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Technology Track – Session 4

Zoom & Microsoft Teams Made Simple: Competent, Confident, and Court-Ready

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About the Presenters...

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Zoom and MS Teams Made Simple: Competent, Confident and Court Ready

2026 Wisconsin Solo & Small Firm Conference

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Written materials prepared September 2026

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Program Description

Video meetings are now a core law practice skill. Learn how to use Zoom and Microsoft Teams competently and professionally for client meetings, hearings, mediations, and internal collaboration, including essential settings, etiquette, security basics, and common pitfalls.

A note about rapidly changing software: Zoom and Microsoft Teams change frequently. Menu names move, features are added, and some functions depend on your subscription level or the settings imposed by your organization. These materials reflect the public product documentation available in August 2026. If your screen looks a little different by the time you read this, you are probably not imagining things.

Artificial Intelligence Disclosure

These materials were prepared with some help from artificial intelligence for research, organization, and polishing. Every section was reviewed and revised by the authors. AI can be a useful assistant, but it still is not getting the CLE credit — and it definitely is not appearing for your client when the judge calls the case.

I. Introduction: Video Meetings Are Now Part of Law Practice

Remember when a video meeting felt like something unusual? The expensive services, technology challenges, and infrastructure inadequacies. For many lawyers, that ended several years ago. Services have come down in cost. Technology has gotten less expensive and easier to use. The infrastructure we rely upon has improved significantly.

Zoom and Microsoft Teams are now ordinary ways to meet with clients, take or defend depositions, attend mediations, work with co-counsel, collaborate inside the firm, and appear in court. Wisconsin's courts describe remote hearings as commonplace and continue to maintain Zoom resources for litigants and lawyers.

The Wisconsin Court System maintains current remote-hearing guidance at https://www.wicourts.gov/courts/zoom.htm.

The important point is not that every lawyer has to become a video-conferencing expert. You do not need to know every setting buried three menus deep. You do need to know the settings and habits that affect whether people can hear you, whether you can share the right document, whether the wrong person can enter the meeting, whether a client communication is actually private, and what you will do when something breaks.

That last point matters. Murphy's Law of video conferencing states that" the most critical virtual meeting or presentation will always suffer from a sudden, unpredictable technical failure. The microphone that worked perfectly yesterday somehow disappears ten minutes before the hearing. The camera chooses a different device. Windows decides it is time for an update. A client joins under a spouse's account name. None of this makes you a bad lawyer. Failing to prepare for predictable problems, however, is a different issue.

The basic premise: If the meeting matters to the client, preparing the technology is part of preparing for the meeting.

Four Common Legal Uses

Although the controls are largely the same, the risk profile changes depending on what you are doing. A weekly staff meeting is not the same as an evidentiary hearing, and a client intake is not the same as a multi-party mediation.

- Client meetings: confidentiality, ease of access, screen sharing, professional appearance, and control over recording.
- Court hearings: reliability, following the court's instructions, exhibit handling, professional conduct, and a backup plan.
- Mediations and multi-party meetings: participant identification, breakout rooms, private attorney-client communication, document sharing, and control over who can move between rooms.
- Internal collaboration: convenience, persistent chat and files, meeting notes, recordings, transcripts, and how the platform fits with the firm's other systems.

II. Competence, Confidentiality, and Why Lawyers Should Care

No discussion of legal technology is complete without talking about professional responsibility. The Rules of Professional Conduct do not disappear because the meeting is on a screen. If anything, video meetings make some of our existing duties more visible because the technology itself controls who can hear us, what they can see, and what information is left behind.

SCR 20:1.1 - Competence

"A lawyer shall provide competent representation to a client. Competent representation requires the legal knowledge, skill, thoroughness and preparation reasonably necessary for the representation."

Current Wisconsin Supreme Court Rules: https://www.wicourts.gov/supreme/sc_rules.jsp

Wisconsin's Rule 1.1 follows the ABA's approach and makes the point that staying competent includes keeping up with the benefits and risks of the technology lawyers use. That doesn't mean every lawyer needs to be the office tech expert or the person everyone calls when the printer stops working. It does mean you should understand, at a practical level, the technology you're using in your practice and the risks that come with it.

SCR 20:1.6(d) - Confidentiality

"A lawyer shall make reasonable efforts to prevent the inadvertent or unauthorized disclosure of, or unauthorized access to, information relating to the representation of a client."

Current Wisconsin Supreme Court Rules: https://www.wicourts.gov/supreme/sc_rules.jsp

Wisconsin Formal Ethics Opinion EF-21-02, Working Remotely, is especially useful here. The opinion addresses remote practice, video meetings, client preparation, and security. Among other things, it provides that lawyers:

Provide adequate security for video meetings or conferences. *The FBI has recommended the following steps: use the up-to-date version of the application; do not make the meetings public; require a meeting password; do not share the link to the video meeting on an unrestricted publicly available social media post; provide the meeting link directly to the invited guests; and manage the screen-sharing options.*[25] *In selecting a videoconferencing platform, the lawyer should make sure it is sufficiently secure both in its structure and its contractual terms of use, especially any terms on access to user information.* [26]

It also makes an important practical point for courtroom work: video hearings may not give lawyers an easy way to have a confidential discussion with the client, so advance preparation matters.

Source: Wisconsin Formal Ethics Opinion EF-21-02: Working Remotely (https://www.wisbar.org/formembers/ethics/Ethics%20Opinions/EF-21-02%20Working%20Remotely.pdf).

A good way to think about this is to separate the legal question from the technology question. The legal question is: what are my duties to the client? The technology question is: what settings, procedures, and habits do I need so that the platform does not undermine those duties? That is what the rest of these materials are about.

III. Before Zoom or Teams: Get the Basics Right

The best Zoom or Teams setting in the world will not rescue a meeting if nobody can understand you. Before we get into platform-specific features, there are several basics that apply to both programs.

1. Audio Matters More Than Video

People will tolerate a less-than-perfect camera. They will not tolerate audio that cuts in and out, echoes, or makes you sound like you are arguing from the bottom of a metal trash can. If you spend money on only one upgrade for video meetings, a decent microphone or headset will usually improve the experience more than an expensive webcam.

Know which microphone and speaker the software is using. Modern laptops may have a built-in microphone, a webcam microphone, a docking-station audio device, a monitor microphone, a Bluetooth headset, and perhaps a USB microphone all connected at the same time. Zoom and Teams cannot read your mind. They may select something other than the device you intended.

- Use a headset or external microphone when it improves clarity or privacy.
- **Do not have two devices in the same room connected to the same meeting audio. That is a reliable way to create feedback.**
- Mute when you are not speaking, especially in court or a large meeting.
- Know how to change the microphone and speaker during the meeting without leaving the meeting.

2. Camera Placement and Framing

A laptop sitting flat on a desk usually puts the camera too low. The result is the familiar upward camera angle that nobody would voluntarily choose for a professional photograph. Raise the laptop, use an external camera, or otherwise get the camera close to eye level.

Frame yourself so your head and upper shoulders are visible. You do not need to fill the entire screen, and you should not look like you are sitting thirty feet away. When you are addressing the judge, client, or audience, occasionally look toward the camera. Looking only at the other person's image makes your eyes appear slightly down or to the side on their screen.

3. Lighting and Background

The easiest lighting rule is also the one most often ignored: put the light in front of you, not directly behind you. A bright window behind your chair turns you into a silhouette. A desk lamp or window in front of you can make a mediocre camera look much better.

Your background is part of your professional appearance. A real office is fine. A clean wall is fine. Background blur is fine. A tasteful virtual background can be fine. The goal is to remove distraction, not to make everyone wonder where you found the animated tropical beach behind your head.

> **Court practice tip:** The Wisconsin Court System specifically recommends a quiet space, a camera at eye level, appropriate courtroom dress, good lighting, no bright windows behind you, and muting when you are not speaking.

Source: Wisconsin Court System, Zoom Hearing Resources / General Tips (https://www.wicourts.gov/courts/zoom.htm).

4. Control the Room Around You

Confidentiality is not only a software setting. Who is physically in the room? Can someone walking behind you see the screen? Is a smart speaker sitting on the credenza? Are client files spread across a table that the camera can see? Is your phone displaying message previews next to you?

EF-21-02 recommends using private remote workspaces so others do not have access to client conversations, video conferences, or case-related materials. That advice is just as relevant in 2026 as it was when the opinion was issued.

