



Discover the intelligent solution to Email Management



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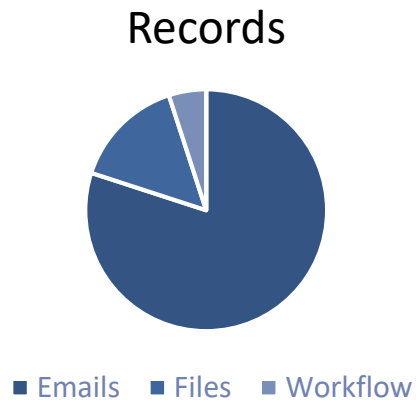
Email is Here to Stay. Sort of...



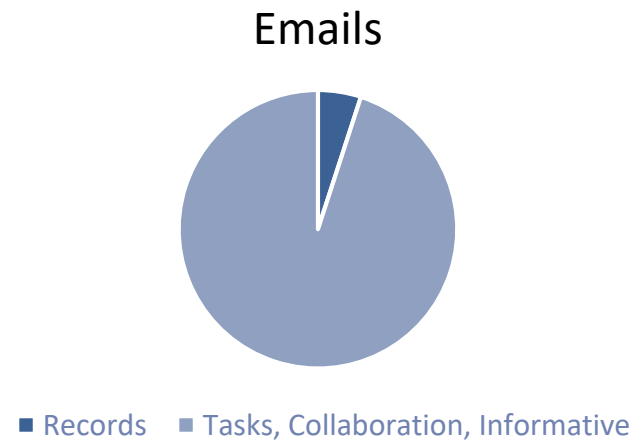
Where Are Your 'Documents' of Record?



80% OF IMPORTANT RECORDS IN AN ORGANIZATION ARE EMAILS



ONLY 5% OF BUSINESS EMAILS ARE RECORDS



“The Record Needle in the Email Stack”



- **Contracts**
- **Proposals**
- **Client correspondence**
(professional services)
- **Formal reviews**
- **Deeds**
(state and local government)
- **Building Plans**
(construction, utilities, oil & gas, energy)
- **Maintenance schedules/plans**
(construction, utilities, oil & gas, energy)

Poll: Have you had instances where lost emails have cost you?



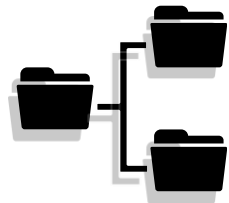
- a. Time
- b. Money
- c. Loss of business
- d. Regulatory penalties



The Anatomy of Email Management



&



CAPTURE

CLASSIFY

DISCOVER



Poll: How do your users currently manage important emails?

- a. Personal mailboxes and PST files
- b. Shared mailboxes
- c. Public folders
- d. SharePoint
- e. Another document management system

Solutions



Dedicated Email Management Solutions





Dedicated Email Management Solution

Pros



- Powerful functions since the solution is custom-built for email management
- Intelligently predict which folder to file a particular email
- Large file-size storage capabilities allow you to handle large amounts of data per file
- Top of the range security is built into the solution
- Advanced analytics based on user activity, often tailored to specific industries to help professionals work smarter

Cons



- Expensive
- Duplicates capabilities of the Microsoft products you already own
- Huge overhead in integrating, deploying, and managing with existing tools and infrastructure
- Considerable training and roll-out initiatives to get the user adoption levels you need to make the solution work for the organization.
- More than you need to fulfil your business requirements
- An additional vendor/product to maintain, service, and train employees

Microsoft-based Email Management

Know Your Options



Option #1



Emails in Exchange



Documents in SharePoint

Drag Your Favorite Folders Here

anniet@ravenwood-corp.com

- Inbox 5
 - Demo
 - Drafts [27]
 - Sent Items
 - Deleted Items 122
 - Archive
 - Clutter 694
 - Collage
 - Conversation History
 - harmon.ie 54
 - Junk Email
 - Outbox
 - RSS Feeds
 - webinar
 - Search Folders
 - Groups
 - Private Group
 - group
 - Project
 - d Attachments Group
 - More...

