Risk and Reward

Five Critical Questions to Consider when Migrating to Microsoft Office 365

Tina Torres and John Rhoades

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Meet our Presenters

John Rhoades
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Background

- Has 20+ years of experience in Information Governance, Knowledge Management, Email Management, Records Management, eDiscovery, and Organizational Change Management

Summary of expertise

- Concentrates in leading large scale information governance projects focused on designing strategic roadmaps, building enterprise taxonomies, developing compliance tools, and implementing unstructured information systems such as Microsoft Office 365 (including SharePoint), Box, and IBM FileNet

- Collaborates with clients to solve complex issues and identify transformative opportunities rooted in managing information as a corporate asset

- Experienced across multiple industries, including Energy, Retail, Engineering and Construction, Insurance, and Public Sector

Background

- Has 18+ years of experience in Information Governance, Records Management, Information Privacy & Data Protection, Technology Solutions including O365 and SharePoint Online, Email Management, Data Archival & Decommissioning, and Litigation Preparedness

Summary of expertise

- Instrumental in developing records management policy features in technology solutions such as Microsoft Exchange and SharePoint in her role as Global Records Director at Microsoft.

- Experienced in advanced Information Governance (IG) strategies and methodologies to help organizations achieve their information goals in governance,

- Provides expertise and guidance such as designing, managing, planning, and implementing full-cycle IG and records management programs, developing advanced metrics and benchmarking, and integrating such risk management programs strategically and tactically into global businesses.

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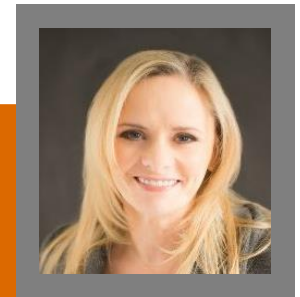
Objectives

01 List common drivers for migrating to Office 365

02 Utilize five critical questions to describe risks triggered by challenges in governing Office 365 content
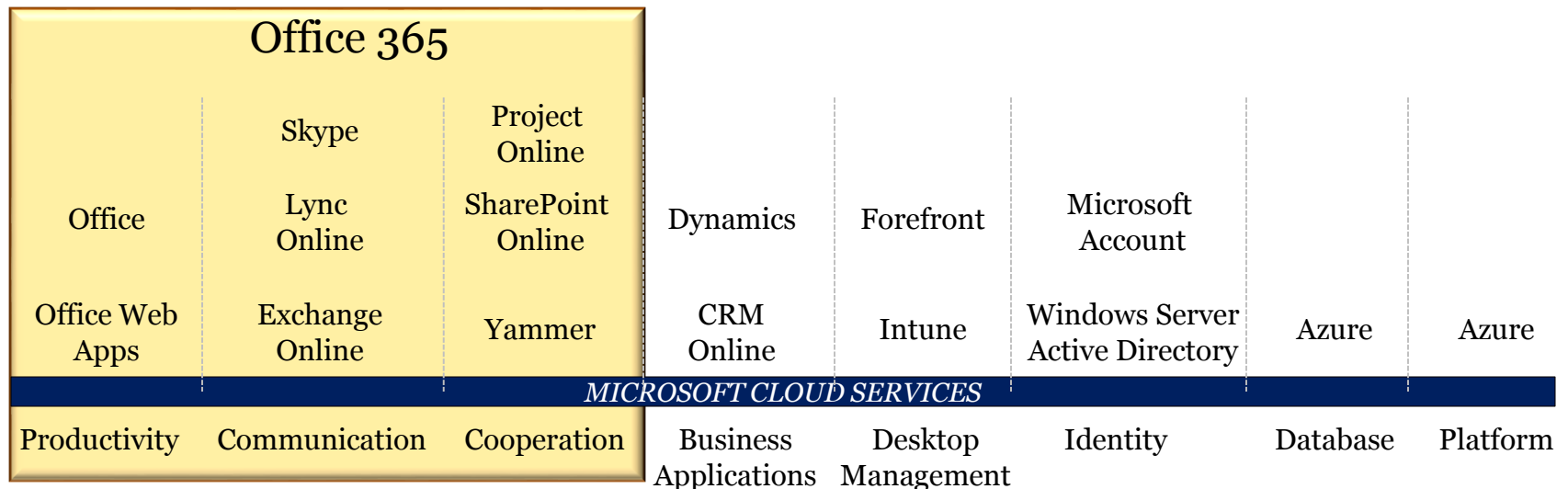
03 Identify mitigation tactics that enable capture of benefits while mitigating business risk

