



Navigating the  
modern workplace

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Insights and strategies  
for legal professionals



# Let's reimagine the workplace.



[www.synnecorp.com/ca/modernworkplace](http://www.synnecorp.com/ca/modernworkplace)

At SYNNEX Canada, we want to equip legal professionals with the tools they need to adapt their workplace and keep employees productive and satisfied. Throughout this playbook, we will explore strategies to accelerate your workplace transformation.

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We've seen two years' worth of digital transformation in two months.  
- Satya Nadella, CEO, Microsoft

## CONNECT

Digital platforms make it easier than ever to virtually connect with colleagues and clients.

## ENGAGE

Discover new ways to keep employees informed, motivated and involved.

## ADAPT

Shifting client and employee needs require innovative and flexible solutions.

## SECURE

Access your work anywhere at any time knowing your files and data are safe and secure.

## AUTOMATE

Simplify time-consuming workflows and processes with powerful automation tools.

# The way we work is rapidly evolving.

Now, perhaps more than ever, we are all rethinking how we work. The idea of The typical workplace, with one physical location, daily face-to-face meetings, and long commutes into the office no longer fits into our new reality.

Prior to the pandemic, legal professionals were adopting technology at varying rates. While some were early adopters of new tools, others preferred tried-and-true methods—and understandably so. In many ways, the legal system and legal Industry adhere to traditions. In the Supreme Court of Canada's more than 100-year history, its first fully virtual hearing only occurred in June 2020.<sup>1</sup>

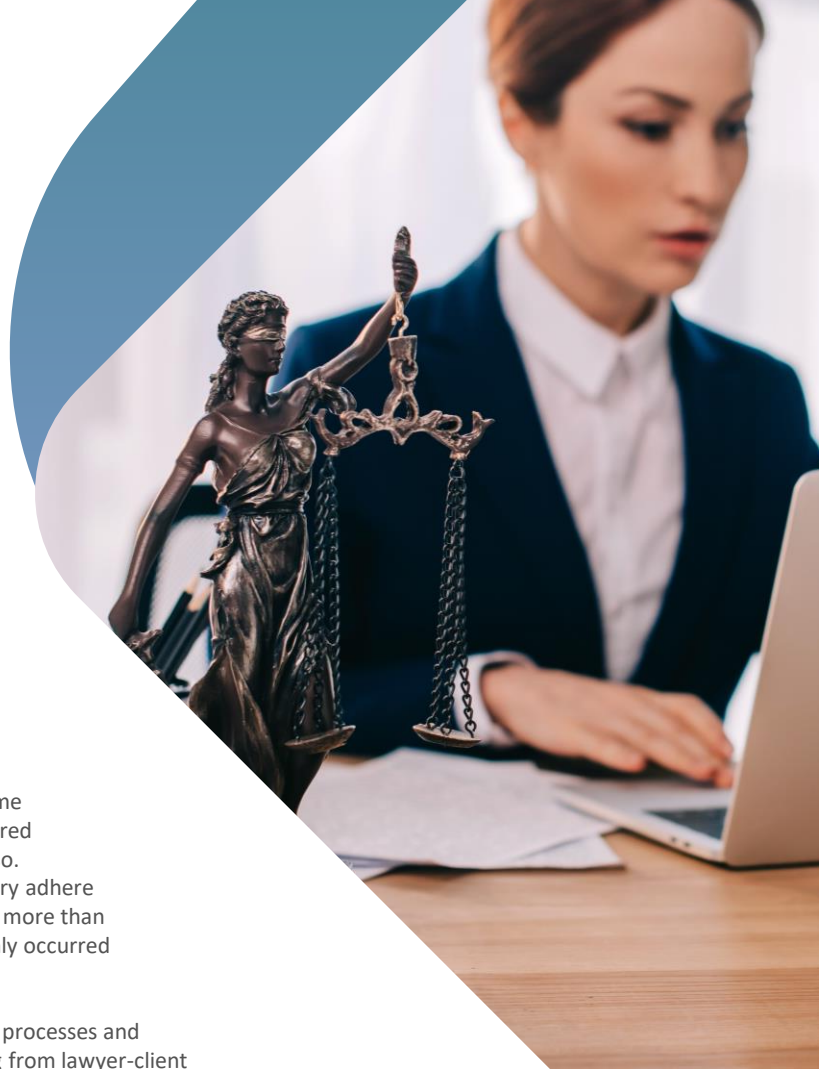
Many of the inefficiencies in longstanding legal processes and services have now been illuminated. Everything from lawyer-client consultations to collaboration between colleagues is overdue for an update.

