsoft's tools to collaborate in real-time is often preferred to emailing or sending documents back and forth.

SharePoint is Microsoft's web-based collaborative platform and content management system. SharePoint does not work as well for document management as other products that are specifically designed for that purpose (for example, NetDocuments or LaserFiche),⁴² but it can be set up to passably function as a DMS.⁴³ SharePoint allows staff to create, store, organize, and manage documents and files, on top of supporting document check-in and check-out, version control, and metadata tagging, all of which may help with search retrieval and document organization.

SharePoint's access controls and permissions may be easier to control than Google's.⁴⁴ Using SharePoint, firms can create separate document libraries with different permissions so that, for example, sensitive human resources files may be stored separately from a client files library. The permissions for each library may be set independently so that only authorized staff have access.

Like SharePoint, OneDrive is a document storage application, but its intended use is different. SharePoint is meant to store organization-wide documents, while OneDrive is intended as dedicated personal storage in which users can store "personal" (that is, not needed to be shared) documents and files. Firms should carefully consider what types of files staff be allowed to maintain in their OneDrive accounts as opposed to SharePoint folders. The difference between SharePoint and OneDrive, and what should go where, can become confusing to staff without proper explanation and discussion of best practices. Firms should implement clear guidelines regarding file storage locations and implement regular training to ensure that staff are clear about the differences.

DropBox

Some firms may have staff that use personal DropBox accounts for collaboration with external partners or grant funders. While there are specific use cases for working in DropBox, firms should ensure that client files are not stored in personal DropBox accounts for security purposes. Instead, if necessary, the firm should consider maintaining an organization wide DropBox Business account. For legal aid organizations and larger teams, DropBox Business offers robust security measures, including encryption and access controls, to protect sensitive client information. It also offers enhanced administrative controls and team management features, enabling organizations to centrally manage user accounts, monitor activity, and enforce security policies.

Firms with subscription plans to Google Workspace or Microsoft 365 should consider whether the extra expense of a DropBox Business account is necessary considering that Google and Microsoft already have document storage and collaboration capabilities included with their platforms. Having an additional document storage application may contribute to an undesirable decentralized approach to a firm's overall document management practice. If there is existing use of DropBox, consider migrating those files into Google or Microsoft. Be sure to examine business needs for active DropBox accounts so that specialized use cases are still being met.

Best Practices and Policy Considerations:

- Reduce document sharing by email. Staff should be discouraged from emailing documents to collaborators as this leads to multiple versions of documents and wasted storage space. Staff should also be discouraged from emailing confidential documents to and from clients, as there are significant risks that client emails are being monitored or could be compromised. Instead, firms should use secure, encrypted client portals for all clients and other sensitive information.
- Ensure proper access to files. Permission schemes need to be carefully considered before committing to a document management and collaboration structure. Separate libraries or other repositories may be created to limit access to sensitive files and other information.
- Have a clear file structure. Having a clear plan for what files go where and who has access to what is essentially important when implementing or overhauling the document collaboration policies. Legal aid firms tend to put files into two categories: case-related documents and non-case related documents. Case-related documents may need to be structured in a special way so that they integrate properly with the firm's case management system. For non-case related documents, the firm may further want to categorize documents as sensitive (for example, human resource documents, donor information, etc.) and non-sensitive (for example, internal policies, operational forms, etc.). The firm may also want to create a third category of knowledge management documents, comprised of sample memos and briefs, trainings, and fillable legal forms.
- Enforce naming conventions. Firms should create and enforce a firm-wide file naming convention scheme. Files are nearly impossible to find when everyone chooses their own file names. For example, all case files might be named: [date of creation, YYYY-MM-DD][internal case number][client last name][descriptive name of document]. Firms should create a list of abbreviations or required descriptive names for documents (e.g., use "MotDismiss" instead of "MTD").
- Ban Shadow-IT. "Shadow-IT" is when staff access software or hardware for work-related purposes outside of the IT department's approval or oversight. The organization must have a policy in place that all work-related documents, and particularly all client-related documents, must be stored and accessed only through cloud storage. Staff should not be permitted to upload client documents to personal storage repositories like DropBox, Box, Google Drive, etc. without the express permission of management.

