

# Successful Email Retention & Disposition

With Microsoft 365 and harmon.ie

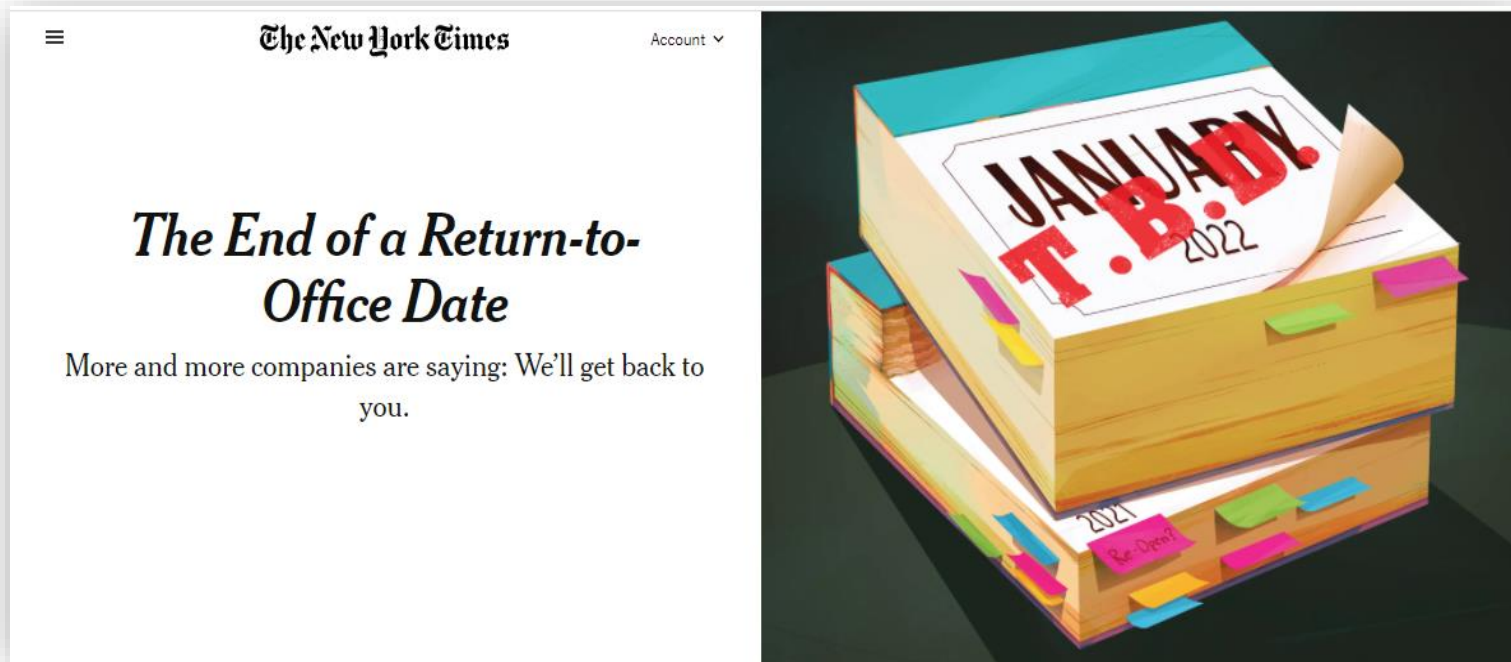


**David Lavenda**  
Chief Product Officer





# The New Hybrid Workplace



- Home
- Satellite offices
- Corporate offices
- Customer sites



# Written Communications With External Parties Remain in Email

**Customers**



**Partners**

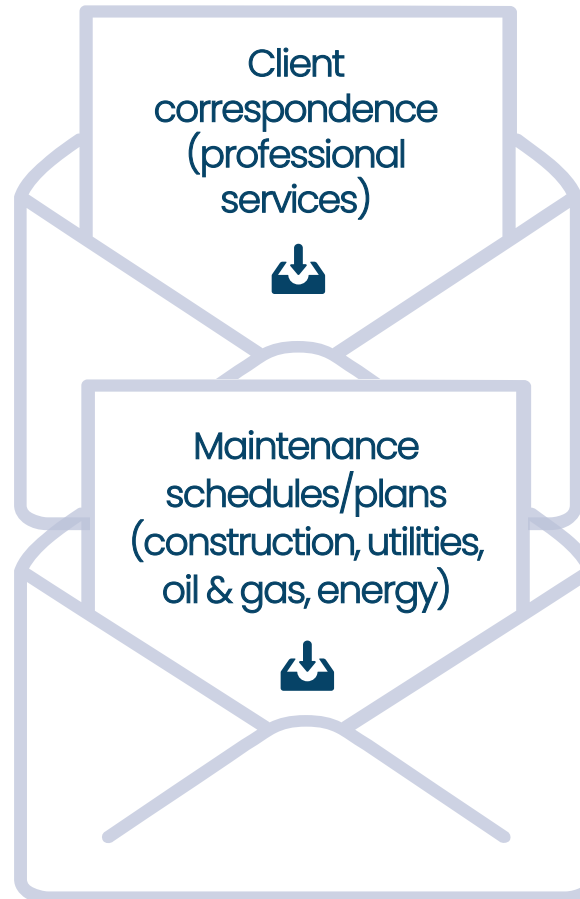


**Suppliers**





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

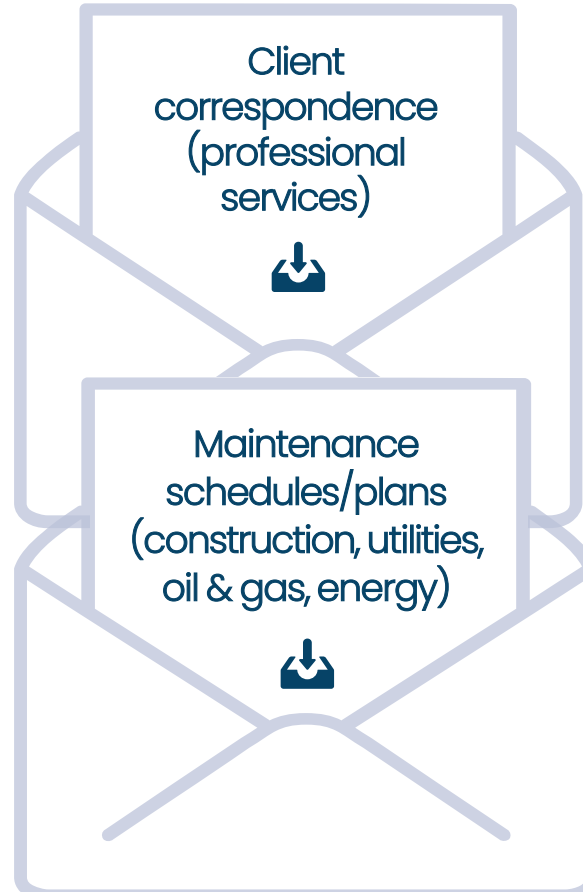


POLL

\*Source: RIMtech



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



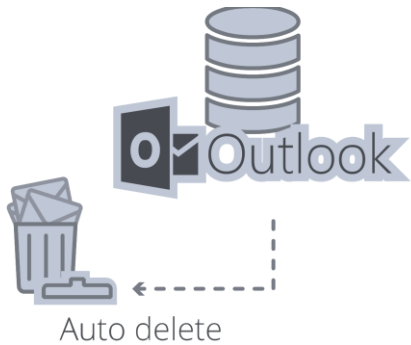
ROUGHLY  
**5%**  
OF EMAILS  
ARE RECORDS\*

\*Source: RIMtech



# What Information Do You Need to Save?

## Email 80%

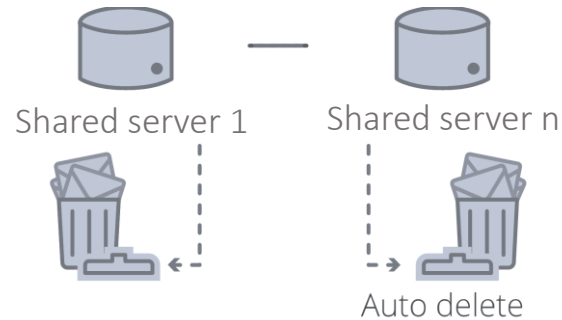


X  
1000 Users  
100 Emails/day  
5% Business records  
220 Working days/year

---

1,100,00 Records/year

## Documents 15%

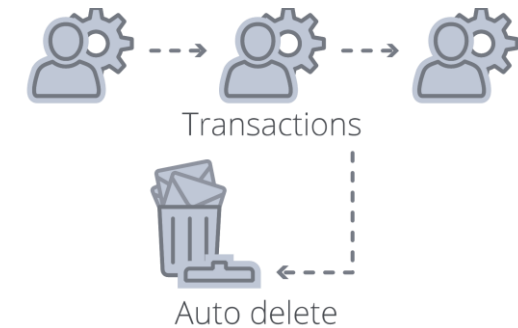


X  
1000 Users  
1 Document/day  
95% Business records  
220 working days/year

---

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

POLL



# Top 4 Email Management Challenges

## ....Just Got Harder Working from Home



### **1. Inconsistent email capture and classification**

- Insufficient capture
- Business operations losses
- Liability



### **3. Non-standard and ineffective search**

- Complicated event/document correlation
- High eDiscovery costs



### **2. Inconsistent retention schedules**

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