So what does the modern workplace look like? Physical and digital workplaces will be flexible and inclusive. Virtual meetings and digitized processes will increase productivity and create better experiences for legal professionals and their clients. Organizations need to recognize the unique challenges of virtual teams and invest in ongoing training and support in order to realize the benefits.

Among the top technologies transforming work are Microsoft Modern Workplace solutions. This suite of products and applications allows employees to work securely from any place, at any time, on any device.

But creating a successful modern workplace isn't just about adopting new technology. It requires a cultural transformation—by being open to adopting new strategies and processes, organizations can position themselves to not only adapt, but to thrive.

SYNNEX Canada's extensive network of partners is dedicated to working with our customers to find the best solutions for their needs. As we all adjust to the modern workplace, we want to provide insight into what this may look like and tips on enhancing the way we work.



<sup>1</sup> Supreme Court of Canada, The Court's first-ever hearing fully by video-conference, June 9, 2020. <https://www.scc-csc.ca/judges-juges/spe-dis/rw-2020-06-09-eng.aspx>

# The future of law



Across practice areas, legal professionals have adopted new ways of working. When, or if, they return to the office, the goal is not to revert to old practices. Rather, now is the time to develop new processes that increase billable hours, enhance communication, and inspire collaboration.

*Let's imagine what that could look like with the help of Microsoft's Modern Workplace solutions.*

Instead of transporting large stacks of paper files, legal professionals can access their documents through OneDrive, their personal cloud storage. They can securely view and edit files on their desktop or mobile device anytime they need.

With Microsoft Teams, legal professionals can meet with clients through audio or video chat, wherever they or their client is located. Without the need for commuting and planning in-person visits, legal professionals can use their time more effectively to discuss projects and cases.

Following meetings, legal professionals can add next steps to a shared client portal. This portal, created on Microsoft Teams, allows the legal professional, their client, and other team members working with the client to view and add tasks, documents, and resources.

Once a client has signed a contract or a team member has drafted a document, this triggers an automated workflow created with Microsoft Power Automate. Notifications are automatically sent to key team members, and reminders will appear as deadlines approach.

By adopting Microsoft solutions, any legal professional's work can look like this—more productive, more secure, and more collaborative.

We know this change won't happen overnight. Developing new processes and adapting to new technology requires time and training. But to get started, we want to provide some practical tips to help begin the journey.

## GET STARTED

SYNNEX Canada provides best-in-class software and hardware to support workplace transformations. [Contact us](#) to learn about the latest offers and book a free consultation.

# The modern workplace with Microsoft

Microsoft's Modern Workplace is a suite of solutions that enhances productivity, communication, and collaboration. It includes operating systems, enterprise-grade security tools, and productivity apps. These tools can replace multiple unconnected technologies. Rather than switching between apps and services, Microsoft solutions form a cohesive ecosystem, with everything that an employee needs to work effectively and efficiently. A few of Microsoft's innovative technologies include:

## Microsoft 365

Designed specifically for workplaces, Microsoft 365 Business combines cloud storage, Microsoft Teams, business-class email, and Office apps (including Word, Excel, PowerPoint, and OneNote). Basic, Standard, and Premium plans are available to fit the needs and budget of each company.

## Microsoft Teams

Teams is a comprehensive digital communication platform to chat, host meetings, share files, and collaborate on projects. Colleagues in any location can work together in real-time through one central hub. Microsoft Teams is included with every Microsoft 365 plan.

## Windows 10 Pro

This powerful operating system is the foundation of the modern workplace, helping teams work more effectively and collaboratively. With advanced protection, business-class tools, and flexible management, Windows 10 is the most advanced and secure Windows operating system to date.

