

Use Office 365 & Teams

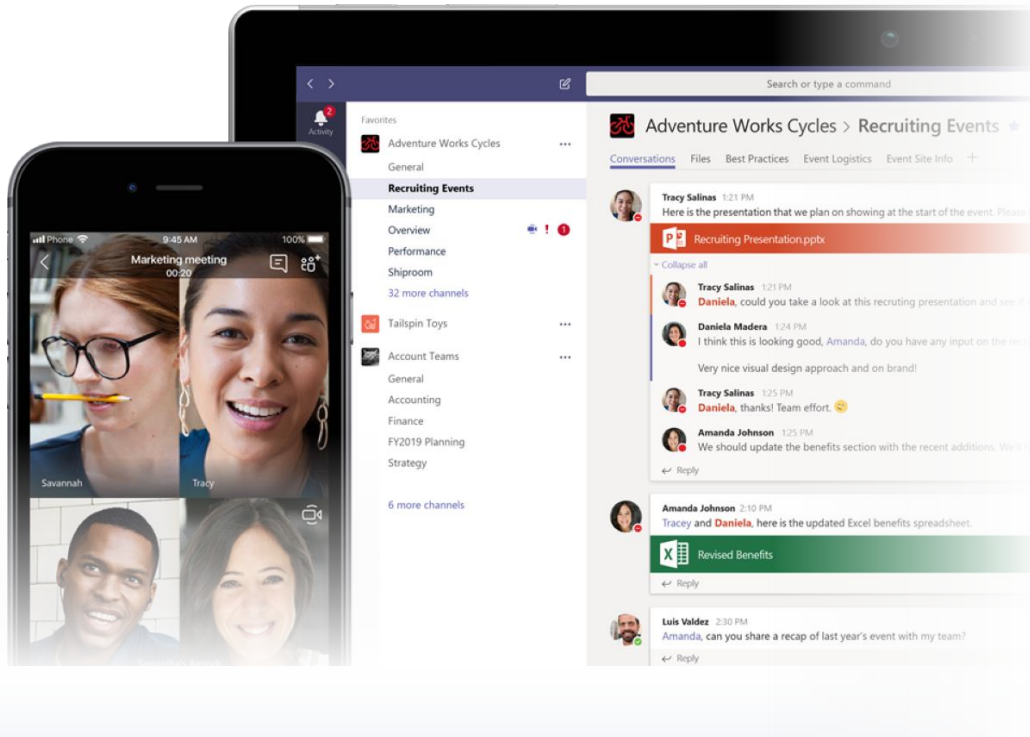
to Work with Clients, Partners, and Suppliers



Richard Poole,
CTO, EMEA

Microsoft Teams

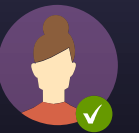
The Hub for Teamwork in Office 365



Fastest-growing Microsoft product of all time.