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

- Inability to effect organization changes



# Email Retention Case Study



**CANADIAN  
CROWN  
CORPORATION**

## **Company details:**

- 64,000 employees
- 6,200 'retail' sites

## **Email Retention initiative goal:**

- Reduce corporate risk associated with 'Access to Information' and Privacy
- Greater security

## **How it was done:**

- Selective 'migration' from shared drives
- Automated Retention and Disposition based on rules (RDS)
- Bulk upload (and classification of emails)
- Automatic versioning (of documents)

## **Results:**

- 8000 total users onboarded
- 181 new team sites designed and built

## **Why It Worked:**

- 1) Access to everything you need on one screen
- 2) True Drag & Drop functionality
- 3) Top notch search capabilities
- 4) Change management dream come true – no changes needed to user behavior





# Email Disposition Case Study

**Global  
Hospitality  
Company**

## Company details:

- >60,000 employees
- Almost 300 global sites
- **Email Retention initiative goal:**
- Reduce risk and expense by ensuring emails are retained for no more than 2 years
- **How it was done:**
- Use Records Center to comply with company's Records Management Policy

## 40,049 Records Declared<sup>1</sup>

Top 3 Functional Areas Declared:

- Properties
- Legal
- Commercial Services

## 35 Million Emails Deleted

- 35,656,663 emails
- 5.52 TB
- Over 19K PST files Deleted

## Significant decrease in risk

*"We wanted everything in that one interface and harmon.ie was able to do that for us."*

