



2019

SharePoint Surgery

SharePoint for Professional Services



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Email Management for Professional Services

Your business runs on email
“Emails You Must Find”

ROT* emails



Important business emails



Email records



Your “Important Business Emails” Needs

- Client correspondence
- Knowledge Sharing and Retention
 - Maintaining and find subject matter and expertise
 - Geographically-dispersed teams
 - Employee turnover
- Proposal building
- Maintain a digital paper trail for every case and project
- Be compliant with corporate records mandates
- Be compliant with industry regulations

Top 4 Email Management Challenges

1. Inconsistent email capture and classification

- Insufficient capture
- Business operations losses
- Liability



2. Inconsistent retention schedules

- Non-compliance
- Over-retention
- Information security breaches

3. Non-standard and ineffective search

- Complicated event/document correlation
- High eDiscovery costs



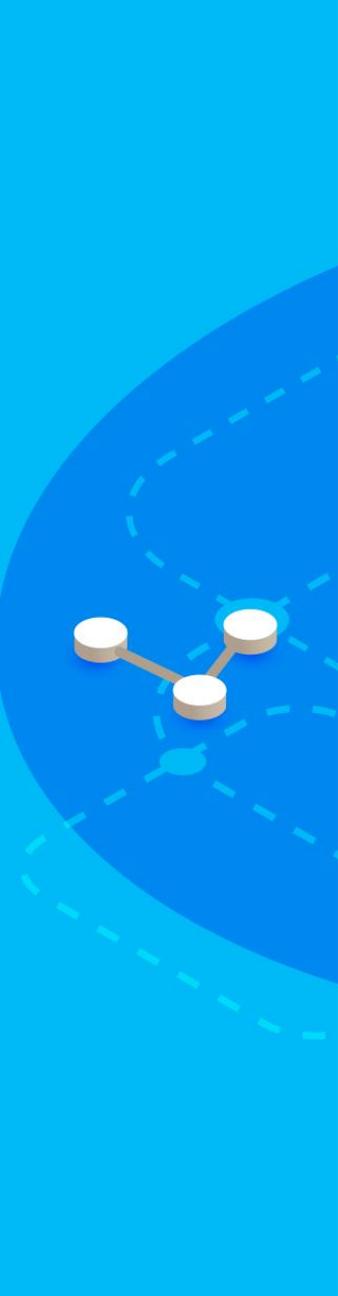
4. Lack of end-to-end governance

- Inability to effect organization changes

Poll Question #1

How do you currently store emails related to client inquiries and requests?

- In SharePoint
- In Exchange
- A different 'off the shelf' document and email management system
- A bespoke solution
- We're looking for a new solution



What's the Right Platform for Managing Client **Emails** (and **Documents**)?

- Dedicated 3rd party solution for email management
- Microsoft-based solutions
 - Exchange for emails, SharePoint for documents
 - SharePoint for emails and documents

Email & Document Management

Microsoft-based Options



TYPE OF CONTENT	EXCHANGE		SHAREPOINT	
	RETENTION	CLASSIFICATION	RETENTION	CLASSIFICATION
Important Business emails	X	X	Labels	Metadata
Email records	Labels	X	X	X
Email Attachments	X	X	Labels	Metadata
Documents	X	X	Labels	Metadata

Accurately classifying emails and documents is the key to finding them later

- Labels define *retention* policies in Outlook and SharePoint
- Metadata in SharePoint provides (the only) descriptive classification, to find information later