- 13M daily users
- Used in 91 of Fortune 100 companies

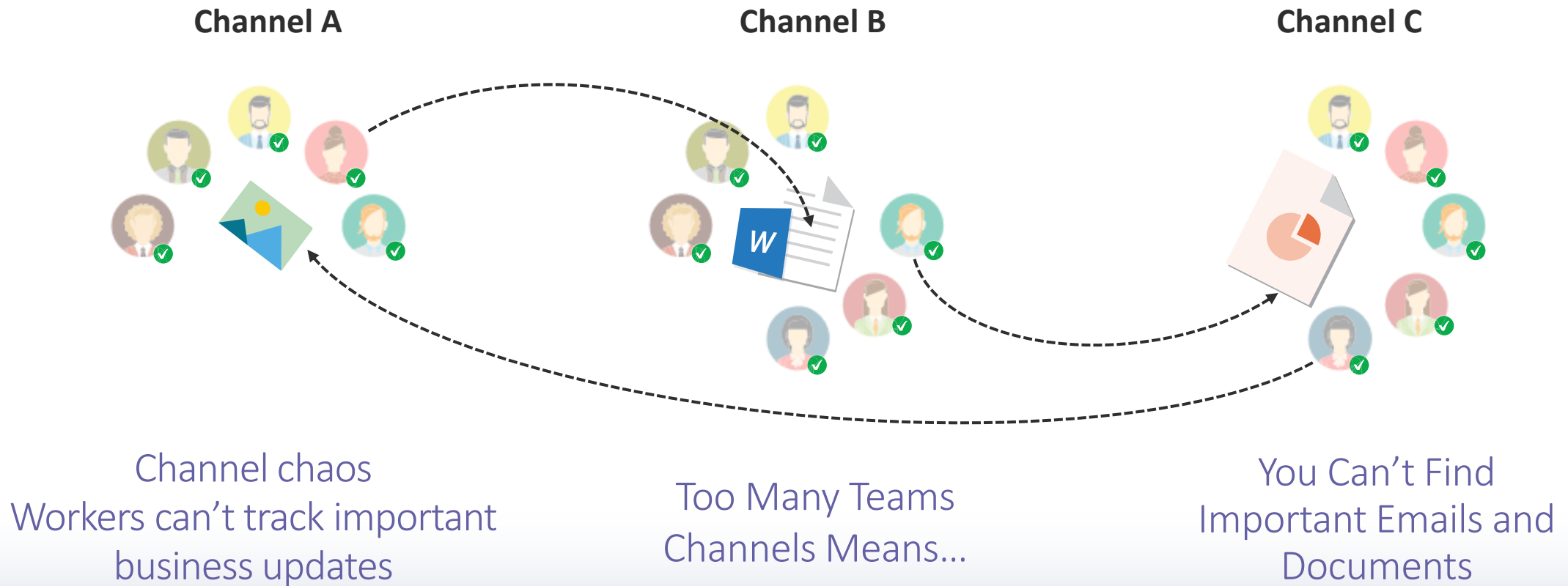
BUT THERE ARE
CHALLENGES



Challenge #1



Challenge #2



Challenge #3



How to Retain Emails &
Documents in a Teams
environment for Compliance

-A-

Story of Honor and Glory

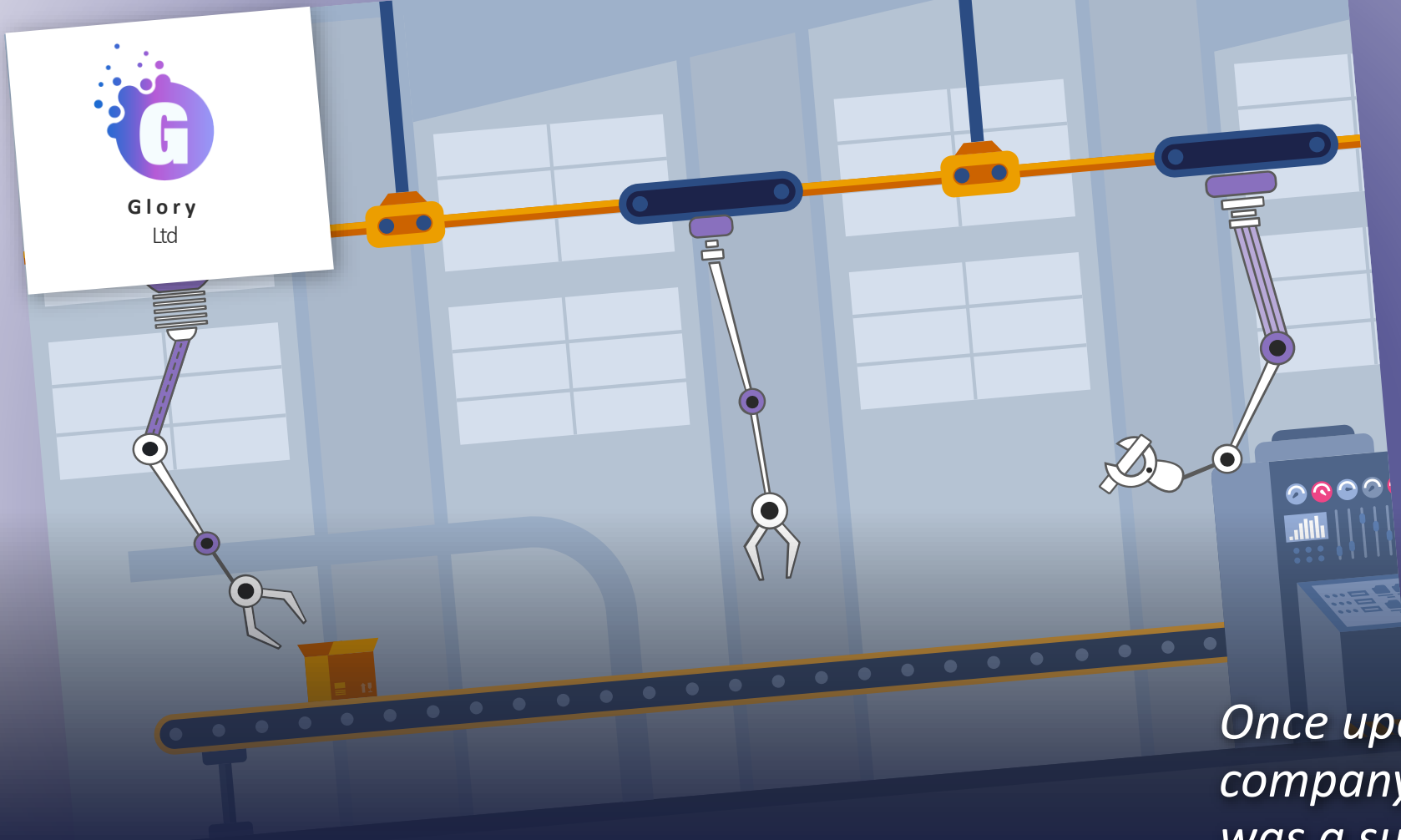


HONOR Inc.



Glory
Ltd

The Tale of
Meghan and Fred



Once upon a time, there was a company called Glory Inc. Glory was a successful manufacturer of industrial robots, making tons of money selling great robots.



HONOR Inc.

But then, the robot market started consolidating...

So Glory Inc. decided to explore a merger with Honor Ltd., another manufacturer of industrial robots

Introducing Meghan Williams...

Glory Ltd

Meghan Williams

Business Analyst
Glory Inc

- ABOUT ME
- RESUME
- PORTFOLIO
- BLOG
- CONTACT
- APPOINTMENT

Metric	Value
[Redacted]	20%
[Redacted]	60%
[Redacted]	80%
[Redacted]	80%
[Redacted]	90%
[Redacted]	70%