Information Governance Director



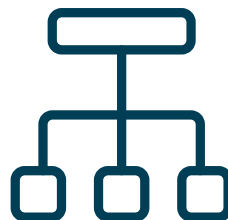
# harmon.ie 365

## The Key To Effective Email Management



### **CAPTURE**

emails and documents from  
Outlook to SharePoint



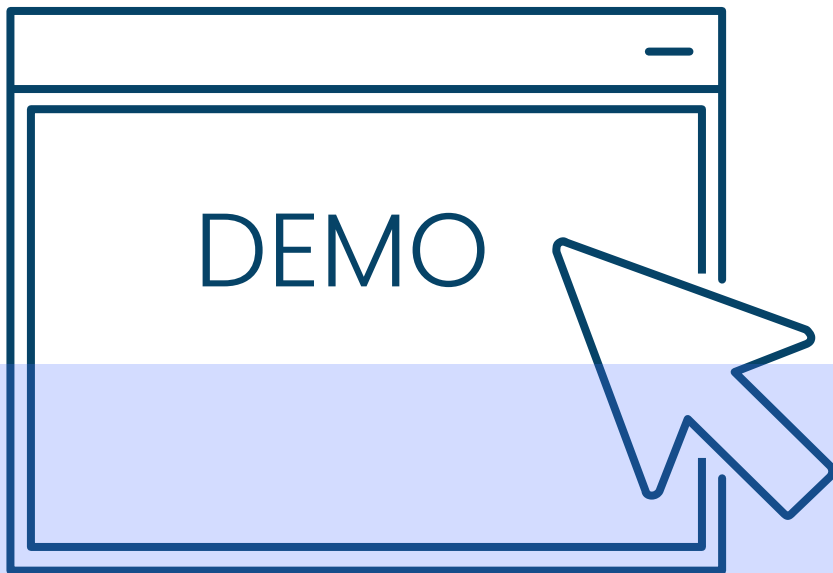
### **CLASSIFY**

emails and documents with  
metadata



### **DISCOVER**

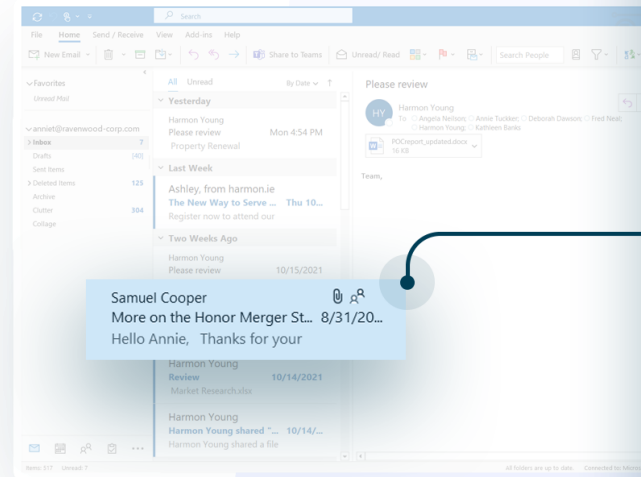
emails and documents  
quickly, with unmatched  
Search and Discovery tools



# harmon.ie 365

Access All Microsoft 365 Apps  
from Outlook

Drive Compliance by staying in  
your "Comfort Zone"



harmon.ie

LOCATIONS

▼ All Locations

- Favorites
- SharePoint
- Recent
- Teams
- Accounts
  - General
  - ABC Corp
  - Glory Inc
  - Email TeamMate
  - Honor
  - Qoherent
- RW Construction and Demo
- RW Contracts
- OneDrive
  - Shared With Me
  - Documents

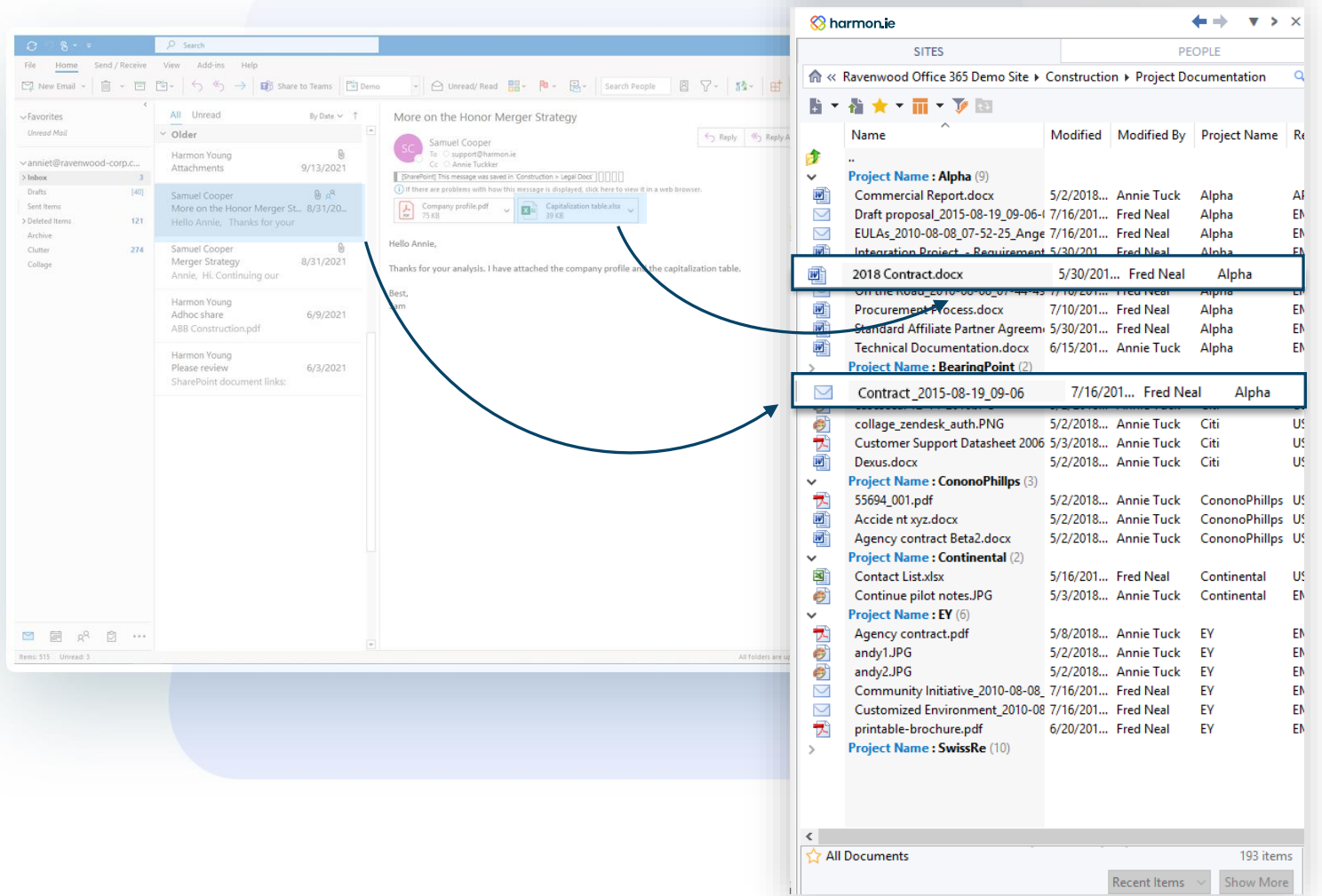
Uploading document to SharePoint

Uploading "Please review.msg" to "Glory Inc"