04 Define key considerations for managing legacy data in the transition to Office 365
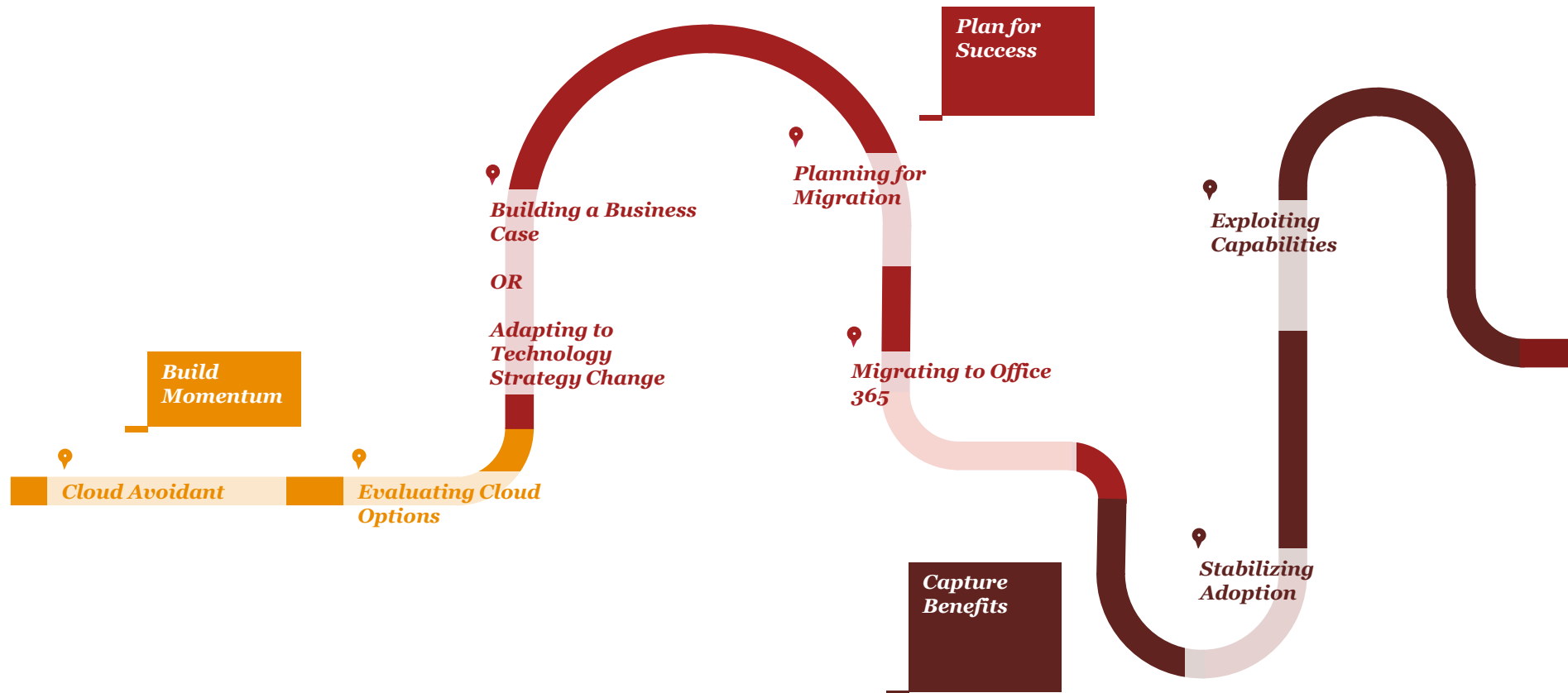
The Microsoft Cloud Spectrum

Our Focus For Today

Office 365

			Dynamics	Forefront	Microsoft Account		
Office	Skype	Project Online					
	Lync Online	SharePoint Online	Dynamics	Forefront	Microsoft Account		
Office Web Apps	Exchange Online	Yammer	CRM Online	Intune	Windows Server Active Directory	Azure	Azure

MICROSOFT CLOUD SERVICES

Productivity	Communication	Cooperation	Business Applications	Desktop Management	Identity	Database	Platform

O365

Where is your company on the road to Office 365?