Source: Wisconsin Formal Ethics Opinion EF-21-02: Working Remotely (https://www.wisbar.org/formembers/ethics/Ethics%20Opinions/EF-21-02%20Working%20Remotely.pdf).

5. Have a Backup Plan

If you have a hearing, deposition, mediation, or important client meeting, decide what you will do if your primary connection fails. Do this before the meeting, not while staring at a frozen screen.

- Keep the dial-in information or court instructions available outside the meeting application.
- Have your charger connected or immediately available.
- Know whether you can use your phone as a hotspot if your primary Internet connection fails.
- For critical proceedings, consider having a second device available and ready.
- Keep the court clerk, mediator, or meeting organizer contact information handy.

Wisconsin's remote-hearing materials tell participants to test their connection, become comfortable with the application, charge the device, and contact the court if they cannot participate as scheduled. In other words, the court is telling you the same thing your IT person would tell you: prepare before the problem happens.

Source: Wisconsin Court System, How to Participate in Remote Court Hearings (https://www.wicourts.gov/courts/resources/docs/remotehearingtips.pdf).

IV. Zoom: 10 Things Every Lawyer Should Know

Zoom remains widely used in Wisconsin courts and legal practice. It is relatively easy to join a meeting, which is one of its strengths. However, that same ease can make lawyers skip the settings that matter.

Before adjusting any settings, it is critical to understand the **discrepancy between the Zoom Web Portal and the Zoom Desktop Client**. The web portal (your online browser account at CompanyName.zoom.us) and the desktop client (the installed app) do not share identical menus or features. Furthermore, any changes made via the web portal require clicking **"Save"** to take effect, whereas the desktop client automatically saves most adjustments.

Here are the ten items that deserve every lawyer's attention:

1. Test Zoom Before You Need Zoom

Do not make a live court appearance or client meeting your technology test. Zoom provides a dedicated test meeting specifically so you can check your internet connection, audio, video, and basic meeting controls. Go to **zoom.us/test** and run through the diagnostic process using the exact same computer, camera, microphone, internet connection, and physical location you expect to use for the real proceeding.

Additionally, check for software updates. A forced or unexpected update five minutes before a hearing is a preventable disaster. If your firm manages Zoom centrally, your available settings may be locked or controlled by your administrator, which you should verify in advance. A best practice is to test your entire setup **at least 30 minutes before your meeting** to deal with any issues in a calm and deliberate manner.

2. Know Whether You Are the Host, Co-Host, or Participant

Your role in a Zoom meeting determines what you can control. The **Host** owns the meeting and holds absolute administrative rights. A **Co-Host** can assist with many meeting-management functions (such as muting participants, admitting users, and managing breakout rooms) but cannot end the meeting for all. A **Participant** has only the permissions the host explicitly grants them.

For any important firm-hosted meeting, always designate a capable co-host (such as a paralegal or assistant). This allows the co-host to moderate the chat, manage the waiting room, and handle late arrivals or technical glitches while the lead attorney remains fully focused on the substance of the proceeding.

3. Master Mute, Unmute, and Audio Device Selection

Every attorney must be able to mute, unmute, change microphones, change speakers, and test audio without hunting frantically around the screen. If a participant says, "We can't hear you," you should immediately execute a short troubleshooting routine rather than clicking random buttons:

- **First:** Verify whether you are muted within the Zoom application itself.
- **Second:** Confirm that Zoom has selected the microphone device you actually intend to use (e.g., your headset rather than the laptop's built-in mic).
- **Third:** Check for a physical mute switch on your headset cord or external microphone, as these are frequently bumped.
- **Fourth:** If the issue persists, run Zoom's built-in audio test or leave and rejoin the meeting.

To maintain a professional environment, always stay muted by default when not actively speaking. You can use Zoom's **push-to-talk feature** by holding down the **space bar** to temporarily unmute yourself, and releasing it to mute again.

4. Use the Video Preview Before You Join

Never click "Join" blindly. The video preview screen is your last line of defense. Spend ten seconds looking at what everyone else is about to see:

- Is the correct camera selected?
- Are you centered in the frame at eye level?
- Is a bright light source or window behind you blowing out the background and turning you into a silhouette?
- Is a confidential document visible on a whiteboard or desk behind you?
- **Is your display name correct and professional?**

This preview window is also the time to fix yours or a client's display name if they are joining as "iPad" or under a spouse's name. Wisconsin's remote court guidance specifically instructs participants to change their displayed names so the court can identify them on the record. You can rename yourself in several ways. See **Changing your display name on Zoom** (https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0061891)

5. Understand the Waiting Room & Registration Gates

The **Waiting Room** is a fundamental access-control tool that holds participants in a virtual staging area until the host manually admits them. For confidential client meetings, depositions, or mediations, you must utilize the Waiting Room to verify who is attempting to enter before any substantive discussion begins. Forwarded calendar invites and links can easily result in unexpected attendees.

To prevent "Zoom-bombing" (unauthorized disruptions), never post meeting links publicly, and always keep the Waiting Room enabled.

For larger or more formal presentations, you can establish **Registration Gates**. This paid feature, which must be configured via your web browser, requires attendees to register with their email, name, and customized screening questions before they are automatically or manually approved to receive the secure meeting link.

6. Know the Host Tools / Security Menu & Rename Lock

If you host Zoom meetings, you must know the **Host Tools** (labeled **Security** in older versions) menu cold. Located in the bottom menu bar, this panel acts as your emergency dashboard. With a single click, you can lock the meeting to prevent new entries, enable the Waiting Room mid-meeting, and restrict participant actions such as screen sharing, chatting, or unmuting.

Importantly, once your formal meeting or court proceeding begins, you should uncheck **"Allow Participants to Rename Themselves"**. This **Rename Lock** is a critical security measure that prevents uninvited users, trolls, or disruptive parties from changing their display names mid-session to impersonate opposing counsel, court staff, or witnesses.

7. Share Deliberately — Not Reflexively

Screen sharing is an exceptional tool for presenting digital exhibits, but it is also the easiest way to inadvertently commit an ethical violation. Most screen-sharing leaks are not sophisticated hacks; they are accidental exposures of Outlook email previews, Teams/Slack messages, unrelated client files, browser tabs, or desktop notifications.

The Screen-Sharing Rule: Share the absolute minimum amount of your screen necessary to accomplish the task. Whenever practical, select and share only the specific, open document window (e.g., a PDF of Exhibit 1) rather than sharing your entire desktop. Before launching a share, always close all unrelated client materials, shut down email and messaging apps, and silence system notifications.

8. Breakout Rooms are Useful — But Beware the Recording Trap

Breakout Rooms are highly effective for caucusing during mediations and settlement conferences because they create isolated virtual spaces. Zoom allows the host or co-host to create up to 50 breakout rooms and move freely between them.

However, mediators and advocates must be acutely aware of **The Breakout Room Recording Trap**:

- **Cloud Recording** only captures the main meeting room; it does not record breakout room caucuses.
- **Local Recording** records whichever breakout room the host (the mediator) is physically sitting in.

If the mediator is recording locally and enters a private, confidential breakout room to caucus with a party, the local recording will continue to record that highly sensitive discussion. To protect the mediation privilege and client confidentiality, the host **must manually pause or stop the local recording** before entering any breakout room, and only resume it upon returning to the main session.

9. Master Recording Limits, Ethical Routing, & Recurring Meeting Locks

Recording a meeting is a permanent legal decision, not just a tech feature. In addition to navigating one-party vs. two-party consent laws depending on your jurisdiction, you must manage several physical and security limits of Zoom's recording features:

- **Mobile Limits:** Local recording is completely unavailable on the iOS or Android mobile apps; mobile recording requires a paid account and must rely on cloud storage.
- **Encryption Limits:** Zoom does not support end-to-end encryption for recorded meeting files.
- **Ethical Data Routing (Geofencing):** Paid Zoom accounts allow users to log into the web portal and specify which data center regions handle their meeting traffic. To prevent confidential client communications from routing through foreign servers, go to your In-Meeting (Advanced) settings and uncheck regions outside the United States and Canada (such as China or Hong Kong).
- **No-Fixed-Time Recurring Meetings:** To minimize administrative friction, schedule recurring meetings set to **"No Fixed Time"**. This locks your custom security settings and generates a single, secure meeting URL that you can reuse indefinitely for ongoing client consultations or office hours. These meeting IDs remain valid for up to one year, eliminating the need to generate a new link for every meeting. Note that you cannot use your Personal Meeting ID (PMI) for recurring meetings, as your PMI should never be used for professional client matters.

