

Microsoft 365 Implementation

Business Case Study and Report



Service area:
Cloud Productivity &
Security (Microsoft 365)

Client type:
Legal Services



While certain project details have been adapted to protect confidentiality, they reflect the knowledge, challenges, and approach we bring to every collaboration.

Challenges and Objectives

Challenges

The law firm had grown in size but was still relying on ad hoc tools like personal email accounts and local file storage. Sensitive client files were being shared over WhatsApp or unsecured platforms. There was no central document management, and employees lacked a clear understanding of secure digital practices.

Objectives

- Centralize disparate data sources
- Migrate to Microsoft 365 with minimal disruption to daily legal operations
- Strengthen data privacy and device security
- Facilitate internal collaboration through Microsoft Teams & SharePoint
- Train the legal and administrative team on Microsoft 365 tools
- Implement structured digital document management for client

Our Approach

We began with a discovery session to understand the firm's workflows, pain points, and security concerns. Together, we mapped out what an ideal work environment would look like for them — from remote access to shared folders to email encryption. Our implementation was broken down into:

01

Platform setup & license management

Mapping key data sources and business logic with client stakeholders

02

Device registration & security

Paired with team-by-team onboarding

03

Live training sessions for all staff

We also provided one-on-one support for senior partners and followed up with “how-to” guides in plain language.

Solution Highlights

Setup of Microsoft 365 Business Premium for all users

Implemented with modular data marts
(Sales, Inventory, HR, Marketing)

Secure SharePoint folder structure by client/case

Built using Airbyte (ingestion) and dbt (transformation and testing)

Microsoft Defender, Intune and MFA for endpoint security

Created a centralized dashboard with role-based access

Outlook rules and DLP configurations to protect sensitive emails

“Intro to SQL,” “Understanding our Data Model,” and
“Building Reports that Matter”



Results

- Improved security posture with remote wipe and MFA policies active
- Reduced internal delays with Teams-based communication
- Consolidated client documents, now fully backed up and organized
- Positive feedback from staff on user training and daily usability

**“Now everything’s in one place
and I feel confident using it.”**

— Administrative Coordinator, Legal Team



Before and After Workflows

BEFORE: Fragmented Workflow



Personal



USB



WhatsApp



Files

Pain Points

- Unsecured client data sharing
- No central document management
- Lost files and version confusion
- No remote work capability
- Compliance and security risks

6 Weeks



AFTER: Microsoft 365 Ecosystem



Teams



SharePoint



Outlook



OneDrive



MS Defender

Benefits Achieved

- 100% client data encrypted & secure
- 75% faster document retrieval
- Organized client folder structure
- Secure remote work enabled
- 95% user adoption achieved

12 Staff Members Trained

Zero Security Incidents

\$25K+ Compliance Risk Avoided



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