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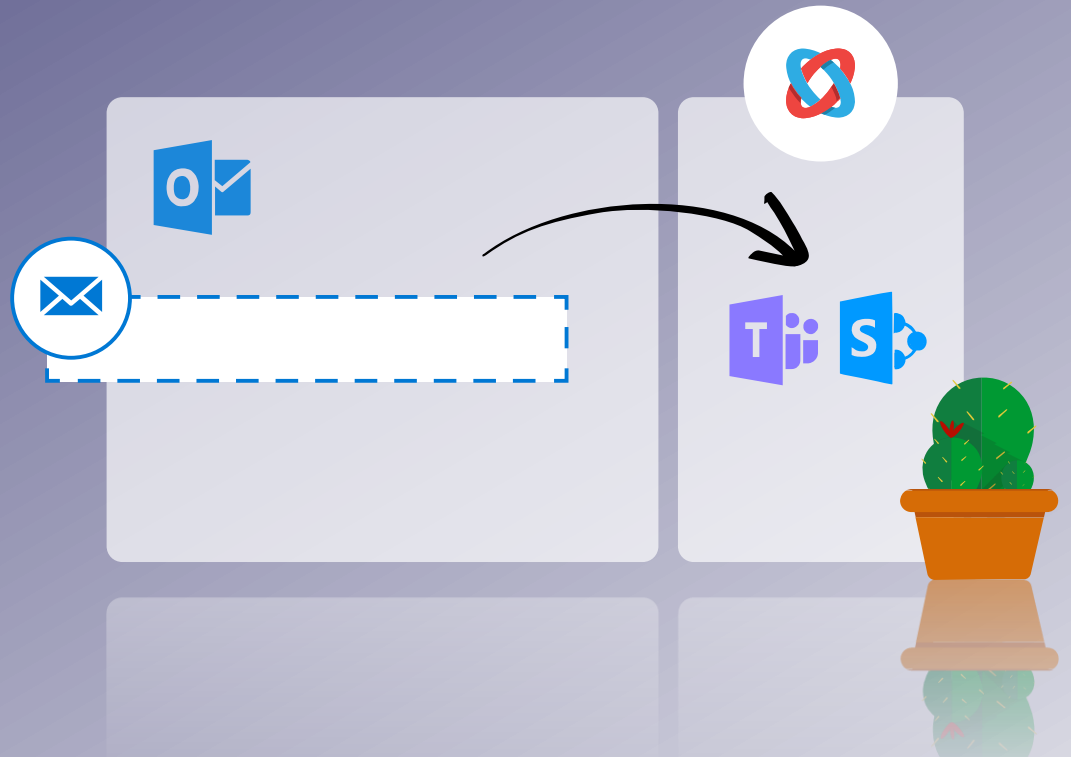
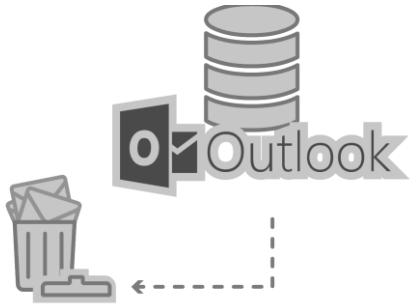
The Role of SharePoint & Microsoft Teams in Email Management

David Lavenda
Chief Product Officer



What Information Do You Need to Save?