10. Have a Court-Ready Zoom Routine

Consistency minimizes panic. Before any significant virtual hearing, establish a strict checklist routine: restart your device, plug into direct wall power (relying on battery is a major risk), close all unrelated software, open and pre-arrange your PDF exhibits, check your lighting, and join the session 10–15 minutes early.

Additionally, treat meeting credentials with care. Wisconsin Court Form **GF-308** explicitly instructs participants to treat Zoom links and passwords as strictly confidential and prohibits sharing them with anyone who is not a party, attorney, or advocate in the case.

Source: Wisconsin Court System, How to Participate in Remote Court Hearings (*https://bit.ly/4hbhtTU*).

V. Microsoft Teams: More Than Just Video Meetings

So, what is Microsoft Teams?

If your answer is "Microsoft's version of Zoom," you're partly right. Teams can certainly be used for video meetings, and for many lawyers that was probably their first introduction to it. But Teams is designed to do quite a bit more than simply put a bunch of people on a screen.

Microsoft Teams is part of Microsoft 365 and combines video meetings, chat, file sharing, calendars, and collaboration in one application. More importantly, it works with many of the Microsoft products most law firms are already using every day, including Outlook, Word, Excel, PowerPoint, OneDrive, and SharePoint.

That integration is probably the biggest reason for a law firm to take a serious look at Teams.

If your firm already uses Microsoft 365, you may already have Teams. And if you do, it can become much more than another program you open when someone sends you a meeting invitation.

Microsoft provides a basic overview of Teams here: https://support.microsoft.com/en-us/teams/platform/what-is-microsoft-teams

Using Teams Inside the Firm

Let's start with internal communication because this is one of the places where Teams is very different from Zoom.

Think about how information moves around a typical law office. Someone sends an email asking whether a document has been filed. Someone else sends another email asking for the latest version of a contract. A lawyer sends a message to a paralegal asking about a deadline. Three people then exchange five emails trying to find a time for a ten-minute discussion.

Does that work? Sure. Is there a better way to handle some of it? Probably.

Teams can act as a central place for much of that day-to-day communication. You can use it for individual and group chats, video calls, meetings, file sharing, and ongoing discussions. Rather than having everything scattered among email inboxes, shared drives, and separate messaging programs, much of the discussion can stay together.

Teams organizes some of this activity into - you guessed it - **Teams** and **Channels**.

A Team might be your entire law firm, a practice group, a committee, or a project. Within that Team, Channels can be used to organize discussions and files by subject.

For example, a small law firm could have a Team for the firm with Channels for:

- General firm matters;
- Litigation;
- Estate planning;
- Marketing; and
- Technology.

Or you might create a separate Team for a large project or matter where several lawyers and staff members need to work together.

How far you take this is up to you. There is no requirement that you move every conversation in your office into Teams. In fact, trying to do too much too quickly is a good way to make everyone hate whatever new technology you just introduced.

Start with something that makes sense.

Microsoft has more information on Teams and Channels here: https://learn.microsoft.com/en-us/microsoftteams/teams-channels-overview

Chat Is Not Just Another Form of Email

One of the simplest uses of Teams is chat.

Instead of sending an email that says, "Did you get the Smith filing done?" you can send a quick Teams message. You can have one-to-one chats or group chats, share a document, make an audio or video call, and keep the conversation together.

That doesn't mean email disappears. It won't. Email remains the better choice for many communications, particularly formal communications and communications with people outside the firm.

But do you really need an email with a subject line, greeting, three sentences, "Regards," and a signature block to ask the person down the hall whether they have five minutes?

Probably not.

For internal firm communication, Teams chat can reduce some of that unnecessary email traffic.

There is a downside. Teams can simply become **another** place you have to look for messages. If some people use email, some use Teams, some use text messages, and somebody still leaves handwritten notes on your chair, you have not improved communication. You have simply created four places to look.

If you're going to use Teams for internal communication, the firm needs some basic rules about what goes where.

Teams and File Sharing

Files are another big part of Teams.

You can share and work with Word, Excel, PowerPoint, PDF, and other files directly through Teams. Behind the scenes, Microsoft uses OneDrive and SharePoint to store much of this information.

Files placed in a Teams Channel are generally stored in SharePoint. Files shared through a Teams chat are generally stored in the sender's OneDrive for Business and shared with the other participants.

Why should a lawyer care where Microsoft puts the file?

Because at some point you're going to need to find it, control who can see it, or figure out what happens to it when the matter is finished.

Microsoft explains Teams file storage here: https://support.microsoft.com/en-us/teams/files/file-storage-in-microsoft-teams

The other advantage is collaboration. Several people can work on the same Word, Excel, or PowerPoint document without emailing copies back and forth.

We've all seen something like this:

Lease Draft.docx
Lease Draft Revised.docx
Lease Draft Revised 2.docx
Lease Draft FINAL.docx
Lease Draft FINAL Revised.docx
Lease Draft USE THIS ONE.docx
There is a better way.

Microsoft 365 allows multiple users to work on the same file while maintaining the document in one location. That doesn't eliminate the need for good document management or version control, but it can eliminate a lot of unnecessary duplicate files.

More information on Microsoft 365 collaboration is available here: https://support.microsoft.com/en-us/office/collab-files/collaborate-from-anywhere-using-microsoft-365

Teams for Client Meetings and Client Work

Teams isn't limited to people inside your firm.

You can use it for client meetings, conferences with opposing counsel, mediations, meetings with experts, and most of the other situations where you might use Zoom.

A client generally does not need to purchase Teams or even have a Teams account simply to attend a meeting. You can send a meeting invitation with a Teams link, and an outside participant can generally join from a browser or through the Teams application.

That makes Teams a practical option for ordinary client meetings, particularly if your firm already uses Outlook and Microsoft 365. You create the meeting, Outlook adds the Teams link to the invitation, and the client clicks the link.

Microsoft provides additional information about Teams meetings here:
https://support.microsoft.com/en-us/teams/meetings-events/meetings-in-microsoft-teams

Teams can also be used for more ongoing collaboration with people outside the firm. Depending upon how your Microsoft 365 environment is configured, clients, co-counsel, consultants, experts, and others can be given guest access to a Team or Channel and allowed to participate in discussions or work with shared files.

That can be useful. It can also create some obvious questions for lawyers.

Who can see what?
What files have actually been shared?
How long does that person keep access?
What happens when the representation ends?
And who in the firm is responsible for shutting the door afterward?
As with most technology, the fact that Teams **can** do something does not automatically mean you should do it. If you're going to use Teams for substantive client collaboration, understand the permissions first.

So, How Is Teams Different From Zoom?

At first glance, Zoom and Teams look pretty similar. You click a link, cameras come on, and people appear in little boxes on the screen.

The biggest difference is what happens around that meeting.

A simple way to think about the two programs is:

Zoom has traditionally been built around the meeting. Teams has traditionally been built around the people working together before, during, and after the meeting.

The line isn't nearly as clear as it used to be. Zoom has added Team Chat and other collaboration tools through Zoom Workplace, while Microsoft has continued to improve the meeting side of Teams.

But the distinction is still useful.

If someone says, "Let's have a Zoom meeting," everyone understands what that means.

With Teams, the meeting may be only one part of what you're doing. You may already have a Teams conversation going, files stored in a Channel, several people editing the same document, and then start a video meeting from inside that same workspace.

For a law firm already using Microsoft 365, that's the real advantage of Teams. Outlook, Word, OneDrive, SharePoint, calendars, chat, and meetings can all work together instead of existing as separate programs that don't know much about one another.

Here is the short version:

Zoom	Microsoft Teams
Traditionally focused primarily on video meetings	Designed for meetings and ongoing collaboration
Very familiar to outside participants	Especially useful inside organizations already using Microsoft 365
Easy way to bring unrelated people together for a meeting	Chat, files, meetings, and collaboration can remain together
Zoom Workplace now adds chat and other collaboration features	Works closely with Outlook, OneDrive, SharePoint, Word, Excel, and PowerPoint
Often a very good choice when the primary goal is simply "have a meeting"	Often a better fit when the goal is "work together"

Neither approach is inherently better. It depends on what you are trying to accomplish.