[Redacted]	20%

Meghan was tasked with building a business case for a merger with Honor Ltd.

Suddenly, out of nowhere a serious tax concern appears....



Business Analyst
Glory Inc

...what can Meghan do to save the merger?

One day, Meghan is introduced to Fred...

HONOR Inc.

Fred Thomas

Client Account Manager
Advize Consultants

- ABOUT ME
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Metric	Value
[Redacted]	20%
[Redacted]	60%
[Redacted]	80%
[Redacted]	80%
[Redacted]	90%
[Redacted]	70%
[Redacted]	20%

Fred and his team of 3 advisors, provide tax advice to corporate clients, like Glory Inc.

Can Fred and his Band of Merry Experts Save the Day?



HONOR Inc.

ABOUT ME

RESUME

PORTFOLIO

... and how can Microsoft Teams deliver Meghan and Glory from the evil tax implications



Meghan and Fred Work Together to Save the Merger



1.

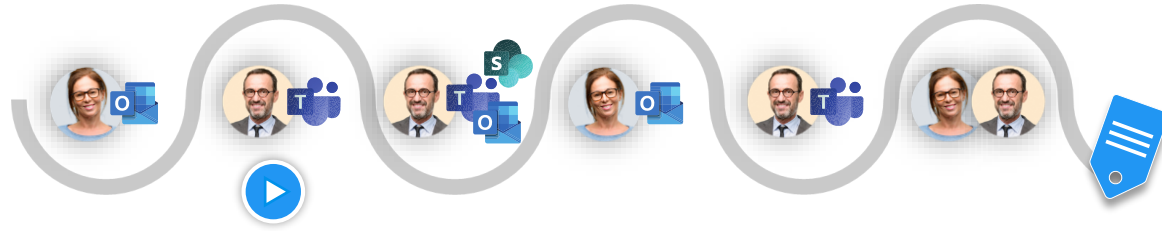


Meghan has questions about the tax implications of the merger.



