



# Mastering Knowledge and Records Management in Office 365

February 20, 2018

# Today's Agenda

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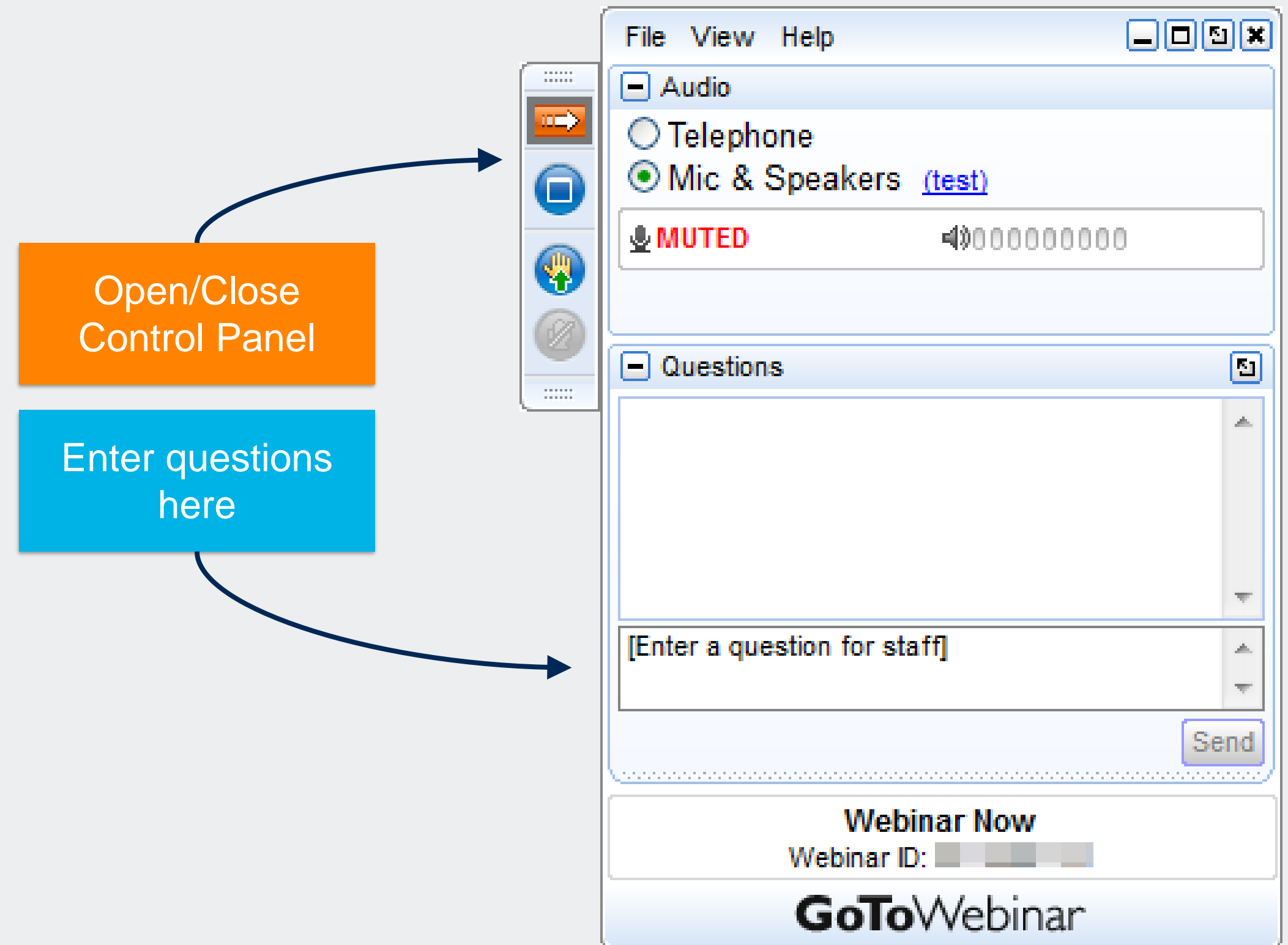
- 1 Webinar Logistics
- 2 The Move to O365: Observations & Lessons for RIM Practitioners
- 3 Insight From the Field
- 4 Email Manager for Office 365
- 5 Q&A



