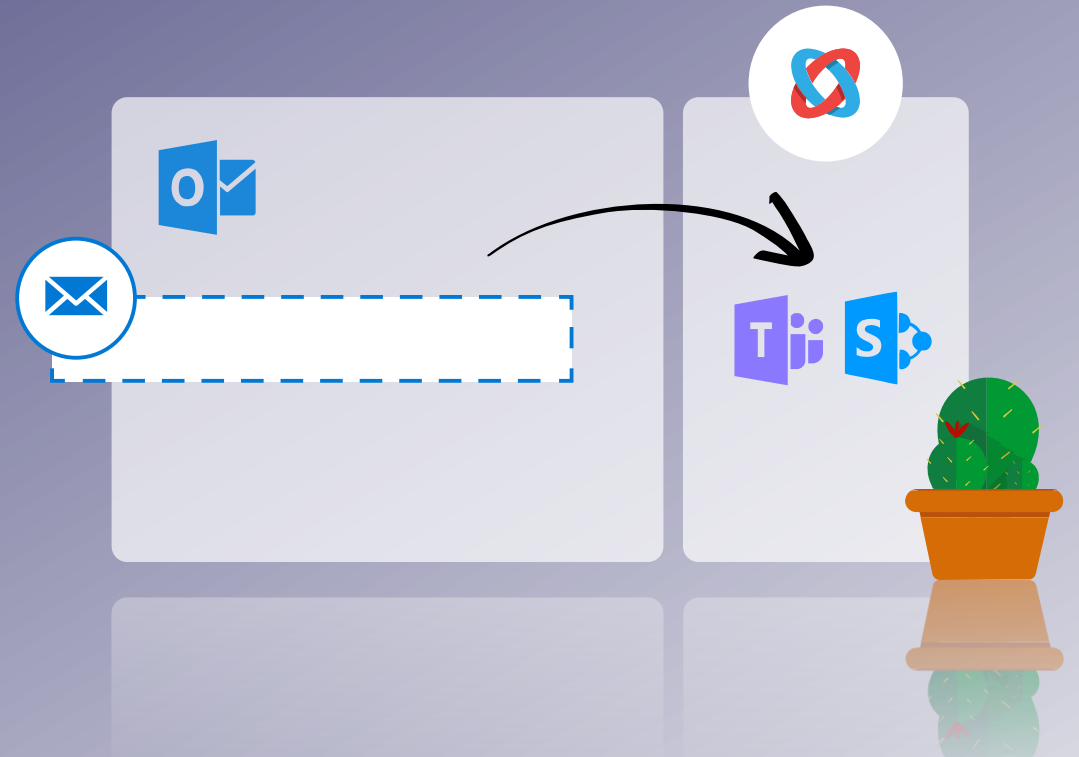




# The Role of SharePoint & Microsoft Teams in Email Management



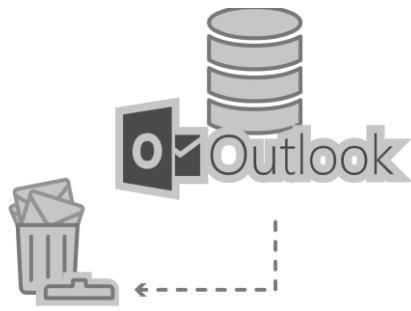
David Lavenda  
Chief Product Officer





# What Information Do You Need to Save?

## Email 80%

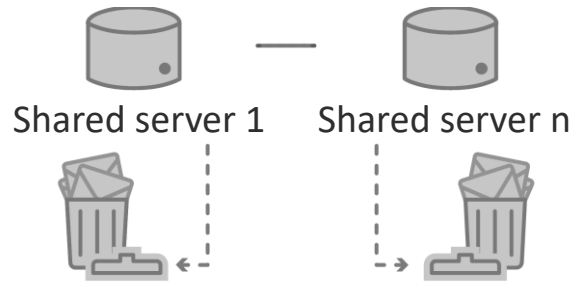


**1000** Users  
**100** Emails/day  
**X** **5%** Business records  
**220** Working days/year

---

**1,100,00** Records/year

## Documents 15%

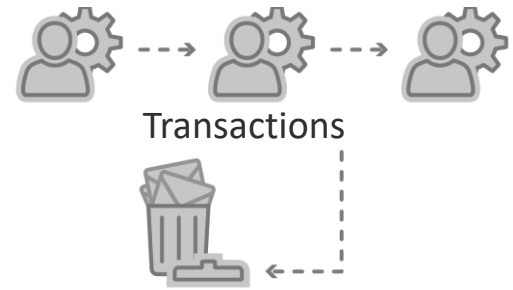


**1000** Users  
**1** Document/day  
**X** **95%** Business records  
**220** working days/year

---