Meghan sends an email and attachment to Fred

2.



Fred starts an internal discussion with colleagues to discuss the merger.



*Fred posts to the
“Accounts” team,
in the
“Glory Inc.” channel*

3.

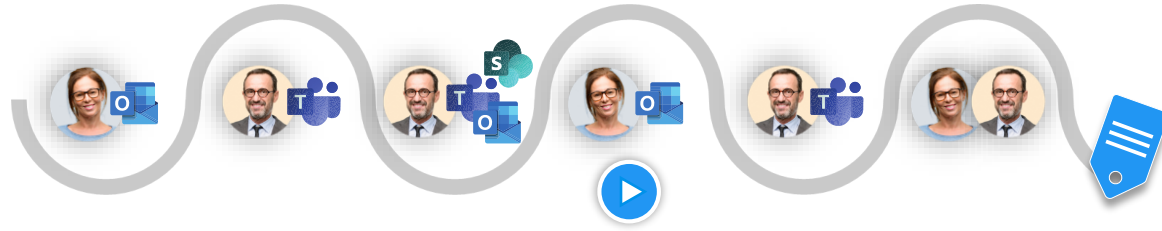


Fred's team formulates a draft 'tax opinion letter'



Fred emails the draft of the opinion letter to Meghan.

4.

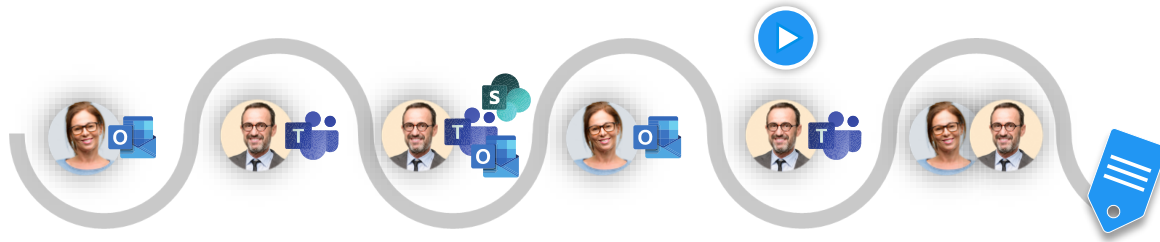


Meghan has more questions.



*More deliberation and emails...
When there are no more
questions, Fred summarizes the
findings.*

5.



Fred formulates a final tax opinion letter.



*Fred sends the opinion letter
to Meghan...
and designates the email
and attachments should be
retained for 7 years*

BUT

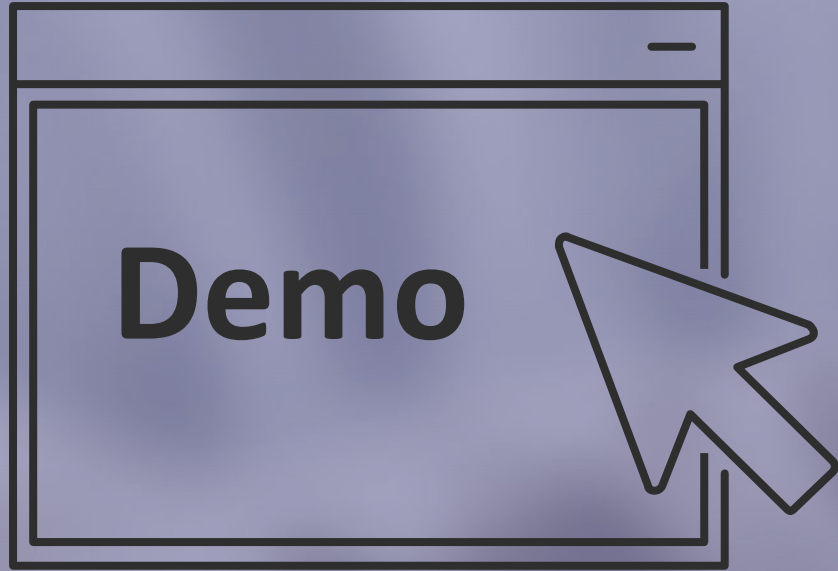
How Can it Be Done?