Search Current Mailbox Current Mailbox

Focused Other By Date ↓

Other: New messages (2)
Ashley, from harmon.ie

Last Month

- Harmon Young
OneDrive example
Driving Change.pptx
12/11/2018

Older

- Harmon Young
Please review
SharePoint document links:
11/26/2018
- Maya Bickson
Topics demo urls
From: Yaarit David <yaaritd@harmon.ie>
11/13/2018
- Harmon Young
Crown Project
From: Ron Johnsen <ronj@harmon.ie>
11/7/2018
- Maya Bickson
collage url
https://demo.colla.ge/static/index.html?mode=browser
11/6/2018
- Harmon Young
Please review
SharePoint document links:
11/2/2018
- Harmon Young
Overhead image
SharePoint document links:
10/29/2018
- Harmon Young
Please review
AGRICULTURAL LEAS4.docx
10/29/2018

Emails in Exchange

Home BP Bird Protection Team Site

Search

+ New Upload Quick edit Sync Export to Excel Flow

Home Documents

Site contents Marketing Campaigns Recycle bin Edit

Name	Modified	Modified By
Wash Reserve Board Emails	December 25, 2018	Admin Account
A World Richer in Nature.xlsx	December 25, 2018	Admin Account
Albatross.docx	January 1	Fred Neal
Archaeological Study.docx	December 25, 2018	Admin Account
Audience Profiling.xlsx	January 2	Fred Neal
Avocets and stilts overview.docx	January 1	Fred Neal
Banner Ad - Visitor Experience....	January 2	Fred Neal
Birds without Borders Infograph...	January 2	Fred Neal
Conjura Attribution Modeling P...	December 25, 2018	Admin Account
Contract Template.docx	December 25, 2018	Admin Account
Data analysis.xlsx	December 25, 2018	Admin Account

Return to classic SharePoint

Documents in SharePoint

Option
#1

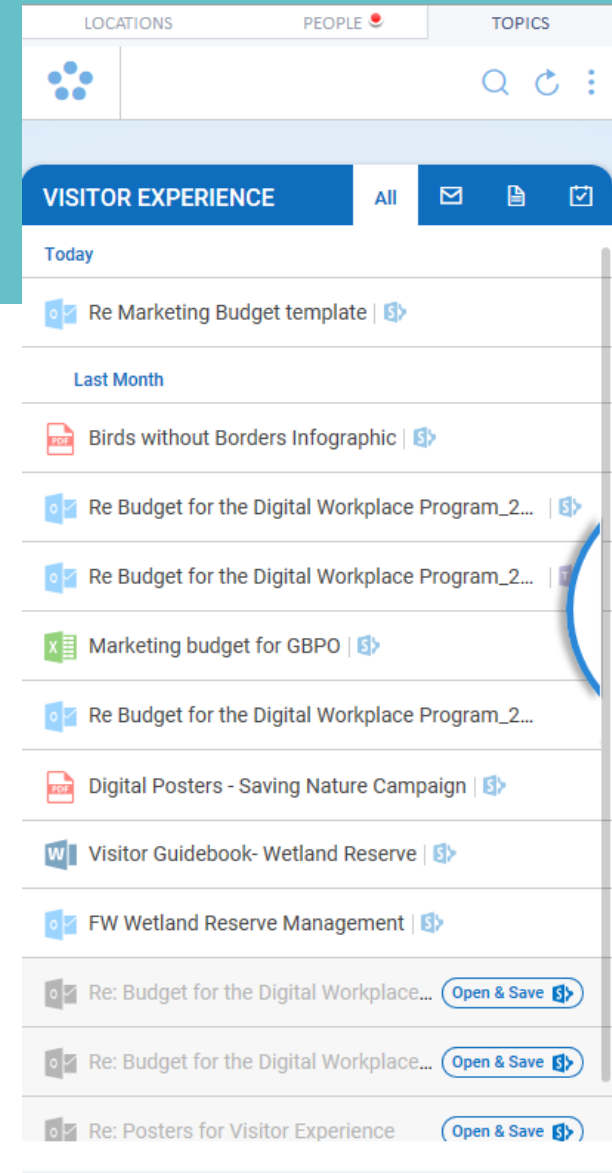


Emails in Exchange



Documents in SharePoint

The Microsoft Graph can be used to generate topics that help knowledge workers discover related emails and documents, regardless of where they are stored in Office 365



Option
#1



Emails in Exchange



Documents in SharePoint

Pros



- No need for user training
- Use Outlook rules to automatically archive emails
- With Office 365 Content Search eDiscovery tool, one search works for emails and documents

Cons



- Content is stored in multiple places; complex discovery
- No classification for emails makes them hard to find
- Mailbox size
- Emails not visible to colleagues and auditors
- What about attachments?