Email 80%

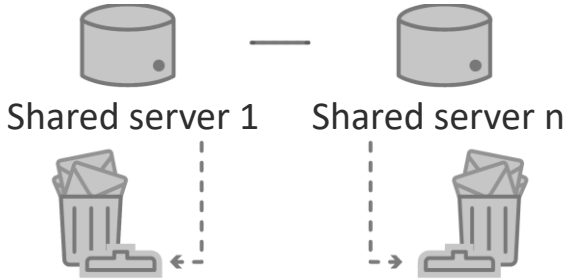


X

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

1,100,00 Records/year

Documents 15%

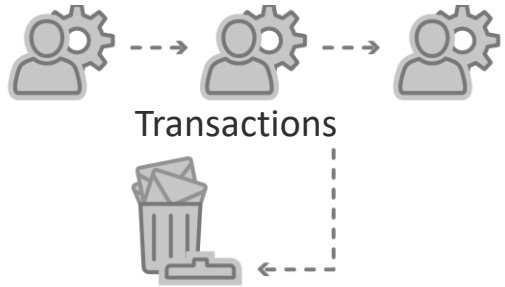


X

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

209,00 records/year

Workflow 5%



X

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

44,00 records/year

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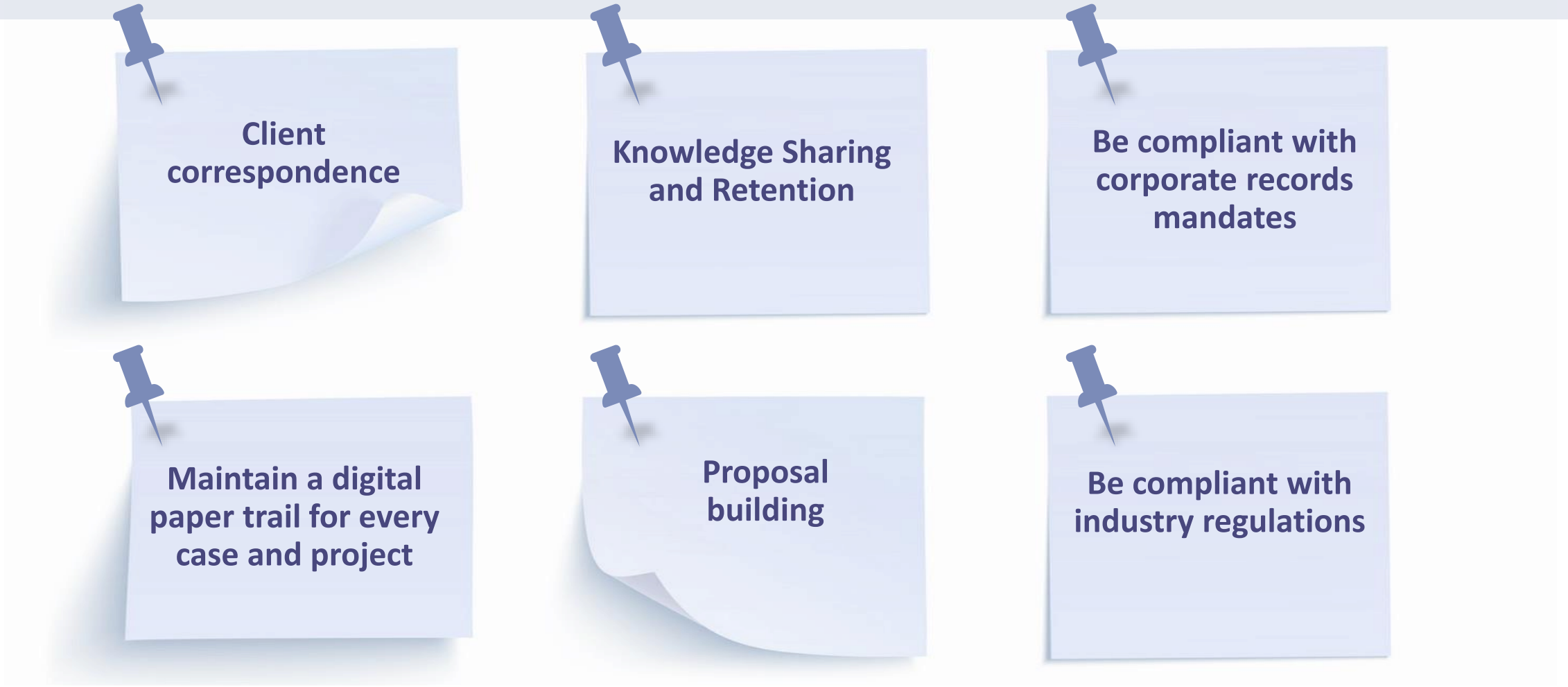
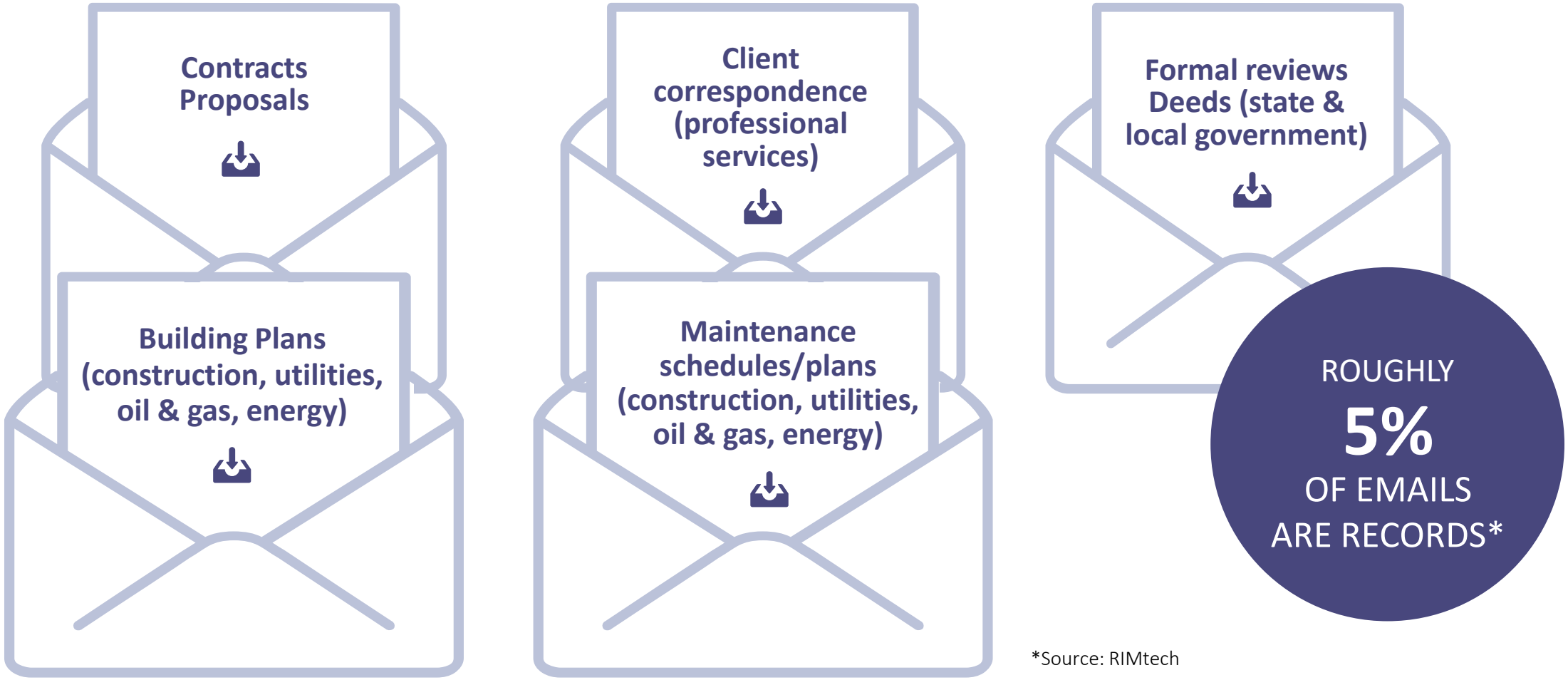
Source: Rimtech, "The Role of Email in RIM Compliance"

