



**iManage**

Making knowledge work

# Best practices for Microsoft Teams

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Secure, productive  
collaboration in  
the new world of  
hybrid work



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# Collaboration everywhere

After the upheaval of 2020, many corporations or organizations are charting a new path with hybrid working models. Although the ratio of office and remote days differ by organization, one thing is certain: strong communication is critical to ensuring productive collaboration across your team's many workspaces.

Microsoft Teams isn't losing steam in the world of hybrid work. In January 2022, Microsoft announced that the company had surpassed 270 million monthly active Teams users, up from 250 million in July 2021.

2022  
270m

2021  
250m

During the height of the pandemic, Microsoft Teams arose as a popular collaboration option for many companies, and for good reason: Teams is a powerful tool for real-time communication no matter where your colleagues are currently located. Although Teams has proven invaluable for many organizations, it's important to be thoughtful when implementing it at your company to avoid repeating the mistakes that some made back when email was the "hot" new communication tool.

Despite all its benefits, Teams also creates some challenges for information management and governance — it can create another silo of information. Adding another communication channel can be convenient, but it also creates an additional repository for information separate from your secured and governed document project files. At best, this can create confusion, at worst it can mean important project-related information is siloed, lost, or left vulnerable to leaks.

# A **familiar** story

Picture this: New technology enters the market, creating a new way of communicating and collaborating that changes how people work, and further fragments the project, client, or transaction file. The industry initially resists it, but as the benefits and enhanced collaboration become apparent – and users demand it – organizations embrace the new technology. This introduces a whole new wave of requirements and governance challenges.

Sound familiar? This is what happened with email in 2001. Just like email adoption all those years ago, Teams has exciting potential, but extracting the full value while maintaining consistent governance and protection will take some thinking and planning.

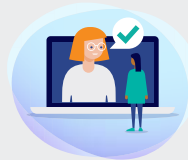
Teams challenges businesses in the same way that email did, interrupting the traditional compilation of documents by introducing a new format into the mix. iManage answered this dilemma with project-centric email management – and by establishing and continuously refining its document management best practices, provided a template for records keeping that remains relevant today.

You can now apply the best practices we honed with email to Teams and shorten your time to success.

When adopting Teams as a new collaboration tool for managing a project or matter, success comes down to these three key lessons from email:



Avoid new content silos by including Teams content in the project file.



Decide and communicate clearly on best practices for using and managing information in Teams to avoid confusion.



Address security, risk, and information governance considerations so Teams content is governed in concert with company policy.

**Read on to learn how your organization can apply a decade of learnings and best practices to Microsoft Teams to ensure this new communication platform can be safely embraced and used to your advantage.**



## Best Practice One: Your integrated project file should include Teams

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Imagine you need to find a communication on a certain project, customer, or deal. Was this discussion via email, or in Teams? If Teams isn't integrated into your document management system (DMS), you'll spend valuable time searching through both your DMS and Teams to find the information you need. A silo like this also makes it challenging for staff to manage projects in a holistic way and could lead to important information being missed entirely.

This could all be avoided by integrating Teams into your project file.

Like email when it was introduced, Teams has the potential to become an information silo if kept isolated from other relevant content.

Keeping project content only in Teams means that it can neither be searched for or mined for knowledge along with the rest of the files in your DMS nor secured in the DMS according to the needs of your staff. Additionally, capturing expertise and exposing key information becomes more challenging as the number of storage spaces and systems increases.

Content silos also make it impossible to provide an accurate picture of your project file. In order for your team to see a true representation of the communications and documentation relating to a specific project or transaction, it is crucial that your Teams communications are captured.