What About Gallery View?

For a while, this was a real difference between Zoom and Teams.

During the early days of widespread video meetings, Zoom did a better job of putting a large number of participants on the screen at the same time. Its Gallery View became one of the things people immediately associated with Zoom. Teams initially displayed fewer participants, which could be annoying in larger meetings and presentations.

That really isn't much of an issue anymore.

Teams now includes Large Gallery, which can display up to 49 participant videos at once, with navigation available for larger meetings.

Microsoft Large Gallery information: https://support.microsoft.com/en-us/teams/meetings/customize-your-meeting-view-in-microsoft-teams

Zoom also supports Gallery View with up to 49 participants per screen on supported computers and configurations.

Zoom Gallery View information: https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0063672

So, while Zoom had a noticeable advantage here several years ago, today gallery size by itself probably isn't a good reason to choose one over the other.

Which Should You Use?

The answer may be both.

If your firm already uses Microsoft 365, Teams deserves a closer look because you may already own it and it works with software you are using every day. It can be particularly useful for internal firm communication, file sharing, and collaboration.

Zoom may still be easier for some outside meetings. Clients, opposing counsel, mediators, and other lawyers may already be comfortable with it. Sometimes the easiest answer really is to send someone a Zoom link and have the meeting.

You don't need to pick a winner.

You need to know enough about both programs that when the court, a client, opposing counsel, or your own firm decides which one you're using, you're not trying to figure it out five minutes before the meeting starts.

With that background, let's turn to the **10 things every lawyer should know about Microsoft Teams.**

VI. Microsoft Teams: 10 Things Every Lawyer Should Know

1. Know Which Microsoft Account and Tenant Identity You Are Using

Unlike Zoom, where joining is usually as simple as clicking a link, Teams is highly identity-dependent. Many lawyers manage multiple Microsoft credentials, such as their primary firm account, personal Microsoft accounts, guest memberships in corporate client tenants, or roles on community boards. Teams can remember and cache all of these credentials simultaneously.

Before joining any critical hearing or client consultation, you must **confirm which account and tenant organization you are currently using** and verify exactly how your name and affiliation will appear to others. If you are invited as an external guest into a client's or opposing counsel's Teams environment, you may have different, more restricted permissions than you do within your firm's home system. A classic and preventable Teams failure is encapsulated in a simple sentence: *"I was in Teams, but I was in the wrong Teams"*.

2. Use the Pre-Join Screen as a Diagnostic Gate

Never click **"Join now"** reflexively. The Pre-Join screen is your last easy opportunity to audit your technical presence before you enter the virtual room. Take ten seconds to review your setup:

- Check your camera framing and verify that your display name is correct and professional.
- Confirm that your background is neat, non-distracting, and has no physical client files or whiteboards in view.
- Verify that your microphone, headphones, and speaker selections are correct.

This check is especially critical if you regularly move between your firm’s office, a home setup, courtrooms, or laptop docking stations, as your computer’s list of active cameras and microphones changes with each hardware connection.

3. Master "Meeting Options" (The Organizer's Control Panel)

For any lawyer organizing or hosting a Teams meeting, the **Meeting options** menu is your central administrative dashboard. Microsoft explicitly notes that these settings directly affect participant engagement, meeting efficiency, and security.

Do not assume your organization's default IT settings are appropriate for a confidential client interview or a deposition. Before your meeting begins, open Meeting options to manually configure:

- Who can bypass the lobby.
- Who is designated as a "presenter" with screen-sharing and participant-management rights.
- Whether attendee microphones and cameras are permitted or locked down by default.
- Whether automatic recording, transcription, and chat features are enabled.

4. Utilize the Lobby for Active Access Control

The Teams **Lobby** serves the same access-control purpose as the Zoom Waiting Room. Rather than letting participants join automatically, the meeting organizer can configure the Lobby settings to hold attendees in a virtual waiting area until they are manually admitted.

Teams offers several lobby-bypass options, allowing you to choose whether only organizers, invited guests, internal firm members, or trusted organizations can enter the meeting directly. For client preparation, depositions, or confidential discussions, **never treat the lobby as a nuisance to disable**. Use it deliberately as a security gate to verify every participant's identity before they are allowed into the confidential space.

5. Enforce Granular Role Security: Organizer, Co-Organizer, Presenter, and Attendee

Teams features highly granular user roles, and understanding them is vital for maintaining control over your virtual proceedings. The roles are structured as follows:

- **Organizers & Co-Organizers:** Have absolute administrative rights to change meeting options, manage the lobby, start/stop recording, and end the meeting.
- **Presenters:** Can share content, mute other participants, remove users, and start or stop recording or transcription (subject to IT policies).
- **Attendees:** Have restricted, read-only rights and cannot manage other users or share screens.

The most common security mistake lawyers make is setting "Who can present?" to "Everyone" out of convenience. This grants all participants—including opposing parties or disruptive users—presenter-level rights to mute you, remove participants, or hijack the screen. For a controlled and secure meeting, **always restrict presenter rights only to those who absolutely need them**.

6. Establish Audio Discipline

As with all video platforms, audio quality dictates the professionalism of your presentation. Underneath the interface, keep these audio basics in mind:

- Confirm exactly which microphone and speaker Teams is utilizing.
- Never connect two active devices (such as a laptop and a smartphone) to the same meeting audio in the same room, as this will trigger an immediate, deafening feedback loop.
- Use physical or software mute buttons when not speaking to eliminate background noise.
- If you are dialing in by phone as a backup, ensure you have muted your computer's microphone and speakers entirely.

Never let the fact that Teams is integrated into your Windows environment make you skip the pre-meeting audio test—built-in software is still susceptible to hardware discrepancies.

7. Understand the Leakage Limits of Background Effects

Teams supports background blur, built-in backgrounds, and custom office backgrounds. While highly recommended to remove visual clutter and maintain a professional appearance, **background blur is not a substitute for physical security**.

Microsoft's own official support documentation cautions that background blur and image replacement **do not guarantee that sensitive information will remain hidden** from other participants. If a document, whiteboard, or physical folder is highly confidential, physically move it entirely out of the camera's range before starting your video, rather than trusting the software's blur algorithm to obscure it.

8. Share Content Deliberately and Mitigate Notification Risks

Teams offers powerful content-sharing tools, allowing you to share your entire desktop, a single application window, or specific PowerPoint files. Sharing your entire desktop is highly risky, as it exposes your screen to incoming Outlook email previews, Teams chat pop-ups, or unrelated client folders.

Microsoft specifically warns about the danger of notifications when sharing an entire screen and strongly recommends enabling **"Do Not Disturb"** or "Focus" mode on your device before presenting. Practice your screen-sharing workflow prior to any major hearing or deposition: if the judge asks you to present an exhibit, can you display that document in ten seconds without exposing the rest of your computer to the court?

9. Distinguish Between Captions, Transcription, Recording, and "Recap"

Teams offers several features that sound similar but have vastly different implications for your firm's information governance:

- **Closed Captions:** A live, real-time accessibility tool that displays spoken text on the screen for immediate comprehension. This is transient and does not generate a saved file.
- **Transcription:** Generates a permanent, written text document of the spoken dialogue that is tied to the meeting.
- **Recording:** Creates a full audio and video record of the session. Crucially, in current Teams behavior, **starting a recording automatically activates live transcription**.
- **Teams Recap:** A central hub that aggregates the recording, transcript, shared files, chat history, meeting notes, action items, and AI-generated summaries into a single, permanent portal.

Because these features create highly detailed, searchable, and permanent records, lawyers must decide **deliberately** whether these records should exist. A meeting that felt temporary may leave behind a permanent digital footprint that is fully discoverable.

10. Manage the "Leave Behind" Footprint of Teams

Perhaps the most significant difference between Teams and Zoom is what happens *after* the meeting ends. In Zoom, once you end the call, the virtual room evaporates. In Microsoft Teams, **the meeting chat, shared files, transcripts, and notes continue to exist and remain active** in your Teams portal long after the cameras are turned off.

If your Teams meeting was scheduled with external participants, those users may retain persistent access to the ongoing meeting chat and shared files, depending on your organization's IT policies and how the invitation was structured. Breakout rooms in Teams are also structurally tied to these

persistent chats. As a matter of basic competence under SCR 20:1.6, lawyers must learn to manage these persistent records intentionally, deleting or archiving chat histories and files once the professional matter concludes.