Your “Important Business Emails” Needs



"All Emails are Equal, But Some Emails Are More Equal Than Others" – George Orwell



*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

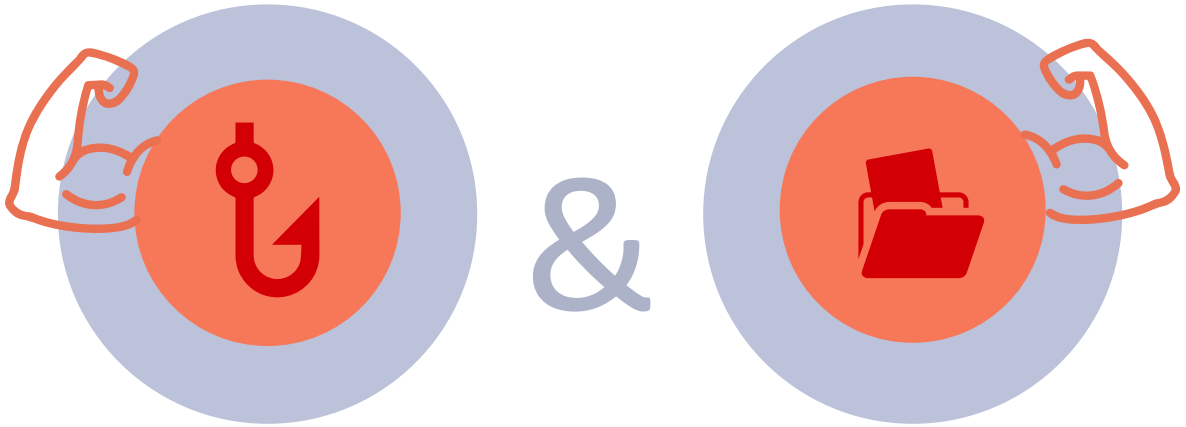
3. Non-standard and ineffective search

- 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**