# Capture

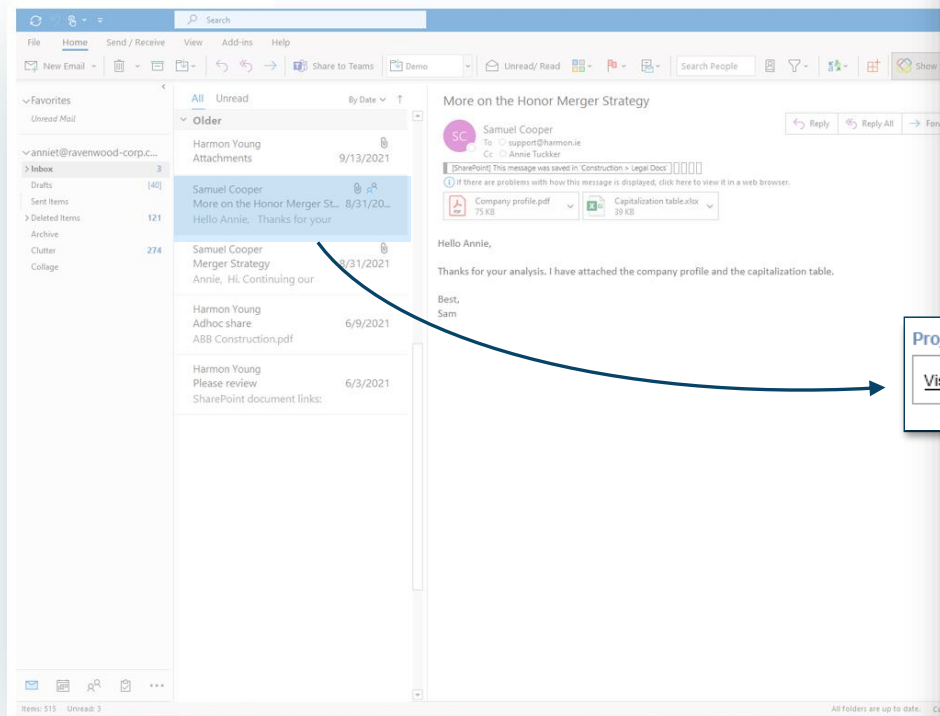
Capture Important Emails and Documents Quickly

Dragging & dropping emails & documents to SharePoint boosts information governance



# Classify

Emails and Documents  
to SharePoint/Office 365,  
using metadata



harmonie

EDIT UPLOADED DOCUMENT(S)

Contract

Please fill the properties of the uploaded document(s).

Content Type

E-mail

Name

Contract

Title

Contract

Projects

Visitor Experience;

8/28/2018 10:34 AM

From

Harmon Young <harmony@ravenwood-corp.com>

Attachments

Yes

In-Reply-To

OriginalSubject

Contract

References

Reply-To

Created: 8/29/2018 7:25 AM Annie Tuckker

Modified: 8/29/2018 7:25 AM Annie Tuckker

Cancel Save

# Automatically Capture Emails

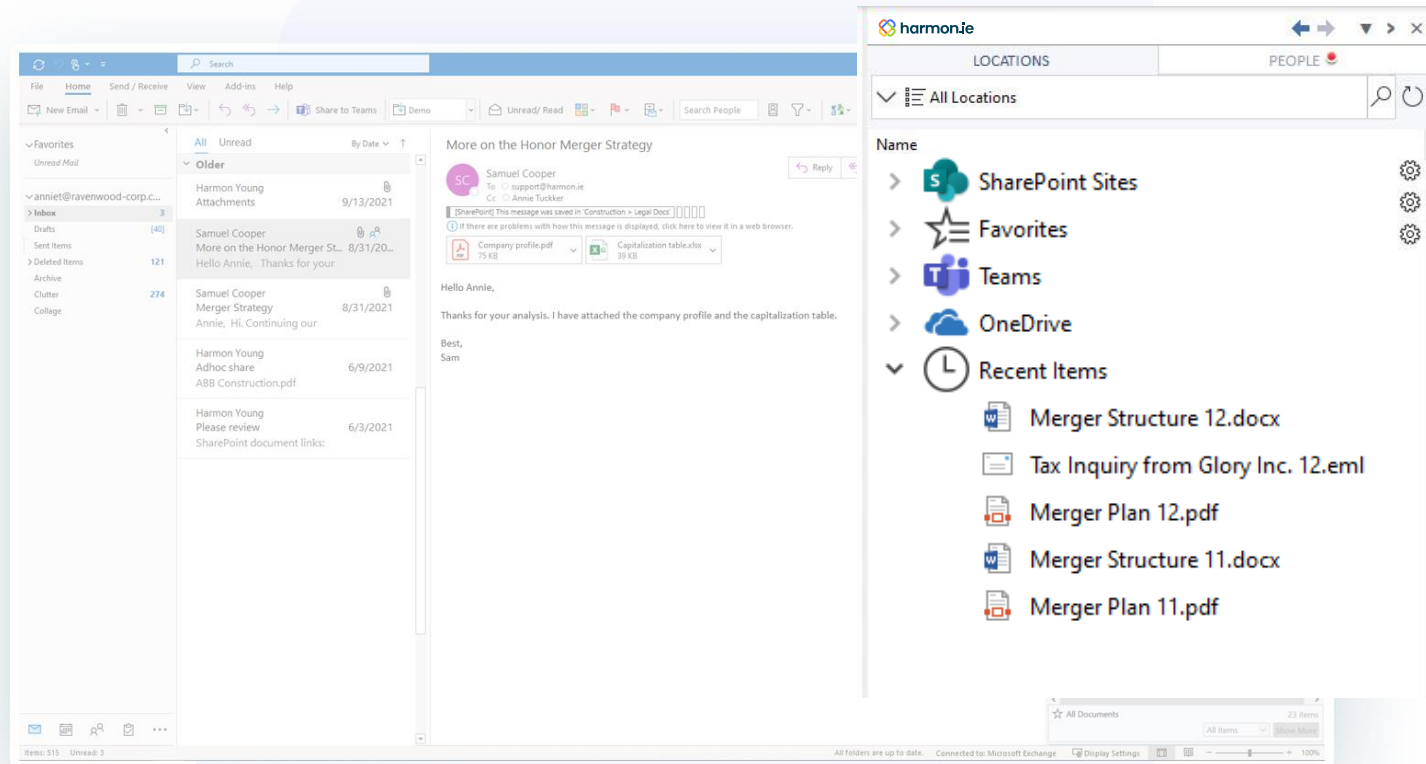
Using Outlook Email Rules

The screenshot displays the Microsoft Outlook interface. On the left, a list of emails is shown, with the most recent one titled "Merger Opportunity" from Samuel Cooper. The main pane shows the details of this email, including the sender's name and contact information. A "SharePoint" notification is visible above the email body. An "Edit Favorite" dialog box is open, showing the name "Test for Webinar" and the location "https://harmonie.sharepoint.com/Marketing/Shared Documents/". The dialog also has checkboxes for "Make this favorite available offline" and "Connect favorite to this Outlook folder", with the latter checked. The right sidebar shows the "harmonie.ie" account and a list of favorites, including "Test for Webinar".

