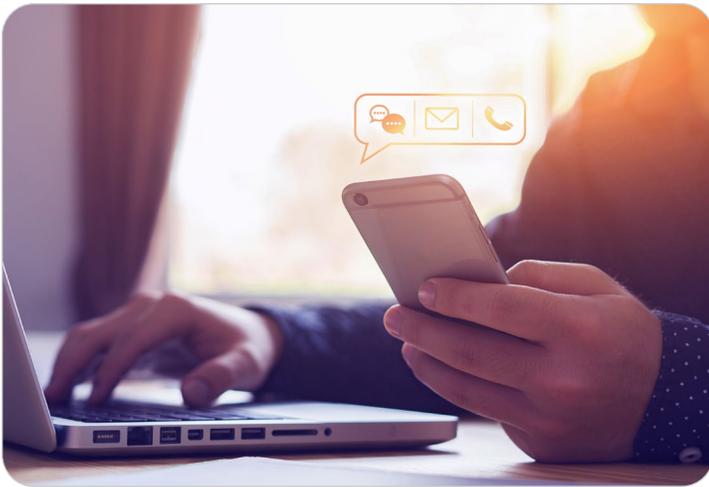




HOW TO ORGANIZE YOUR MESSAGING PLATFORM FOR MAXIMUM EFFICIENCY

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If your law firm or legal team wasn't using an instant messaging platform prior to 2020, odds are you've started using one by now. As businesses around the world adapted to working from home, finding a solution to enable team members to communicate in real time became absolutely essential.

Real time messaging platforms provide a number of crucial benefits, particularly when you're dealing with a dispersed team. From sharing urgent updates or rapid feedback to

collaboration and "water cooler" conversations, real time messages allow teams to stay connected in socially distant working conditions. In fact, it's safe to say that messaging platforms have become a staple component of the modern workplace.

But given the key role these systems now play in day-to-day work, it's more important than ever to get it right so that your chosen platform can be a hub of productivity.

In this article, we discuss several effective ways to organize your platform's channels and your document management system (DMS), including the advantages and disadvantages of each approach, as well as expert tips and best practices. We share specific examples from the NetDocuments real time messaging platform, [ndThread](#), and our Microsoft Teams integration, [ChatLink](#). However, many of the suggestions we provide can be applied to other real time chat solutions.

Implementing Real Time Messaging

For instant messaging platforms to truly be effective, they must be implemented purposefully. And yet, too many teams default to organization extempore... which really isn't organization at all.

Businesses that implemented real time messaging in the midst of the global pandemic know this all too well, since implementation processes were pushed aside in favor of business continuity. Being forced to implement messaging software on the fly left many teams (and their IT departments) struggling to find the "correct" way to organize message channels, threads, and discussions.

But teams now have the opportunity to elevate those improvised solutions and create something that delivers even greater benefits for their organization.

4 Effective Ways to Structure Your Messaging Platform

While working with customers in the legal industry, we've seen teams structure their messaging platforms in a variety of ways — some more effective than others. Here, we'll share four of the best systems we've seen, and how to make sure you're getting the most out of them.

Additionally, with solutions like ndThread or ChatLink, you can directly connect your instant messages with NetDocuments. This eliminates that essential step of remembering to file matter-related discussions in the DMS — ndThread and ChatLink can do this automatically.

TIPS FOR SUCCESS:

1. No matter which system you choose, make sure to include “fun” channels as a place where employees can discuss shared interests (like books, pets, or hiking).
2. Ensure you also maintain official channels that should be tracked and saved for audit or compliance purposes.

MATTER-CENTRIC ORGANIZATION

For law firms and legal teams, organizing messages around matters just makes sense, as most legal professionals already organize other files and data by matter in their DMS. Following this same structure in your messaging platform helps users stay organized and keeps matter-related discussions neatly collected and easy for users to find.

Additionally, with solutions like ndThread or ChatLink, you can directly connect your instant messages with NetDocuments. This eliminates that essential step of remembering to file matter-related discussions in the DMS — ndThread and ChatLink can do this automatically.



Pros:

- Matter-centric organization makes life easier on legal professionals by keeping **all matter-related content in a single location** — including email, messaging discussions, and documents.
- By mirroring your matter-centric DMS configuration within the messaging application, channels can be archived in the DMS. This allows you to **create a more complete matter file**.
- With NetDocuments, external users can be invited to participate in discussions and collaborate on documents. This **removes discussions and feedback from email** and keeps them secure and organized in the DMS.
- NetDocuments also provides **access to additional tools** for task management and document assembly within the Teams messaging platform via ChatLink.
- You can **create new channels and workspaces automatically** in NetDocuments and ndThread as part of matter intake from your practice management system.