VII. Court Ready: What Changes When the Judge Is on the Screen?

A remote hearing is still a court hearing. That sounds obvious, yet video meetings can make people behave as though they are attending an informal conference call. The Wisconsin Court System's own guidance puts it plainly: you may be participating from home, but it is still a court hearing.

Source: Wisconsin Court System, How to Participate in Remote Court Hearings (https://www.wicourts.gov/courts/resources/docs/remotehearingtips.pdf).

Read the Court's Instructions — Even If You "Know Zoom"

Individual courts may use different applications and different procedures. The Wisconsin Court System expressly tells participants that courts may use different apps and processes and that the court will provide instructions. Follow the instructions for the particular judge and hearing rather than assuming every remote appearance works like the last one.

Source: Wisconsin Court System, Zoom Hearing Resources (https://www.wicourts.gov/courts/zoom.htm).

The Day Before

☐ Review the court's connection instructions and hearing time.
☐ Test the platform, Internet connection, microphone, speakers, and camera.
☐ Confirm the correct meeting link, meeting ID, password, or dial-in information.
☐ Organize exhibits and open or bookmark the documents you expect to use.
☐ Determine how your client and witnesses will join.
☐ Determine how you will communicate privately with the client if you need to do so during the hearing.
☐ Charge all devices and identify a backup connection method.
☐ If another lawyer or staff member will assist, decide who will handle technology and exhibits.

Thirty Minutes Before

☐ Restart the computer if appropriate and plug it into power.
☐ Close unnecessary applications and unrelated client matters.
☐ Silence Outlook, Teams, text-message, and operating-system notifications.
☐ Open the exhibits and other documents you are likely to need.
☐ Check camera framing, lighting, and background.
☐ Confirm the microphone and speaker selections one more time.
☐ Keep the court's instructions and contact information available outside the meeting window.

When You Join

☐ Join early enough to solve a problem without making the court wait.
☐ Use a display name that clearly identifies you.
☐ Confirm that you can hear and be heard.
☐ Remain muted when you are not speaking.
☐ Do not begin a confidential conversation merely because you appear to be alone in a waiting room.

☐ Assume the proceeding may be publicly livestreamed unless the court tells you otherwise.

During the Hearing

Remote appearances reward deliberate communication. Speak clearly and a little more slowly than you might in a conference room. Avoid interrupting because even a small transmission delay can make two people talking at once unintelligible. Do not multitask. Do not answer email because the judge cannot see your hands. The fact that you can get away with something on camera does not make it a good idea.

The Wisconsin Court System also tells remote participants not to smoke, eat, or drive during the hearing. That guidance may sound elementary, but courts have seen enough remote appearances to know why it had to be written down.

Source: Wisconsin Court System, Zoom Hearing Resources (https://www.wicourts.gov/courts/zoom.htm).

Private Attorney-Client Communication

This is one of the most important issues to solve in advance. EF-21-02 notes that video hearings often do not allow easy confidential lawyer-client discussions. Depending on the court, the answer may be a breakout room, a separate telephone connection, text messaging, or another court-approved method. Whatever method you intend to use, make sure the client understands it before the hearing starts.

Also consider the practical side. If your client is participating only by smartphone, can the client receive your text while staying connected to the hearing? Does switching apps interrupt audio? Will a telephone call knock the client out of the meeting? Test the procedure if the case matters.

Source: Wisconsin Formal Ethics Opinion EF-21-02: Working Remotely (https://www.wisbar.org/formembers/ethics/Ethics%20Opinions/EF-21-02%20Working%20Remotely.pdf).

VIII. Screen Sharing, Confidentiality, Recording, and AI Meeting Tools

This is the intersection where video-meeting convenience collides directly with your ethical duties of confidentiality (SCR 20:1.6) and information governance. While automated transcription, screen sharing, and AI summarization are incredibly efficient, they automatically generate a permanent digital record that may be subject to discovery or inadvertent exposure.

The Lawyer's Screen-Sharing Checklist

☐ **Is Outlook or your email client completely closed?** (Silencing is not enough; close the app to prevent incoming message previews).

☐ **Are all internal communication tools (Teams, Slack, text apps) shut down?**

☐ **Have all operating-system and push notifications been silenced?** (Enable "Do Not Disturb" or "Focus" mode).

☐ **Are all unrelated client files, browser tabs, and desktop folders closed?**.

☐ **Am I sharing a specific application window rather than my entire desktop?**.

☐ **If sharing a web browser, am I utilizing "Browser Tab Sharing"?** (New in Zoom Workplace 7.0, this allows you to share a *single active tab* rather than the whole browser window, completely shielding your saved favorites, bookmark bars, and other open tabs from view).

☐ **Are tracked changes, draft comments, hidden metadata, or attorney notes fully stripped or hidden** from the document I am about to display?.

☐ **Do I know the exact keyboard shortcut to instantly kill the screen share if something goes wrong?** (Zoom shortcut: ⌘**Cmd+Shift+S** on Mac, **Alt+Shift+S** on PC).

What If You Share the Wrong Thing?

If an accident occurs, **stop sharing immediately**. Do not lose precious seconds explaining, apologizing, or narrating the mistake while the confidential document remains visible on the screen. Kill the share first, close the offending file, and then address the exposure. If privileged or confidential information was visible, you must treat this as an ethical and legal issue under SCR 20:1.6, rather than pretending it went unnoticed.

Recording, Transcription, and High-Fidelity Exhibits

Never record "just because we can". Recording and live transcription generate discoverable records of what was meant to be a transient conversation. Always determine in advance where the file will be stored, who will have access to it, and how long it will be retained under your firm's document retention policy.

For standard meetings, video quality is typically compressed to conserve bandwidth. However, for cases that depend on highly detailed visual evidence (such as reviewing dashcam footage, analyzing security surveillance, or presenting complex medical animations), standard compression can severely compromise your presentation.

Firms can resolve this by purchasing the **Zoom Enhanced Media Add-on**. This premium administrative license unlocks high-fidelity media capabilities for your meetings, including:

- **Full HD (1080p) Video Quality** for host and participant feeds.
- **High Frame Rate Content Sharing (up to 60fps)** to ensure smooth video playback.
- **High Bitrate Video (up to 12Mbps)** to prevent compression artifacts.
- **High Bandwidth Mode (HBM)** to stabilize multi-party HD feeds.
- **Optimized Video Layouts on 4K Displays** for crisp text and visual precision.

AI Meeting Assistants and Notetakers

By 2026, AI has integrated deeply into the virtual meeting landscape. Zoom offers its native **AI Companion**, while Microsoft Teams provides **Copilot** and AI-powered meeting recaps. These tools can automatically generate concise summaries, outline action items, and allow participants to ask in-meeting questions.

However, as a lawyer, utilizing these tools requires extreme care and strict compliance with data security standards:

- **The HIPAA & PHI AI Ban:** The Zoom AI Companion is strictly approved *only* for Level 1 and Level 2 data (basic, non-sensitive firm administrative information). **It is strictly prohibited in any meeting involving Level 3 data or higher**, which includes Protected Health Information (PHI), HIPAA-regulated medical records, or highly sensitive proprietary business data. If your case involves

medical records or trade secrets, the host must ensure the AI Companion is completely turned off.

- **Third-Party AI Bots:** Uninvited third-party AI "notetaker" bots frequently attempt to join meetings via calendar invitations. Never assume a bot in the participant list is harmless. It is capturing and storing your client's information on an external server. If you are the host, **know how to remove an unauthorized bot immediately** using Host Tools. If you are a participant and an unfamiliar bot appears, demand to know who owns it and what it is recording before discussing any confidential information.

The McMurry Non-Default Security Settings Checklist

Legal technology expert William F. McMurry emphasizes that standard, out-of-the-box Zoom settings are designed for user convenience rather than strict legal confidentiality. To protect attorney-client privilege, lawyers should log into their Zoom Web Portal and manually configure the following **non-default security settings** before conducting sensitive client interviews or consulting with experts:

☐ **Require Encryption for Third-Party Endpoints:** Ensures that any external or legacy hardware joining the meeting is fully encrypted.

☐ **Disable Auto-Saving Chats:** Prevents Zoom from automatically saving and storing written chat logs, which could otherwise be subject to discovery.