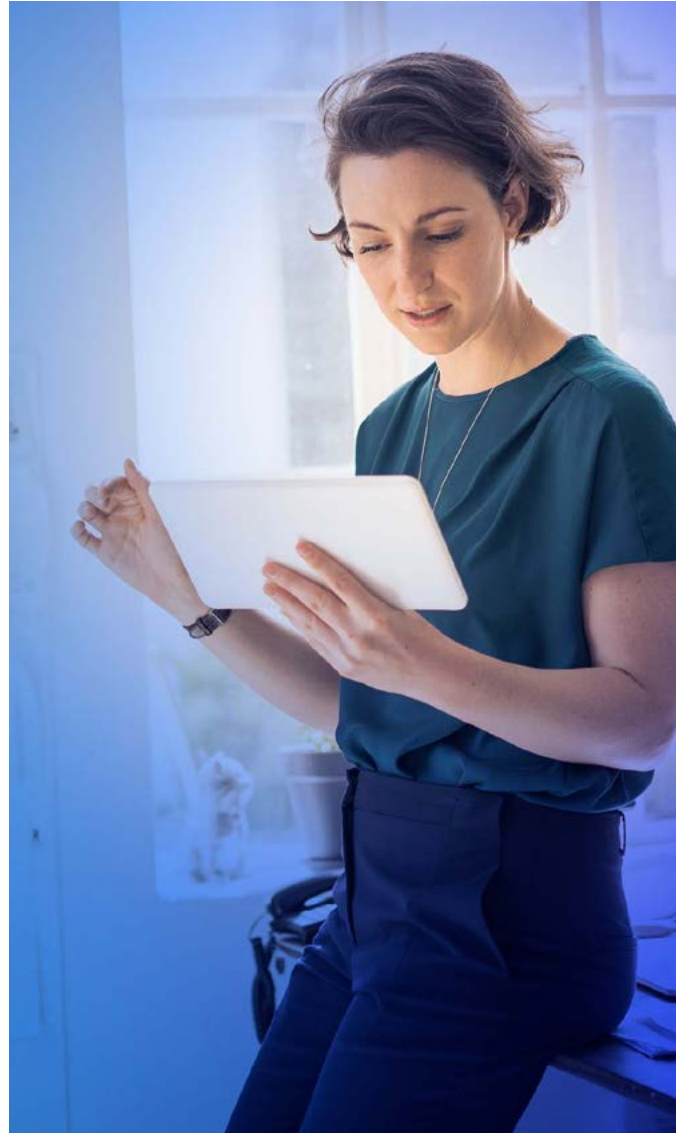
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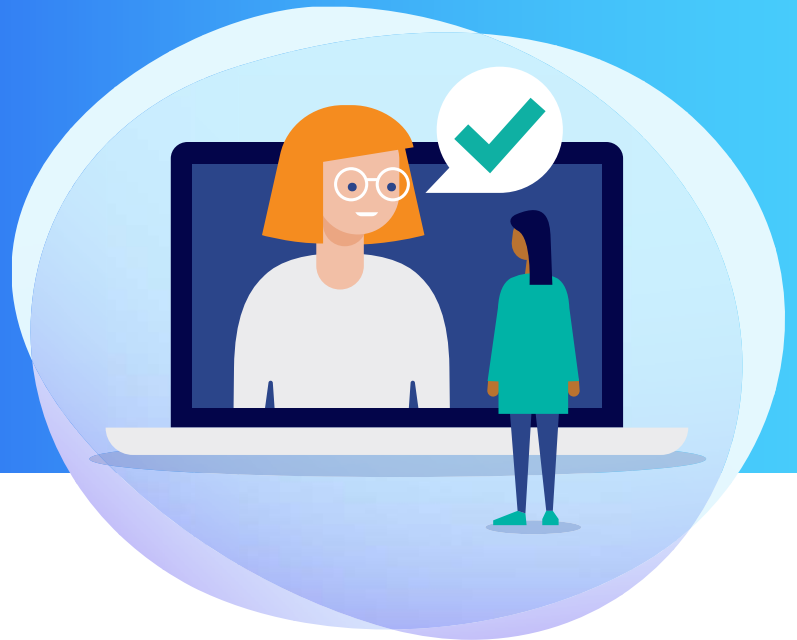
Information silos introduce increased context switching, or switching between interfaces, which has been shown to reduce productivity by 20% per context or task.



The risk of reduced productivity from context switching is even higher with Teams if team workspaces proliferate quickly and without oversight in your organization.

The problem of email as an information silo was solved by making the DMS the single source of truth and extending the project file by integrating email into the DMS. The same must be done with Teams content so that all relevant information, regardless of medium, is always available via a single search in your DMS. Integrating Teams into your project file also means that the features you rely on in your DMS — including search, metadata, and even AI analysis — can also leverage the rich data in Teams.





## Best Practice Two: Decide on and communicate your Teams best practices

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Don't repeat the mistakes of the past. Many organizations struggled for years to find the best way to implement and use email – don't let that happen with Teams. Add Teams to your digital file and define your best practices from day one. If you clearly communicate the expectations, you can avoid many of the growing pains and inconsistencies that came with the implementation of email.

Based on what we learned from email management over the past decades, we recommend the following best practices for Teams:



### **Integrate Teams content into the project-centric view.**

This creates a seamless way to move between project-centric workspaces and threaded conversations, share secure document links, and co-author inside Teams.



### **Create just one Team workspace per projects that require them.**

Avoid the chaos of ad-hoc workspace creation by keeping all communications on a single project together.



### **Define that all content in Team workspaces dedicated to projects be considered work product and archived.**

Better safe than sorry when it comes to project related communication.



### **Decide what happens with other workspaces not specific to a project.**

Are these Team workspaces work product or not? Should they be preserved or not?



### **Determine what does and does not need to be saved to project files.**

For example, consider whether side chat conversations between staff on a particular project engagement warrant saving along with discussions in the official project Team workspace.