Cons:

- If your firm handles thousands of matters simultaneously, channel management can quickly get out of hand.
- Searching for all documents related to a single client's matters — or looking for analytics across multiple matters — can be challenging.
- Matter files can also become unwieldy, so it's critical to use metadata effectively to maintain order.
- Organizing channels by matter can accidentally expose details to a wider audience. For example, a channel called "4835-2120 ACME Divestiture" could unintentionally inform parties who should be locked behind an ethical wall. While most DMS software have protections against unauthorized viewing or browsing workspaces, messaging software does not always provide the same protection.



1. Create a single channel that is identified by team, client, or department and nest each matter file for efficient browsing.
2. Research your messaging software to ensure that private channels can be created, and that they do not appear in any browsing list (or that there is a way to restrict browsing or searching for them by name).
3. Confirm that your messaging software provides scripting or tools that allow you to build and secure channels automatically when new matters or workspaces are created.
4. Finally, consider whether each matter truly needs its own discussion thread.

TIPS FOR SUCCESS: MATTER-CENTRIC

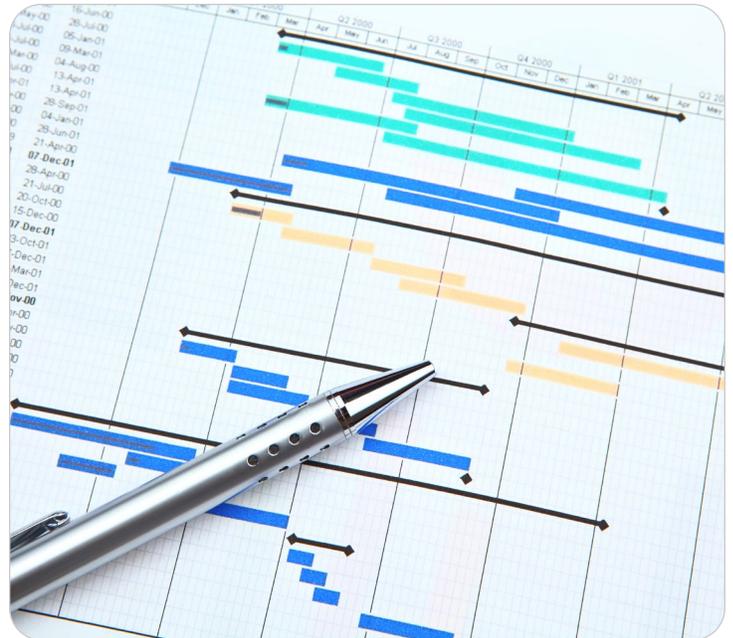
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PROJECT-BASED ORGANIZATION

If your organization manages many simultaneous, long-term projects lasting months or years, it may be helpful to organize your messaging platform (and your DMS) by project.

Pros:

- Project-based workspaces offer an **easy way to organize work and resources**. Security can be set up at the workspace-level for the entire project team, while individual folders and documents can be further locked down as needed.
- With workspaces that represent active projects and corresponding discussion threads, teams can **easily keep projects distinct and archive all materials** once the project is complete.
- Project channels provide an easy way to **invite external stakeholders** to the conversation. This provides the added benefit of including their thoughts/discussions when saving or archiving the channel.
- Through [ChatLink](#), NetDocuments provides **access to additional tools** for task management and document assembly — without having to leave the Teams messaging platform.
- NetDocuments also provides the ability to enable **task lists, document assembly, collaboration spaces, and workspace analytics** to all project team members.



Cons:

- Short-term projects will cause administrative challenges as they have to be created and archived on a continual basis. This setup option is most effective when you have long-term projects and multiple project teams.
- Each channel that is created must include the correct team members and settings. If you are running multiple short-term projects, the administrative setup might not be worth the effort.

TIPS FOR SUCCESS: PROJECT-BASED

1. Ensure your messaging platform allows you to mix internal and external participants.
2. If it does, make sure you understand what happens when documents are included in the conversation. Can external users download, view, and edit them?