# Webinar Logistics

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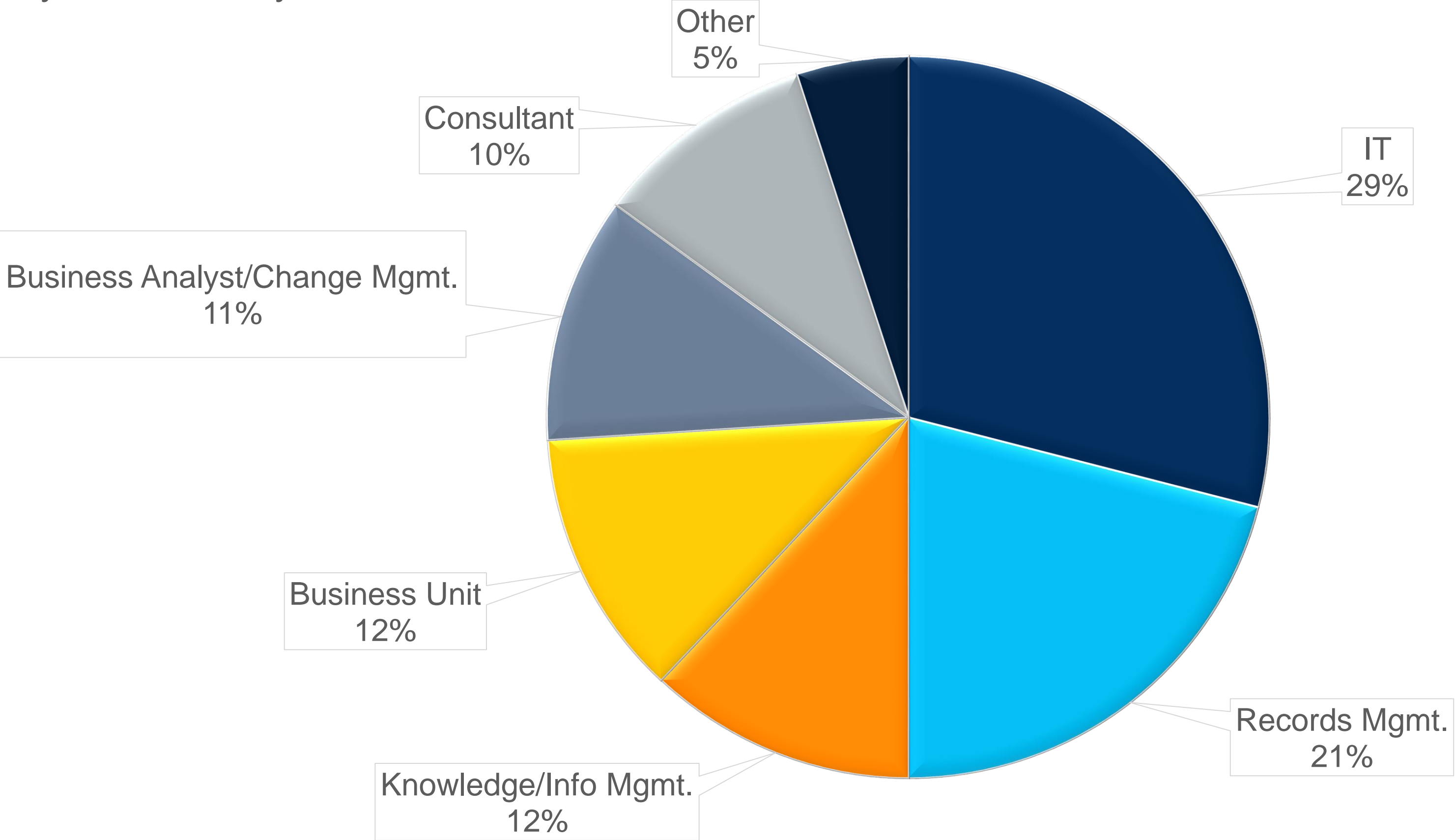
- Today's webinar will last 60 minutes
- You will receive a recording to the webinar
- Enter questions in the Control Panel





# Who's here today?

Today's audience by functional area



# Today's Speakers

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**CHRISTIAN BUCKLEY**

Microsoft MVP, CollabTalk



**BRUCE HERZER**

Director, Colligo



**RIYAZ LAKHANI**

Director, Colligo

# The Move to Office 365





# Office 365: Supporting Your Unique Workstyles



## Chat-based Workspace

Teams



## Mail & Calendar

Outlook



## Voice, Video & Meetings

Skype



## Sites & Content Management

SharePoint and OneDrive for Business



## Enterprise Social

Yammer

### Office 365 Groups

## Complete Collaboration Solution

Office 365 addresses the breadth of collaboration needs across organization

## Integrated Experiences

Office 365 Groups and Graph enable integrated experiences that facilitate effective collaboration

