

2.1. Collaboration Technologies: Common Virtual Meeting Tools

Common Virtual Meeting Tools

There are several virtual meeting tools available. In this section, we will discuss the tools most used by legal aid firms, some best practices, and policy considerations when using these tools.

In general, firms have either chosen to use the Google suite of products or the Microsoft suite of products and often adopt the included meeting tool. Some firms use both suites of products and find that this increases training and support requirements.¹⁰ Still other firms use their suite provided tool internally and use a different platform such as Zoom for external meetings.

Google Meet

The business and enterprise versions of Google Workspace allow users to meet virtually using Google Meet.¹¹ Depending on the plan purchased, organizations can host between 150-1000 participants, record and transcribe meetings, track attendance, and live stream meetings. With Google Meet, meetings can last as long as 24 hours and offer US and international dial-in phone numbers for participants. A noise cancellation feature to filter out background noises from meetings may be set as a default feature for the whole organization or left to individual selection.¹²

Users find Google Meet's interface easy to use for both hosts and participants.¹³ Google states that Google Meet meetings are encrypted in transit and at rest.

Teams

If a firm is already integrated into the Microsoft landscape (using Microsoft 365 products), using the included Teams application is a cost-effective option for virtual meetings. Teams has been designed to work smoothly with Microsoft's other products, including Outlook, PowerPoint, SharePoint, and OneDrive. However, end-to-end encryption requires a subscription to Teams Premium. Like Google Meet, the number of participants that a meeting can accommodate depends on the subscription the organization has chosen. Microsoft distinguishes between "webinars," "meetings," and "live events." Webinars accommodate up to 1,000 participants; organizers can specify presenters to give those participants access to meeting controls such as screen sharing. Meetings accommodate up to 20,000 participants but only 1,000 will have access to the full interactive capabilities; the remaining attendees may "view-only". Live events accommodate up to 20,000 participants with moderated Q&A and more advanced production capabilities.

Recording and transcription of meetings is available in Teams. Microsoft recently announced that Teams would be integrating artificial intelligence (AI) into its transcription capabilities allowing Teams to create automatic meeting summaries and suggested tasks. Firms should proceed with caution when using AI with confidential client information.¹⁴

Users already on the Microsoft system find that Teams integrates fairly easily into their work and allows straightforward collaboration. However, some users find Teams to be complicated and overwhelming due to the number of notifications and presentation options.

Zoom

During the pandemic, Zoom rocketed to the forefront of online meeting tools. Because many courts use Zoom for virtual court hearings, every firm needs to be prepared to use Zoom competently.¹⁵

Like many products, the number of features available on Zoom and the number of attendees allowed in a meeting is plan dependent. The "Zoom One" product has added a number of collaboration tool features to the traditional Zoom virtual meeting platform.¹⁶ At the time of publication, the free plan limits attendees to 100 while some paid plans extend those limits up to 1,000 attendees. Meetings with end-

to-end encryption are limited to 1000 participants.¹⁷ Like the other platforms, Zoom provides call-in numbers for phone participation.

Unlike Teams and Google Meet, Zoom is a standalone product that does not integrate with the Microsoft and Google products. Although attendees may attend a Zoom meeting via their web browser, participants must download the Zoom application on their device for full functionality. Zoom now separates the virtual meeting product from the virtual conference and event product and has diversified their product offerings to include a team chat, VoIP phone service, and even email and calendar options. Many users find that sharing their screen on Zoom is easier in Zoom than in other virtual meeting platforms, although doing so while continuing to see other participants can be tricky. Some users find Zoom's interactive features like breakout rooms, live polling, and co-annotation of shared documents easier than those in other products. Meeting hosts should exercise caution when posting public links to meetings online or on social media to avoid “Zoom-bombing,” a practice where someone logs into a meeting and is disruptive. Zoom has introduced features to minimize these intrusions¹⁸ but the meeting host must be aware of the practice and proactive in adjusting the Zoom meeting settings.

Best Practices and Policy Considerations

1. **Security and Privacy:** Firms must choose a platform with robust security features, especially if those platforms will be used to communicate with or about clients or share other sensitive information (e.g., human resources issues). The firm should disseminate a best practice guide to all staff regarding how to use the software competently in order to minimize the risk of disclosure of confidential information.
2. **Hacking Risks:** The firm’s best practices guide should include measures to prevent “Zoom-bombing” and what to do if a video conference is attacked.

Staff must be reminded to regularly update all software in order to minimize the risk of hacking and other security breaches.

3. **Access Controls:** Firms should limit administrative controls to virtual meeting software and carefully track who is using firm accounts (e.g., a shared Zoom account) in order to prevent misuse and double-booking. Staff should be required to implement at least the minimum standards of security for meetings. These minimum standards include requiring unique meeting IDs, password protection, and enforced waiting rooms. For further protection, firms can lock events once all attendees have joined, manage file and screen sharing options (e.g., not allowing any .exe files to be shared), and ensure that users are connecting to meetings securely through Wi-Fi networks with wireless WPA2 or WPA3 encryption.¹⁹
4. **User Support:** Staff should know whom to contact if they are having issues with virtual meeting technology. Should staff contact internal IT first or go directly to the software provider's support team?
5. **Employee Training:** Employees must be trained regularly on how to use applications safely and efficiently.