## Microsoft Power Automate

Rapidly adapt and automate your processes and tools. Power Automate makes automation possible for non-programmers. This low-code/no-code tool helps businesses modernize processes and streamline repetitive tasks.

## Enterprise Mobility + Security (EMS)

EMS is an intelligent mobility management and security platform that protects users, devices, apps, and data. Employees can work in new and flexible ways knowing that their information is secure across their devices.

*The solutions listed above are all included in Microsoft 365 Business Premium and Enterprise subscriptions.*

[Contact us](#) to learn more about available subscriptions for:

Microsoft 365 Business Basic | Microsoft 365 Business Standard | Microsoft 365 Business Premium

# The modern workplace embraces new forms of connection.

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*Whether meeting with clients or collaborating with team members, digital platforms are making it easier than ever to connect with each other.*

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## OFFER VIRTUAL MEETINGS AND CONSULTATIONS

For many clients, receiving prompt answers is more important than meeting face-to-face. By shifting to virtual meetings, legal professionals can connect with clients securely and more efficiently. Because clients don't need to visit a physical office, this also widens the geographic area that legal professionals can serve.

[Microsoft Teams](#) is a convenient way to host meetings over audio or video chat. Legal professionals can simply send a meeting link to their client. Microsoft Teams follows security best practices and procedures, so meetings are private and secure. It also offers meeting features such as [screen sharing](#) and [recordings](#), which are great alternatives to some of the typical procedures of in-person meetings.



## CREATE SPACES FOR CASUAL TEAM CONVERSATIONS

In between remote work and team members' varying schedules, it can be difficult to stay connected. Most daily communication between team members will likely be about clients or projects—but a strong team needs to bond on a personal, human level. Find ways that colleagues can have different types of interactions outside of emails and meetings.

On Microsoft Teams, [channels](#) are sections that are dedicated to specific topics or projects. Channels can be used to set up communities of practice or to discuss news and trends. Consider also having a “water cooler” channel where team members can chat about topics unrelated to work.

### GET STARTED

- Check out these [tips for remote and onsite collaboration](#).
- [Contact us](#) to learn how Microsoft 365 can transform the way you connect with clients.

# The modern workplace keeps us engaged.

*As more employees continue to work away from the office, it's important to find new ways to keep them engaged with the company.*



## **KEEP EMPLOYEES INFORMED**

Employees need timely announcements and updates on what is happening within the company. Important news can happen at any moment—from new court decisions to shifting safety guidelines. Emails can be easily missed among other incoming communications. Instead, consider having a central portal to share files, news, and announcements.

To keep team members on the same page, legal professionals can use Microsoft Teams to share industry news and workplace announcements. Team members can also upload and share common documents or resources, such as contracts or legal briefs, which will then be stored on the team's [SharePoint site](#). To ensure communications are seen, team members can [mark their message as urgent](#) or use [@mentions](#) to send a notification directly to a colleague. With the Microsoft Teams mobile app, team members can stay informed, even when they are on the go.

## **FORM DIGITAL BRAINSTORMING SPACES**

In a time of so many unprecedented changes, creative thinking is needed to solve problems—and many of the best solutions come from colleagues brainstorming together. Whether teams are working on a client's case or thinking about ways to improve their practice, creating digital spaces for the exchange of ideas can help elevate the quality of work produced.

There are a variety of tools that can help with this. In Microsoft Teams, colleagues can send a message to everyone in the team as soon as inspiration hits. Conversations are threaded, which makes it easy to reply to previous messages or ideas. Another useful tool is [Whiteboard](#), a shared digital canvas that can be used by all attendees during a Microsoft Teams meeting.

# The modern workplace is adaptive and flexible.

*As legal systems shift, so do the requirements of clients. Legal professionals and workplaces need to evolve alongside these changes and adapt to current needs.*



## KEEP IT IN THE CLOUD

With more employees continuing to work remotely, file cabinets with physical documents need to be upgraded to a digital solution. By switching to the cloud, documents, data, and emails are accessible from any device at any location. Cloud storage also eliminates the need to manage costly, high-maintenance physical servers.