Plan for Success

Planning for Migration

Building a Business Case

OR

Adapting to Technology Strategy Change

Build Momentum

Cloud Avoidant

Evaluating Cloud Options

Exploiting Capabilities

Migrating to Office 365

Stabilizing Adoption

Capture Benefits

Polling Question #1

Please answer the following polling question by:

Phone: Texting "jenfries048" to 22-333 and then texting your corresponding answer (either A, B, C, D, or E)

Computer: Typing in pollev.com/jenfries048 in your web browser and then selecting your corresponding answer (either A, B, C, D, or E)

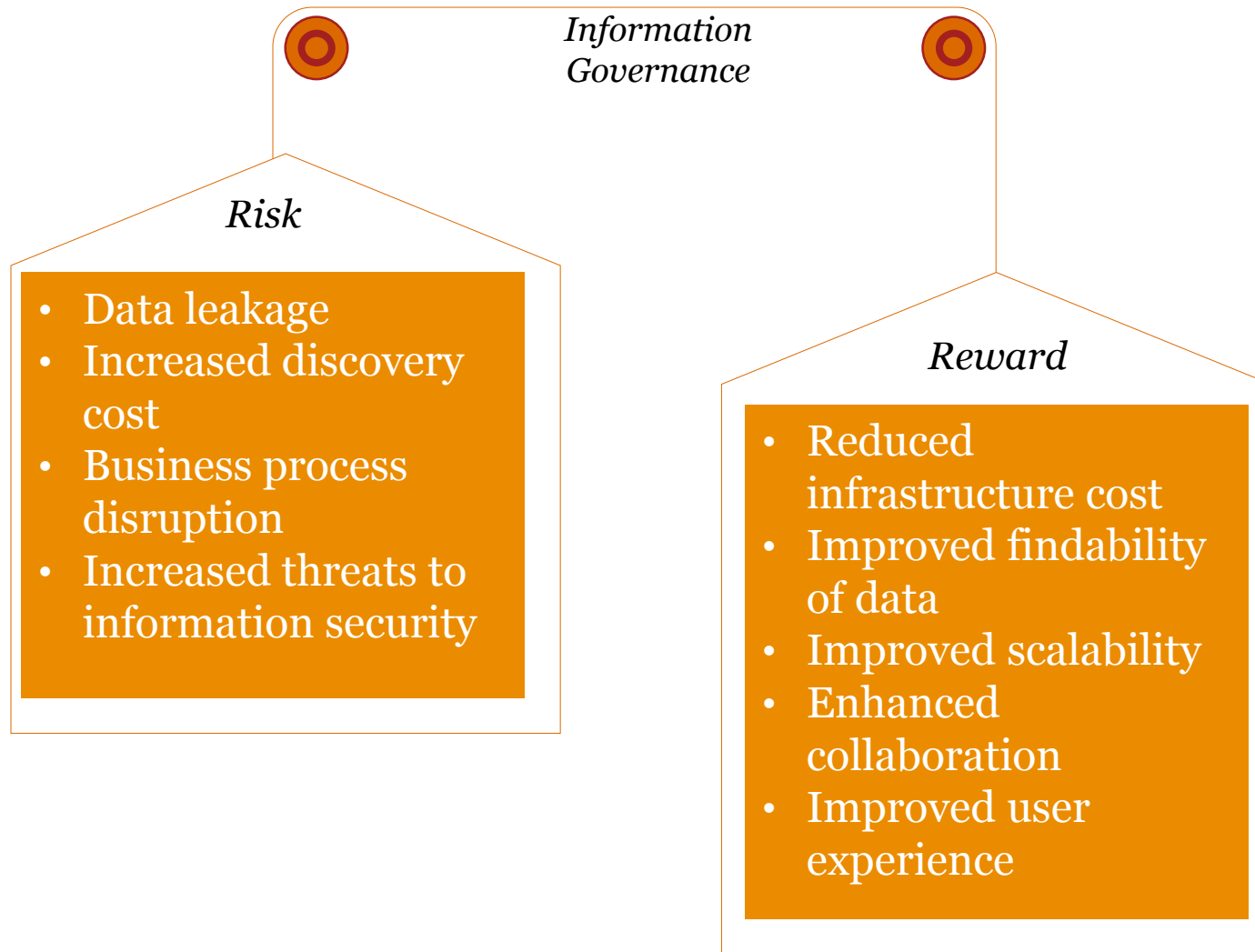> What was the primary factor for your organization to move to Office 365?

A) Technology strategy to move away from internal data center/scalability

B) Better licensing deal for Office 365

C) Feature improvements

D) Business process improvement

E) Risk Avoidance

F) N/A – my organization has not decided to move to Office 365

What was the primary factor for your organization to move to Office 365?