# harmon.ie 365

Recent Items

My most recent items  
from across Microsoft 365  
apps

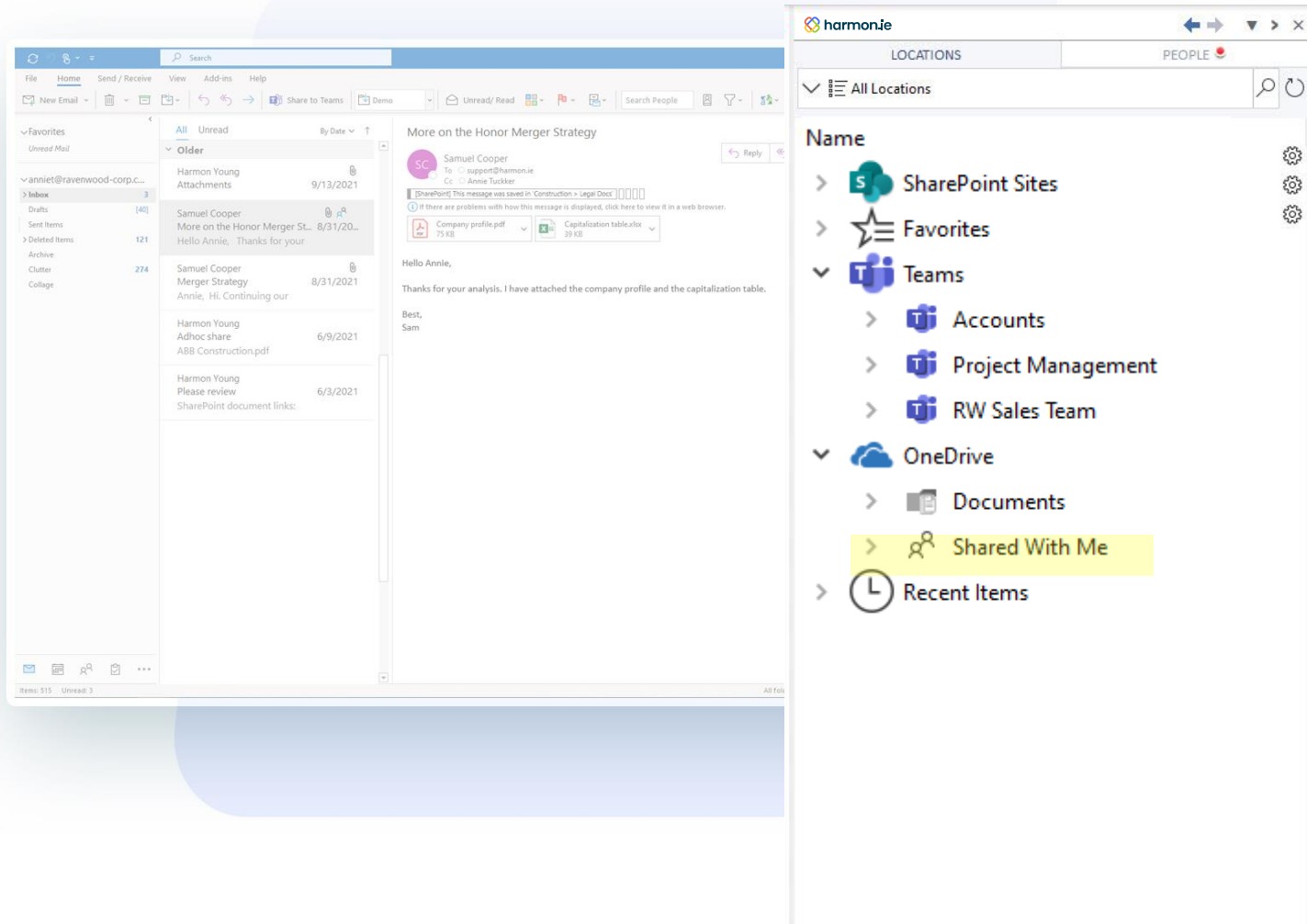




# harmon.ie 365

'Shared With Me' Items

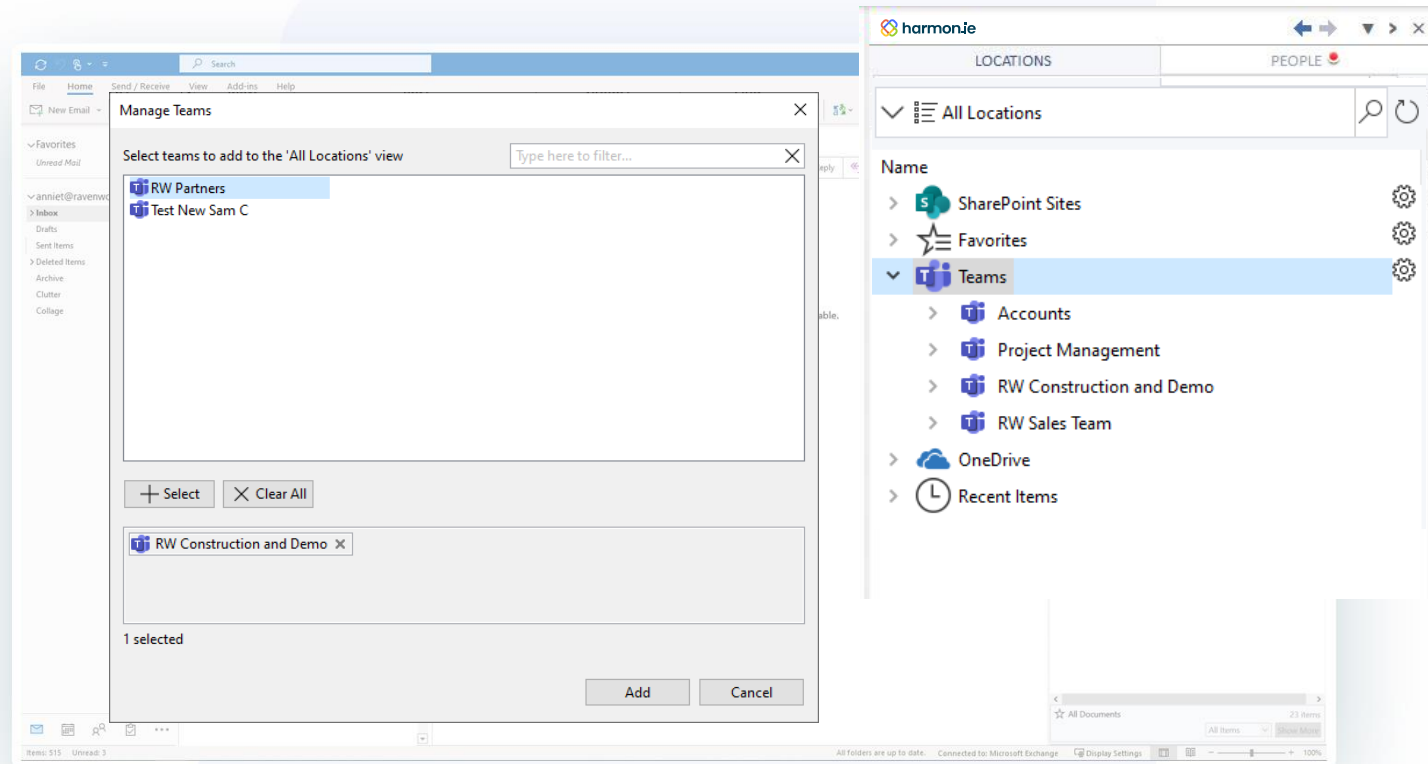
