

# 5 Steps to More Efficient Document Creation with MS Teams

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MS Teams is a popular platform for [improving collaboration](#) in distributed workforces, increasing productivity, enabling a flexible work culture and facilitating quality remote service. For the Distributed Firm, it delivers another valuable benefit: efficient document workflows.

[Learn about the benefits of MS Teams for the Distributed Firm](#)

If your firm members are now working from different locations, accessing and downloading client documents on different devices, the workflows your team built for in-office operations have likely become inadequate. Document management becomes inefficient and error-prone, affecting productivity and quality of work.

We've laid out the first 5 steps to making your document workflows more efficient with MS Teams:

- 1. Integrate MS Teams with Your File System**
- 2. Keep Track of Your Versions**
- 3. Map Your Document Workflow**
- 4. Map Your Team Workflow**
- 5. Draft and Review Collaboratively**

## **STEP 1: Integrate MS Teams with Your File System**

At its core, Teams is an online collaboration platform, enabling firm members to access their files on any device, in any location, and to discuss, review and mark them up with other members of the team.

MS Teams not an appropriate repository for firm files, however, which is why integration with the firm's main file system is essential. It works with just about any file system, eg., Windows, Google Drive or even more robust document management systems such as Worldox.

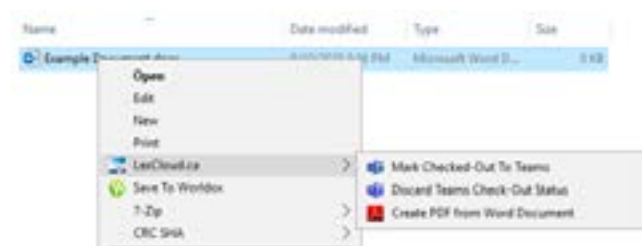
Its "integration" is rather simple: copy documents from the firm's file system by dragging and dropping them into a Channel in MS Teams, where they'll be reviewed, edited and finalized before being copied back over.

## STEP 2: Keep Track of Your Versions

Ensuring documents are properly versioned makes retrieval much more efficient and reduces risk of error, however keeping track can be difficult in the Distributed Firm, and when files are regularly moved back and forth between the main file system and MS Teams, best practices should be followed.

- Immediately after a document is copied from the firm's file system over to MS Teams, to prevent duplication we strongly recommend that it be locked for editing.
- Once the Teams version has been finalized and moved back into the file system, it should be marked "final".
- The working version left behind in Teams should be immediately deleted, though you may wish to leave a PDF of the document for reference.

LexCloud.ca has created a simple widget to help firms keep track of document versions: when a document is ready to be copied from the main file system over to Teams, users can right-click on the file and select **LexCloud.ca > Mark Checked-Out to Teams**.



[Worldox](#) Document Management Software removes the need for these manual best practices, as it features built-in version tracking for integration with MS Teams.

[Learn more about Document Management for Law Firms](#)

## STEP 3: Map Your Document Workflows

Documents can either be created inside a MS Teams Channel or copied over from the file system, with the above best practices used to preserve versioning. To ensure a seamless transfer between platforms, your firm requires a new document workflow.

Every firm and even every department has their own unique document creation process, and so workflows require careful planning and consideration of each team's needs. Here, we provide an example of a typical document workflow between a firm's Windows file system and MS Teams:



## STEP 4: Map Your Team Workflows

A well-built document workflow is only as good as the team that uses it. A team workflow will help members understand how the document workflow translates to the work they do, and it should clearly communicate which members are responsible for each specific task.

We strongly recommend that team members be involved in the planning process; in order to ensure efficiency and compliance, it should feel as natural as possible.



## STEP 5: Review and Edit Collaboratively

Law firms are not accustomed to thinking of their document creation as a collaborative process, however in the absence of in-person interactions, real-time, virtual collaboration cuts out the back and forth, contributing to a more efficient review process.

MS Teams has several powerful document collaboration capabilities:

- Discussion channels
- Screen sharing
- Audio/Video calling
- Simultaneous document review (MS Word, PowerPoint, Excel)
- Real-time chat
- In-document notations and conversation tabs

## It's Time to Get Started!

MS Teams' virtual collaboration capabilities enable firms to conquer the challenges that come with document creation in a distributed team.

By integrating MS Teams with your existing file system and following best practices to preserve document versioning, you can build seamless, efficient workflows that enable your team to maximize productivity in any location.

**LexCloud.ca is a Certified Microsoft Provider with more than 25 years of specialization in leveraging technologies for law firms. [Contact us](#) today for a free MS Teams consultation!**

**READ MORE:** [Technology Essentials for the Distributed Firm](#)  
[Everything you need to ensure remote productivity](#)

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