Internal Communication

Using Document Collaboration and Cloud Storage Applications

The creation of cloud-based storage and applications has led to a number of new and efficient ways for staff to collaborate on documents with one another. For many staff, it has become normal and expected to email different versions of documents back and forth for collaboration, either by sharing the document itself, or by sharing a link a location where the document is stored (such as SharePoint). However, if uniform guidelines are not set in place by management, staff tend to end up with multiple versions of the same document and it becomes difficult to distinguish which is the most recent copy. Email servers and cloud document storage become filled with many different versions of documents, eating up costly storage space. The more copies that exist, the more difficult it becomes to view accurate version history and historical edits.

It is crucial to understand the risks of collaborating without any clear policy in place. Unstructured collaboration--- internally, externally, and with clients--- all come with unintended consequences and risks.

Staff should also be reminded to remove all metadata before sending documents out of the firm and should regularly be trained in how to use Acrobat or Word to appropriately redact information from documents.

External Communication

with Clients and Others Using Document Collaboration and Cloud Storage Applications

It is not recommended to allow clients to access documents directly from cloud storage, as this opens a number of permission and safety issues. Instead, staff should collaborate with clients via an encrypted, secure client portal. Client portals allow staff to upload client documents into a repository whereby clients then retrieve the documents using a password that they have been given separately (preferably over the phone). Staff should not be permitted to email or text clients regarding sensitive or confidential information. It is important to remember that while a firm's internal systems may be secure, there is no way to ensure that a client's system is secure and unmonitored; this is especially true for domestic violence cases.

39. Legal Services Corporation. "Model Practices & Innovations in Technology Resources." <https://www.lsc.gov/i-am-grantee/model-practices-innovations/technology/resources>

40. North Carolina Bar Association. "Microsoft 365 Versus Google Workspaces." <https://www.ncbar.org/2021/02/09/microsoft-365-versus-google-workspaces/>.

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42. Agility System. "SharePoint Document Management." <https://www.agilitysystem.net/insight/sharepoint-document-management/>.
43. If the organization plans to use SharePoint as a DMS, especially if it plans to use it in connection with a case management system, the firm should contact a consulting firm familiar with law firm document management in order to assist in setting it up properly.
44. Cornell Information Technologies. "Google File Ownership: The Good, the Bad, and the Ugly." <https://it.cornell.edu/gsuite/google-file-ownership-good-bad-and-ugly>.

2.4. Task and Project Management Applications

Submitted by [GravityWorks](#) on Fri, 02/14/2025 - 9:05 AM

Introduction

Law firms have realized in recent years the importance of using project management techniques to run their programs and serve their clients effectively and efficiently.⁴⁵ Individuals also need to be able to track outstanding tasks and to-dos (see the LSNTAP Project Management Toolkit). Software designed specifically for project management can help the firm communicate and collaborate more efficiently, leading to better client management and outcomes. Project management software allows staff to plan, organize, and track projects to optimize resource allocation and keep relevant parties informed throughout the project or case. Even if a firm isn't ready to purchase a full-fledged project management tool, there are other tools available for staff to use for personal task management.

Below follows a discussion of some of the more popular tools the team can use for project management. This is in no way an exhaustive list; the project management application landscape is vast and wide, with applications targeted at different sized teams with varying needs.

Common Tools for Project Management

Calendaring: Microsoft Outlook, Teams, Google Calendar, Case Management System

Accurate calendaring is a linchpin of the practice of law that goes beyond simply tracking client meetings and court hearings. All time-sensitive obligations should be tracked on the firm's calendar(s), including deadlines for court filings and statutes of limitations. Things get complicated, however, when firms are using multiple tools to share different calendars. As stated above, firms need to provide staff with clear guidance about which tool is appropriate for which type of calendaring.

Firms should consider whether to share one central calendar for certain important events (for example, important case deadlines, court appearances, and staff-wide meetings) and allow staff to manage their own individual calendars for client meetings,

staff-member specific meetings (for example, one-on-one meetings with supervisors), etc. All of the systems discussed here allow for color-coding of events/calendars to help users distinguish one calendar or type of event from another. Firms should implement access controls to limit the viewing of certain calendars and events to only those who require access.