Items shared with me  
from across Microsoft 365  
apps



# harmon.ie 365

Discover & Favorite Teams

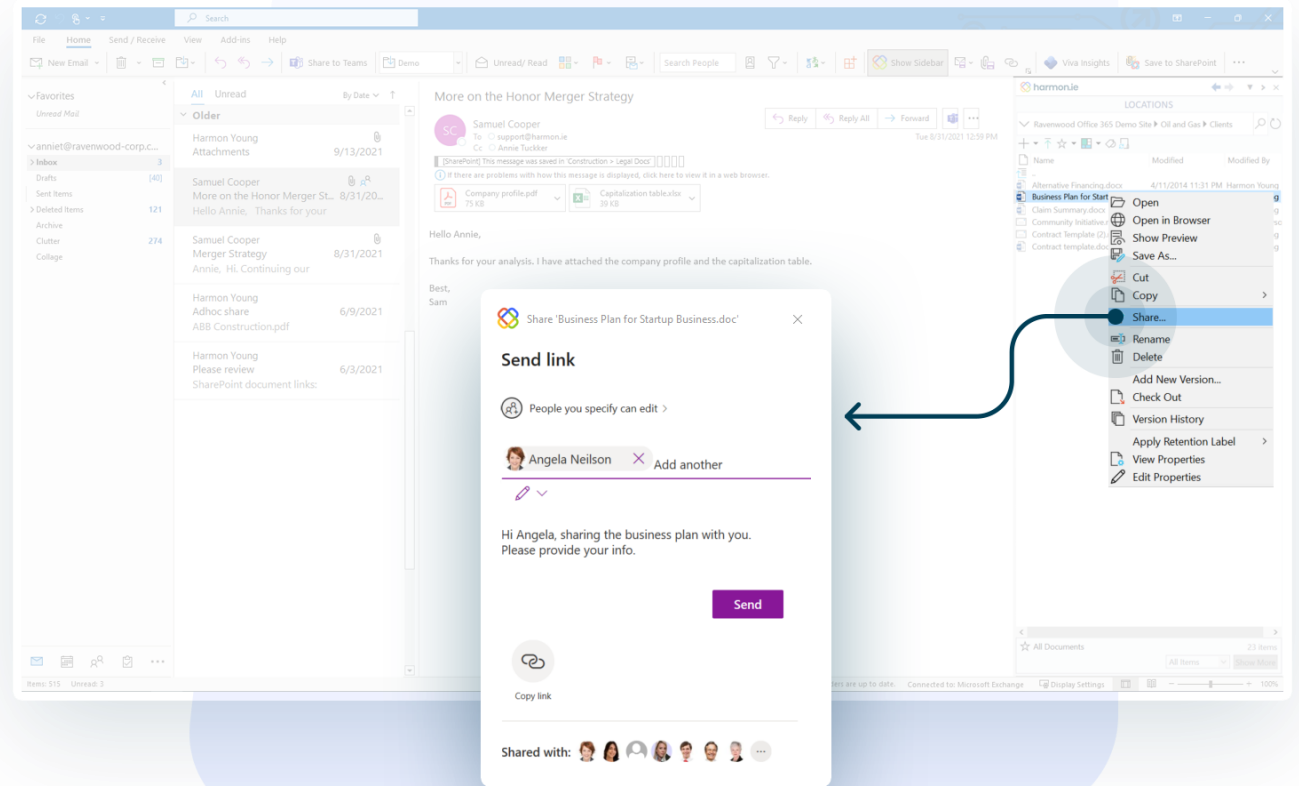
Access your most important Teams from Outlook