ⓘ Poll is full and no longer accepting responses

A) Technology strategy to move away from internal data center/scalability	28%
B) Better licensing deal for Office 365	24%
C) Feature improvements	8%
D) Business process improvement	4%
E) Risk avoidance	
F) N/A - my organization has not decided to move to Office 365	36%

0% 5% 10% 15% 20% 25% 30%
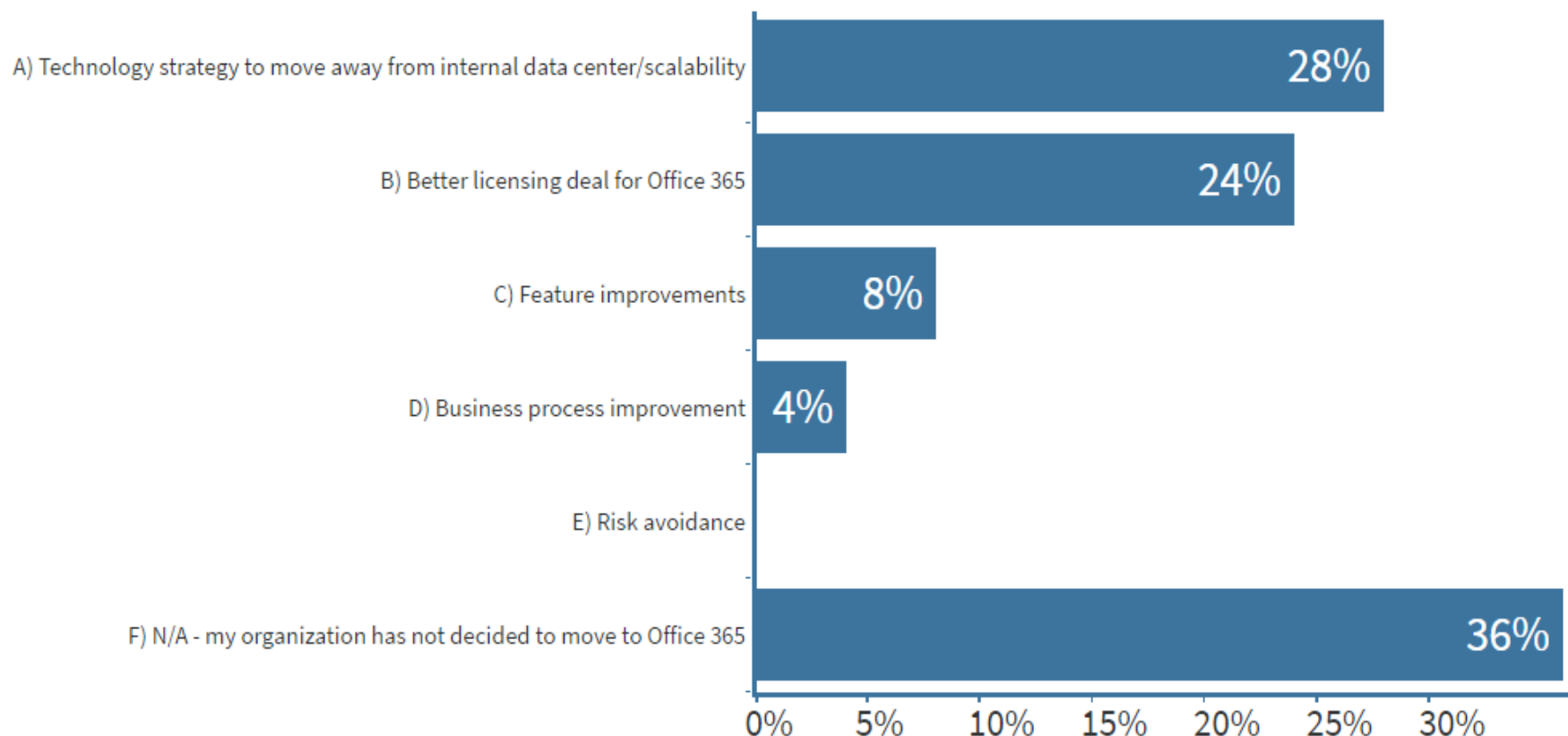
Drivers for Office 365: Balancing risk and reward

Information Governance

Risk

- Data leakage
- Increased discovery cost
- Business process disruption
- Increased threats to information security

Reward

- Reduced infrastructure cost
- Improved findability of data
- Improved scalability
- Enhanced collaboration
- Improved user experience

Five critical questions - primary risks triggered by challenges in governing Office 365

1

How will you perform preservation and discovery against cloud based content?

2

How will your information governance policies, processes, and procedures need to change?

3

What do you do with existing landfills of information as you migrate to the cloud?

4

What new privacy and security issues could develop?

5

How will existing user behaviors need to change?