Introducing harmon.ie SmartAssistant™



The screenshot displays a Microsoft Outlook interface. The top ribbon includes tabs for Respond, Quick Steps, Move, and Tags. The main pane shows an email from Harmon Young to Annie Tuckker, titled "Updated construction plans". The email body contains the text: "Hi Annie, Attached is the updated construction plans for ABB, approved by eng. Lewis. Thanks, Harmon". An attachment named "ABB Construction.pdf" (684 KB) is visible. The right-hand sidebar shows a navigation pane for "harmon.ie" with sections for "LOCATIONS", "PEOPLE", and "TEAMS". Under "TEAMS", there are several folders listed, including "Project Management", "RW Construction and Demo", "Test New Sam C", and "SharePoint".



Connecting Email and Teams Conversations



The screenshot displays the Microsoft Outlook interface on the left and the Microsoft Teams interface on the right. In Outlook, an email titled "Tax Inquiry from Glory Inc." is selected, showing attachments like "Merger structure.xlsx", "Merger Plan.pdf", and "Merger Structure.docx". A blue box highlights the email header, and a blue arrow points from it to the "Glory Inc" channel in the Teams interface. Another blue box highlights the "Glory Inc" channel in Teams, with a blue arrow pointing back to the email. A third blue box highlights the email content in Outlook, with a blue arrow pointing to the Teams channel. The Teams interface shows a list of channels under "All Locations" and "Teams and Groups", with "Glory Inc" selected.

Fred drags emails with attachments to a Teams channel

1. Emails are stored in Exchange
2. Documents are stored in SharePoint

Connecting Email and Teams Conversations

Adding Descriptive Labels

The screenshot displays an Outlook email interface. The main window shows an email titled "Tax Inquiry from Glory Inc." from Meghan Williams, dated Sun 9/22/2019 12:13 PM. The email body contains the following text:

Fred,

As we have previously discussed, we are exploring a possible merger with Honor Inc. Attached to this email, you will find a document that describes the current proposal for the merger structure. Please provide feedback and guidance on the tax implications of this proposal.

Thanks in advance,

Meghan Williams
Business Analyst, Glory Inc.
(312)555-1212

The email includes three attachments: "Merger structure.xlsx" (39 KB), "Merger Plan.pdf" (75 KB), and "Merger Structure.docx" (293 KB). The "harmon.ie" sidebar is open on the right, showing "EDIT UPLOADED DOCUMENT(S)" with a list of "Multiple Items... (4 items)". The "Inquiry Type" dropdown menu is open, showing the following options:

- Mergers
- Acquisitions
- Manufacturing

A blue callout box with the text "Add Descriptive Label to classify the email as a 'merger inquiry'" points to the "Mergers" option in the dropdown menu.



Move the Conversation to Teams

The screenshot shows an Outlook interface with an email titled "Tax Inquiry from Glory Inc." from Meghan Williams. The email includes attachments: "Merger structure.xlsx" (39 KB), "Merger Plan.pdf" (75 KB), and "Merger Structure.docx" (293 KB). A notification states, "You saved this message in the 'Accounts' Team".

The email body contains the following text:

Fred,

As we have previously discussed, we are exploring a possible merger with Honor Inc. Attached to this email, you will find a document that describes the current proposal for the merger structure. Please provide feedback and guidance on the tax implications of this proposal.

Thanks in advance,

Meghan Williams
Business Analyst, Glory Inc.
(312)555-1212

The Teams sidebar on the right shows a list of teams under "Teams and Groups". At the bottom of the sidebar, a button labeled "Click here to share this one" is highlighted with a blue box. A callout bubble points to this button with the text: "Post an update about the new email and attachment to Teams".