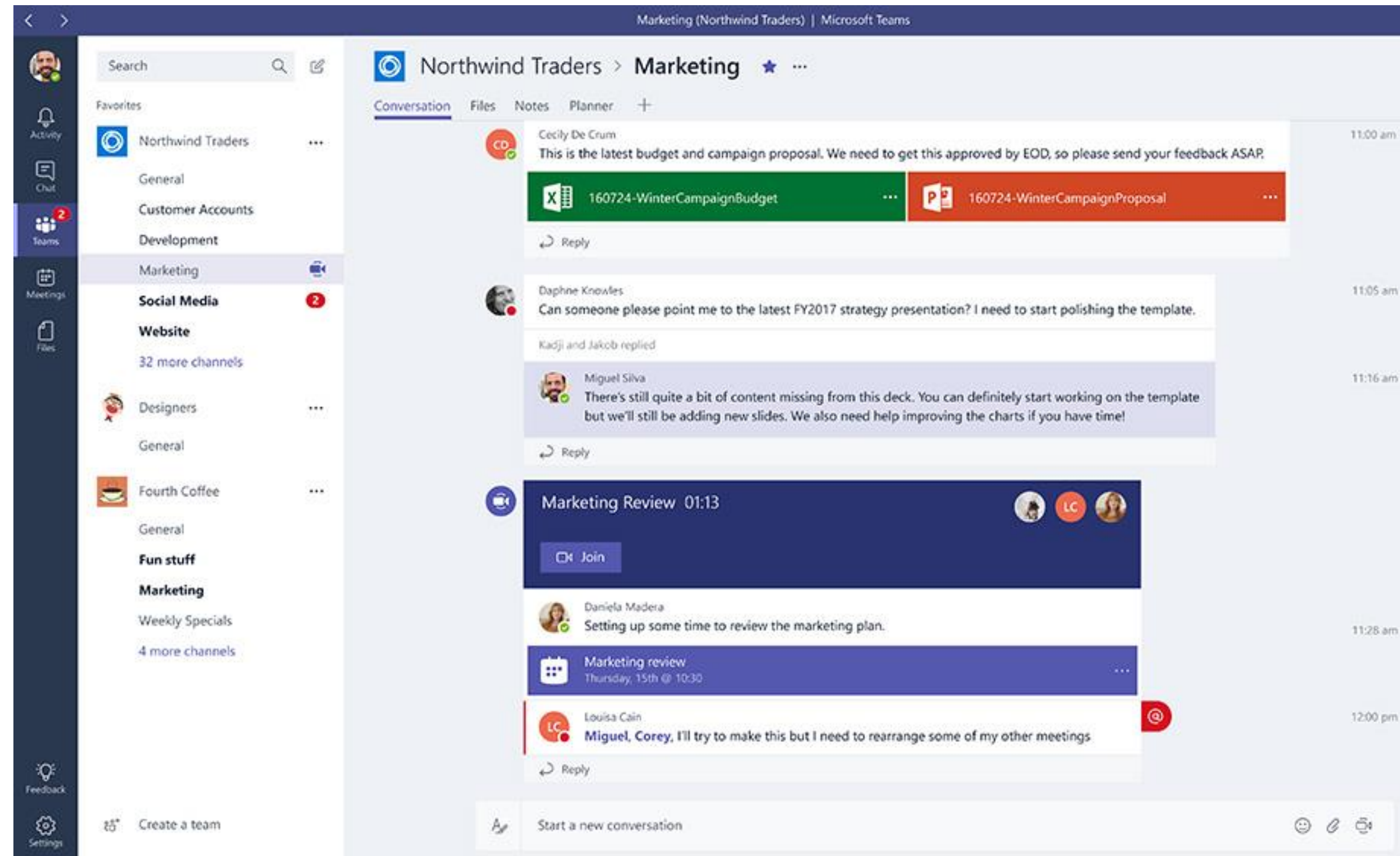
## Security and Compliance

Office 365 provides the security, compliance and manageability required in today's workplace

# Microsoft's Intelligent Communications Vision



- Intelligent communications goes beyond traditional unified communications alone.
- With intelligent communications, users are able to complete tasks more efficiently with minimal context-switching.
- Increases meeting productivity, and better manage your everyday communications overload.
- Microsoft Teams is at the core of Microsoft's vision for intelligent communications—bringing together conversations, meetings, files, Office apps, and third-party integrations—to provide a single hub for teamwork in Office 365.





# The History of Email in the Enterprise





# “The Killer App”

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- It began at MIT in 1965 using the MAILBOX program.
- The first message sent by the US Department of Defense’s ARPANET was in October 1969.
- By 1976, more than 75% of ARPANET traffic was email.
- Internet Service providers (ISPs) were launched and began growing in the mid-1980s.
- Email became a corporate standard by the early 1990s.
- As email became a marketing and communications platform throughout the 1990s, “spam” exploded.
- With bandwidth more readily available in the early 2000’s, email became the primary transport for information assets within the enterprise.





# Are Social, Search, and Mobile The Death of Email?





# The Evolution of Email

1. Basic  
Communication

2. Records  
Management

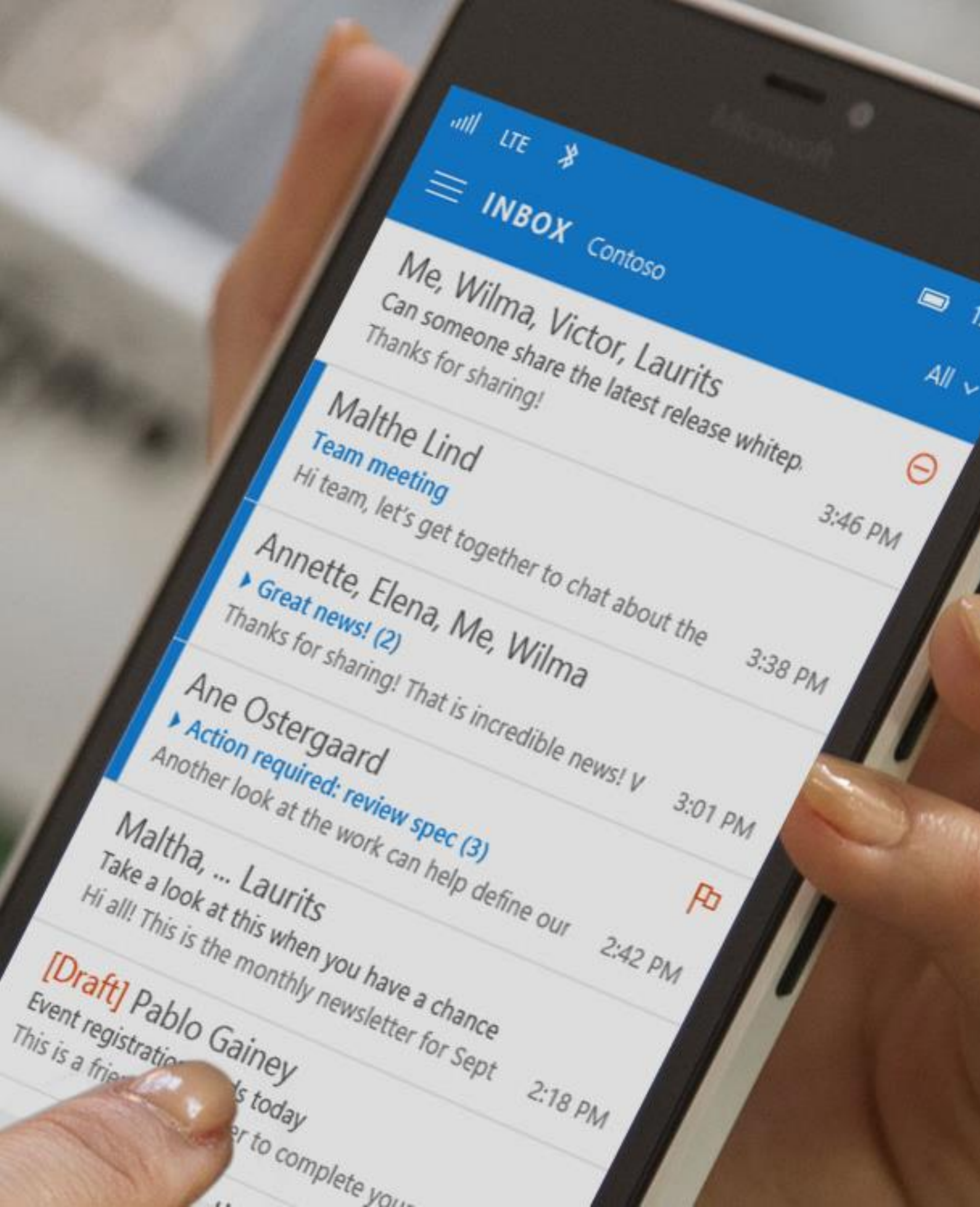
3. Collaboration  
Tool

4. Cognitive Search,  
AI, and ML

5. Business  
Transformation







# Email Trends



Marketing generally follows end user adoption and engagement trends, and can be a good indicator for enterprise collaboration trends:

- Personalization
- Interaction
- Chatbots
- Artificial Intelligence / Machine-Learning
- Data visualizations
- Video



# There is an Enterprise Problem with IP “leakage”

*Follow the flow of IP within your organization*

- **Collaboration often begins with email**
  - Sharing external/internal links
  - Asynchronous that leads to synchronous/IM
- **Assets shared in online platforms**
  - In many cases it is secondary to email
  - Can be redundant
  - Cloud slowly displacing LFT’s, but not eliminating email as transport
- **Knowledge Management fails to capture tacit knowledge**
  - Critical conversations and assets shared within email
  - Increases risk of IP leakage
  - Reduces context / relevance of KM
  - Lost IP has a direct financial impact





# Impacts of Office 365

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- Supports many different collaboration styles and requirements
- Reduces the complexity of managing your infrastructure
- Enables “one version of the truth”
- Provides consolidated administration
- Email becomes yet another integrated component of the Graph





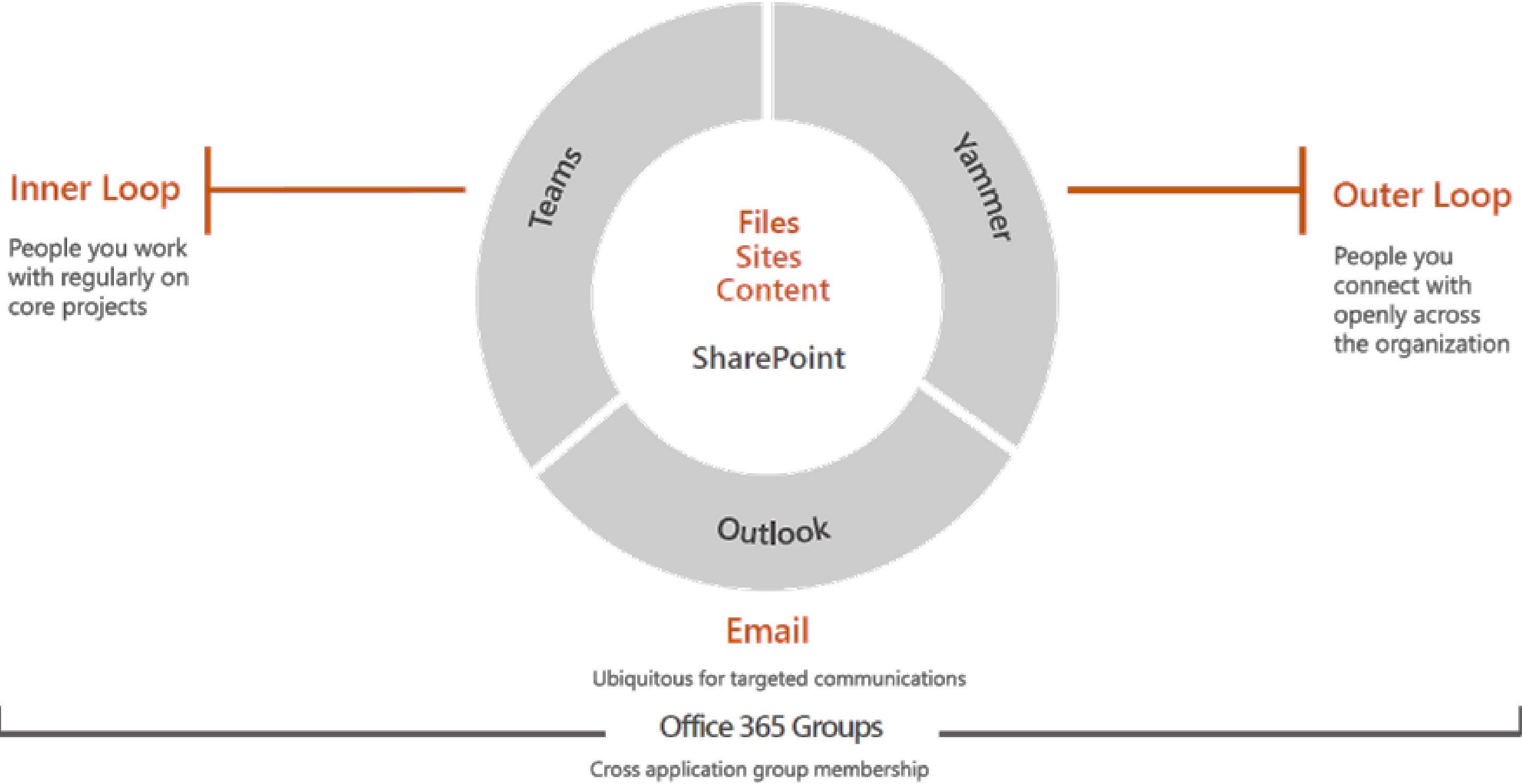
# Understanding Groups and Graph

# Understanding the Groups Construct





# Using the Right Tool, at the Right Time



# Office 365 and Digital Transformation

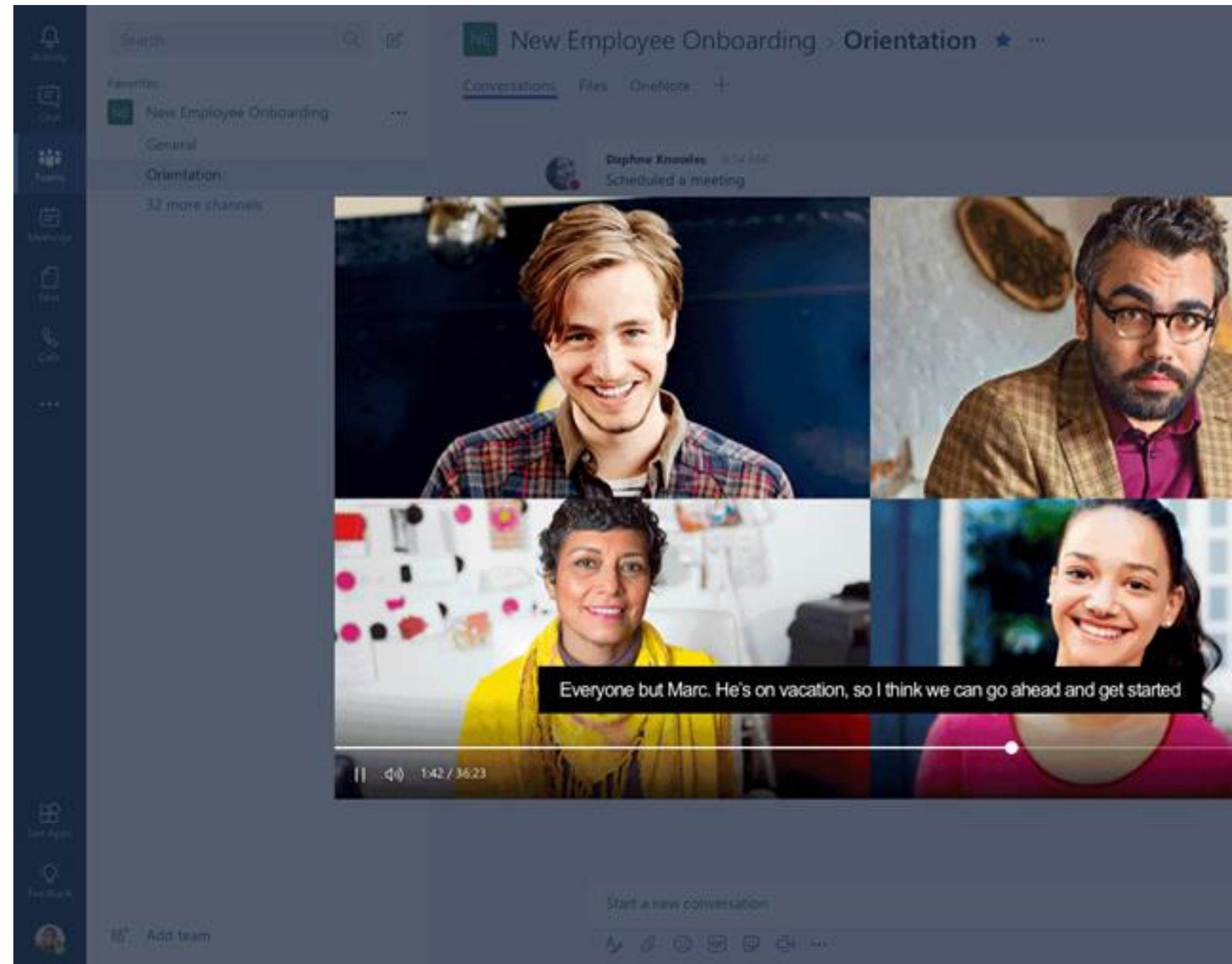


Microsoft Cognitive Services and the Microsoft Graph will transform how content, conversations, and data are captured, classified, and surfaced

Discovery will be integrated into every app and solution, putting relevant files and history at your fingertips

Transcription, translation, and speech recognition will connect even more people in one streamlined experience

Artificial intelligence will auto-generate notes and next steps based on company, team, or individual methodologies and best practices, and make suggestions to optimize and improve