Option #2



Group Email Mailboxes/Public Folders



Documents in Teams

The screenshot shows the Outlook interface with a group mailbox for 'Tech Sales'. The left sidebar shows 'Favorites' including 'Inbox 26', 'Demo', 'Sent Items', 'Drafts', 'EMEA', 'WW Sales Team', and 'Tech Sales 3'. The main pane shows a list of comments on tasks, such as 'OWA Save multiple emails [Hiiton]' and 'Site Blocking - should block before trying to connect'. A blue callout box in the bottom left corner contains the text 'Group Email Mailboxes'.

The screenshot shows the Microsoft Teams interface. The left sidebar shows a list of channels including 'Marketing', 'SP Conference NA', 'WW Sales Team', 'General', 'Weekly Scrum', 'harmon.ie Management', '2019 Sales Meeting', '3 Year Growth Plan', and 'Inside Sales and Marketing'. The main pane shows the 'Logjam Tours > General' channel with a 'Files' tab selected. A table of files is displayed:

Type	Name	Modified	Modified by
Image	topic board.jpg	10/23/18	David Lavenda
Document	harmon.ie 2018 information overload ...	10/23/18	David Lavenda

A blue callout box in the bottom left corner contains the text 'Documents in Teams'.

Option
#2



Group Email Mailboxes/Public Folders



Documents in Teams

Pros



- Emails are visible to colleagues/auditors
- Easy to set up Groups/Teams to get started
- With Office 365 Content Search eDiscovery tool, one search works for emails and documents

Cons



- Content is stored in multiple places; complex discovery
- No classification for emails makes them hard to find
- Users need to manually move emails
- Team documents get stored with no metadata
- What about attachments?

Option #3

Emails *and* Documents in SharePoint

Office 365 | SharePoint

Home
BP Bird Protection Team Site

Search

+ New | Upload | Quick edit | Sync | Export to Excel | Flow | ...

Property Renewal Options (2).xlsx	December 25, 2018	Admin Account	
Property Renewal Options.xlsx	January 2	Fred Neal	Marketing Budget
Re Budget for the Digital Workp...	4 days ago	Fred Neal	
Re Budget for the Digital Workp...	4 days ago	Fred Neal	
Re Budget for the Digital Workp...	4 days ago	Fred Neal	
Re Budget for the Digital Workp...	4 days ago	Fred Neal	
Re Budget for the Digital Workp...	4 days ago	Fred Neal	
Re IT Requirements for Fundrais...	January 2	Fred Neal	
Re Marketing Budget template...	4 days ago	Fred Neal	
Reserve Aerial Photos.jpg	January 6	Fred Neal	Marketing Budget
Reserve Extension Plan.docx	January 2	Fred Neal	Marketing Budget
Reserve Strategy.docx	January 6	Fred Neal	Marketing Budget
Review this RFE from Kronos.msg	January 1	Fred Neal	
Saving Nature Infographic.pdf	January 6	Fred Neal	Marketing Budget

Emails

Documents



Pros



- Single repository for all important information
- Single interface for all important information
- Makes of built-in permission model
- Uniform metadata for emails and documents
- eDiscovery captures all important information with single procedure
- *Able to the leverage the Microsoft Graph to introduce intelligent email management*

