Look Before You Leap:
Governance Tips for Making the Move to Office 365

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Viewpointe

Speaker Profiles

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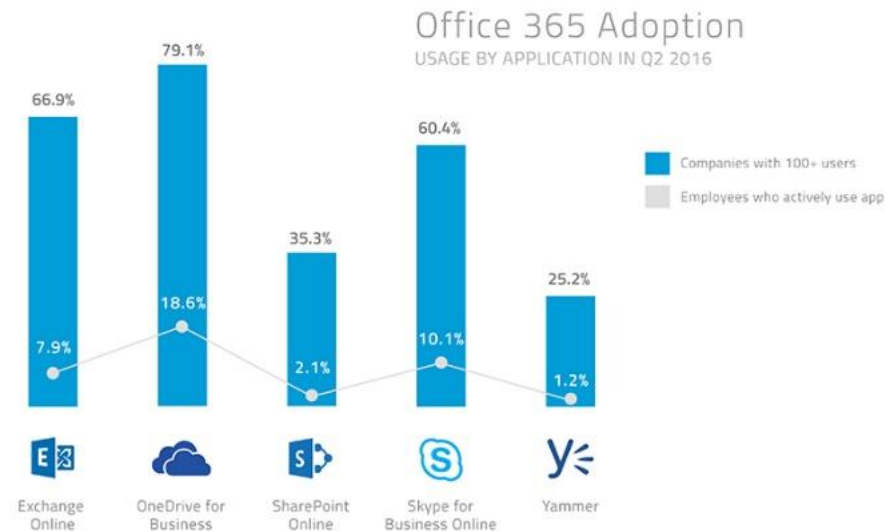**Scott Whipps**, Records and Information Manager, Honda North America Inc

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Microsoft Office 365 Adoption

- As of Q2 2016, 22.3% of enterprise employees use at least one Office 365 application
  - Up from 6.8% in Q3 2015
- O365 means different things to different people/departments in the same enterprise

Office 365 Adoption
USAGE BY APPLICATION IN Q2 2016

66.9% — Exchange Online (7.9%)
79.1% — OneDrive for Business (18.6%)
35.3% — SharePoint Online (2.1%)
60.4% — Skype for Business Online (10.1%)
25.2% — Yammer (1.2%)

Companies with 100+ users
Employees who actively use app

Source: Office 365 Adoption & Risk Report

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What is Microsoft Office 365?

- Cloud Microsoft Office Suite
- Content Creation
  - Word, Excel, PowerPoint etc.
- Collaboration and Communication Tools
  - SharePoint, OneDrive, Skype etc.

Not a full list of O365 applications

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Licensing Options

Office 365 ProPlus	Office 365 Enterprise E1	Office 365 Enterprise E3	Office 365 Enterprise E5
$12.00	$8.00	$20.00	$35.00
user/month	user/month	user/month	user/month
(annual commitment)	(annual commitment)	(annual commitment)	(annual commitment)
Buy now	**Buy now**	**Buy now**	**Contact sales**
Learn more ⊕	Learn more ⊕	Learn more ⊕	Learn more ⊕
Fully installed Office on PC/Mac with apps for tablets and phones	Online versions of Office with email and video conferencing	All the features of ProPlus and E1 plus compliance tools, information protection, and voicemail integration	All the features of E3 plus a new class of unified communications solutions with advanced Skype for Business meetings and voice capabilities
• (Email not included) • 1 TB file storage and sharing • Fully installed Office on PC/Mac • Office apps on tablets and phones • Self-service BI in Excel	• Email with 50 GB mailbox • 1 TB file storage and sharing • HD video conferencing • Office Online • Team sites	• Unlimited email storage for in-place archive • Advanced email with archiving and legal hold • Unified eDiscovery center • Rights management, data loss prevention, and encryption • Hosted voicemail support	• PSTN conferencing to dial in to Skype meetings from anywhere • Cloud-based call management with option to add PSTN calling • Advanced analytics with Power BI Pro and Microsoft MyAnalytics • In-place, Advanced eDiscovery • Advanced security with Advanced Threat Protection and Customer Lockbox • Enhanced visibility and control of your Office 365 environment

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Customer's Perspective

- Goals and Drivers for Microsoft Office 365
  - Cost savings
  - Cloud flexibility/scalability
  - Better integration/collaboration of Microsoft Office applications

- O365 Impacts
  - Compatibility with Outlook and other on-prem applications
  - Migration (resources, testing, data access)
  - eDiscovery Processes/Legal Holds/Investigations
  - Records Management Processes (retention, access)
  - IT Processes (termination, data sharing/access, investigations)

Customer's Perspective

- Potential Risks
  - New content types – skype, yammer, sway, etc.
  - Retention control – personal OneDrive content
  - Disposition of ROT
  - Security (can the correct users be granted/restricted access?)
  - Timelines (can current access/downloads of data be maintained?)

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Archiving Benefits

- **Implement Holistic Governance**
  - eDiscovery, compliance, records management
  - Collect and analyze enterprise content across sources

- **Reduce Risk**
  - Eliminate ROT
  - Analyze for PII, sensitive information
  - Secure content appropriately

- **Improve Access**
  - Organize data
  - Index content
  - Provide approved legal, IT, HR access

- **Decrease Spending**
  - Enforce retention and disposition schedules
  - Reduce overall data footprint
  - Streamline processes for legal, records, IT
  - Eliminate maintenance & infrastructure of legacy applications

How Archiving Prepares You for O365

- **Reduces Migration Stress**
  - Enables data cleanup in preparation for O365 rollout

- **Allows for Consistent User Access to Existing Content**
  - Provides backed up content to retain data completeness

- **Lay Out an Ideal Information Governance Strategy and Expectations**
  - Ensures that these governance strategies are transferred and known to end-users of the new system

Information Governance Gaps in O365

- **eDiscovery**
  - Necessary to export large amounts of data
  - Data comes from variety of sources outside Microsoft Suite

- **Compliance**
  - Limited compliance features depending on deployment model

- **Data Sources**
  - Only works with Microsoft-compatible applications
  - Over 40% of sensitive information is stored in non-Microsoft Office formats

Source: Office 365 Adoption & Risk Report

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Archiving for an O365 Customer

- **Holistic Governance Across Data Silos**
  - Archive allows for single point of control for information governance
  - O365 represents a new source of a wide variety of content and collaboration formats which require governance
- **Consistent eDiscovery Processes**
  - ECA search of archived content, pro-active eDiscovery
  - Case organization and review across content types
  - Notification and analysis without duplication/movement of data
- **Analysis and Compliance Review**
  - Route collected content through lexicon rules for categorization
  - Apply retention, review routing, and retrieval based on results
  - Streamline compliance review and report on review statistics

Takeaways

- Know your license and functional entitlements
- Know the game plan for what content/users will make the move to cloud
- Consider a cleanup before the move
- Moving to O365 is a process, and the process can be a multi-year phased plan
- Consider your information governance strategy—O365 might not be the only solution you need to achieve those goals
- Involve legal team before O365 decision is made
- Document and share legal/information governance requirements during each phase of O365 project