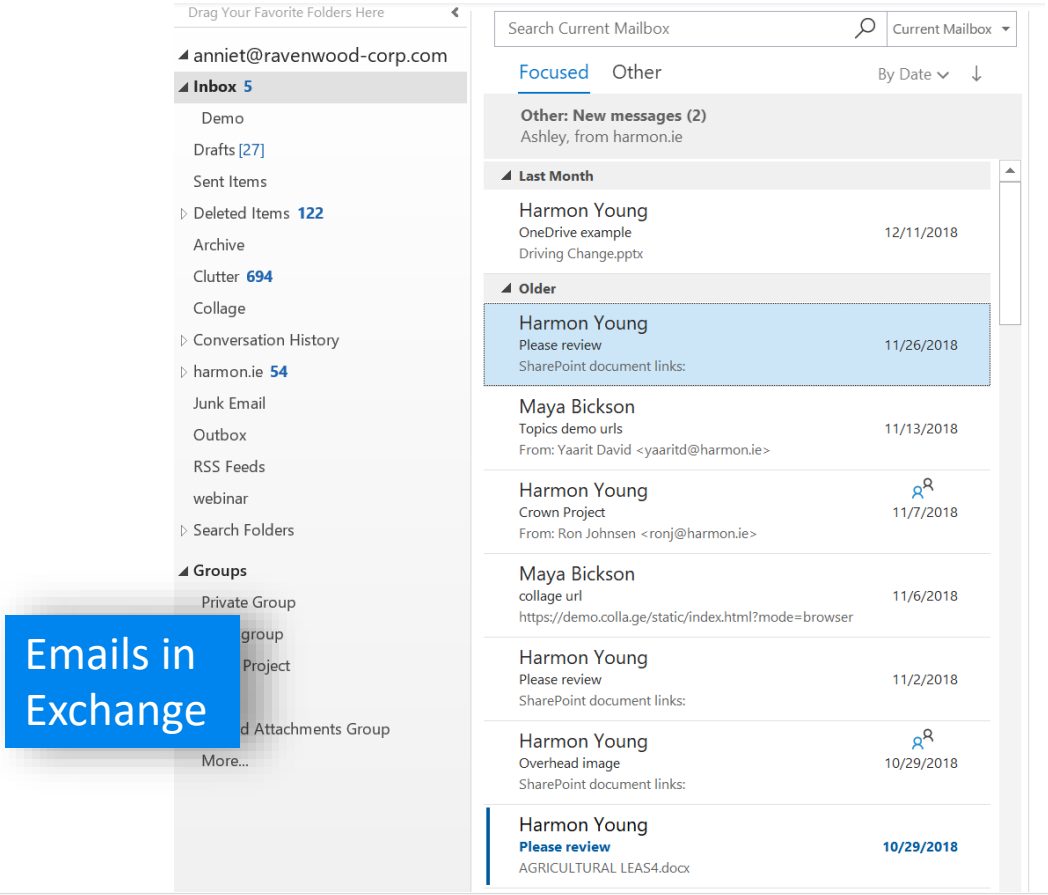
DISCOVER

Microsoft-based Email Management

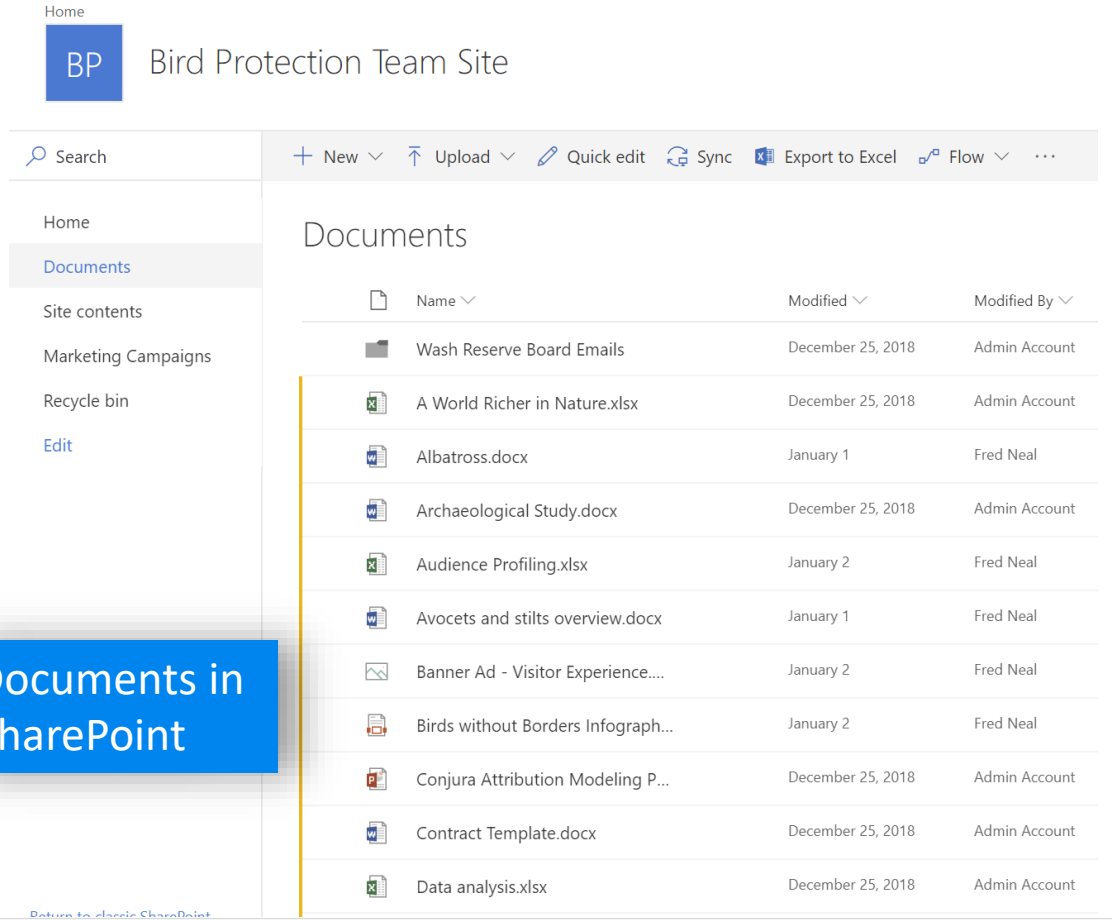
Know Your Options

OPTION 1

Emails in Exchange
Documents in SharePoint



Emails in Exchange



Documents in SharePoint

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Emails in Exchange
Documents in SharePoint