Question 1: How will you perform preservation and discovery against cloud based content?

Key Risks

- Challenges integrating Office 365 and your existing hold order management systems could frustrate efforts to preserve content

- Increased individual storage capacities could increase discovery costs due to an exponential growth in content

- Orphaned applications that remain as repositories may increase the complexity and effort of discovery
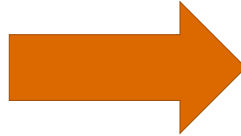
Mitigation Tactics

- Map discovery process flow against technologies to identify bottlenecks and fail points

- Reinvigorate information management policies and apply governance to unstructured content

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Sample discovery process flow
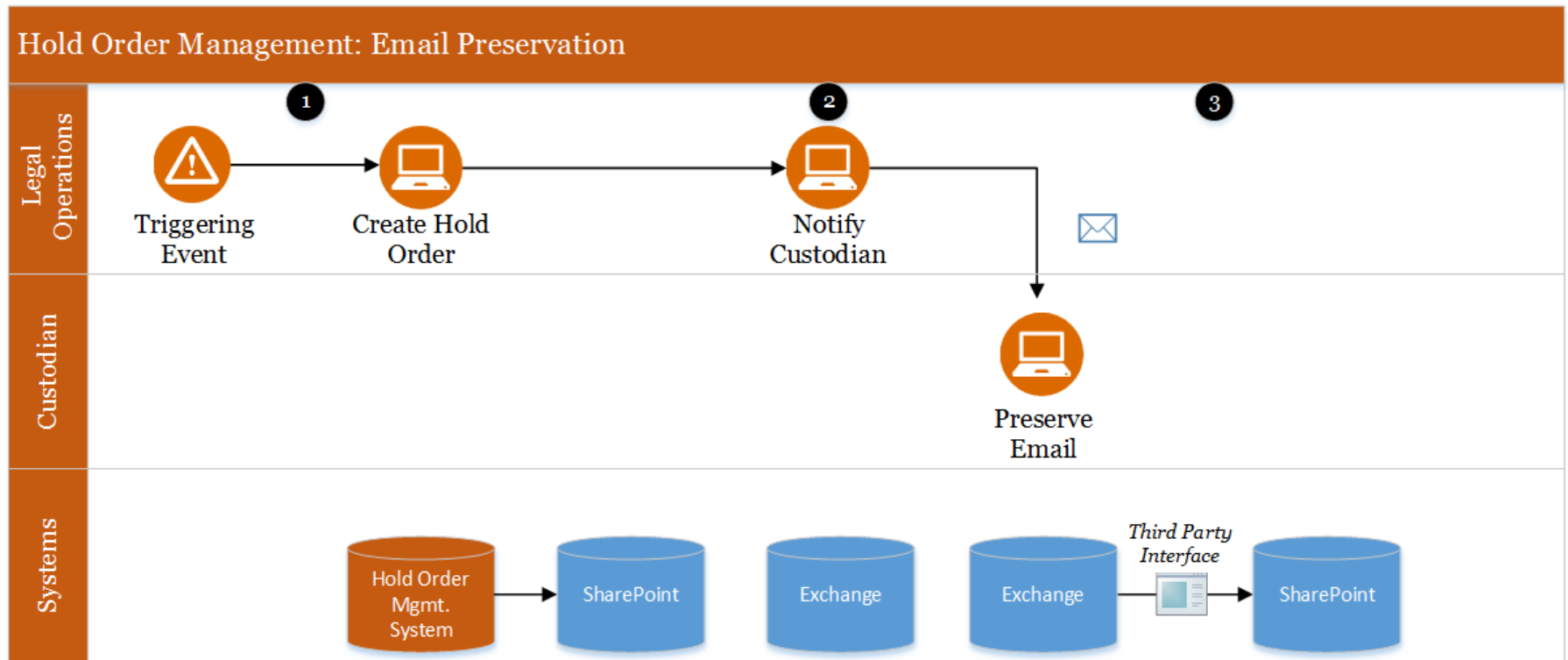
Question 2: How will your information governance policies, processes, and procedures need to change?