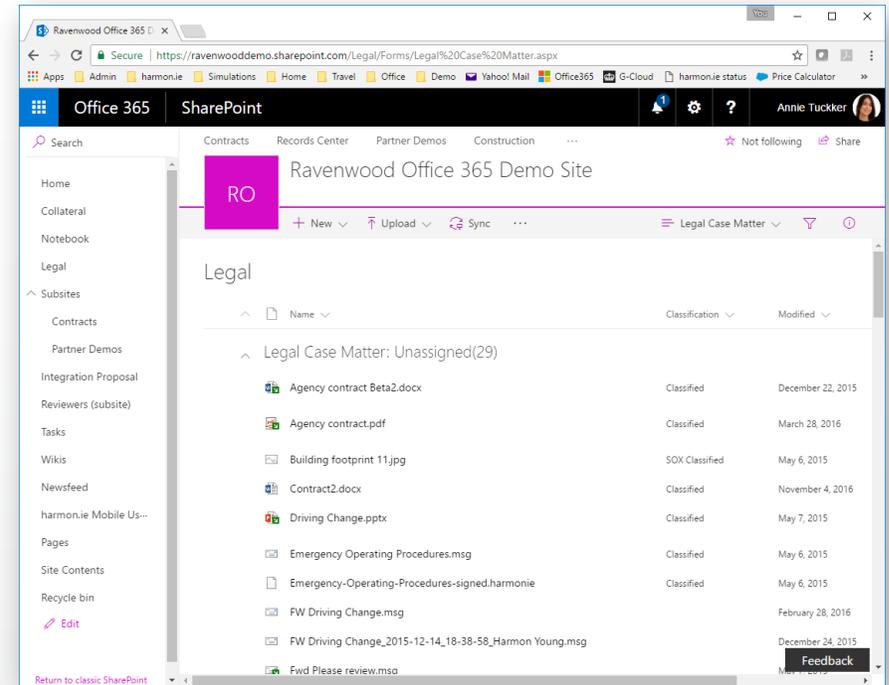
Poll Question #2

Do you use Microsoft labels to apply retention policies?

- Yes, 'in-place' – emails in Exchange, documents in SharePoint
- Yes, - emails and documents in SharePoint
- Yes, but only for emails in Exchange
- Yes, but only for documents in SharePoint
- No

SharePoint is the best solution, but...

- Users may have come from a bespoke system, that meets specific needs
- Those systems typically have a tight e-mail integration
- On its own, SharePoint isn't the **single interface** that business users need / like / want to use – people spend their worktime in Outlook



SharePoint is the best solution

It's the ideal **single platform** 

- Manage e-mail communication and documentation together – in context
- Metadata can be utilized to organize and classify
- Search all data together

Is **SharePoint** the best solution?

YES



with Outlook and harmon.ie



harmon.ie helps “Make the right thing the easy thing”

How do you collaborate?

With clients

- Capturing documents and e-mails
- Sending and receiving documentation
- Maintaining document versions



How do you collaborate?

With colleagues

- Sending and receiving links
- Identifying duplicates
- Updates
- How do I know if someone else has already filed this e-mail?

How do you know **what** content should be saved?

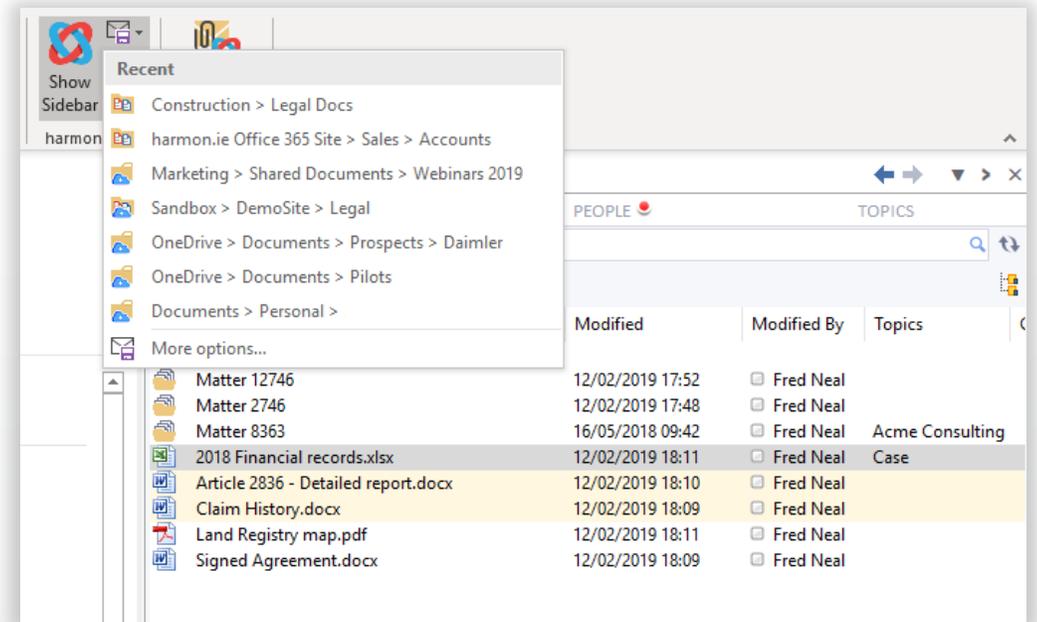
- Identify relevant Topics from e-mails you receive
- Use Topics to find related content
- Identify other content to save

The screenshot shows a SharePoint interface for a site named 'harmon.ie'. The navigation pane on the left includes 'LOCATIONS', 'PEOPLE', and 'TOPICS'. The 'TOPICS' section is expanded to show 'ELECTRIC MOBILITY', which is further filtered to 'AUTOMATED DRIVING'. The main content area displays a list of emails under the heading 'In your Mailbox'. A blue callout bubble with the text 'Potential emails to save to SharePoint' points to the first three email entries: 'Automated driving competition', 'Innovations_2019-01-09', and 'Automated driving Planning 2019_'. Below this, a section titled 'Saved to SharePoint' lists various documents and files related to automated driving, such as 'Fly by wire_2019-01-09...', 'Robotics in Automated driving_2019-...', 'Assisted driving concept...', 'Assisted driving framework...', 'Driving Safety instructions...', 'Driving Safety guidelines...', 'Automated driving program...', 'Automated driving competition...', and 'Automated driving components...'. Each entry includes a small icon representing the file type and a 'Save' button.