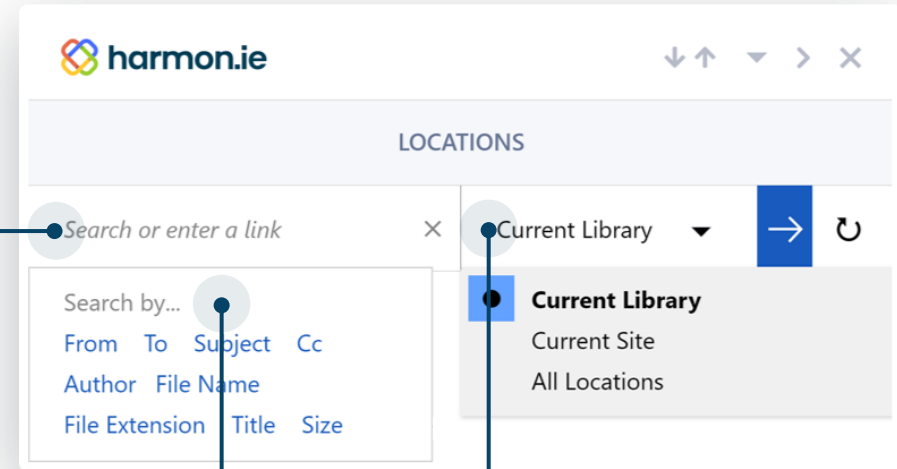
# harmon.ie 365

## Modern Share Experience

Granular share capabilities right from Outlook



# Search Across Microsoft 365 Apps



Type text to search or enter SharePoint link to navigate to location or document

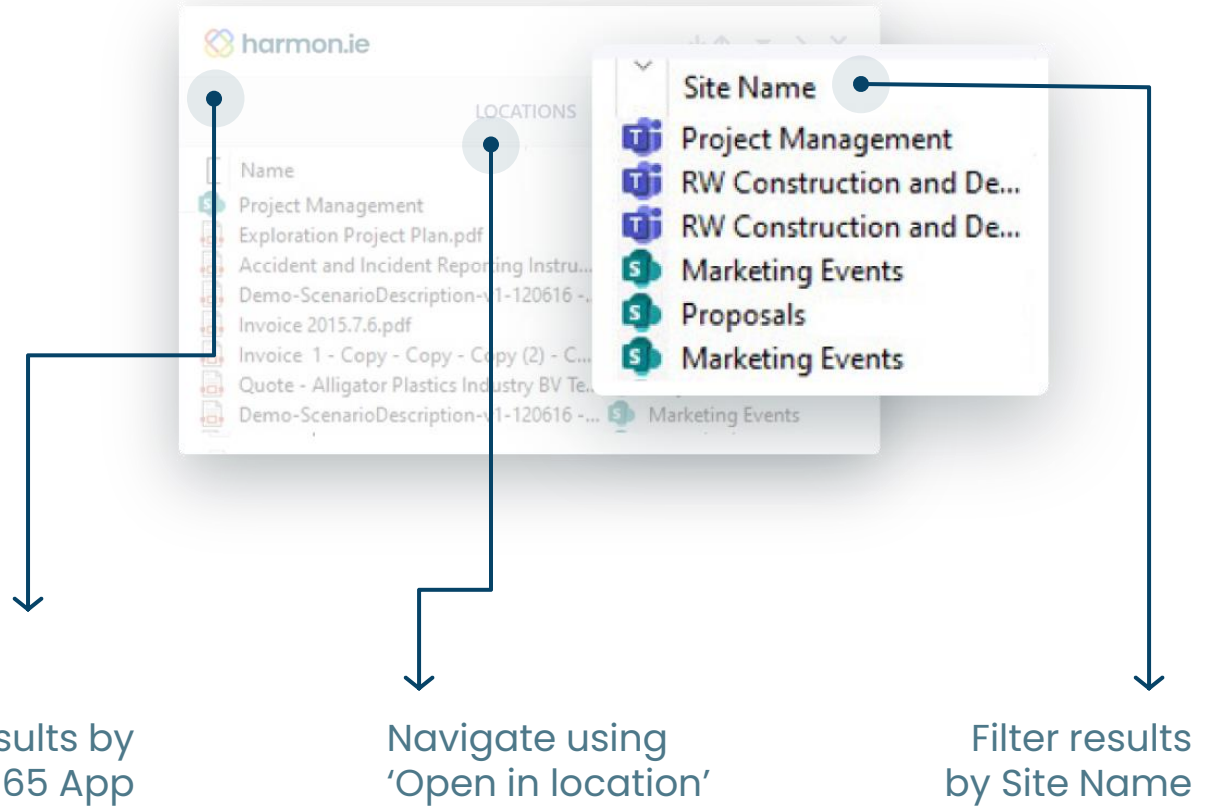
Search by column or metadata

Search scope

# Search Across Microsoft 365 Apps



- Filter/Sort by Microsoft 365 App
- Filter/Sort by Site
- Navigate directly to location



# Microsoft Trusted Partner





Download a 30-day eval here

**Download NEW product:**

<https://harmon.ie/login>

**Get 30-day free trial:**

<https://harmon.ie/enterprise-trial>





ABOUT US



# harmon.ie Client Examples

## Aerospace & Defense



## Banking & Finance



## Construction



## Energy



## Government



## Healthcare



## Insurance



## Manufacturing



## Publishing & Entertainment



## Professional Services



## Technology



## Utilities



**NEW**

Marquee Customers



# harmon.ie Client Examples

**babcock**<sup>TM</sup>

**DRASS**<sup>®</sup>



**Deloitte.**

Employment and  
Social Development Canada  
**Canada**<sup>Canada</sup>

**bdc** \*

**EY**



**Allianz** 



**EPA**  
VICTORIA

**ebn**

# Case Study

Bosch Manages Emails and Documents with harmon.ie and SharePoint



**“ We want everybody to use harmon.ie, because once you use it, you love it. ”**

**Daniel Stuch**, Bosch Senior Project Leader Application Development and Rollout

## Company

Over 400,000 employees

## Industry

Engineering and  
Technology, Manufacturing

## Location

Global multinational

## About BOSCH

The Bosch Group is a leading global supplier of technology and services. It employs roughly 400,000 associates worldwide, with 2019 sales of 77.7 Billion euros. Its operations are divided into four business sectors: Mobility Solutions, Industrial Technology, Consumer Goods, and Energy and Building Technology. The Bosch Group comprises roughly 440 subsidiary and regional companies in 60 countries. Including sales and service partners, Bosch's global manufacturing, engineering, and sales network covers nearly every country in the world.