<u>Key Risks</u>

- Existing governance policies may not reflect the move to "social", increasing the risk of non-compliance

- Current focus may be on records management and not broader information governance challenges

- Lack of consistently applied data classification standards may frustrate efforts to strengthen information security
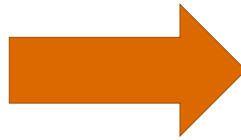
<u>Mitigation Tactics</u>

- Review policies for inclusion of messaging and social media

- Mobilize and empower a cross-disciplinary information governance council to develop standard and provide guidance

Information Governance Council

Organizations can champion information protection utilizing information governance.
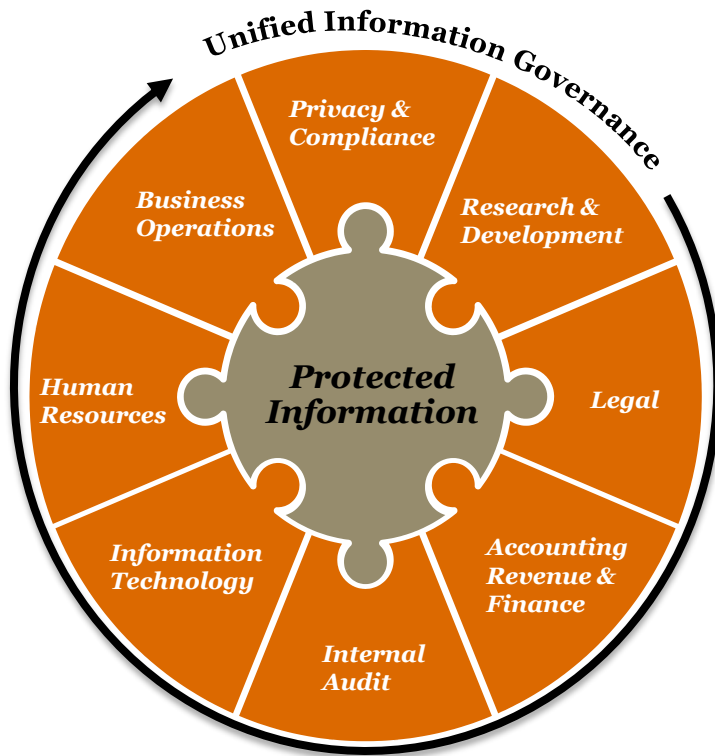
Who the Information Governance Framework applies to:

- Roles and responsibilities matrix for enterprise departments that handle sensitive information within and for an organization

What the Information Governance Framework provides:

- A structure to address sensitive information ownership, determine responsibilities for protecting the identified information, and translate into a prioritized actionable remediation roadmap

Question 3: What do you do with existing landfills of information as you migrate to the cloud?

<u>Key Risks</u>

- Discovery risk may increase as "dark" data is migrated to the new environment

- Data could be orphaned on file shares and endpoints as content is migrated

- Benefits case may be diluted by effort to migrate existing archive repositories
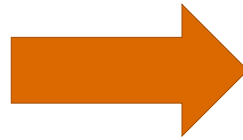
<u>Mitigation Tactics</u>

- Utilize a risk based approach to analyze existing information stores

- Identify target systems for decommissioning

- Develop a remediation / migration strategy that strikes the balance between what is done using available tools and what users will be required to perform

- Set reasonable timelines to achieve data migration

Disposition Landscape

Companies in general fall into one of two categories:

1
- Records need to be disposed
- Have not yet executed any disposition efforts

Rapid Movement

2
- Identification of sensitive data stores
- Standard developed disposition processes aligned to Information Governance program and policies for *active systems*
- Pilots/execution of key systems for disposition
- Regimented sun-setting of systems for IG policy

Key Industry Drivers

- ❖ **Cyber risk – without unnecessarily stored data, there is no need to protect it**
- ❖ **Privacy regulations and associated risks**
- ❖ **Storage, efficiency and stability of systems**
- ❖ **E-Discovery risks and associated costs**

Challenges in Systems and Data Decommissioning

Business Value of Content

Assessing the value of content in legacy systems is difficult due to lack of content classification features.

Content Deletion/Export

Legacy systems often don't have capabilities to purge content based on content type. Exporting content into formats legible by other systems or the human eye is difficult.

Data Access

Inaccessible data can't be read or triaged.

Processes

Business processes are not set up to encompass all the necessary steps for defensible disposition

Question 4: What new privacy and security issues could develop?

Key Risks

- Shift to social could surface content outside of user permissions

- "Dark" data that is migrated may not have the appropriate control associated with it

- Extending the enterprise increases risk of data leakage

- Continued release of cloud environment updates could create new threats
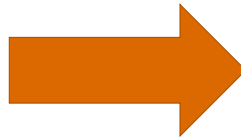
Mitigation Tactics

- Include Security and Privacy teams on your information governance council

- Conduct conference room pilots of technology that presents the most risk

- Define specific uses cases and benefits to extending access to third parties

- Judiciously conduct pilots with third parties to prove use cases

Question 5: How will existing user behaviors need to change?