Microsoft Outlook

For most firms that use Microsoft, the Teams and Outlook calendars will be synched so that they essentially are one calendaring system. Using Outlook for calendaring, especially if a firm is already using it for email, gives staff a centralized location to access communication and scheduling information. It is also easier to view and manage multiple calendars on Outlook, as opposed to Teams, due to the ability to subscribe to and view more than one calendar on-screen at a time. Outlook has a scheduling assistant feature that allows staff to see when others within the firm are free or busy, allowing for ad hoc meeting-scheduling without the use of a meeting poll. Outlook also has a scheduling poll feature called Find Time to allow staff to send out meeting polls to gauge meeting availability for those inside and outside the organization. Finally, Outlook also allows integration with a number of third-party tools.

Microsoft Teams

The Teams calendar, on the other hand, is particularly useful for scheduling Teams video collaboration meetings. Team members can schedule, join, and manage video meetings directly from the calendar. Teams also allows for channel-based calendars, where each team or channel can have its own calendar where members can view and manage those calendars collectively.

Google Calendar

Google Calendar provides many of the same calendaring features as Outlook and Teams. Shared calendars are available, and Google Calendar has a find a time feature similar to Outlook's scheduling assistant. Google Calendar allows staff to create an appointment schedule, which creates a shareable page that lets others know when there are available appointments to reserve. Users can also create a scheduling poll by using Google Forms; however, Google does not have an integrated feature that will send scheduling polls like Outlook does.

Case Management System Calendars

Most case management systems also have integrated calendars. Some, like LegalServer and Clio, allow for third-party integrations with Outlook and Google Calendar. When connecting two systems, there is always a risk that a technical issue could cause missing or inaccurate information on one or both of the systems. As calendaring is vitally important to ensuring that firms do not miss important events like statutes of limitation and court filing deadlines, firms should consider whether the convenience of connecting the two systems— e.g., the CMS and Outlook—is worth the risk that the connection may introduce errors in calendaring. See A Word of Advice, above, for other considerations concerning calendaring and malpractice insurance.

Microsoft To-Do, Teams Tasks, Planner, Project

Microsoft has a range of tools available to help with project management, many of which are included with Microsoft 365 licenses already. For individuals, Microsoft's To-Do is a simple task management application that can be used to manage daily tasks, create due dates and reminders, and break down more complicated tasks into smaller steps. Tasks created in To-Do automatically appear in the user's Outlook tasks.

Microsoft Planner and the Teams Tasks applications can be used for simple projects shared amongst a Teams channel. Tasks are aggregated by assigned staff via To-Do, Outlook, and Planner (see more below). Shared plans, which are available for team projects, allow staff to share and organize tasks collaboratively. These tasks are added to the group's channel in Teams for greater visibility and efficiency.

Project is Microsoft's dedicated project management application available at extra cost. Project includes the typical project management features (task and project planning, resource allocation, reminders, etc.) but also offers automated workflows, resource and demand management, portfolio analysis, roadmaps with milestones and phases, report creation, and connections with the other Microsoft collaboration tools.

Google Tasks

As of the time of this writing, Google does not have a dedicated project management tool. However, Google Workspace subscribers can use Google Tasks for simple task management, including subtasks and reminders.

Google Workspace allows for integrations with a number of dedicated project management applications like Asana, ClickUp, Monday, Trello, and Wrike. Without these integrations, users may find that the Google Workspace applications are not sufficient for management of complicated projects.

Airtable

Airtable is an online application used for creating relational databases – essentially, it is a data management and sharing program. Although Airtable is not specifically designed for project management, it is sometimes used to manage projects because it allows for substantial flexibility and customization. Since Airtable is not specifically designed for project management, there may be other applications that better meet project management needs.

Other Tools

There are hundreds of project management applications available for more extensive project management needs. A few of the more popular project tools are Asana, ClickUp, Jira, and Monday.