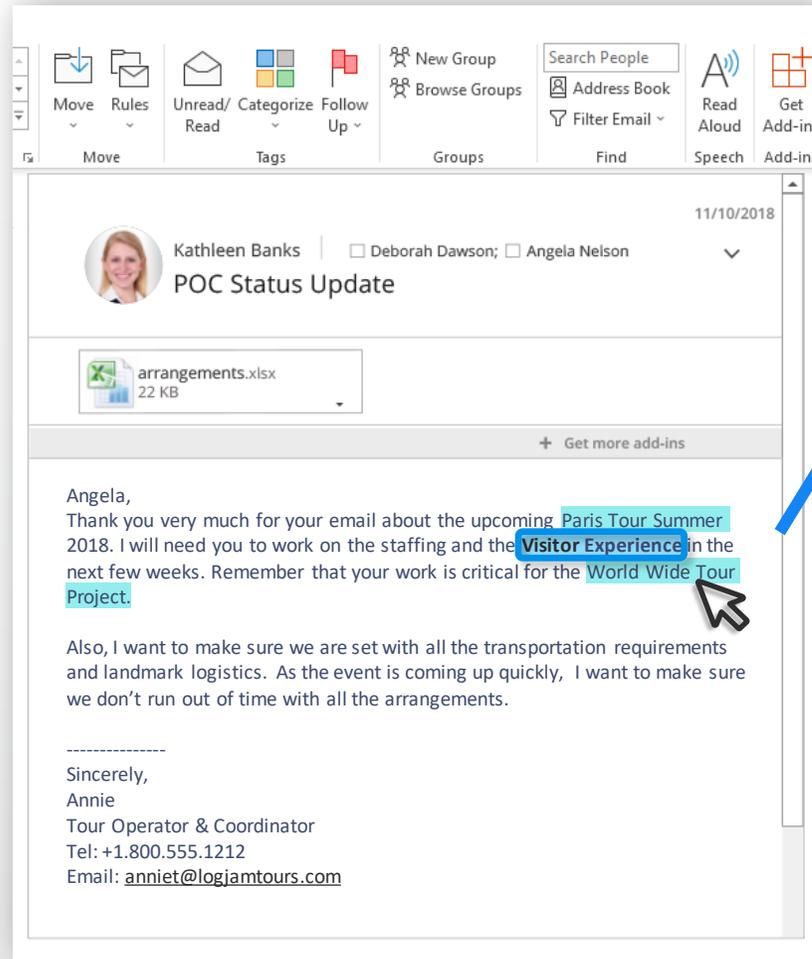
How do you know
where the content
should be saved?

Suggest locations based on:-

- Where related content has already been stored
- Where you have recently been working