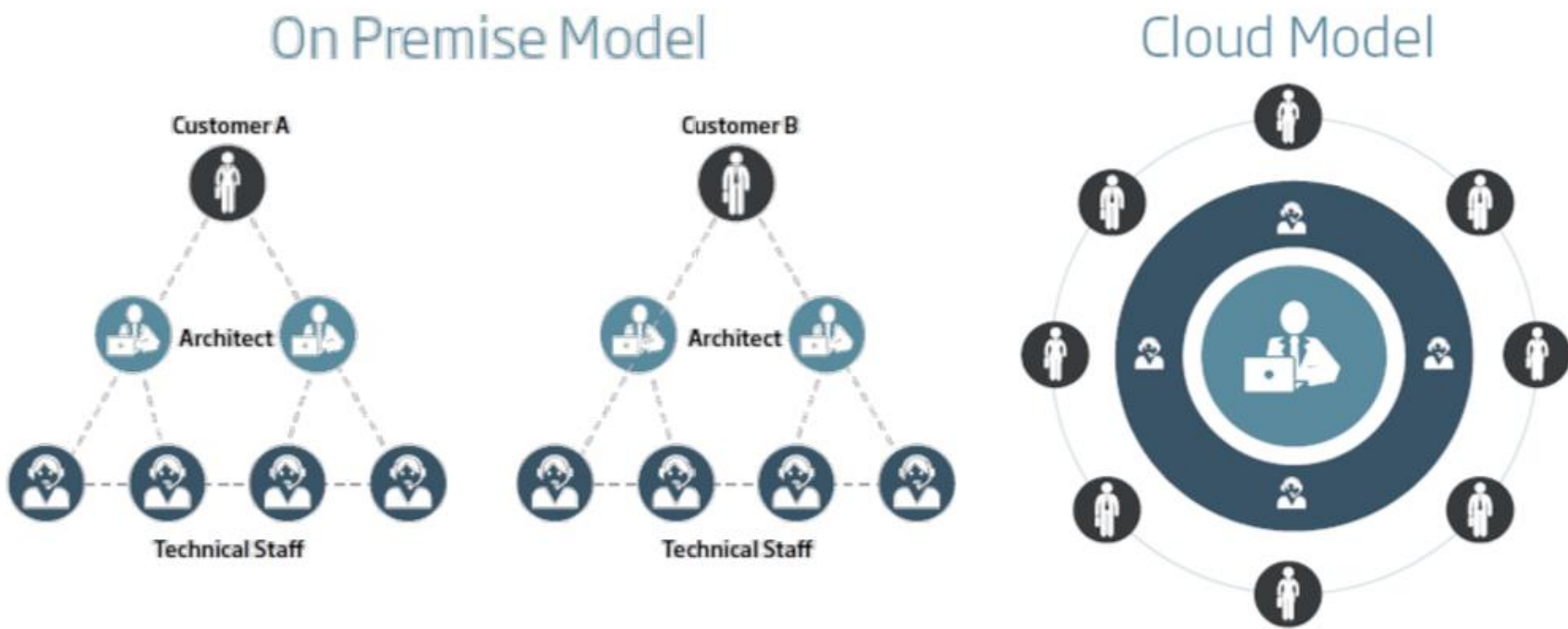









# Office 365 and Digital Transformation



Purely on-prem environments will make way for hybrid and cloud-only solutions

Organizations will leverage more and more data and services through the Microsoft Graph, increase their rate of innovation



| Available now   |  |   | Available in Developer Preview  |  |  |   |
|---|--|---|---|--|--|---|
| <br><b>Tabs</b><br>Surface rich content within Teams | <br><b>Bots</b><br>Help users get tasks done in conversations | <br><b>Connectors</b><br>Post rich updates to channels | <br><b>Actionable Messages</b><br>Add rich interaction to your connector cards | <br><b>Activity Feed</b><br>Engage users via feed notifications | <br><b>Compose Extensions</b><br>Allow users to query and share rich cards in conversations | <br><b>Office store</b><br>Drive engagement by submitting your app to the Office Store |



# Individual Collaboration Behaviors Drive Additional Change

Improving personal productivity has a compounding effect:

- People are better prepared for change
- Look for additional opportunities for optimization
- Find new ways to move between tools/workloads
- Focus not just on getting work done, but on how they can meet or beat expectations





# Office 365 Collaboration Use Case Guidance



| Teams  | Yammer  | Outlook   | SharePoint  | Skype  |
|--|---|---|---|--|
| Chat-based workspace   | Enterprise Social   | Email & calendar  | Sites & Content Management  | Voice, video and meetings  |
| <b>USE CASES</b>   |   |   |   |  |
| <ul style="list-style-type: none"> <li>• Iterate quickly on a project with your team</li> <li>• Share team files and collaborate on deliverables</li> <li>• Connect developer tools into your workspace</li> </ul> | <ul style="list-style-type: none"> <li>• Create a community of practice around research or trends</li> <li>• Crowdfund ideas on how to solve problems</li> <li>• Foster two-way conversations between leadership and staff</li> </ul> | <ul style="list-style-type: none"> <li>• Upgrade your DL to a group inbox with shared assets</li> <li>• Share updates with your group in email</li> <li>• Keep your group in sync with a shared calendar</li> </ul> | <ul style="list-style-type: none"> <li>• Create a company intranet for news and resources</li> <li>• Customize your Team Site to automate document workflows and share lists</li> <li>• Collaborate on your individual files in OneDrive</li> </ul> | <ul style="list-style-type: none"> <li>• Set up meetings with audio, video, and web conferencing</li> <li>• Hold Town Hall meetings with up to 10,000 people</li> <li>• Make business calls using the Internet or phone network</li> </ul> |

The background is a blurred office scene. In the center, a person stands at a whiteboard, pointing at it. In the foreground, a desk is visible with a laptop, a coffee cup, and some papers. The entire image has a blue color overlay.

# Insights from the Field





# Audience Poll

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Poll: Which Office 365 email management use cases are most important to your organization?

- ⊕ Outlook Mobile
- ⊕ Outlook Browser
- ⊕ Outlook Desktop



# Insight from the Field: SharePoint Usage

How firms are using SharePoint for knowledge and records management today



# Insight from the Field: Top Questions



| Challenges and Opportunities   | Insight and Suggestions  |
|--|--|
| <p>What do Labeling and the Security and Compliance Center mean for records management? Should I use them?</p> | <ul style="list-style-type: none"><li>• Advanced data governance features have been introduced to SCC</li><li>• Centralized content labeling capabilities across workloads</li><li>• Traditional records management processes will still have a place for some</li></ul> |
| <p>How do I best enable knowledge sharing in O365? Does Office 365 have a central data repository?</p>         | <ul style="list-style-type: none"><li>• Custodial vs. non-custodial workloads</li><li>• Teams changes the way people work, but migration will take time</li><li>• Clients tell us they want content in one centralized repository</li></ul>                              |
| <p>How do I get workers to adopt the process and put their content into the central repository?</p>            | <ul style="list-style-type: none"><li>• Barriers to adoption include complexity and accuracy</li><li>• Workers are most concerned about ease of use</li><li>• Give simple and familiar interfaces across the Office 365 experience</li></ul>                             |



# Introducing Colligo Email Manager for Office 365



It works where you work.