**209,00** records/year

## Workflow 5%



**2** Custom work flow/year  
**100** Work flow users  
**X** **1** Transaction/day  
**220** working days/year

---

**44,00** records/year



# Your “Important Business Emails” Needs




**Client  
correspondence**



**Knowledge Sharing  
and Retention**



**Be compliant with  
corporate records  
mandates**



**Maintain a digital  
paper trail for every  
case and project**



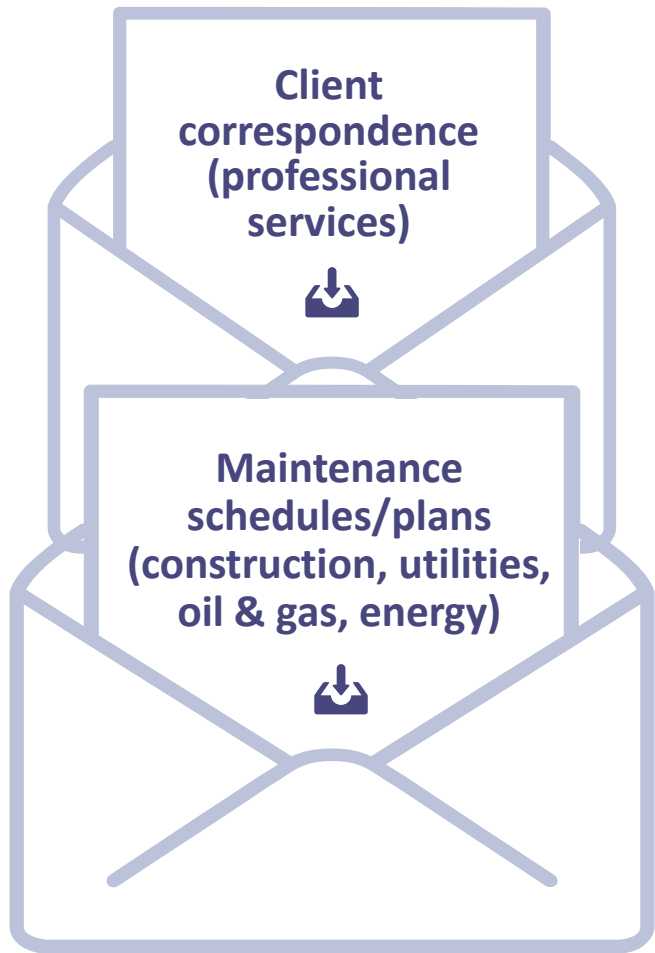
**Proposal  
building**



**Be compliant with  
industry regulations**



*“All Emails are Equal, But Some Emails Are More Equal Than Others”* – George Orwell