Finding Related Information Using Topics



11/10/2018

Kathleen Banks | Deborah Dawson; Angela Nelson

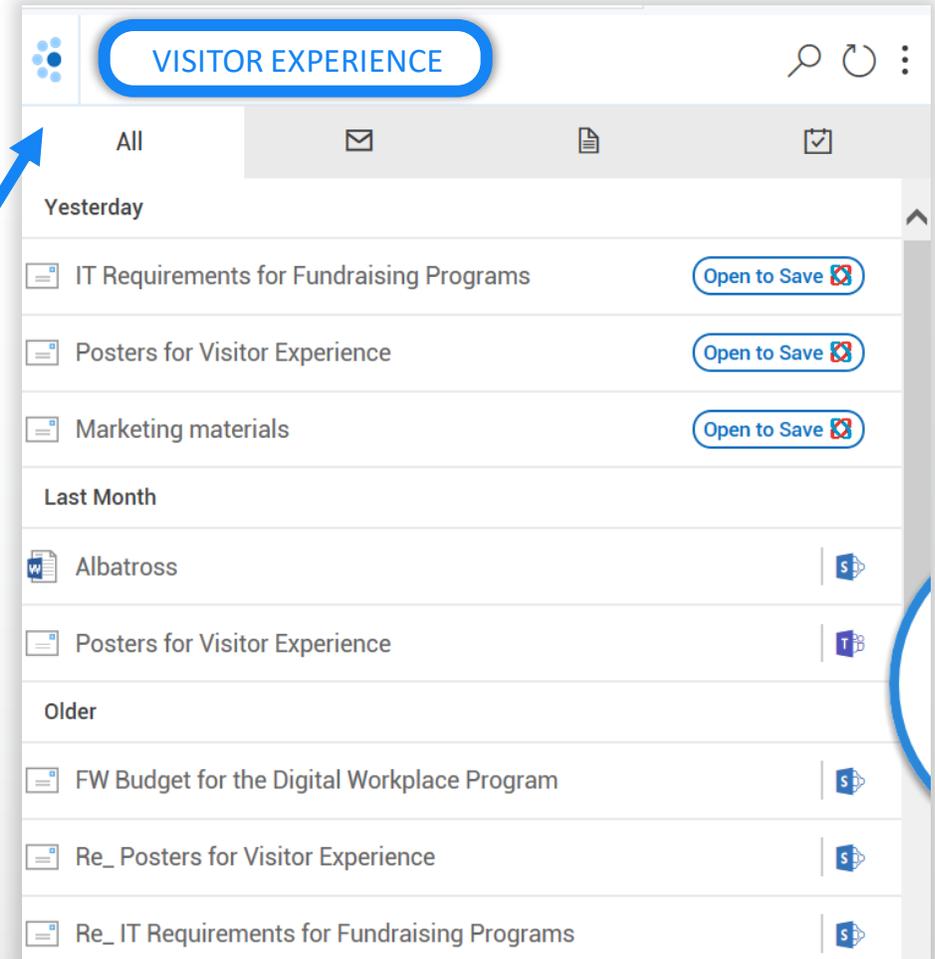
POC Status Update

arrangements.xlsx
22 KB

Angela,
Thank you very much for your email about the upcoming Paris Tour Summer 2018. I will need you to work on the staffing and the **Visitor Experience** in the next few weeks. Remember that your work is critical for the World Wide Tour Project.

Also, I want to make sure we are set with all the transportation requirements and landmark logistics. As the event is coming up quickly, I want to make sure we don't run out of time with all the arrangements.

Sincerely,
Annie
Tour Operator & Coordinator
Tel: +1.800.555.1212
Email: anniet@logjamtours.com



VISITOR EXPERIENCE

All

Yesterday

- IT Requirements for Fundraising Programs [Open to Save](#)
- Posters for Visitor Experience [Open to Save](#)
- Marketing materials [Open to Save](#)

Last Month

- Albatross
- Posters for Visitor Experience

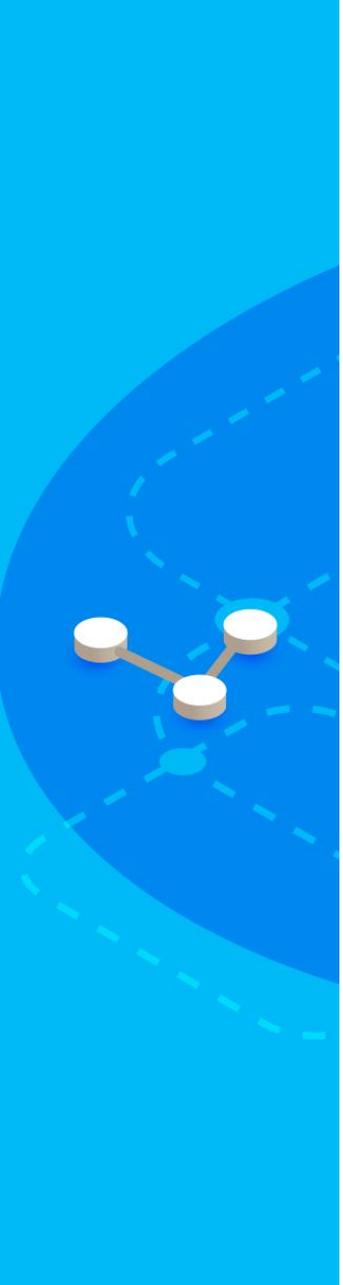
Older

- FW Budget for the Digital Workplace Program
- Re_ Posters for Visitor Experience
- Re_ IT Requirements for Fundraising Programs

Customer Case Study

- harmon.ie is a fundamental part of EYOS solution for both document and mail management
- included in standard EYOS training material
- POC with initial group of global representatives, to gather requirements and test deployment
- Global push to 40,000 EY Tax workers
- Planning to use OWA solution for Mac and web





Poll Question #3

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