Cons



- Additional step needed to upload email messages to SharePoint

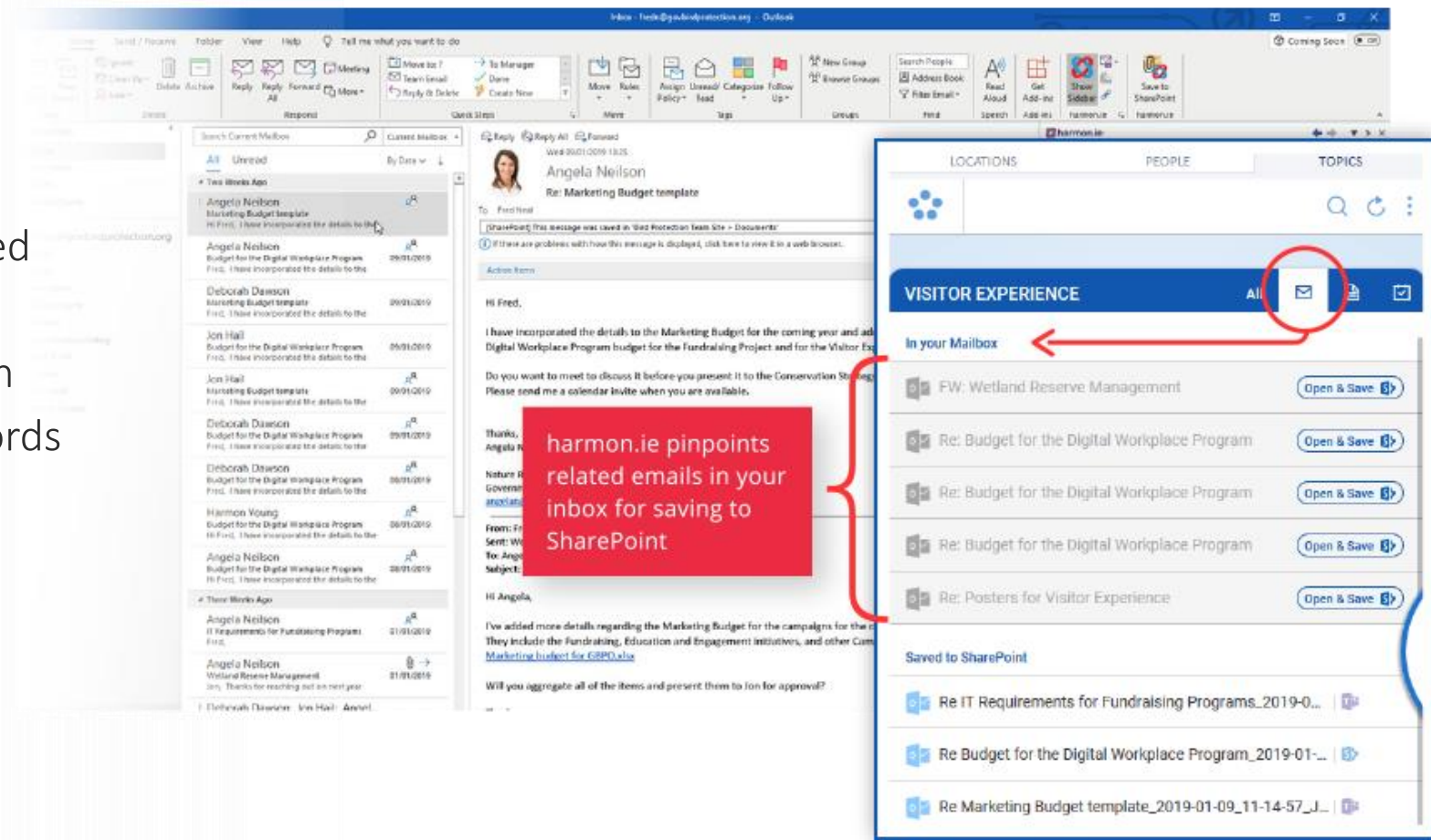
Option #3

Emails



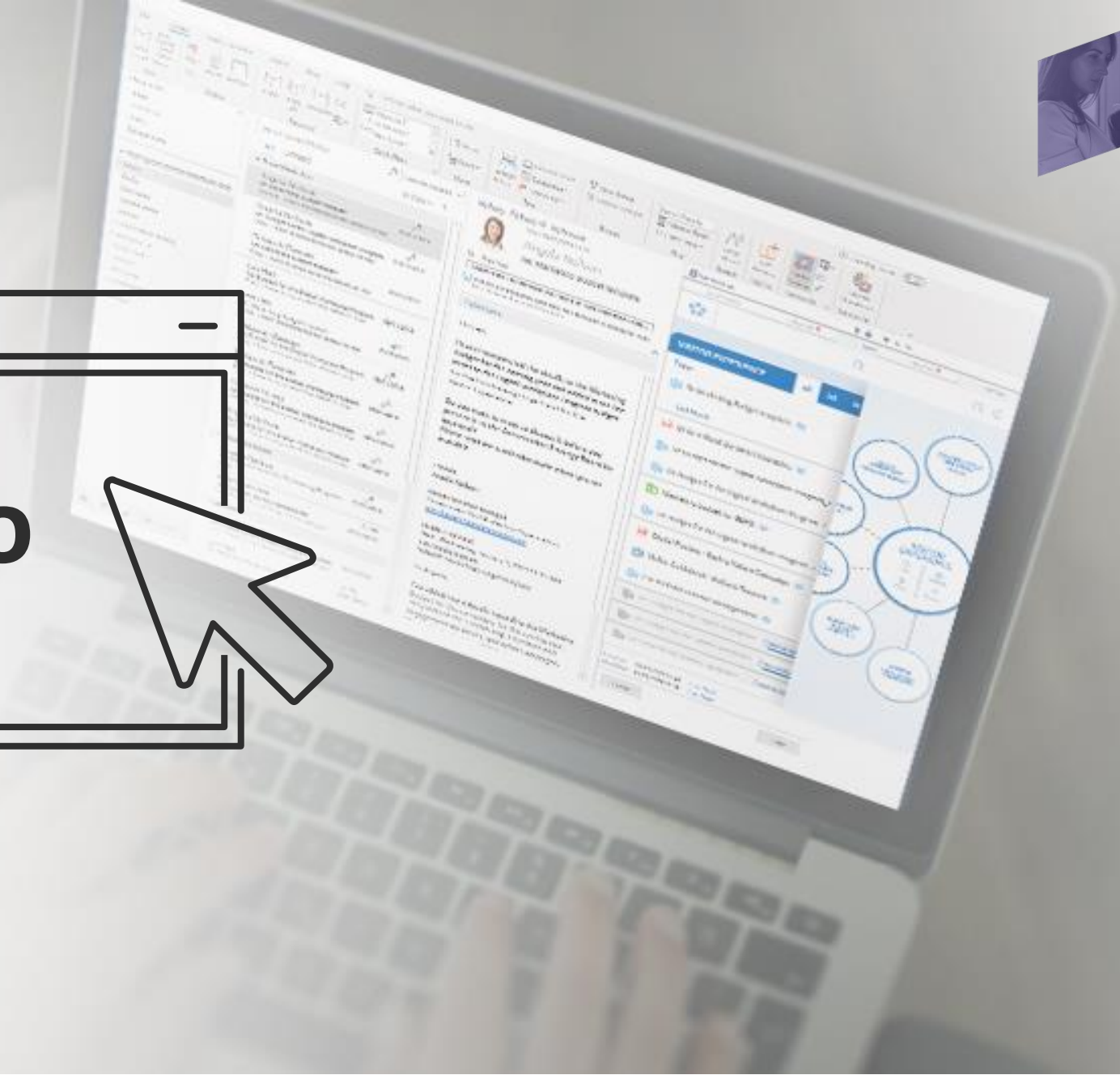
Documents in SharePoint

The Microsoft Graph can be used to generate topics that help knowledge workers select which emails need to be saved as records





Demo





What About Office 365 Labels?

The screenshot shows the Office 365 Security & Compliance center. The left-hand navigation pane includes: Home, Alerts, Permissions, Classifications, Labels, Label policies, Sensitive info types, and Data loss prevention. The 'Labels' menu item is highlighted with a blue callout box containing the text 'Office 365 Labels'. The main content area shows the 'Labels' page with a breadcrumb 'Home > Labels'. There are two tabs: 'Sensitivity' and 'Retention', with 'Retention' highlighted in yellow. Below the tabs, there is a text description: 'When published, labels appear in your users' app... example, you can create labels that retain conten...'. There are three buttons: '+ Create a label', 'Publish labels', and a partially visible button. Below the buttons is a list of checkboxes: 'Name', 'Hiring records', 'Project closure', and 'OneDrive retention label'.



Office 365 Labels

Pros



- Retention policies can be added to labels
- Consistent labels can be applied to emails and documents

Cons



- Limited classification
- Policy management is complex
- Emails and documents are stored in separate repositories
- Labels need to be applied to each type of content separately in Exchange, OneDrive, etc.
- Automatic labeling can take up to 7 days to be applied
- Policies can only be set with E5 licensing



Poll: Are you planning to use any of the following Microsoft capabilities?

- a. Teams
- b. Labels
- c. Group mailboxes
- d. None of the above

Recommendation

Do you need to find
emails and documents
later?

YES

Single
repository

Uniform
metadata

NO

Emails
Exchange

Office 365
Labels



Recommendation

For an email management initiative to be successful, the business user experience needs to be in **focus**



Would you like to be contacted by a harmon.ie representative?



1. Yes, I'm an existing customer
2. Yes, I'd like to trial harmon.ie
3. Yes, I have some questions
4. No, thanks