Best Practices and Policy Considerations:

- Project management is a skill:** Organizations should not expect staff who are not trained in project management (attorneys, support staff, etc.) to effectively know how manage a project or improve communication and collaboration via a project management application. Highly skilled project managers are trained in project and resource management and help monitor and shepherd projects from initiation through completion. We recommend that staff with training in and prior experience with project management be responsible for supporting staff in the set-up and use of the chosen project management software.
- Define application uses and best practices:** The organization likely has multiple programs already that can assist in task management (Teams, Outlook, Google Tasks, etc.). If teams are collaborating using task or project management software, it is helpful to create policies regarding where shared tasks should be stored and who will be monitoring them.
- Carefully consider how many licenses are needed by the firm:** The Project management applications can be costly and often charge by the license. However, many applications allow for a limited number of free "guest" spots to be able to view and review the projects. Consider how many paid licenses the team needs and whether the firm can save money by allowing others to fill

those guest spots.

4. **Careful with client data:** As discussed in the section on ethics, firms must take extra care when inputting confidential client data into any application. When using applications such as project management tools, do not enter confidential client information into the software unless absolutely necessary. If it is necessary, confirm that the firm maintains ownership of the data, that the data are stored within the United States, and that the company will destroy the data at the firm's request.

Internal Communication

Using Project Management Applications

The purpose of project management software is to organize and streamline communication of project goals, tasks, and resources throughout a project. All project management applications allow staff to communicate about particular tasks. Most programs will also send email and mobile reminders, if desired. If staff are required to communicate about a project within the project management application, it will be easier to keep track of those conversations for historical and future project planning purposes.

External Communication

Using Project Management Applications

For confidentiality reasons, project management software is not recommended for client communications. As discussed above, firms should use an encrypted client portal for client communications.

Using project management software to communicate with third parties, such as other community organizations or pro bono volunteers may be convenient. However, since most project management applications charge by the license, make sure guests can access shared parts of the project. Permission controls are also important whenever sharing information outside of the firm is necessary.

45. LSNTAP (Legal Services National Technology Assistance Project). "Project Management Legal Aid Toolkit"; Woldow, Pamela. Richardson, Douglas B. American Bar Association. "Legal Project Management for Lawyers in One Hour" https://www.americanbar.org/content/dam/aba-cms-dotorg/products/inv/book/214262/5110763_excerpt.pdf.

3. Advantages and Challenges of Collaboration Software

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Advantages of Collaboration Software

Improved Internal and External Communication

Using collaboration software within the firm, along with proper guidance and management, will improve internal and external communication, save money on document storage and management, improve file organization, allow for more efficient in-office and remote work, and improve productivity and efficiency. What follows are some of the advantages of using collaboration software in the firm.

Proper use of collaboration applications will improve staff's communication in a number of ways:

1. **Real-Time Communication**
Collaboration applications like Google Chat and Teams allow for instantaneous (as well as delayed) communication among staff when a phone call or virtual meeting is not desirable or possible.
2. **Centralized Communication**
By using one system to communicate (for example, Microsoft 365 or Google Workspace), staff can work more efficiently by not having to switch through multiple applications. Having one system also allows for easy retrieval of past conversations.
3. **Document Sharing and Collaboration**
Staff will work more efficiently together and save storage space by working on the same document or file instead of emailing back and forth different versions.
4. **Notifications and Reminders**
Docketing and calendar control are essential in a law firm; one missed date could lead to disastrous consequences for a client and a malpractice case for the firm. Collaboration software allows for teams to work together on tasks and set deadlines for themselves and each other, with the ability to control how and when notifications are received and reminders of outstanding tasks to be completed.
5. **Better Organization**
Effective use of the many features of collaboration software can allow the firm to improve operations and procedures and ensure that files and communications are optimally organized. Better organization does require some thought before implementing (or re-implementing) a system and careful consideration should be brought to where and how files will be saved.
6. **Flexibility**
Cloud-based collaboration software facilitates remote work and more flexible work arrangements. Staff can access information needed for work (files, case management details, communications, etc.) from nearly anywhere, regardless of their physical location. This flexibility allows firms to accommodate different work preferences and needs, especially for employees requiring accommodations based on disability or family situation.
7. **Greater Productivity**
Collaboration software can significantly increase productivity within the firm. By allowing for several different communication modalities from which to choose, staff can communicate in ways that best fit the needs of any situation. These tools allow for centralized access to information, improving efficiency and ease of locating information when needed. The integrations between task management and communication tools allow staff to assign and review tasks, set and monitor deadlines, and track progress throughout the course of a project or representation of a client. Finally, collaboration software, when used properly, can allow for greater knowledge sharing and learning within the organization, which in turn can improve client services.