☐ **Disable File Transfer:** Block participants from sending files through the in-meeting chat to prevent accidental data leaks or the transmission of malware.

☐ **Disable Feedback to Zoom:** Disables post-meeting pop-up surveys and prevents your meeting metadata from being shared back to Zoom's servers for product analysis.

☐ **Disable Desktop/Screen Share for Users:** Restricts screen-sharing permissions strictly to the Host/Co-Host by default, preventing opposing parties or unauthorized users from hijacking the screen.

☐ **Disable Remote Control:** Blocks other participants from requesting or taking remote control of your screen or device during a share.

☐ **Disable Local Recording:** Turn off local recording permissions for participants to ensure you maintain sole control over the physical audio/video file.

☐ **Disable Cloud Recording:** Disables storing meeting recordings in Zoom's cloud storage, forcing all authorized records to be kept under your firm's direct physical custody.

☐ **Disable Automatic Recording:** Prevents Zoom from automatically starting a recording the instant the meeting launches, ensuring that any decision to record is made deliberately and on the record.

IX. The Five-Minute Emergency Troubleshooting Drill

Competence does not mean nothing ever goes wrong. Technology will go wrong. Competence means you have a short routine and do not panic when it does.

"They Can't Hear Me."

1. Check whether you are muted in the meeting application.
2. Confirm the correct microphone is selected.
3. Check for a physical mute switch on the headset or microphone.

4. Check operating-system microphone permissions if the problem persists.
5. Leave and rejoin if necessary, or use an approved telephone connection as backup.

“I Can't Hear Them.”

1. Check system volume and the volume on any headset or speaker.
2. Confirm the correct speaker or headset is selected in Zoom or Teams.
3. Check whether Bluetooth has connected to a different device.
4. Disconnect unnecessary audio devices if the list is confusing.
5. Use permitted telephone audio as a backup if necessary.

“They Can't See Me.”

1. Confirm that the camera is turned on in the meeting.
2. Select the correct camera.
3. Check for a physical privacy shutter or lens cover.
4. Close another application that may be using the camera.
5. Leave and rejoin if necessary.

“My Internet Is Failing.”

1. Stop unnecessary bandwidth-heavy activity and close unrelated applications.
2. Turn off your video temporarily if permitted and audio remains stable.
3. Switch to a backup connection or hotspot if available.
4. Use approved telephone audio if the proceeding permits it.
5. Tell the court or organizer what happened. Do not simply disappear.

“I Shared the Wrong Thing.”

1. Stop sharing immediately.
2. Close or move the confidential material.
3. Confirm the correct document before resuming the share.
4. Determine whether confidential or privileged information was actually disclosed.
5. If it was, address the disclosure appropriately rather than assuming it went unnoticed.

“I Am Echoing.”

Look around the room for a second device connected to the same meeting audio. A laptop plus a phone, or two lawyers sitting next to each other with both computers connected to audio, is a common cause. Mute or disconnect audio on all but one device.

X. Zoom vs. Teams: A Lawyer's Quick Comparison

For legal practitioners, deciding which platform is "better" is the wrong question. Instead, you must understand how their distinct structures impact security, access control, and information governance. Use the following comparison matrix to guide your firm’s deployment of these platforms:

Feature / Aspect	Zoom	Microsoft Teams
Basic Mental Model	**Primarily Meeting-Focused:** Designed for seamless, transient, video-first connections.	**Microsoft 365 Portal:** A persistent collaboration hub where video meetings are one component of ongoing casework.
Entry & Access Control	**Waiting Room:** Simple, web-based control to hold all or specific participants in a virtual queue.	**Lobby:** Highly granular bypass options linked to Azure Active Directory identities and organization rules.
Organizer Control Panel	**Host Tools / Security Menu:** A highly visual, consolidated, in-meeting dashboard for rapid emergency response.	**Meeting Options:** A detailed administrative panel configured before the meeting, dictating roles and permissions.
Primary User Roles	**Host, Co-Host, Participant:** Straightforward meeting control and easy administrative delegation.	**Organizer, Co-Organizer, Presenter, Attendee:** Granular, identity-based permissions that must be actively managed.
Screen Sharing Safety	**Desktop, Application Window, or Browser Tab:** New "Browser Tab Sharing" shields background browser data.	**Screen, Window, PowerPoint, or SharePoint:** Integrates with M365 files, but full-screen shares expose notifications.
Breakout Room Mechanics	**Meeting-Centric Rooms:** Easy creation of up to 50 rooms. Local recording captures the host's current room.	**Integrated Rooms:** Rooms are connected to persistent Teams chats, files, and SharePoint repositories.
Post-Meeting Footprint	**Minimal:** Recording and chat files must be manually saved and managed.	**Extensive:** Meeting chat, shared files, transcripts, and AI-generated Recaps persist in the M365 environment.
Critical Professional Mindset	**Manage the Meeting:** Focus on active facilitation, screen sharing safety, and breakout confidentiality.	**Manage the Footprint:** Focus on user identity, permission settings, and what data persists after the call ends.

XI. Common Mistakes We Have All Seen

A technology CLE would be incomplete without acknowledging the things that happen in the real world. Most are not dramatic. They are small mistakes that become distracting because everybody in the meeting gets to experience them with you.

- “You're on mute.”
- The wrong microphone or speaker is selected.
- The lawyer joins under a spouse's, child's, or generic device name.
- The camera is looking up from desk level.
- A bright window is directly behind the speaker.

- A television, radio, or conversation is audible in the background.
- Email or chat notifications display another client's name while screen sharing.
- The lawyer shares the entire desktop instead of the one document that matters.
- The lawyer cannot find the exhibit after announcing that it will be shared.
- Two devices in the same room create feedback.
- The lawyer and client assume a breakout room is automatically confidential.
- A meeting is recorded or transcribed simply because the feature is available.
- An AI notetaker joins and nobody asks why it is there.
- The lawyer has no backup plan after losing Internet access.

The objective is not technological perfection. It is to eliminate the problems you can reasonably anticipate and to know how to recover from the ones you cannot.

XII. Ten Rules to Remember When You Forget Everything Else

1. Test before the meeting.
2. Join early.
3. Audio matters more than video.
4. Put the camera near eye level.
5. Know whether you are muted and which microphone you are using.
6. Know who is allowed into the meeting and who has elevated permissions.
7. Share a window instead of your entire digital life whenever practical.
8. Do not assume a breakout room is automatically private.
9. Think before recording, transcribing, or adding an AI notetaker.
10. Always have a backup plan.

Zoom and Teams are tools. The professional obligation is not to memorize every feature. It is to know enough about the technology you are using to represent the client competently, protect confidential information, communicate effectively, and handle predictable problems without allowing the technology to become the focus of the proceeding.

For most lawyers, that means mastering a relatively small number of controls and developing a repeatable routine. Once those things become habit, the technology largely disappears into the background — which is exactly where it belongs.

Resources

Wisconsin Court and Ethics Resources

- Wisconsin Supreme Court Rules - Current Rules: https://www.wicourts.gov/supreme/sc_rules.jsp
- Wisconsin Formal Ethics Opinion EF-21-02: Working Remotely: https://www.wisbar.org/formembers/ethics/Ethics%20Opinions/EF-21-02%20Working%20Remotely.pdf
- Wisconsin Court System - Zoom Hearing Resources: https://www.wicourts.gov/courts/zoom.htm
- Wisconsin Court System - How to Participate in Remote Court Hearings: https://www.wicourts.gov/courts/resources/docs/remotehearingtips.pdf

- Wisconsin Court System - GF-308 Instructions for How to Appear Remotely: https://www.wicourts.gov/formdisplay/GF-308.pdf?formNumber=GF-308&formType=Form&formatId=2&language=en

Zoom Resources

- Joining a Zoom test meeting: https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0063307
- Zoom Test Meeting: https://zoom.us/test
- Testing computer or device audio: https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0062765
- Testing your video: https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0061836
- Waiting Room: https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0059359
- Host Tools / in-meeting security settings: https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0061231
- Screen sharing: https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0060596
- Managing breakout rooms: https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0062540
- Recording consent: https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0059819
- Changing your display name on Zoom: https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0061891
- Zoom Video Tutorials: https://support.zoom.com/hc/en/download-and-configuration?id=download_and_configuration https://www.youtube.com/@JustAskJake-c6i/search?query=zoom https://www.youtube.com/@zoomplayground/videos