ROUGHLY  
**5%**  
OF EMAILS  
ARE RECORDS\*

\*Source: RIMtech



# 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

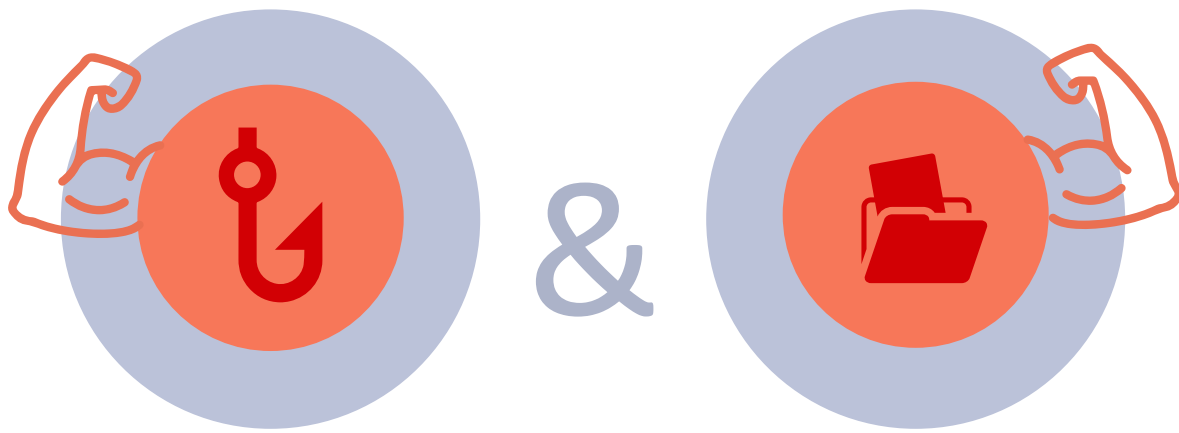
- Complicated event/document correlation
- High eDiscovery costs