### **Establish a policy-driven or smart way to ensure the right communications are saved to the project file.**

Some organizations stipulate that all content in Teams is relevant business content. Others may allow their users to designate what is relevant. Still others may use AI-based search capabilities to identify potential content to include.



### **Make it easy to find and utilize the right content.**

Augment Teams content with key metadata like project and content type. Without this, professionals searching the DMS are left to figure out what something is – email, document, or Teams message – and what it is relevant to, in order to find it and make use of it.



### **Ensure that Teams is not used to circumvent security.**

For example, no one should be able to take content from protected sources such as the DMS and make it available to a wider audience in Teams.

Embracing Teams is crucial in our era of remote and flexible work, but it is not as simple as it appears.

In addition to the best practices we have just defined, consider the following:

- **At what level will team workspaces be created?**
- **Will team workspaces be created for all projects or just some?**
- **How will conversations be named to avoid confusion in a team workspace?**
- **Should users be able to create team workspaces?**
- **What is appropriate in a Teams conversation versus email?**

Reflecting on how your company manages email information governance can help determine your best practices for using Teams. By communicating these from the beginning you can avoid months (or years) of inconsistency and confusion.





## Best Practice Three: Manage lifecycle and governance from the start

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In the early days of email, it was not immediately obvious to everyone how to appropriately manage the lifecycle and governance of the information being exchanged. Teams creates similar governance and security challenges since information is now split for retention and security purposes. Luckily, many of these issues can be avoided with Microsoft Teams if you set and automate policies from the start.

Just like any other content and communications at your organization, Teams must be secured and governed in line with your corporate policies. That means the same security measures and security credentials that protect your email and DMS content must be extended to include the content in Teams.

To avoid headaches down the road, it's also a good idea to ensure that, like content in your email and DMS software, your Teams content is preserved and tracked for both company records and audit purposes.

Extending a consistent governance and security framework over Teams content is essential for any organization that manages high-value content.

Organizations should establish policies and guidelines to protect sensitive content from disclosure, both internally and externally. For example, ethical walls and need-to-know security protections are vital to limit access to various types of Personally Identifiable Information (PII).



External collaboration must be carefully monitored as well. If you plan to invite external users to your Teams workspaces – then your security must ensure these collaborators can only see what they are authorized to see.

Another major consideration when planning external collaboration is the question of who owns and controls the data. If an external collaborator is inviting you into their workspaces in their Teams tenant and you have conversations or share documents, those records reside in their tenant, under their stewardship and ownership. Do you have a regulatory need to maintain your own records? Do you have to mandate the 3rd party partner comes into your tenant? Or do you need to capture each chat and document to ensure your records are accurate? Decide how your organization answers these questions before engaging in another organization's Teams tenant.

Lifecycle and governance policies for Teams must be determined and enforced from the start so that Teams continues to be an invaluable tool of collaboration for your company, rather than a potential liability.

# Avoiding the **mistakes** of email

Teams is not the first and certainly won't be the last new collaboration tool to be adopted broadly. When email first came on the scene, it took years for best practices to coalesce. In a world where we need to collaborate virtually much of the time, we can't afford to waste years trying to find the best way to use a powerful tool like Teams.

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With our experience and industry-leading solution for integrating email into document management, iManage knows we need to start the Teams conversation early to avoid channel confusion; ensure proper governance and lifecycle management; and encourage channel adoption in a consistent way. The industry can't take an ad-hoc approach, as it did with email.

Instead, it's essential to take a macro view so that workflows can remain streamlined, and Teams can become part of the mix safely and securely. Just like with email, we know that integrating Teams into your project file is the way to go.



# Shorten your **time to success** with Microsoft Teams

How can you achieve all this and shorten your time to success? By integrating Teams with iManage Work.

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Work creates a project-centric view and single source of truth for your documents. Integrating Teams content into Work offers a seamless way to move between email, PDF, and Teams, saving clicks — and time. Your staff can simply search in Work and get all the relevant content in one secure place. Users can also search for iManage documents in Teams and content from iManage can easily be included in Teams communications.

By embracing this integration, users can access Work content through Teams and include it in the context of the conversations around a project, customer, or deal. This allows you to keep the relevant files and messages together and easily review the communication that transpired around a particular topic.

Before Teams, professionals would need to send multiple emails to collaborators, which could get buried in email inboxes and lose context. Colleagues would often use email attachments to share documents, which can create governance issues. When Teams and Work are integrated, you have a single source of truth that avoids these challenges and reduces risks for your organization.

Our partnership with Microsoft gives you the best of both worlds: the convenience of Teams with the security and governance of iManage Work. With this integration, you can streamline workflows and add Teams into your project files safely and securely.

Don't repeat the mistakes of the past. Determine your plan for Microsoft Teams and integrate Teams into Work now.



**Learn more about how iManage and Microsoft are better together**



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