# Case Study

ESDC: Doing Information Management Without Doing Information Management

## ESDC: DOING INFORMATION MANAGEMENT WITHOUT DOING INFORMATION MANAGEMENT



“

*“harmon.ie enables our employees to do information management (IM) without knowing they are doing information management... And that makes all the difference.”*

Alexandre Singh, ESDC Executive Director Business Solutions and Information Management



**Industry**

Government



**Location**

Canada



**Size**

32,000 employees

## About ESDC

**Employment and Social Development Canada (ESDC)** is the department of the Government of Canada responsible for developing, managing and delivering social programs and services, including employment insurance, pension plan, old age security, guaranteed income supplement benefits, and more. ESDC employs about 32,000 workers, of which 60-70% are regional employees, and 30-40% are employed in Ottawa. It distributes approximately C\$120B to Canadians every year.



# Case Study

Department of Agriculture and Agri-food (AAFC)

“

*People are not going to change. If you want them to use SharePoint, you have to make it easy for them to capture, classify, and find emails and documents. harmon.ie is the key.*

Mario Gaulin, Director of Enterprise Information Solutions at AAFC

**Industry**

Governmental

**Location**

Canada

**Size**

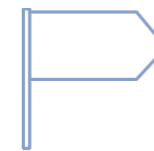
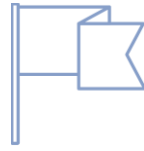
More than 6000 employees

## Organization Background

The Canadian Department of Agriculture and Agri-Food, also referred to as Agriculture and Agri-Food Canada (AAFC) is the department of the Government of Canada responsible for policies governing the production, processing, and marketing of all farm, food, and agri-based products.

The Department works closely with provincial and territorial governments in the development and delivery of policies and programs. The Department is also responsible for ensuring collaboration with its portfolio partners which are also involved in regulating and supporting Canadian agriculture.





## Organization:

Bosch is a multi-national manufacturing company focusing on solutions for mobility, industry, energy & building, and consumer goods

60 countries and 460 regional subsidiaries

410,000 associates

## need:

Business records & important information were distributed via email. Personal mailboxes are not accessible to co-workers

Legal & internal retention obligations require associates to route documents through the company information lifecycle.

SAP Portal rooms were discontinued once support was suspended

## Today:

6000 users rolled out by Dec 2019

Up to 70% efficiency gains when storing emails to SP

Access to SharePoint from Outlook increases SharePoint adoption

Data volume reduced by sending links, not files (ease of use)

## Futures:

Extend harmon.ie globally to 360,000 associates

*[With harmon.ie] you save up to 70% of the steps or gain 70% of productivity when you drag and drop emails...into the right SharePoint site."*

**Daniel Stuch**

Senior Project Leader Application Development and Rollout  
Bosch

# Government of Canada Case Study



Agriculture and  
Agri-Food Canada

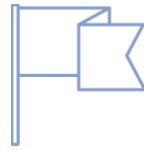


## Organization:

AAFC is responsible for policies governing the production, processing, and marketing of all farm, food, and agri-based products in Canada.

SharePoint 2019 Infrastructure  
(migrating to SharePoint Online)

- 8058 MySites
- 1790 internal collaboration sites
- 97 external collaboration sites



## need:

Limited Inbox space

Saving emails to SharePoint

Document versioning 'chaos'

Tag emails and documents

Bulk uploading of content

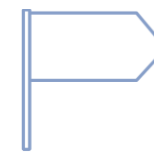


## Today:

Used by a diverse group of knowledge workers to capture and classify documents and emails from Outlook and Windows Explorer into SharePoint

Links are now sent instead of attachments to:

- Save email Inbox space
- Eliminate versioning chaos
- Tag emails and documents so they can be found later



## Futures:

Complete SharePoint Online rollout

Extend harmon.ie to entire organization

Auto-tagging with SharePoint Syntex

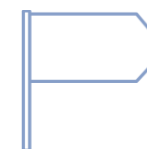
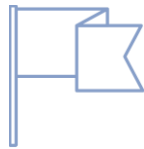


*"People receive an email with a link to a document that points directly to SharePoint, and they are amazed - 'how did you do this?'"*

**Mario Gaulin**

Director of Enterprise Information Solutions Canada Department of Agriculture and Agri-food (AAFC)





## Organization:

Provider of engineering services for defense, emergency services, civil nuclear

129 years old company

£588m profit in 2019

Over 35,000 employees

## need:

It is mandatory to classify emails and documents

Shared drives didn't solve the problem. No classification; managing permissions was impossible

SharePoint was installed, but bulk uploading and classification was not practical

## Today:

harmon.ie is available through a service catalog

250 users are already installed

Classification, version history, and comments are heavily used features

harmon.ie is a key part of company "Digital Workplace" tour

## Futures:

Extend to a corporate deployment

Take advantage of harmon.ie / Teams integration

Evaluate harmon.ie mobile apps

*"We have approximately 26,000 users; the reason we chose harmon.ie was is it bridged the gap we had for storing emails in SharePoint. harmon.ie was a good price and were able to implement in the time scales we required ."*

**Cassy Freeman**  
Digital Workplace Lead  
Babcock

# MAPAL Dr. Kress KG



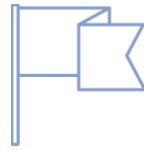
## Organization:

Global provider of tools and solutions for the manufacturing industry.

5,500 employees worldwide

40 branches and subsidiaries in 25 countries.

Headquartered in Germany



## need:

Needed a central repository for contract management

Users need to classify documents and emails so they can be found

A sizable part of workforce was reluctant to switch from previous Lotus Notes system to Outlook email

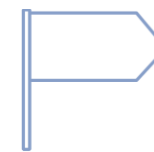


## Today:

Harmon.ie drag and drop make capturing documents simple

Ability to classify emails and documents using metadata from Outlook enables organization to attain contract management goals

Access to SharePoint from Outlook drove adoption and reduced resistance to moving to Outlook



## Futures:

Extend harmon.ie to additional workers

Explore mobile capabilities to extend value

*“Since implementing harmon.ie, we have more documents in SharePoint – particularly in purchasing, but also across the entire organization.”*

**Steffen Kabus**

Team Leader Digital Workplace / IT-Architect SharePoint & Cloud at

MAPAL Dr. Kress KG

Thank You