Challenges of Collaboration Software

While collaboration applications are required for a technologically competent and efficient law firm, staff must be aware of some of the challenges of using collaboration software:

1. Security Risks

As with using any application, there is a persistent risk that sensitive or confidential information could be compromised by an internal or external party. When choosing collaboration software, the firm must do its due diligence by reviewing terms of service (TOS), end user licensing agreements (EUA or EULA), etc. Firms should only use software for which the firm remains the owner of any data input into the system. Firms should be contractually authorized to remove and destroy any data stored within the system. The firm must enforce a data destruction policy and ensure that any data stored within the collaboration applications are also destroyed per that policy.

2. Permissions Issues

Firms must carefully plan and control who can access sensitive and confidential information in a collaborative system. Make sure that systems are set up according to the principle of least privilege, or the principle that "a security architecture should be designed so that each entity is granted the minimum system resources and authorizations that the entity needs to perform its function."⁴⁶ Planning permissions takes careful consideration and must be completed before implementing applications and systems, and requires regular review thereafter.

3. Change Management and Training

In our experience, the number one reason that an IT system or process fails to work within a firm is that not enough attention is paid to change management and training. Technological change requires that staff be supported to implement and use the new technology successfully. This requires training before and during implementation and regular ongoing training thereafter. Organizational change cannot be successful if staff are not included in understanding why things are changing, how they are changing, and how staff will be expected to change their work tasks and operations.

46. National Institute of Standards and Technology (NIST). "Least Privilege." NIST Computer Security Resource Center Glossary https://csrc.nist.gov/glossary/term/least_privilege.

4. Conclusion

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The Future

Office collaboration technology is exploding, and it will be exciting to see what companies come up with next to improve communication and collaboration. Artificial intelligence (AI) will likely be behind much of the change. Keep in mind that, particularly with AI, firms must be incredibly careful to ensure that they are not breaching their duties of technological competence and client confidentiality. This is particularly true of software built on public large language models (LLMs) that use user data for ongoing machine learning. Firms should only use AI tools that are specifically intended for legal work and with terms and conditions that protect client confidentiality.

Here are some applications to stay tuned for:

1. AI-powered project management: Microsoft has already begun to use AI to help condense and summarize meeting notes and prepare agendas. In the near future, many of text-based and rote

tasks will be replaced by AI.

2. Document automation: Collaboration on documents will become even more streamlined using document automation programs. These programs allow parties to work together to put agreed-upon information and terms into the application, producing a document seamlessly integrating that information.
3. Organization and knowledge management: Soon, AI-powered systems will be able to assist firms in keeping systems organized, especially when it comes to knowledge management documents. With better internal search engines and the use of meta-data, the structure and organization of documents will not matter as much because the program will be able to search for and locate files using information other than location.
4. Virtual assistants: Use of AI virtual assistants to automate administrative tasks, such as rote emails, coordinating and scheduling meetings, and managing calendars will proliferate. This will free up staff to focus on legal work and help more clients.
5. Data analysis: Collaboration applications of the future will be able to easily identify patterns within project data (for example, how long a case takes from intake through conclusion based on a variety of factors), allowing firms to improve resource allocation and better anticipate staff needs surrounding collaboration and communication.

Conclusion

In the ever-evolving landscape of legal practice, the purposeful incorporation of technological collaboration tools, as discussed above, will be a pivotal catalyst for the legal aid community. When used carefully in the pursuit of purposeful collaboration, these tools hold the potential to usher in an era characterized by unparalleled levels of efficient communication. In navigating these technologies, the legal aid community must undertake the conscientious development and adherence to robust collaboration and technology-use policies. These policies serve as the compass guiding the ethical and efficient use of collaboration tools. It is within the nexus of the innovative use of technology and ethical diligence that promises improved client service and the betterment of the broader legal community.