



Microsoft

Make the Leap to Office 2010

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The Rewards of Early Adoption

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Law firm curiosity and enthusiasm for Office 2010 is very much on the rise. We're frequently asked whether we recommend a migration to Office 2007 or Office 2010. The answer, of course, is that it depends on the unique situation of each firm — timing, resources, integrated applications and business drivers. The improved features of Office 2010, highlighted below, will also play into the decision. Many law firms were anticipating an upgrade to Office 2007 last year, but the economy changed many plans for technology spending. So now, as the economic landscape for our industry is improving, most firms are questioning a move to 2007 when 2010 will be released this year.

DRIVING FORCES BEHIND EARLY ADOPTION

But now the time is right, it seems, for firms like Leonard, Street and Deinard to make the move to Office 2010. "We are early adopters judiciously," says the firm's David Oxley. "Not bleeding edge, but a lot of research is done on needs and advantages, risks, and how disruptive it could be to the firm and our clients. We jump early if we see an immediate benefit (in a project), and for others we won't because we don't (see an immediate benefit). We saw a need and benefit for 2010, so decided to move early."

"We are excited about this change" adds Terry Pressley of Leonard, Street and Deinard. "This is our opportunity to get in front of the curve and not have to take two steps to get there."

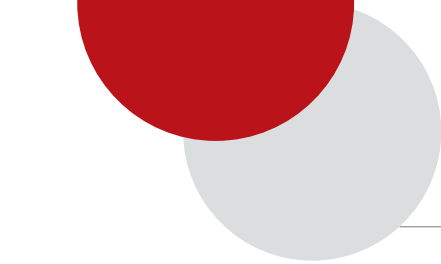
Fish & Richardson has a reputation for being an early adopter and was one of the first law firms to adopt Microsoft's SharePoint technology. According to Beau Mersereau of Fish & Richardson, the firm's "IT Steering Committee made the final decision that we would be early adopters for Office 2010. Our ITSC is composed of attorneys from various practice groups and senior management in the firm." With tech-savvy attorneys, support from firm leadership and a history of early adoption, Fish & Richardson is well poised for a successful early run at Office 2010, and most of the legal industry is watching with a keen interest.

Based on our own research and discussions with Microsoft gurus, law firm technologists, legal software vendor partners and other sources, the primary business drivers for upgrading to Office 2010 include improving client service, providing a better environment for employee and client-facing collaboration, and building a user experience tailored for maximum efficiency and productivity.

CLIENT SERVICE AND INTERNAL/EXTERNAL COLLABORATION:

- **Critical Mass on XML File Format**

For firms still using Office 2003 (or an earlier version),



collaboration and client service is getting more complicated as attorneys and staff rely on compatibility packs or other internal solutions to bridge the XML gap between application versions. According to Oxley, “More and more XML formatted files are coming into the firm (Leonard, Street and Deinard). This is the year that clients are moving to either Office 2007 or Office 2010 with Windows 7. We feel that this is the year we will hit critical mass on XML formatted files.”

Mersereau says that at Fish & Richardson, “The .docx file format was a business driver for our decision to be an early adopter of Office 2010. We routinely collaborate on documents with our clients and other firms. Many of those documents are in the new file format. We would prefer to keep them in their native format.”

In addition to collaborating with clients who are using Office 2007, firms also need to support employees who have Office 2007 at home and are working on documents in both places. Pressley says, “We see more of a blending of home life and work life. Our users have personal applications on their computers at the office. They have office applications on their computers at home.”

As law firms begin to reach that critical mass for XML files and the need for collaborating in native file formats, we expect to see more upgrades to either Office 2007 or 2010 this year and next. We believe that Office 2010 provides new and important technology benefits to the legal end user and to the collaboration process that go above and beyond those available in Office 2007.

- **Co-Authoring and Web-Based Applications**

Two of the most talked about features of Office 2010 are Web-based applications and features that allow simultaneous co-authoring of documents. However, what remains to be seen at this point for the legal industry is how the traditional document management systems will support co-authoring functionality and whether they will play nicely in the cloud with the Office Web applications. There is a great deal of buzz around SharePoint becoming the next legal DMS. In the meantime, the more than 85 percent of ILTA’s 2009 Technology Survey respondents who have an incumbent document management system will have to wait and see what will be possible in the short and long terms.

Document management questions aside, the possibility of co-authoring documents is an exciting one for our industry. Some firms will be slow to adopt as they work through the workflow and business processes around collaboration; however, we know

there will be others, including Fish & Richardson, who will leverage the co-authoring technology right away. Mersereau says, “We’re hoping that this will allow our teams to work on documents without e-mailing them to each other after each edit. We want to create a solution for our employees to interact and collaborate with each other and our clients.”

As for the Office 2010 Web apps, we are most excited about the new Outlook Web Access (OWA) for legal. OWA in 2010 is updated to provide a more consistent user experience by carrying over more of the standard features that users are accustomed to having in Outlook, such as the calendar sharing and scheduling assistant functionalities.

HIGH TOUCH USER ENVIRONMENT:

- **Customizable Ribbon Interface**

In keeping with the theme of user experience, top on the list of favorite improvements in Office 2010 is the ability for users to customize their own Ribbons. Furthermore, firm customization can be brought closer to the end user through a firm-specific tab or group. “The ability for our employees to customize the Fluent UI/Ribbons was a big plus in our decision to jump to Office 2010,” says Mersereau. In Office 2007, the only customization the end user could do was add buttons to the Quick Access Toolbar. Oxley also stresses the importance of this feature for Leonard, Street and Deinard. “We are ‘high touch’ with our users and allow them to customize their environments to a format that will work best for them,” says Oxley.

- **Outlook Productivity Benefits**

Speaking of Ribbons, Outlook 2010 has the Ribbon interface carried throughout the application, providing a consistent user experience across the Office suite. In fact, as an application, Outlook 2010 has the greatest changes over its 2007 predecessor. Conversation view in Outlook 2010 is one of the nuances garnering a lot of attention. Imagine an attorney having the ability to peruse an entire e-mail thread in a single view without having to search, scan or scroll to find related messages. Now imagine that attorney having the ability to ignore the entire thread with a single click. Some would say that’s a frightening prospect, while others would say it is genius.

- **Streamlined Views of File Features**

When it comes to using Word, Excel and PowerPoint more efficiently, Office 2010 again scores better than earlier versions. The Backstage view is a new element in the 2010 file applications that can bring all of the file-level features such as printing, document properties, distributing and sharing into a single view. Microsoft calls these “Out features,” meaning things that are done *with* documents. All the other commands found on the Ribbon, or “In features,” are things you do *to* the

document, such as formatting or inserting a table. From a user perspective, the Backstage view means less clicking around the Ribbon and tabs to find these various functions, which were historically scattered about the user interface. It is also important to note that Microsoft considers the Backstage view as a development platform where third-party apps might be located and accessed differently than they are today.

Whether your firm is looking to be an early adopter of Office 2010 or just trying to stay on top of what's coming in the latest version before you make your decisions, we hope you'll consider these differentiators and benefits carefully. We couldn't be more excited about 2010 and what it offers law firms, their users and their clients. At a time when there is increasing demand for efficiency, Microsoft provides a toolkit that will help launch law firms into the next generation of effectiveness, collaboration and client service. **ILTA**

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