Key Risks

- Increased storage availability could reinforce hoarding mentality

- Integrated repositories could create confusion on appropriate storage location for data
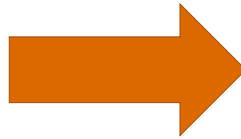
Mitigation Tactics

- Design a change management program to shift mindset to information as a corporate asset, much like cash or equipment

- Provide guidance on "what goes where"

Polling Question #2

Please answer the following polling question:

Which of the following will present the most challenge to your organization?

A) Defining a strategy for governing content in Office 365

B) Mobilizing an Information Governance Counsel

C) Migrating existing content into a governed repository

D) Mitigating privacy and security concerns

E) Changing user behavior

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Which of the following will present the most challenges to your organization?
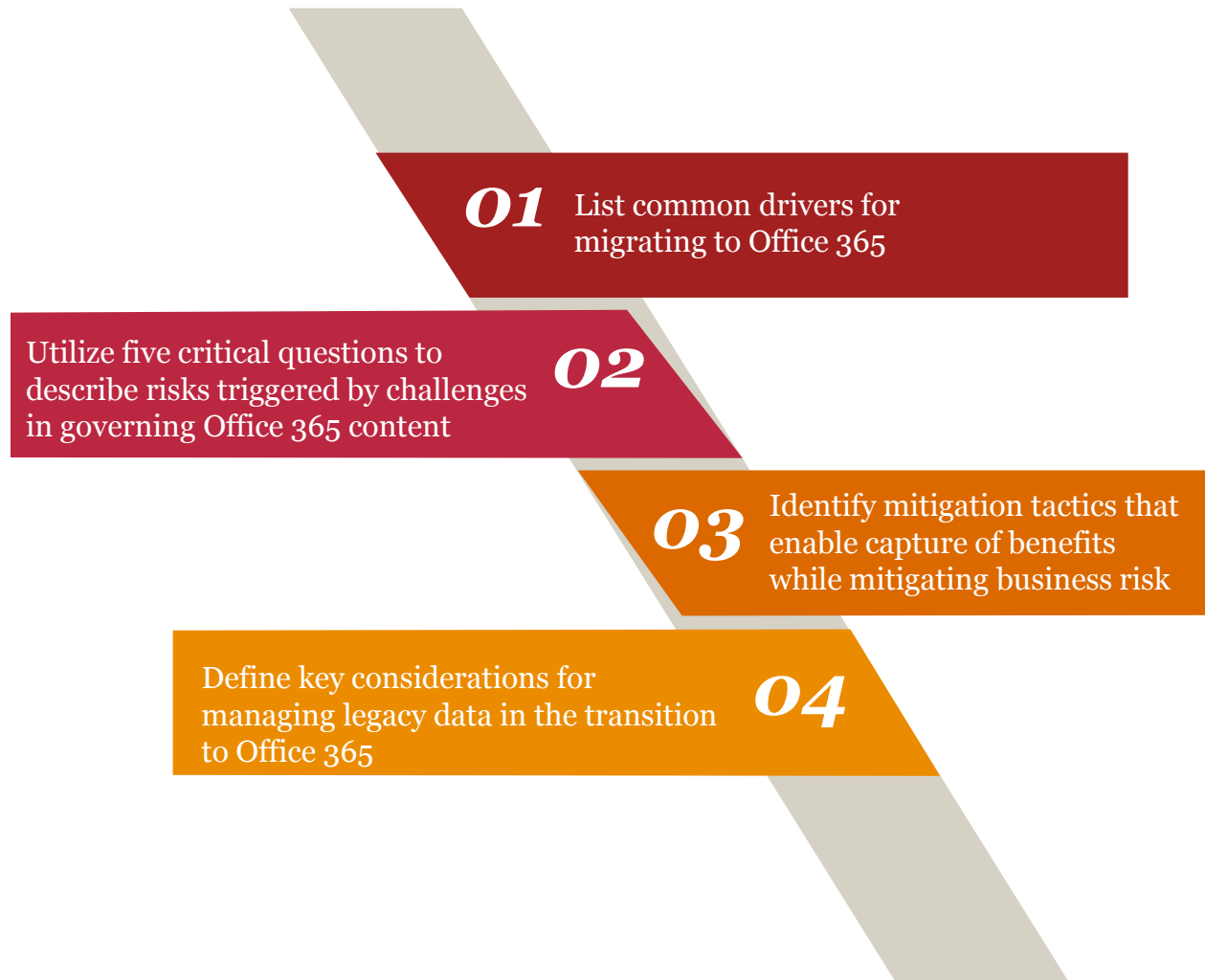
ⓘ Poll is full and no longer accepting responses