Microsoft Teams Resources

- Meeting options: https://support.microsoft.com/en-us/teams/meetings/meeting-options-in-microsoft-teams
- Using the lobby: https://support.microsoft.com/en-us/teams/meetings/using-the-lobby-in-microsoft-teams-meetings
- Meeting roles: https://support.microsoft.com/en-us/teams/meetings/roles-in-microsoft-teams-meetings
- Present content / screen sharing: https://support.microsoft.com/en-us/teams/meetings/present-content-in-microsoft-teams-meetings
- Background effects: https://support.microsoft.com/en-us/teams/meetings/change-your-background-in-microsoft-teams-meetings
- Managing breakout rooms: https://support.microsoft.com/en-us/teams/meetings/manage-breakout-rooms-in-microsoft-teams
- Live transcription: https://support.microsoft.com/en-us/teams/meetings/start-stop-and-download-live-transcripts-in-microsoft-teams-meetings
- Meeting recap: https://support.microsoft.com/en-us/teams/meetings/recap-in-microsoft-teams
- Meeting chat: https://support.microsoft.com/en-us/teams/meetings/chat-in-microsoft-teams-meetings

- Microsoft Office 365 for Beginners: 12+ Hours of Excel, Word and PowerPoint Training Course: https://www.youtube.com/watch?v=Kxf3Az-3sCo
- Getting Started with Microsoft Teams 2026 | Full Tutorial: https://www.youtube.com/watch?v=DnxEyXXl2gE
- Microsoft Teams Tips and Tricks 2026 (multiple videos): https://www.youtube.com/results?search_query=microsoft+teams+tips+and+tricks+2026

Addendum 1: 10 Things Every Lawyer Should Know About Zoom

1. Test Zoom before you need it. Use zoom.us/test with the same hardware and connection you will use for the real meeting.

2. Know your role. Host, co-host, and participant permissions are different.

3. Master audio. Know how to mute, unmute, and switch microphones and speakers quickly.

4. Use the preview. Check the right camera, framing, lighting, background, and display name before joining.

5. Use the Waiting Room. Control who gets into confidential meetings.

6. Know Host Tools / Security. This is where you can lock a meeting and control participant permissions.

7. Share deliberately. Close unrelated material and share one window when practical.

8. Understand breakout rooms. Know who controls them and who can enter before discussing privileged information.

9. Think before recording. Recording and transcription create records; decide whether you actually need them.

10. Have a court-ready routine. Test, plug in, open exhibits, silence notifications, join early, and keep a backup connection handy.

Addendum 2: 10 Things Every Lawyer Should Know About Microsoft Teams

1. Know your account. Confirm which Microsoft account and organization you are using.

2. Use the pre-join screen. Check camera, microphone, speaker, background, and framing before joining.

3. Review Meeting options. Do not assume the defaults fit a confidential or important meeting.

4. Use the Lobby. Decide who enters directly and who waits to be admitted.

5. Understand roles. Organizer, co-organizer, presenter, and attendee permissions differ.

6. Master audio. The basics still matter: correct device, no feedback, mute when appropriate.

7. Keep backgrounds conservative. Blur and replacement are not a substitute for moving confidential material out of camera range.

8. Share the right thing. Choose a window or specific content when practical and silence notifications.

9. Distinguish captions, transcription, recording, and recap. They create different kinds of information and records.

10. Remember what Teams leaves behind. Chat, files, recordings, transcripts, and recaps may persist after the meeting.

Addendum 3: Court-Ready Video Hearing Checklist

Day Before

☐ Read the court's instructions and confirm the date, time, and platform.
☐ Test Internet, microphone, speakers, and camera.
☐ Open and organize exhibits.
☐ Confirm how the client and witnesses will connect.
☐ Agree on a private attorney-client communication method.
☐ Charge devices and identify a backup connection.

Thirty Minutes Before

☐ Plug into power and restart if appropriate.
☐ Close unrelated programs and client matters.
☐ Silence all notifications.
☐ Open exhibits and hearing notes.
☐ Check lighting, camera angle, background, microphone, and speaker.
☐ Keep court contact information available outside the meeting application.

When Joining

☐ Join early.
☐ Use a clear display name.
☐ Confirm audio and video.
☐ Mute when not speaking.
☐ Do not assume the waiting room is a confidential place for client discussion.
☐ Remember the hearing may be livestreamed.

During the Hearing

☐ Speak clearly and avoid interrupting.
☐ Do not multitask.
☐ Know how to show an exhibit without exposing unrelated information.
☐ Use the agreed method for private client communication.
☐ If the connection fails, use the backup plan and promptly advise the court.

Video Conferencing Cheat Sheets: Zoom and Microsoft Teams

A Practical Practice and Security Guide for Solo and Small-Firm Lawyers

This guide is meant to be used, not studied. It pulls together the Zoom and Microsoft Teams controls, shortcuts, security settings, and practice tips you are most likely to need in a client meeting, deposition, mediation, or court appearance. The source names are included in the text so you can tell where each recommendation came from without having to chase down numbered footnotes.

Part 1: Zoom Cheat Sheet

1. The In-Meeting Controls You Need to Know

- **Mute / Unmute (microphone icon):** Turns your microphone on or off. Use the up-arrow (^) next to the icon if you need to choose a different microphone or speaker, or run a quick audio test. (Participant controls in a meeting; Zapier's Zoom Tips)
- **Start / Stop Video (camera icon):** Turns your camera on or off. The up-arrow (^) lets you choose a camera, add or change a virtual background, and reach the video and appearance settings. (Participant controls in a meeting; Zapier's Zoom Tips; Grain's Zoom Feature Guide.)
- **Invite:** Opens the invitation window so you can copy the meeting link or send an invitation by email. (Participant controls in a meeting; Zapier's Zoom Tips.)
- **Manage Participants:** Opens the participant panel. Hosts and co-hosts can mute a participant, use Mute All when background noise becomes a problem, change display names, assign a co-host, or return someone to the waiting room. (Managing participants in a meeting)
- **Host Tools (Security menu):** This is the host's control center. From here, you can lock the meeting, turn on the Waiting Room, and decide whether participants may share screens, use chat, unmute themselves, or change their names. (Sensei Enterprises' California Lawyers Association guide; Zoom Support's Host Tools documentation.)
- **Polls:** Lets you create and launch single- or multiple-choice questions. Polls may be anonymous or tied to registered participants and can be a simple way to keep people involved. (Zoom Support's Polling guide.)
- **Share Screen:** Lets you share one program window, your full desktop, or a connected tablet. For client work, sharing one window is usually the safer choice. (Participant controls in a meeting.)
- **Chat:** Opens the chat panel. You can send a message to everyone or, if the host allows it, send a private message to one person. Private messages are marked as such in the chat window. (Morris, King & Hodge Zoom Consultation Guide; Participant controls in a meeting.)
- **Record:** Starts, pauses, resumes, or stops a local or cloud recording, depending on the account and meeting settings. (Participant controls in a meeting; Zapier's Zoom Tips.)
- **Breakout Rooms:** Moves participants into separate private rooms, either manually or automatically. Zoom supports up to 50 breakout rooms, which makes the feature especially useful for mediation caucuses. (Zoom Support's Breakout Rooms guide.)

- **Reactions / Raise Hand:** Lets participants respond without talking over the speaker. Options include a thumbs-up, clap, heart, and raised hand. Participant controls in a meeting; Zapier's Zoom Tips; Participant controls in a meeting.)
- **End Meeting:** Ends the meeting for everyone. If the meeting needs to continue after you leave, first transfer host control to someone else. (Zoom Essential Features Guide.)

2. Keyboard Shortcuts Worth Knowing

These shortcuts come from Zoom Support's Hot Keys and Keyboard Shortcuts guide:.