CUSTOMER-DRIVEN ORGANIZATION

With a customer-driven methodology, workspaces and message threads center around a single customer or client. Folders within each workspace represent individual projects, matters, or events (like board meetings). All materials related to a single customer are stored and tracked together.

Pros:

- Organizing work according to client or organization ensures **all customer materials are in a single location**.
- Configuring your message threads according to client/customer **makes it easier to invite external stakeholders** to the main channel and provide quick access to sub-channels or project folders.
- With NetDocuments, **updating a client or stakeholder on a project's status is simple** as task lists exist at the workspace level and can be easily viewed across multiple projects or matters.



Cons:

- While storing all information for a single client in one workspace can consolidate the materials, it can make security and configuring ethical walls more difficult on the IT/security team.
- Depending on the sub-channels that you create, archiving individual channels and setting specific security may be more work than it's worth.
- Long-term clients may accrue a large amount of content, causing the workspace to be overloaded with documents and emails.

TIPS FOR SUCCESS: CUSTOMER-DRIVEN

1. Determine the frequency of creating and archiving channels that will be needed.
2. Significant consideration should be taken regarding security and need-to-know access.
3. Establishing a strict governance and retention policy will ensure only relevant conversations, email, and documents are maintained in the system.



ORGANIZING BY TEAM OR DEPARTMENT

While your DMS is likely organized by matter or project, it might make more sense to organize your conversation threads by team or department instead. Creating team channels allows your users to quickly and easily locate discussions for matters or projects they are working on.

Not many law firms or legal teams organize their DMS by teams or departments, but that's not to say they couldn't. Team/Department organization can be helpful if each group of people work together on multiple projects and have similar security needs.

Pros:

- Team/Department organization **streamlines the process of setting and updating permissions** and can be more efficient when building task lists or using collaboration tools (like [MarginNotes](#)).
- Instead of combing through hundreds of customer or project channels, **users can jump straight to a project group** channel to find the relevant discussions.

Cons:

- While organizing your DMS by team can be tricky, it is much easier to move people between working groups within a messaging application.
- Frequently changing teams can be annoying, but the bigger concern is what historical conversations might have been missed by the new team members.

TIP FOR SUCCESS: TEAM OR DEPARTMENT

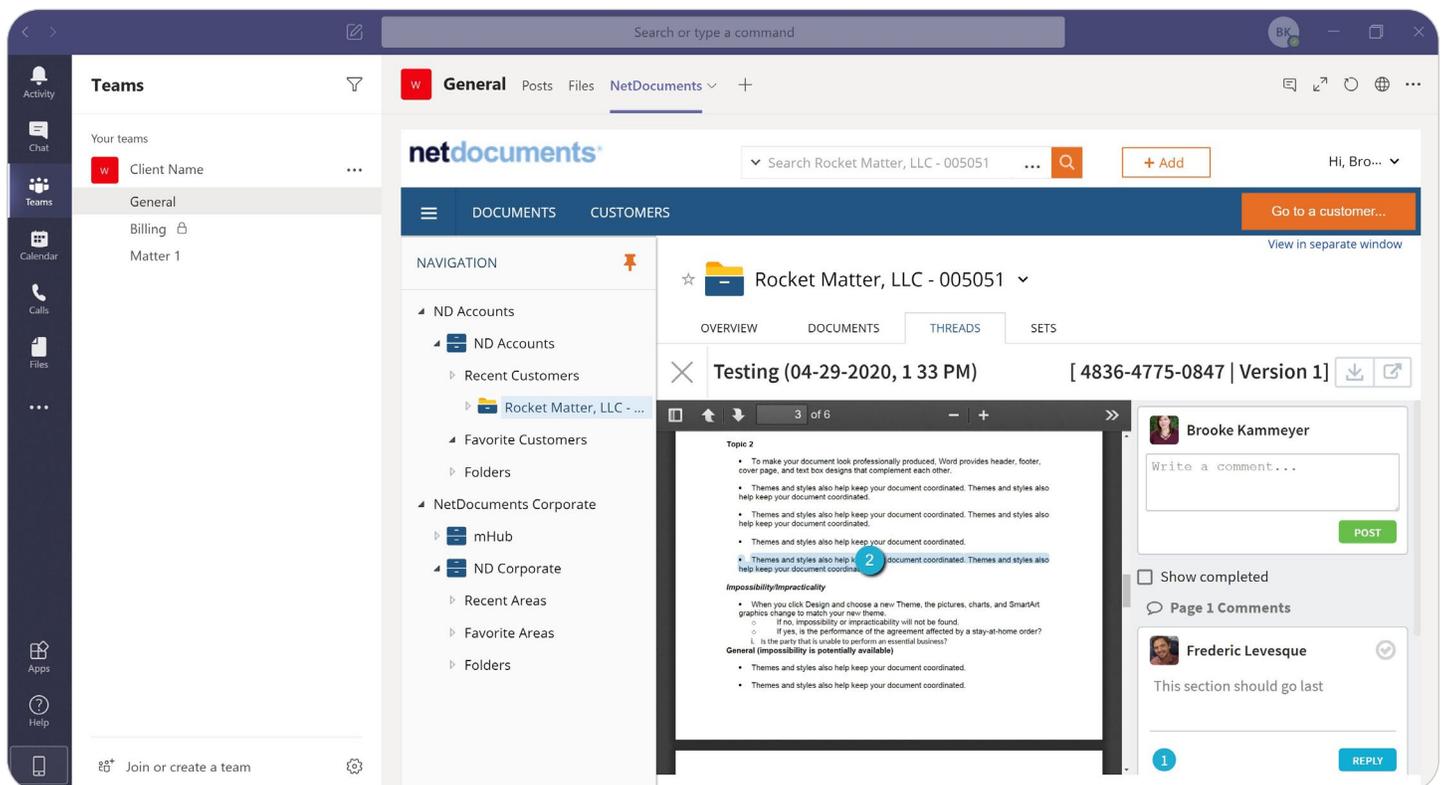
1. The quickest way for a new team member to get ramped up on a project is to review what's happened historically, so make sure your messaging application has the ability for new members to view previous conversations and message threads. This should include any documents, discussions, and links or references to external materials.