Pros

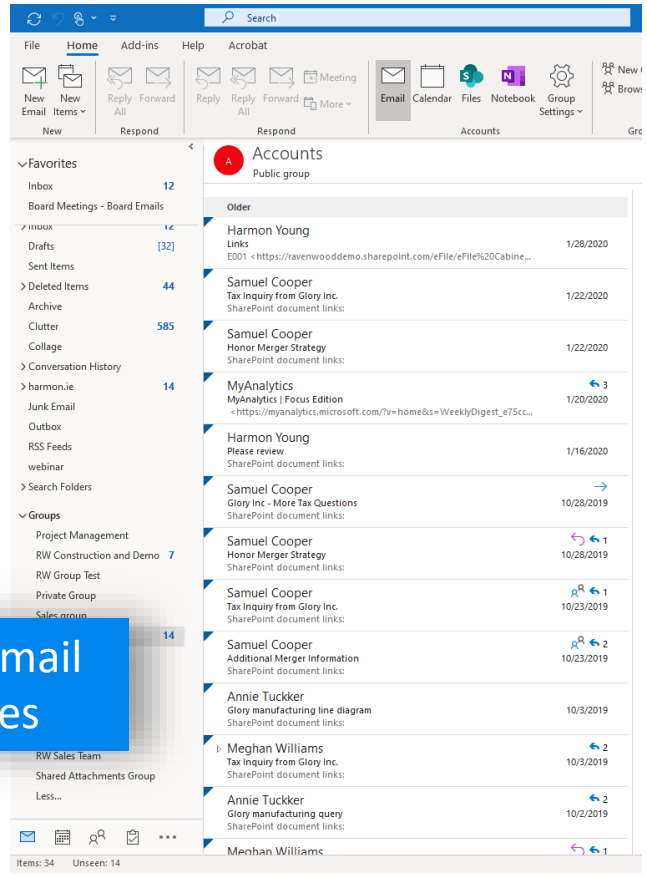
- No need for user training
- Use Outlook rules to automatically archive emails
- With Office 365 Content Search eDiscovery tool, one search works for emails and documents

Cons

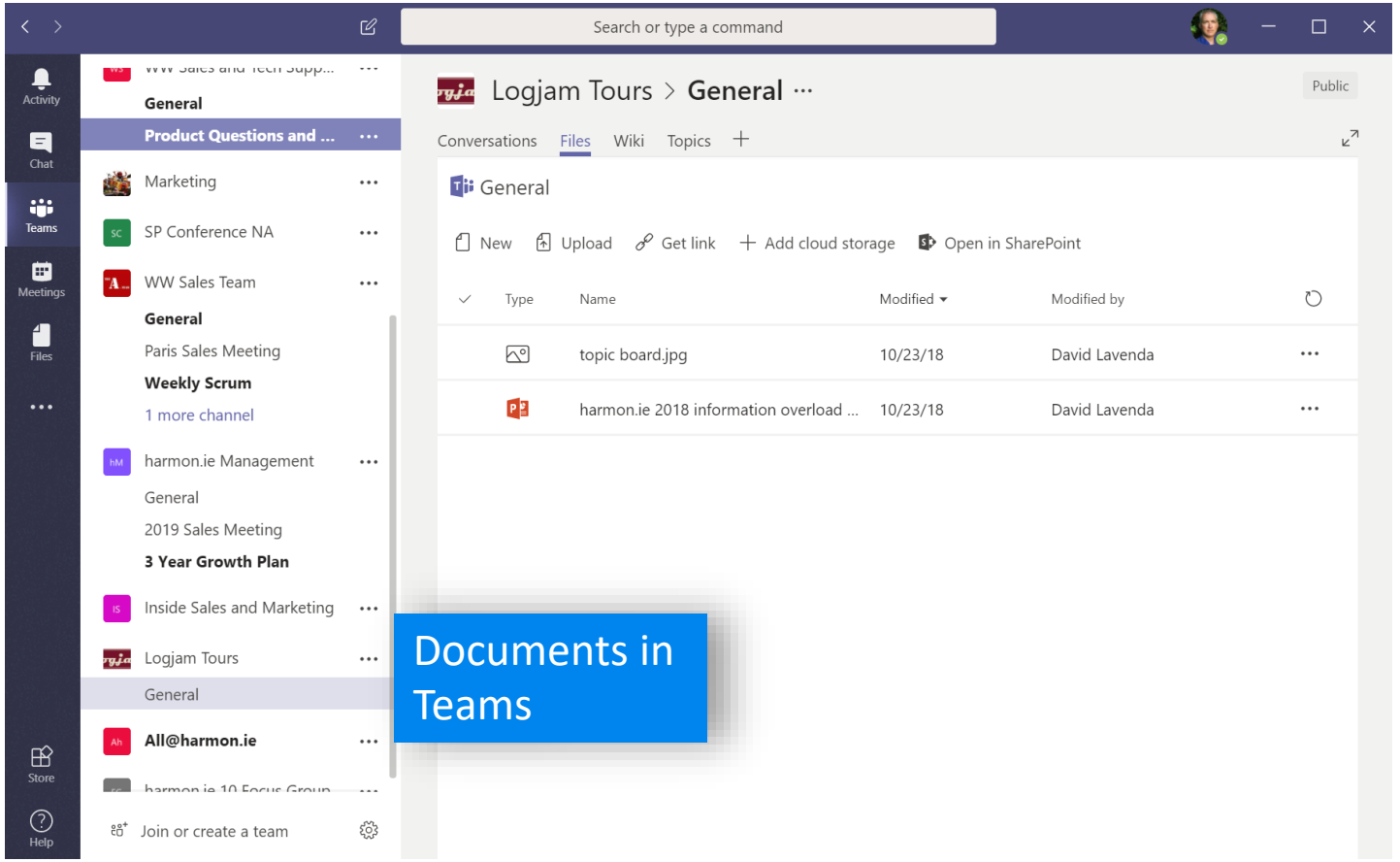
- Content is stored in multiple places; complex discovery
- No classification for emails makes them hard to find
- Mailbox size
- Emails not visible to colleagues and auditors
- What about attachments?