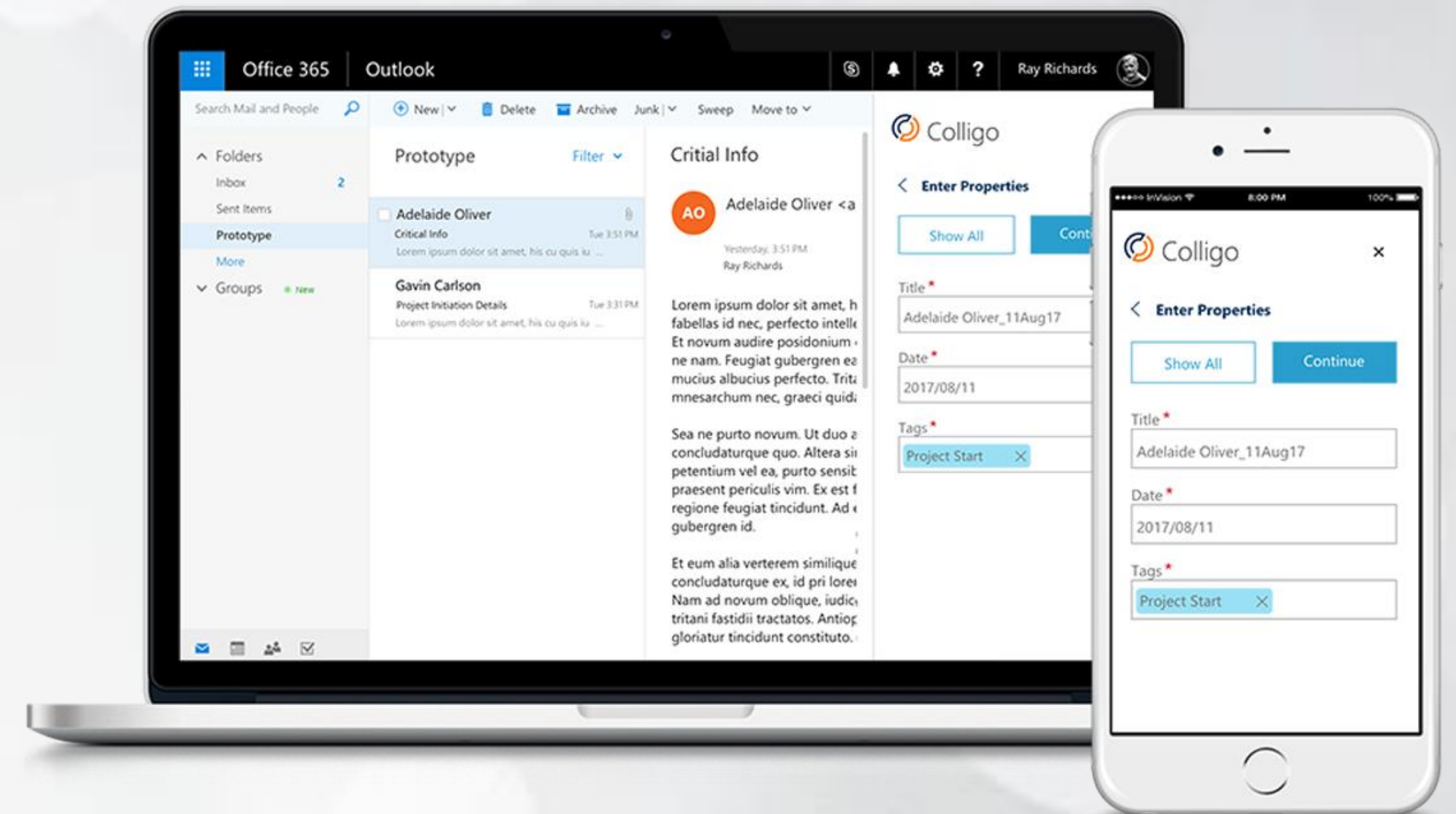
Access from anywhere Outlook or O365 goes



