Records and Information Management Worth Bragging About

How to build an information management program that garners respect, not frustration

Microsoft Partner

Microsoft

Gold Application Development
Gold Collaboration and Content
Gold Cloud Productivity
Gold Messaging
Gold Datacenter

Collaborate with Confidence

Accessible content is available upon request.

Today’s Presenters

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We Are AvePoint

Leader in Microsoft 365 data management solutions

AvePoint® is headquartered in Jersey City, NJ, with approximately 1,500 employees across 29 offices, 14 countries, and five continents.

8M
Cloud Users

88
Countries

7
Continents

Microsoft Partner
Microsoft

5x
Partner of the Year Award Winner

AVPT
Nasdaq Listed

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Starting Where Your Users Work:

A Collaboration Platform for Long Term Success

Microsoft 365 – The Hub for Collaboration

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A Best-Practice Approach to Information Architecture and Knowledge Management in Office 365

Don't try and organize your information by department… think about the information type instead.

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Collaboration’s Beef with Information Management

Does IM Care About Collaboration Tools?

270

million monthly active users in Microsoft Teams

17%

higher satisfaction with access to digital collaboration tools

+75%

employees **perform better** in collaborative environments

Used by **90%**

of Fortune 500 companies

400%

growth in Microsoft Teams since March 2020

60%

"digital workplace has helped the company be more agile"

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Teams in use
Abandoned Teams
The Information Manager

3 Key Lifecycle Stages

Provisioning

- Are you going to enable self-service?
- Do you want managed provisioning done by IT?
- Or a combination of both?
- Are native user options OK or is more governance required?

Ongoing Management

- How do you track data ownership on an ongoing basis?
- How do you ensure the right users have the right access at the right time?
- Is there a need to gather, maintain and report on common governance details?

Expiration/End Of Life

- Do you have a “Managed” de-provisioning process?
- What are your triggers to start the process?
- Do you have Records Management requirements that need to form part of this process?

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Why Engagement is Critical

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Aligning IM to your Workspaces

Metadata

What is essential for business purposes?

- Is additional metadata required for disposition triggers?
- Does the business area require metadata for searching, viewing or reporting?
- What are you keeping just because you always had it?

Rules

Is there a lifecycle for required content?

- Declaring records?
- Moving content to different locations?
- Retaining outside Microsoft 365 for long term storage?
- Export?

Approvals

- Before you action content for lifecycle outcomes, who do you need to ask?
- How many approval steps do you need to go through?
- How are you maintaining a record of the approvals?
- Can you assign approval processes to both a rule and a location?

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You’re Collaborating…Now What?

Aligning your information management strategy

Information Managers

Microsoft 365

Machine Learning and AI

For machine learning and automated intelligence to truly be useful, you must first understand the outcome you want to achieve.

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Bragging Rights

Information Management & Responsibility

A system doth not a problem solve

*- Shakespeare**

**probably*

Perfection is not an option

Choose your 'critical mandatories'

User Experience is key

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The Essentials Are the Same

1

Retention & Disposal Rules
(what is the outcome for our information?)

2

Business Classification Scheme
(used to tag the rules to the content)

3

Information Architecture
(the structure where the content lives)

→ **The Path is Different**

Things to Remember

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Resources

IM Lifecycle Program

Information Lifecycle Management

M365 Compliance

RM vs. O365 Native Brochure

Records E-Book

Microsoft 365 Records Management Roadmap

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thank you

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