OPTION 2

Emails in Group Mailboxes
Documents in Teams
Conversations in Teams



Group Email Mailboxes



Documents 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,

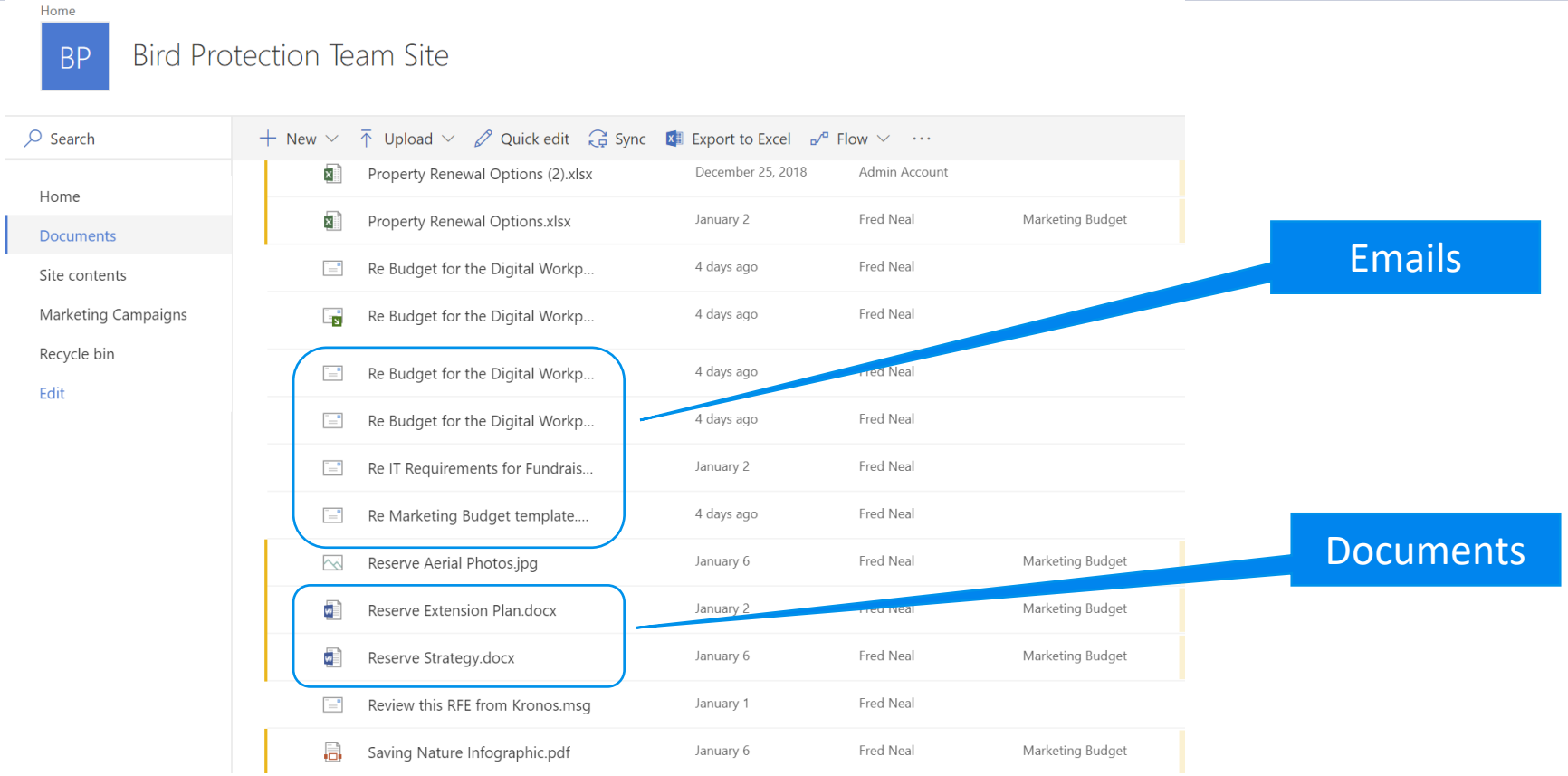
  one search works for emails, documents and conversations