- **Mute or unmute: Cmd + Shift + A (Mac) / Alt + A (Windows)**
- **Temporarily unmute (push-to-talk): Hold down the Space Bar while you speak, then release it to mute again. This won't work while you are actively typing or clicking in another program.**
- **Start or stop video: Cmd + Shift + V (Mac) / Alt + V (Windows)**
- **Open the invitation window: Cmd + I (Mac) / Alt + I (Windows)**
- **Start sharing your screen: Cmd + Shift + S (Mac) / Alt + Shift + S (Windows)**
- **Pause or resume screen sharing: Cmd + Shift + T (Mac) / Alt + T (Windows)**
- **Start recording: Cmd + Shift + R (Mac) / Alt + R (Windows)**
- **Pause or resume recording: Cmd + Shift + P (Mac) / Alt + P (Windows)**
- **Mute everyone (host only): Cmd + Ctrl + M (Mac) / Alt + M (Windows)**
- **Unmute everyone (host only): Cmd + Ctrl + U (Mac) / Alt + M (Windows)**

3. Security and Practice Settings That Matter

- **Know where settings are saved:** Changes made through the Zoom web portal - usually at CompanyName.zoom.us - do not take effect until you click Save. Changes made in the desktop or mobile app save automatically. (Zapier's Zoom Tips.)
- **Turn off participant renaming when names matter:** Once a hearing or other formal proceeding begins, uncheck Allow Participants to Rename Themselves in Host Tools. That keeps a disruptive participant from changing a display name to look like opposing counsel, court staff, or a witness. (Sensei Enterprises' California Lawyers Association guide; 2026 Wisconsin Solo & Small Firm Conference materials.)
- **Watch the breakout-room recording trap:** A cloud recording captures only the main meeting. A local recording follows the host into whichever room the host enters. If you are mediating, pause or stop a local recording before entering a private caucus. Otherwise, you may record confidential settlement discussions without meaning to. (Sensei Enterprises' California Lawyers Association guide.))
- **Limit the data-center regions used for meetings:** Paid accounts can choose which regions may route meeting traffic. In the web portal, open the In Meeting (Advanced) settings and consider turning off regions outside the United States and Canada, including China and Hong Kong, when confidential client information is involved. (Selecting data center for meetings, webinars, whiteboards, notes and docs.)
- **Use No Fixed Time for recurring meetings:** For recurring office hours or client consultations, choose No Fixed Time. You can keep the same security settings and reuse the meeting link for up to one year. Do not use your Personal Meeting ID for client matters. (Zapier's Zoom Tips.)
- **Be careful with AI Companion and sensitive information:** Do not assume AI-generated summaries, smart recordings, or in-meeting questions are appropriate for every matter. Northwestern IT's guidance, for example, limits Zoom AI Companion to Level 1 and Level 2 data and prohibits it for Level 3 information, including PHI, HIPAA-regulated medical records, and highly sensitive business information. Check your own firm's policy and the client's requirements before turning it on. (Northwestern IT Generative AI Guidance and Data Classification Policy.)

Part 2: Microsoft Teams Cheat Sheet

1. The Main Controls and Organizer Settings

- **Pre-join screen:** Treat this as your final check before walking into the room. Make sure the camera is at eye level, the lighting is decent, Teams has the right microphone and speakers, and you are joining under the correct Microsoft account and organization. Then click Join now.
- **Meeting Options:** You can open Meeting Options from the calendar entry or the meeting itself. This is where the organizer controls who bypasses the lobby, whether attendees may use their microphones and cameras, when chat is available, and which role each person receives. (Microsoft Teams Support.)
- **Lobby settings:** Decide who may enter on their own and who has to wait. For a confidential client meeting or deposition, do not turn the lobby off. A sensible starting point is to let firm members and invited organizers enter directly while everyone else waits to be admitted. (Microsoft Teams Support.)
- **Roles - Organizer, Presenter, and Attendee:** Do not set Who can present? to Everyone. A presenter can mute people, remove participants, and start or stop a recording. Opposing parties, witnesses, and most outside guests should remain Attendees unless they truly need presenter rights. (Microsoft Teams Support.)
- **Content sharing:** Share a specific program window or PowerPoint file instead of your whole desktop. Full-screen sharing can put Outlook previews, Teams messages, and other notifications in front of everyone. (Microsoft Teams Support.)

2. Avoiding Audio and Video Problems

- **Two devices, one room, one awful noise:** Do not connect a laptop and phone - or any two devices in the same room - to the meeting audio at the same time. The result is usually an immediate and painfully loud feedback loop. (Wisconsin Solo & Small Firm Conference written materials; Microsoft Teams Support.)
- **Stay muted when you are not speaking:** This is especially important in court. If you use a telephone as your backup audio, mute both the microphone and speakers on the computer so you do not create an echo. (Wisconsin Court System guidance.)
- **Background blur is not a confidentiality tool:** Teams can blur or replace your background, but Microsoft warns that those effects may not hide papers, whiteboards, or other sensitive information. Move confidential material completely out of camera range before turning on video. (Microsoft Teams Support's background effects guide.)

3. Managing What Remains After the Meeting

- **Teams leaves a footprint:** A Teams meeting usually leaves more behind than a typical Zoom call. The meeting chat, shared files, and whiteboard notes may remain available to participants after everyone hangs up. Do not treat the end of the call as the end of access. (Microsoft Teams Support; Wisconsin Solo & Small Firm Conference written materials.)
- **Recording, transcription, captions, and recap are not the same thing:**
    - *Closed captions: Live captions appear during the meeting but are not saved as a separate file. (Microsoft Teams Support.)*
    - *Transcription: Creates a written record of what was said during the meeting. (Microsoft Teams Support.)*

  - *Recording: Captures the meeting's audio and video. Under the current Teams setup, starting a recording also starts transcription. (Microsoft Teams Support.)*
  - *Recap: Brings the recording, transcript, chat, notes, and available AI-generated material together in one place in Microsoft 365. (Microsoft Teams Support's recording and transcription guides.)*
- **Treat cleanup as a confidentiality issue:** Review what remains after the meeting. Remove temporary file shares and end or clean up ongoing chats with outside participants when the matter is finished and the platform allows it. This is part of protecting client information under SCR 20:1.6, not merely good digital housekeeping. (Wisconsin Formal Ethics Opinion EF-21-02, Working Remotely; Microsoft Teams Support.)

Part 3: The Five-Minute Emergency Troubleshooting Drill

When something goes wrong during a hearing or an important meeting, don't start experimenting. Work through these steps in order. They are drawn from Wisconsin Court System remote-hearing guidance and the Wisconsin Solo & Small Firm Conference materials.

The Problem	What to Do First
They can't hear me.	1. Make sure you are not muted in Zoom or Teams. (Zoom Support Audio Guide.) 2. Check that the meeting is using the right microphone. (Zoom Support Audio Guide.) 3. Look for a physical mute switch on the headset cord or microphone. 4. If that does not work, leave and rejoin or use the telephone dial-in number.
I can't hear them.	1. Check the computer volume and any controls on your headset. (Wisconsin Solo & Small Firm Conference troubleshooting guide.) 2. Make sure the meeting is sending sound to the right speaker or headset. (Zoom Support Audio Guide.) 3. Turn off Bluetooth on your phone in case it has taken over the audio. (Wisconsin Solo & Small Firm Conference troubleshooting guide.)
They can't see me.	1. Click Start Video. (Participant controls in a meeting.) 2. Check whether the camera's physical privacy shutter is closed. (Wisconsin Solo & Small Firm Conference troubleshooting guide.) 3. Close FaceTime, Skype, Photo Booth, or any other program that may already be using the camera. (Wisconsin Solo & Small Firm Conference troubleshooting guide.)
My internet is failing.	1. Stop other high-bandwidth activity on your network. (Wisconsin Solo & Small Firm Conference troubleshooting guide.) 2. Turn off your camera to preserve bandwidth for audio. (Wisconsin Solo & Small Firm Conference troubleshooting guide.) 3. Switch to your phone's cellular hotspot if it is available and reliable. (Wisconsin Solo & Small Firm Conference troubleshooting guide.) 4. Use the telephone dial-in backup and let the court clerk or mediator know what happened. (Wisconsin Court System remote-hearing tips.)
I shared the wrong thing.	1. Stop sharing immediately. In Zoom, use Cmd + Shift + S on a Mac or Alt + Shift + S in Windows. (Wisconsin Solo & Small Firm Conference troubleshooting guide.) 2. Do not explain first. Stop the share first. (Wisconsin Solo & Small Firm Conference troubleshooting guide.) 3. Close the wrong window, confirm the correct exhibit, and then share again. (Wisconsin Solo & Small Firm Conference troubleshooting guide.)
I am echoing.	1. Look for a second phone, laptop, or other device connected to the meeting audio in the room. 2. Mute the second device's microphone and turn its speaker all the way off.