Microsoft offers a variety of cloud storage solutions, such as [OneDrive](#), which is included with Microsoft 365 Business plans. OneDrive allows users to save and access files across their devices, so their information is accessible wherever they are working. Legal professionals can securely store and share files with their team or with clients, reducing the need for paper documents.

## CREATE PORTALS FOR CLIENTS

Clients are facing tremendous changes in their personal and work life as well. They are looking for legal professionals who are understanding and responsive to their needs. Through creating a portal or shared workspace with clients, legal professionals can foster more organized, connected, and transparent client experiences.

With Microsoft Teams, legal professionals can grant [guest access](#) to clients—this means that they can create a joint workspace with team members and the client to communicate and share files or resources. To join a team, clients simply need to create a free Microsoft account. Once in a team, all team members can, for example, create to-do lists or assign tasks to each other. This allows both clients and legal professionals to see the status of pending items. Data is encrypted and protected from malware and suspicious user activity, so communication is private and secure.

### GET STARTED

- Review the [remote work checklist](#).
- Enable your team to do their best work from anywhere. [Contact us](#) to find out how.





# The modern workplace prioritizes security.

*Client confidentiality is a top priority. As legal professionals move to digital services, it's essential to implement best practices and procedures, backed by the latest in cybersecurity technology.*

## SET UP AUTOMATIC UPDATES AND MULTI-FACTOR AUTHENTICATION

Automatic updates and multifactor authentication are two simple but essential practices that legal professionals can adopt. Automatic updates ensure that all devices and applications have the latest security features. Updates for Microsoft 365 Apps are automatically downloaded by default, so users will always have the most secure version of Microsoft Apps.

[Multi-factor authentication](#) increases security by requiring multiple credentials to verify a user's identity. This added layer of security is essential for protecting clients' information from unauthorized access. In fact, 99.9 percent of attacks on accounts can be blocked through multi-factor authentication.<sup>2</sup> Multi-factor authentication can be set up on all Microsoft accounts.

## ENCRYPT YOUR EMAILS

Email is a preferred communication method for many legal professionals. Now, as even more communication is happening online, encryption is critical when exchanging sensitive emails. Encryption is a process where emails with sensitive information are encoded so that the contents can only be read by the intended recipient.

[Microsoft Outlook for business](#) has enterprise-grade security and multiple [encryption options](#) to meet the needs of legal professionals. Legal professionals can choose to encrypt all outgoing messages by default or set up encryption features for single messages. Another option is to disable forwarding, so recipients cannot pass along confidential emails to other parties.

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<sup>2</sup>Microsoft Security, One simple action you can take to prevent 99.9 percent of account attacks, August 2019.  
[www.microsoft.com/security/blog/2019/08/20/one-simple-action-you-can-take-to-prevent-99-9-percent-of-account-attacks/](https://www.microsoft.com/security/blog/2019/08/20/one-simple-action-you-can-take-to-prevent-99-9-percent-of-account-attacks/)

# The modern workplace automates everyday work.

*By digitizing and streamlining time-consuming manual tasks, legal professionals can focus on higher-value strategic work.*



## AGGREGATE AND ORGANIZE CLIENT INFORMATION

Strong relationships with clients are essential to any successful legal workplace. Because legal professionals may be working with several clients at once, it's essential to maintain detailed client notes.

[Microsoft OneNote](#) is a secure digital notebook that can help legal professionals keep an organized record of client interactions. With OneNote, legal professionals can take notes during client meetings, highlight important items, tag to-do tasks, and insert files or audio notes directly into OneNote. With the Outlook integration, legal professionals can send emails or meeting details directly to OneNote so they can keep track of all relevant client details in one place.

## IDENTIFY AND ADDRESS PAIN POINTS

Investing time and effort into finding areas of redundancy is key to creating more productive workplaces. By asking team members to identify inefficiencies in their workflow, legal workplaces can get a better understanding of common pain points.