Get the right content in the right place with the right properties



Reduce chaos—send content as secure links or attachments



**Microsoft Partner**  
Gold Application Development  
Silver Cloud Platform



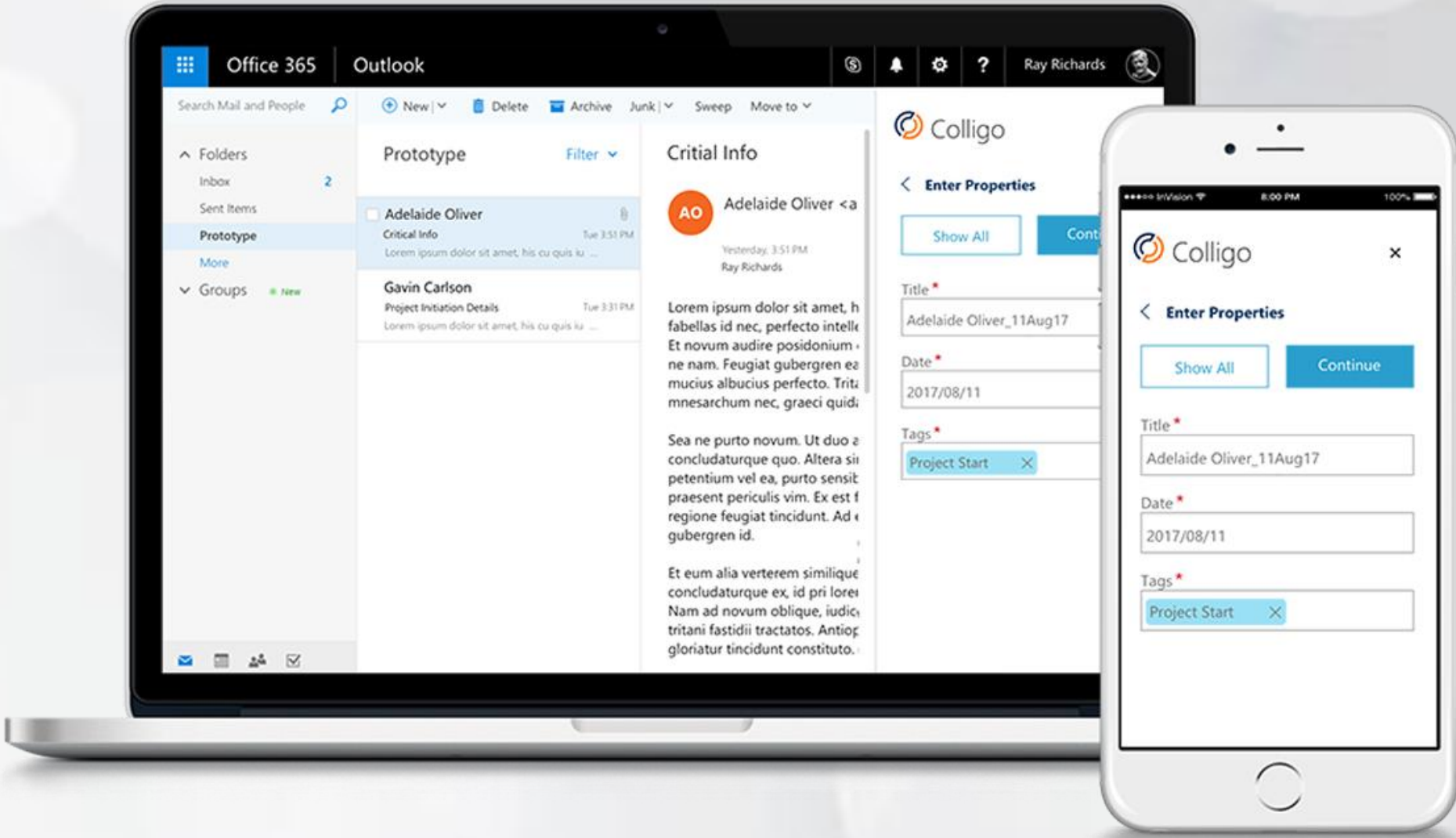
# Colligo Email Manager for Office 365



To request a demo visit

[www.colligo.com/O365](http://www.colligo.com/O365)

The latest addition to the award-winning Colligo Engage platform.



**Microsoft Partner**  
Gold Application Development  
Silver Cloud Platform



# Help us improve our webinars!

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Poll: What content would be helpful to you?

- ⊕ I'd like more information on getting started with knowledge & record management in SharePoint.
- ⊕ I'd like to see a case study
- ⊕ I'd like to get a personalized demo
- ⊕ I'd like to set up a trial of the software
- ⊕ I'd like something else





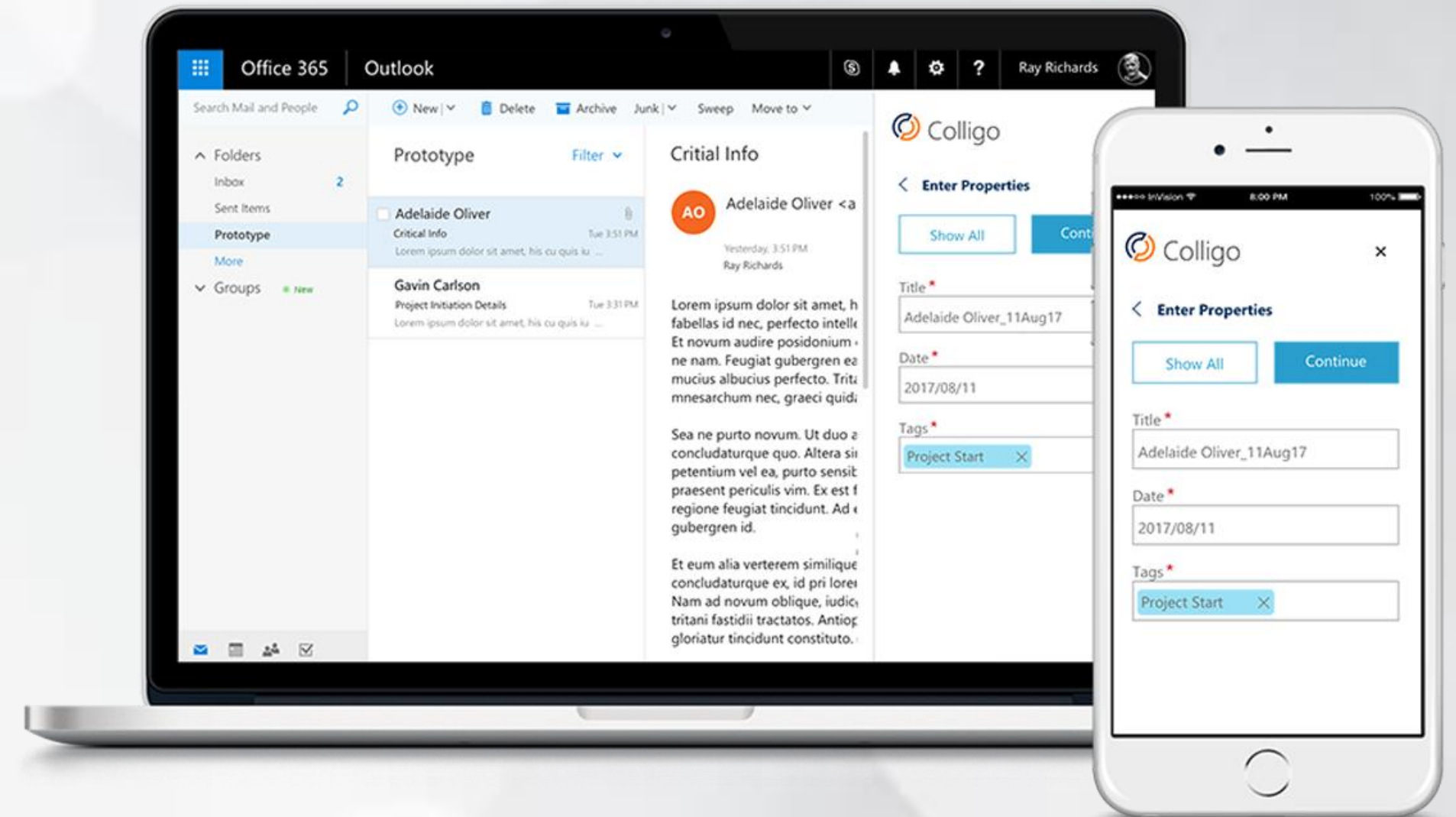
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**Thank You!**



**colligo**