Internal Communication Using Virtual Meetings

For firms that allow hybrid (office/outside the office) work, internal virtual video meetings have become a daily occurrence. While risks here are lower than with communicating with clients, firms should still make sure to provide clear guidance to staff on how to best use virtual meeting software within the firm.

Consider "Zoom fatigue"²⁰, whereby people suffer a number of psychological and physical symptoms if they spend hours on virtual meetings each day or week. Frequent eye contact with others may cause stress and social anxiety in some staff.

Requiring staff to regularly be on camera can limit their mobility, leading to a host of physical and cognitive symptoms. Regular virtual meetings can also increase cognitive load, as it is more difficult to observe and react to non-verbal communication on video.

Firms should consider limiting the number of video conference meetings each week and allow staff to participate off-camera occasionally. While working virtually without visual contact can lead to feelings of isolation, on-camera participation is often not necessary and can allow staff to give their eyes, minds, and bodies a break.²¹

Communication with Clients Using Virtual Meetings

Virtual meeting technology has provided many benefits to clients. For clients who struggle with transportation or childcare, virtual meeting technology has allowed them to attend appointments or court hearings more easily. On the other hand, for clients who struggle with technology or lack the required technology to participate, virtual meeting software has put up new barriers to accessibility.

When using virtual meeting software, firms should ensure that clients are not required to create an account to access the meeting, as this could potentially impede accessibility. Firms should choose mobile-friendly platforms, as many clients have access to cell phones but may not have access to laptop or desktop computers. A final consideration is how much mobile data such a meeting will consume. Clients may be using prepaid data plans and it may be more cost-effective for clients to meet over the phone instead of a data-heavy video meeting.

When meeting with a client over video, firms must keep in mind that conversations will include confidential client communications and that information must be protected. When selecting a platform, firms must confirm that the client's information will be protected by the software vendor while using the virtual meeting system.²² When meeting with clients virtually, attorneys and support staff must ensure that confidential information is not overheard or observed on either end of the meeting. It is best practice to not meet with clients while they are in public places; this may include someone's home if third parties are present. Clients should

be instructed to meet in a location where they will not be observed or overheard.

Before meeting with a client over video, staff should confirm that the client has access to the technology needed to meet and that the client understands how to use that technology. If the client is uncomfortable, a phone call or in-person meeting may be more appropriate. Take particular caution when a virtual court hearing is required; if the client will not be with the attorney physically during the court appearance, the attorney needs to make sure to practice using the technology with the client ahead of time. For important virtual court appearances, such as final hearings, best practices dictate that the attorney be physically present with the client to fix any technological issues that may arise.

Third-Party Communication Using Virtual Meetings

Be cautious when using virtual meeting software with third parties, especially when discussing or sharing confidential client information. Staff should ask that third party meeting hosts ensure that their systems are protected and secure. If not convinced of that security, staff should host the meeting using the firm's platform. Third parties should be asked to also follow the best practices mentioned previously in order to avoid inadvertently disclosing confidential or sensitive information.

10. Using tools from too many duplicative systems (e.g. allowing users to use Outlook or Gmail, or both; allowing users to save things in SharePoint or Google Drive, or both) can complicate onboarding, training, and daily workflows for users. Supporting multiple systems is a significant challenge for firms, as lack of clarity around which tool to use can lead to confusion. Firms should make organization-wide decisions regarding standard tools for internal and external collaboration and enforce them.

11. The application is called Google Meet at the time of publication (Jan 2024). Google sometimes changes the names of their conferencing products and it may be called something else now.

12. [Google Meet Help: Filter out noise from your meeting on Google Meet](#)

13. PCMag. "Readers' Choice 2022: Video Conferencing and Online Meeting Services." *PCMag*. <https://www.pcmag.com/news/readers-choice-2022-video-conferencing-and-online-meeting-services>.

14. ABA House of Delegates Resolution on the Use of Artificial Intelligence, August 12-13, 2019

15. Gizmodo. "Zoom's AI 'Privacy Policy': Train on Your Data." *Gizmodo*, January 15, 2019. <https://gizmodo.com/zoom-ai-privacy-policy-train-on-your-data-1850712655>. Zoom recently changed its Terms of Service (TOS) to allow for training its artificial intelligence (AI) model on client data. Although Zoom claims to have walked this change back, as of publication, the TOS still allow for training of the AI. Firms must carefully review the TOS of any program being used and make a judgment regarding whether use of the program meets the lawyers' duties under the state's rules of professional conduct.

16. Zoom Video Communications. "Zoom Collaboration Tools." *Zoom*. <https://www.zoom.com/en/products/collaboration-tools/>.

17. Zoom Video Communications. "Title of the Article." *Zoom Support*, Accessed [insert the date you accessed the page]. https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0065408. End-to-end-E2EE-encryption-for-meetings - requires a Large Meeting License

18. The Washington Post. "Zoom bombing prevention tips" *The Washington Post*, January 24, 2023. <https://www.washingtonpost.com/technology/2023/01/24/zoom-bombing-prevention-tips/>.

19. Cybersecurity and Infrastructure Security Agency (CISA). *CISA Guidance for Securing Video Conferencing*. https://www.cisa.gov/sites/default/files/publications/CISA_Guidance_for_Securing_Video_Conferencing.

20. RAMACHANDRAN, VIGNESH. "Stanford researchers identify four causes for 'Zoom fatigue' and their simple fixes" *Stanford News*, February 23, 2021. <https://news.stanford.edu/2021/02/23/four-causes-zoom-fatigue-solutions/>.

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