Once these areas have been identified, automation tools, such as [Microsoft Power Automate](#), can be used to create more efficient processes. Power Automate is a no-code/low-code platform where anyone can build automated workflows between apps and services. For example, workflows can be created to send reminders before a scheduled court hearing or to start an approval process when a contract is saved to a particular folder in the team's SharePoint site.

### GET STARTED

- Read about how Microsoft Power Platform has helped [transform these organizations](#).
- [Contact us](#) to find out how automation can save you time and money.

# Simple, cost-effective solutions

There is a pressing need for digital transformation in legal workplaces. To find continued success, legal professionals need to embrace tools that make their services more efficient and accessible.

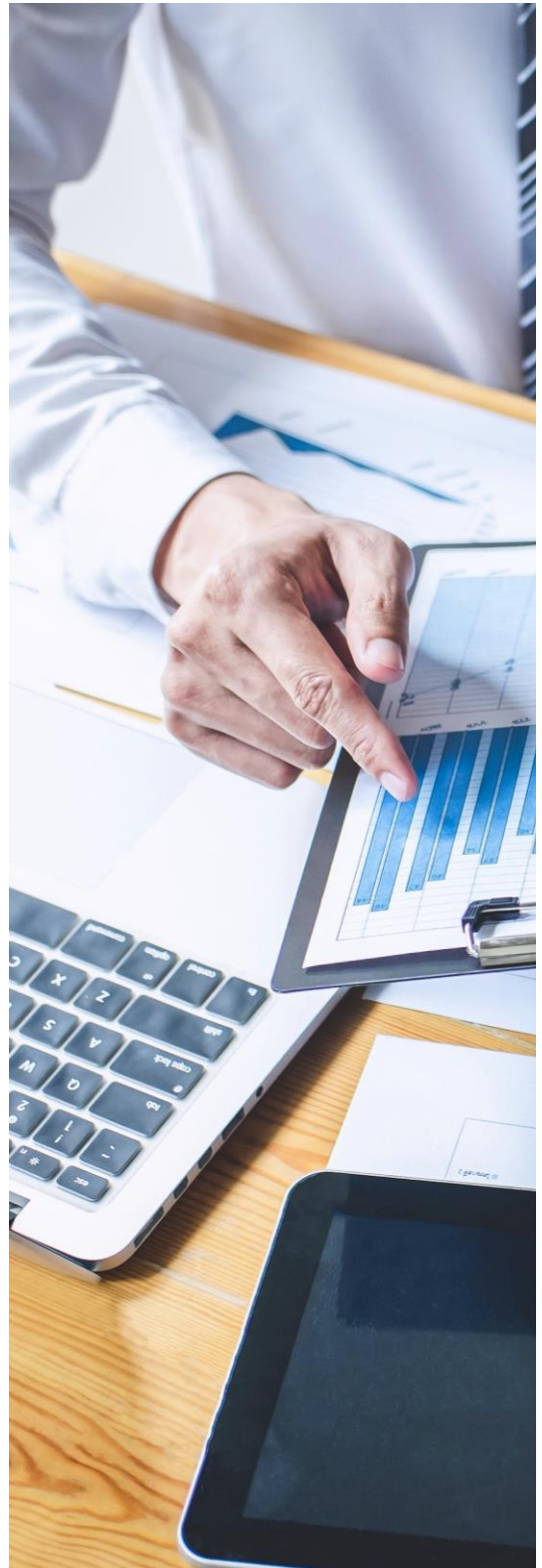
This technology does not replace the essential work that law practitioners and administrators do. Ultimately, this technology is here to empower legal professionals to work more productively and better engage with their clients.

Through this guide, we aimed to provide an overview of what the modern workplace looks like, as well as practical tips for those working in the legal industry. By implementing the right tools and strategies, legal professionals can adapt their practices, stay resilient through challenges, and thrive in the future.

SYNNEX Canada and our partners are here to equip legal professionals with the best tools to improve their work. As a hybrid distributor, we offer a complete solution, with both the hardware and software needed to support a modern workplace transformation.

We understand that every organization has different needs. SYNNEX Canada and our partners will implement custom solutions that meet the requirements of each unique workplace.

**Contact us to learn more and begin the journey towards the modern workplace.**



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