## 4. Lack of end-to-end governance

- Inability to effect organization changes



# The Key to Successful Email Management



**CAPTURE**

&

**CLASSIFY**



**DISCOVER**

# 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





# 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



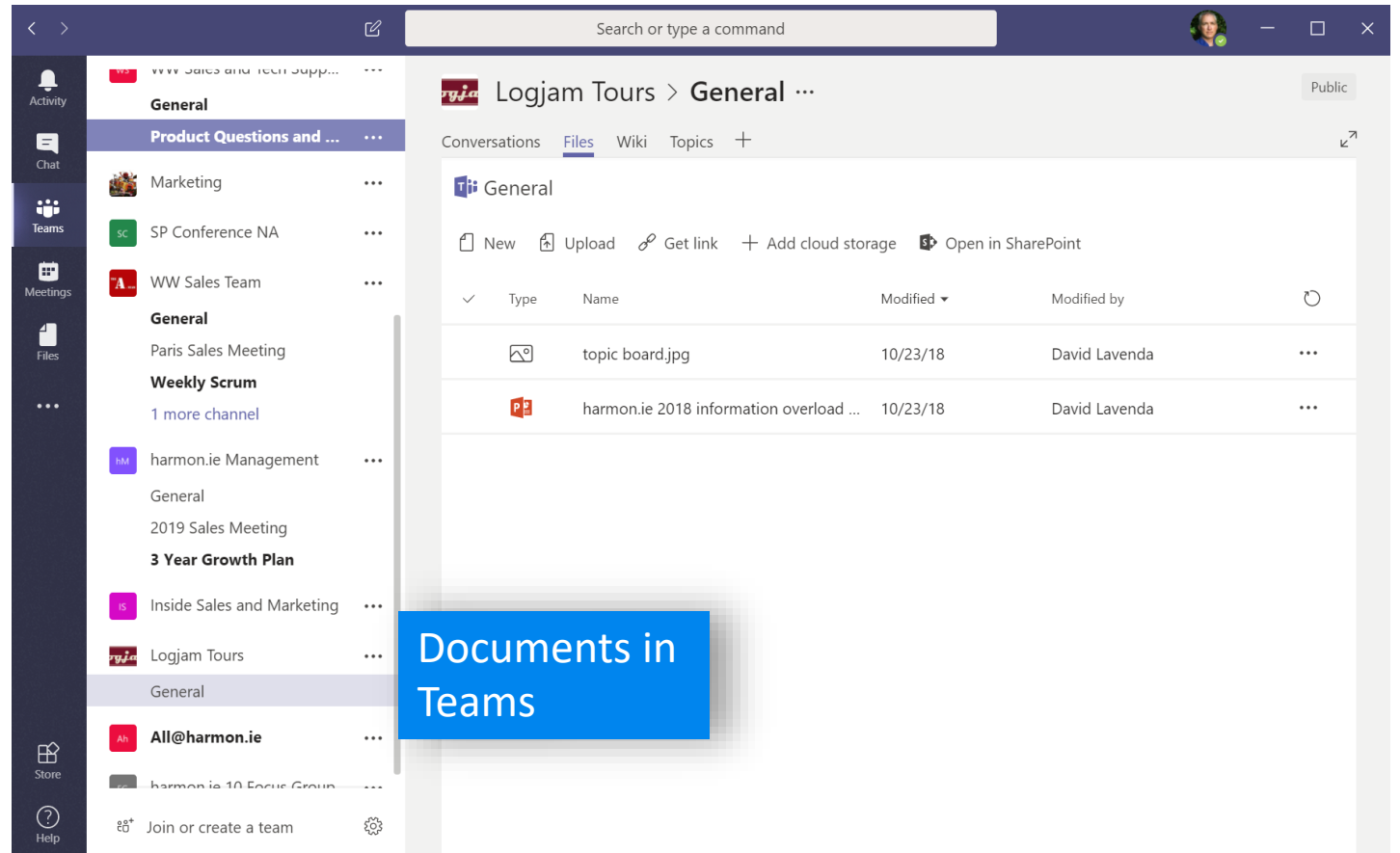
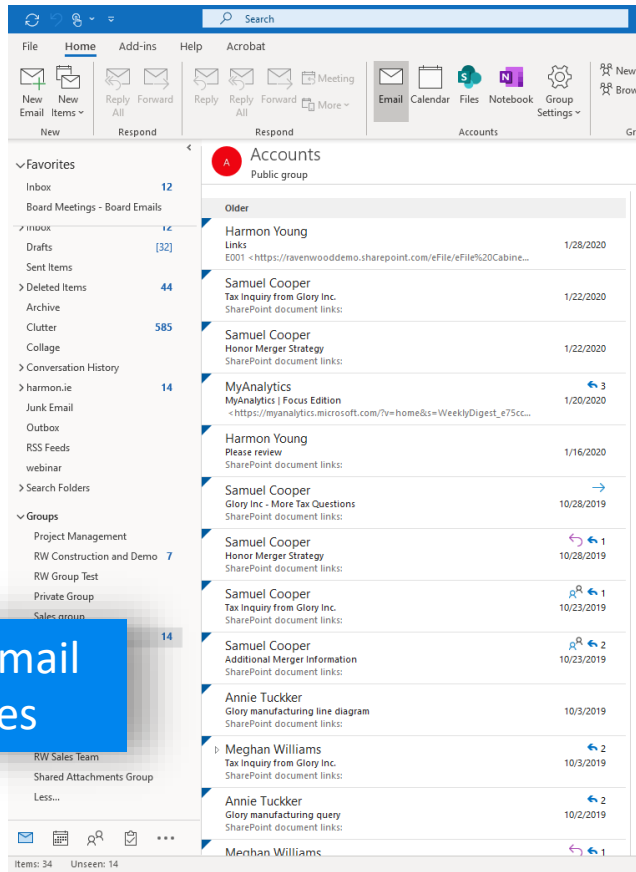
# Emails in Group Mailboxes



# Documents in Teams



# Conversations in Teams





# Email in Group Mailboxes



# Documents in Teams



# Conversations 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, documents and conversations

## 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 in SharePoint



# Documents in SharePoint/Teams



# Conversations in Teams



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 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



# Emails in SharePoint



# Documents in SharePoint/Teams



# Conversations in Teams



## 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

## Cons



- Additional step needed to upload email messages to SharePoint



# Recommendation

Do you need to find emails  
and documents  
**later?**





# Recommendation

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