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



Emails in SharePoint
Documents in SharePoint/Teams
Conversations in Teams

Pros

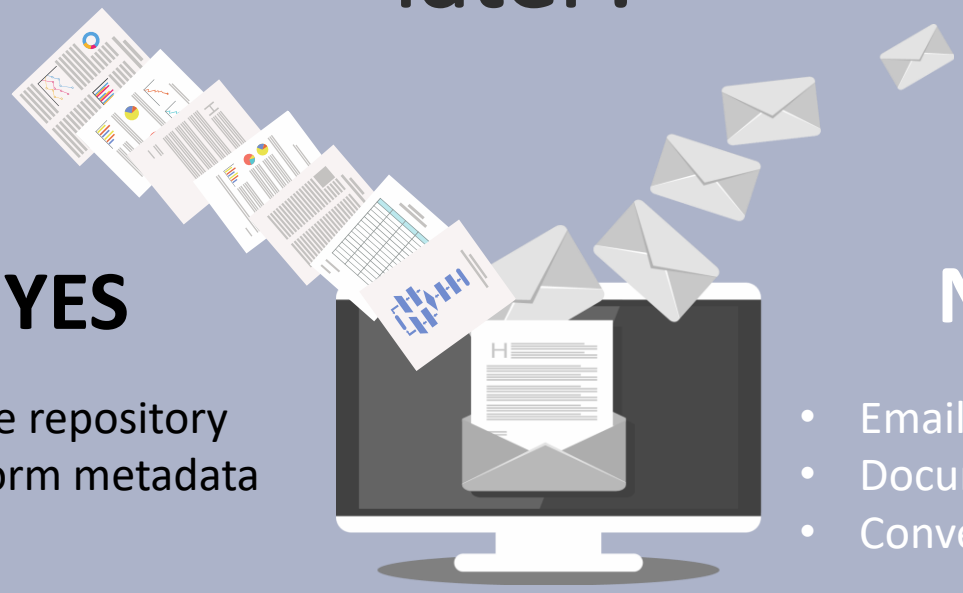
- Single repository for all important information
- Single interface for all important information
- Makes of built-in permission model
- Uniform metadata for emails and documents
- eDiscovery captures all important information with single procedure

Cons

- Additional step needed to upload email messages to SharePoint

Recommendation

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



YES

- Single repository
- Uniform metadata

NO

- Emails - Exchange
- Documents – SharePoint
- Conversations - Teams

Recommendation

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