Is a Hybrid Approach Worth It?

It can be tempting to combine several of these methods to organize your messaging platform. And while many systems will allow you to mix and match, the reality is that consistency leads to efficiency.

For example, if you have discussion channels for clients as well as for matters, your team may have to search through several places to retrieve details from a conversation because they don't remember in which specific channel it happened.

On the other hand, if you follow one method of organization exclusively, your team knows precisely where to go every time. This benefit is strengthened when the structure of your messaging platform mirrors that of your DMS.



NetDocuments seamlessly blends with Microsoft Teams via Chatlink

A NOTE ABOUT MICROSOFT TEAMS

Before you commit to a particular organizational structure, you should make sure that it's compatible with your business structure, your messaging platform, and your DMS.

For Microsoft Teams users, you'll want to review the [teams limits](#) from Microsoft. They limit the number of teams in which a user can be a member, how many total teams can be created within the system, and how many discussion channels can be created per team.

In a similar vein, it may not make sense to replicate your entire DMS environment within Teams. Just because you *can* create thousands of teams or channels, doesn't mean you should — in fact, you may actually *lose* efficiency because of the time it takes for users to navigate through all of them.

No Matter How You Organize, NetDocuments Has Your Back.

Finding a chat solution that meets the unique requirements of legal organizations can be a challenge. That's why NetDocuments offers [ndThread](#) — a [chat messaging tool](#) that is secure, governable, convenient, and seamlessly integrated into the rest of the NetDocuments platform.

If you're a Microsoft Teams user, [ChatLink](#) enables you to integrate the NetDocuments platform so that you can get the security of NetDocuments while working within the Teams interface.

Regardless of the setup you choose, NetDocuments makes it easy to organize and secure both your documents and message threads. In fact, NetDocuments and the Power Automate Connector make it easy to create, reorganize, or mirror the structure and permissions of the DMS environment – even after the initial rollout—enabling organizations to maintain seamless operations with minimal effort.

To learn about how NetDocuments can help your team optimize productivity and security with real time messaging, document and email management, and more, [contact us](#).



About the Author - Brooke Kammeyer, Product Marketing Manager, NetDocuments

Brooke Kammeyer brings over 14 years of experience to NetDocuments in customer success, product launches, and building strategic marketing programs. Throughout her career, Brooke has been focused on creating exceptional experiences for customers, which includes creating products that make real impacts in customer's daily lives. Since joining NetDocuments in 2019, Brooke has been instrumental in successfully bringing core solutions like ORGANIZE, PLAN, and DELIVER to market with a focus on how they solve the legal industry's current and future challenges.