Move the Conversation to Teams

The screenshot shows the Microsoft Teams interface. On the left is a navigation pane with 'Teams' selected. The main area shows a channel named 'Accounts > Glory Inc'. A message from 'Fred Neal' at 9:21 PM is highlighted with a blue box. The message content is: 'Hey Glory Inc, I wanted to share this email and its attachments with you. Take a look!'. Below the text are four attachments: 'Tax Inquiry from Glory Inc_ Sent by Meghan Williams, at 9/22/2019 12:13 PM', 'Merger structure.xlsx', 'Merger Plan.pdf', and 'Merger Structure.docx'. The interface also shows a search bar at the top, a 'Public' label, and various icons for Planner, OneNote, and Website.

Fred's team views Meghan's inquiry email in the Teams conversation



Email Draft Opinion to Glory

Fred emails the opinion letter draft to Meghan



Email Final Opinion Letter to Glory

Attach File | Signature | Table | Pictures | Link | Symbol | ...

To: Meghan Williams;
Cc:
Subject: Final Tax opinion letter

Tax Opinion Letter.docx
37 KB

Meghan,
Here is the final tax opinion letter regarding the Honor merger.

Let me know if you have questions.

Fred
Tel: (312)555-1212
fredn@ravenwood-corp.com

harmon.ie
Humanizing the Digital Experience

Fred emails the final tax opinion letter to Meghan

And Let's Not Forget About Compliance...



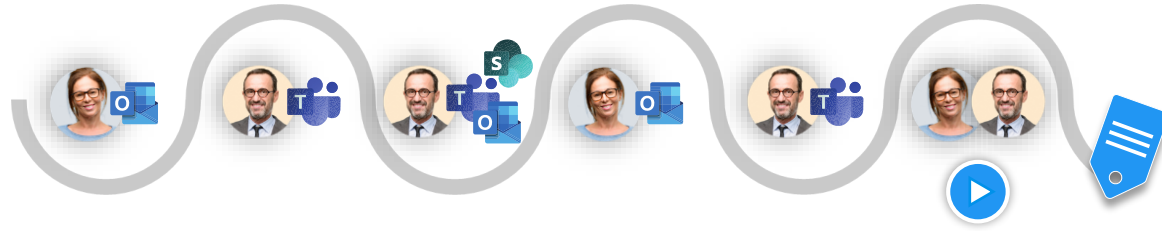
The screenshot shows an Outlook interface. The main pane displays an email from Meghan Williams with the subject 'Final Tax opinion letter'. The email body contains the text: 'Meghan, Here is the final tax opinion letter regarding the Honor merger. Let me know if you have questions. Fred Tel: (312)555-1212 fredn@ravenwood-corp.com'. A document attachment 'Tax Opinion Letter.docx' (37 KB) is visible. A context menu is open over the document, listing various actions. The 'Apply Retention Label' option is highlighted, and a sub-menu is visible showing several retention labels: 'None (clear the label)', 'Contracts (7 days)', 'Étiquette de test (7 years)', 'für deutsch (7 years)', 'Record label (5 days)', 'Sensitive (14 days)', 'Testetikett (7 years)', and 'תגיית חדשה (1 month)'. The background shows a file explorer window with a list of documents and a 'harmon.ie' application window.

Assign Retention Labels to emails and documents as part of the daily collaboration flow, to ensure compliance

Happy Ending



6.



Six months later, Fred receives a similar question about merger tax implications from another client.



Fred uses Descriptive Labels to find the relevant emails and documents.



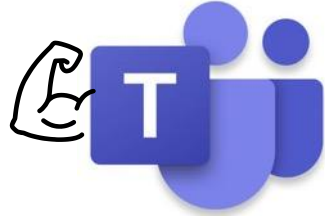
Discovering Information



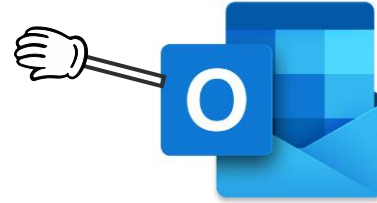
Six months later, Fred uses Descriptive Labels to find Meghan's case to solve another client's inquiry

Fred continues to shine

The Moral of the Story



Teams is great for
internal collaboration



But email is still needed
(for external communications)

YOU NEED



harmon.ie

SmartAssistant

to connect emails, documents, and conversations in **Teams**

The
END
(for now)

-A-
Story of
Honor and Glory



Glory Honor