A) Defining a strategy for governing content in Office 365 — 40%
B) Mobilizing an Information Governance Council — 12%
C) Migrating existing content into a governed repository — 8%
D) Mitigating privacy and security concerns — 20%
E) Changing user behavior — 20%

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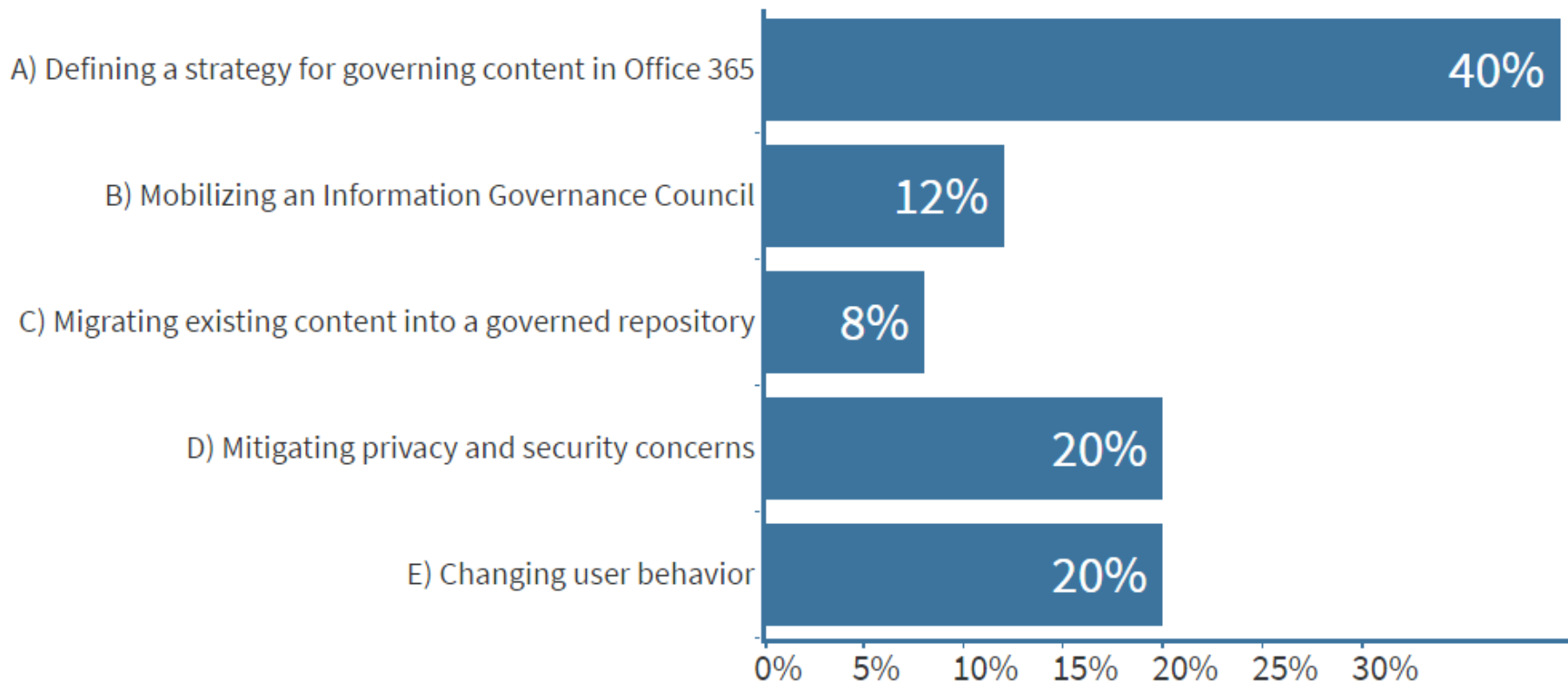
Final thoughts

- Migrating to Office 365 is a transformative event

- Information governance acts as the balancing agent between the risks and rewards of migrating to Office 365

- In the cloud, data is the only thing you will own-- implement governance and processes that can be sustained over time, not just enacted in support of implementation

- Pacing and communication are critical to gain user adoption

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Wrap-up and Q&A

01 List common drivers for migrating to Office 365

Utilize five critical questions to describe risks triggered by challenges in governing Office 365 content **02**

03 Identify mitigation tactics that enable capture of benefits while mitigating business risk

Define key considerations for managing legacy data in the transition to Office 365 **04**

Contact information

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