



Mastering Knowledge and Records Management in Office 365

February 20, 2018

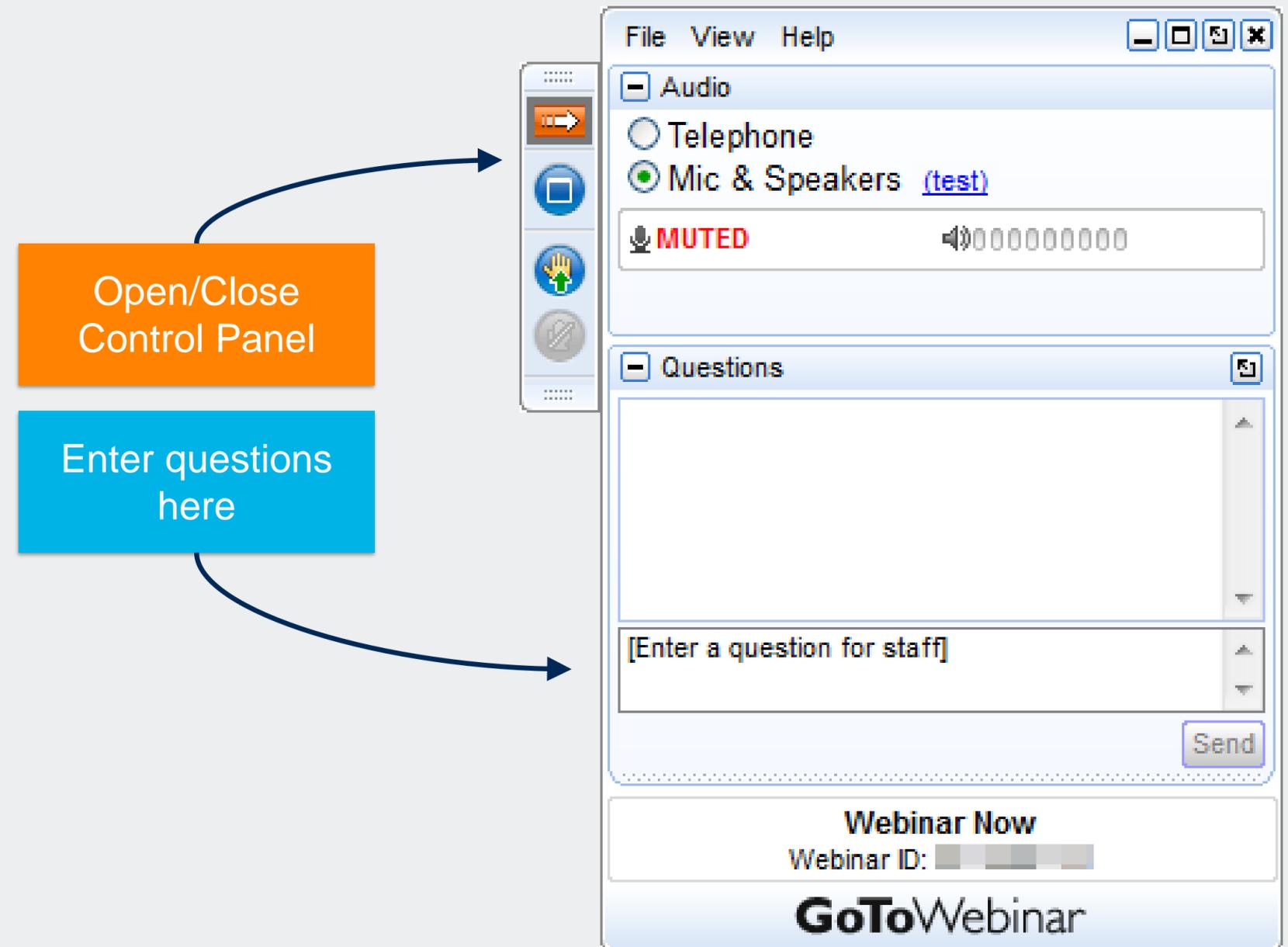
Today's Agenda

- 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

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



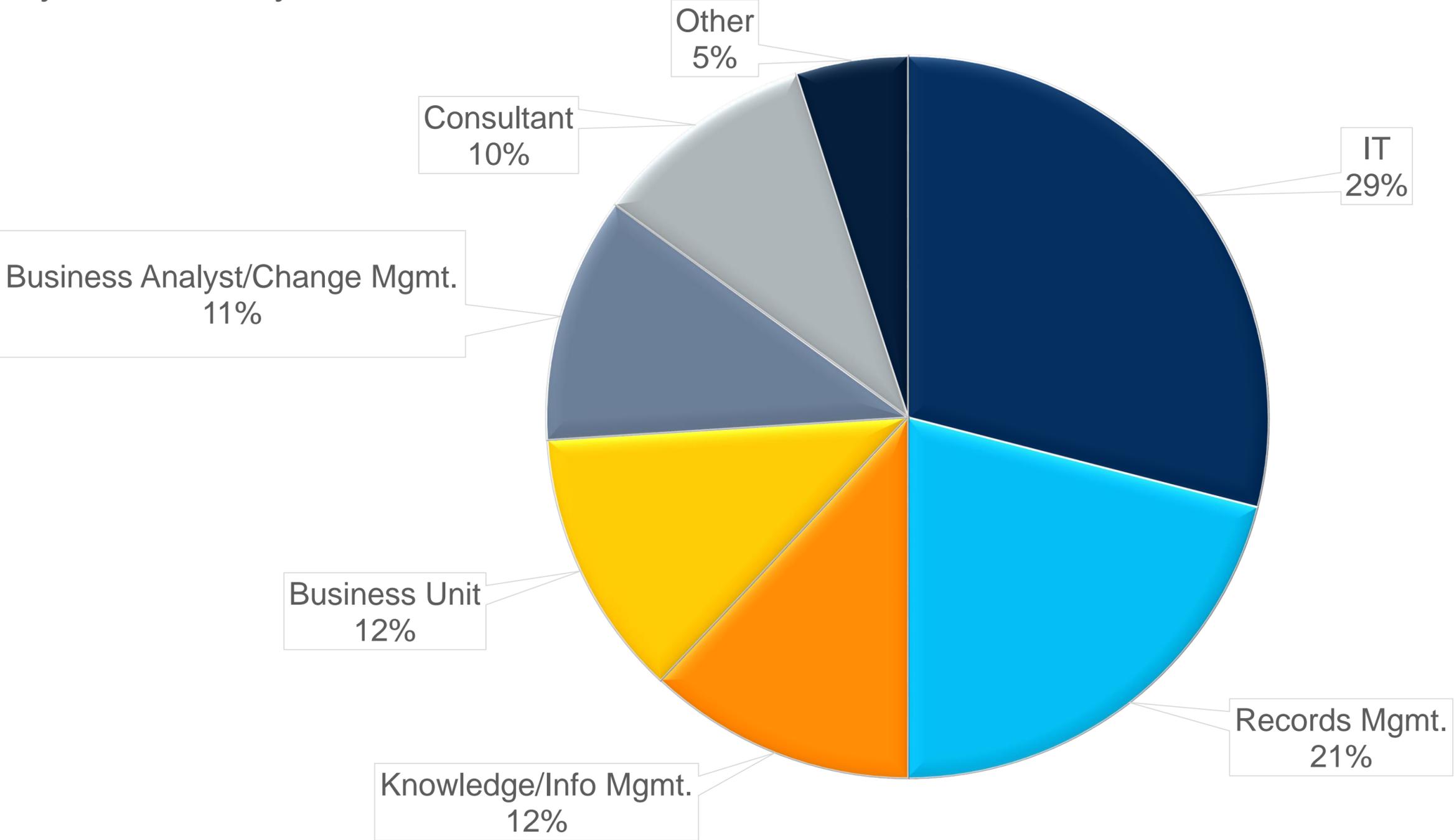
The screenshot shows the GoToWebinar control panel interface. On the left, there is a vertical toolbar with several icons. Two callout boxes are present: an orange box labeled "Open/Close Control Panel" with an arrow pointing to the top icon in the toolbar, and a blue box labeled "Enter questions here" with an arrow pointing to the "Questions" section of the main panel.

The main panel has a menu bar with "File", "View", and "Help". It contains the following sections:

- Audio:** Includes radio buttons for "Telephone" and "Mic & Speakers (test)". Below this is a "MUTED" indicator with a microphone icon and a volume slider.
- Questions:** A large text input area with a scroll bar. Below the input area is a smaller text field containing "[Enter a question for staff]" and a "Send" button.
- Webinar Now:** A section displaying "Webinar ID:" followed by a blurred grey box.
- GoToWebinar:** The logo at the bottom of the interface.

Who's here today?

Today's audience by functional area



Today's Speakers



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

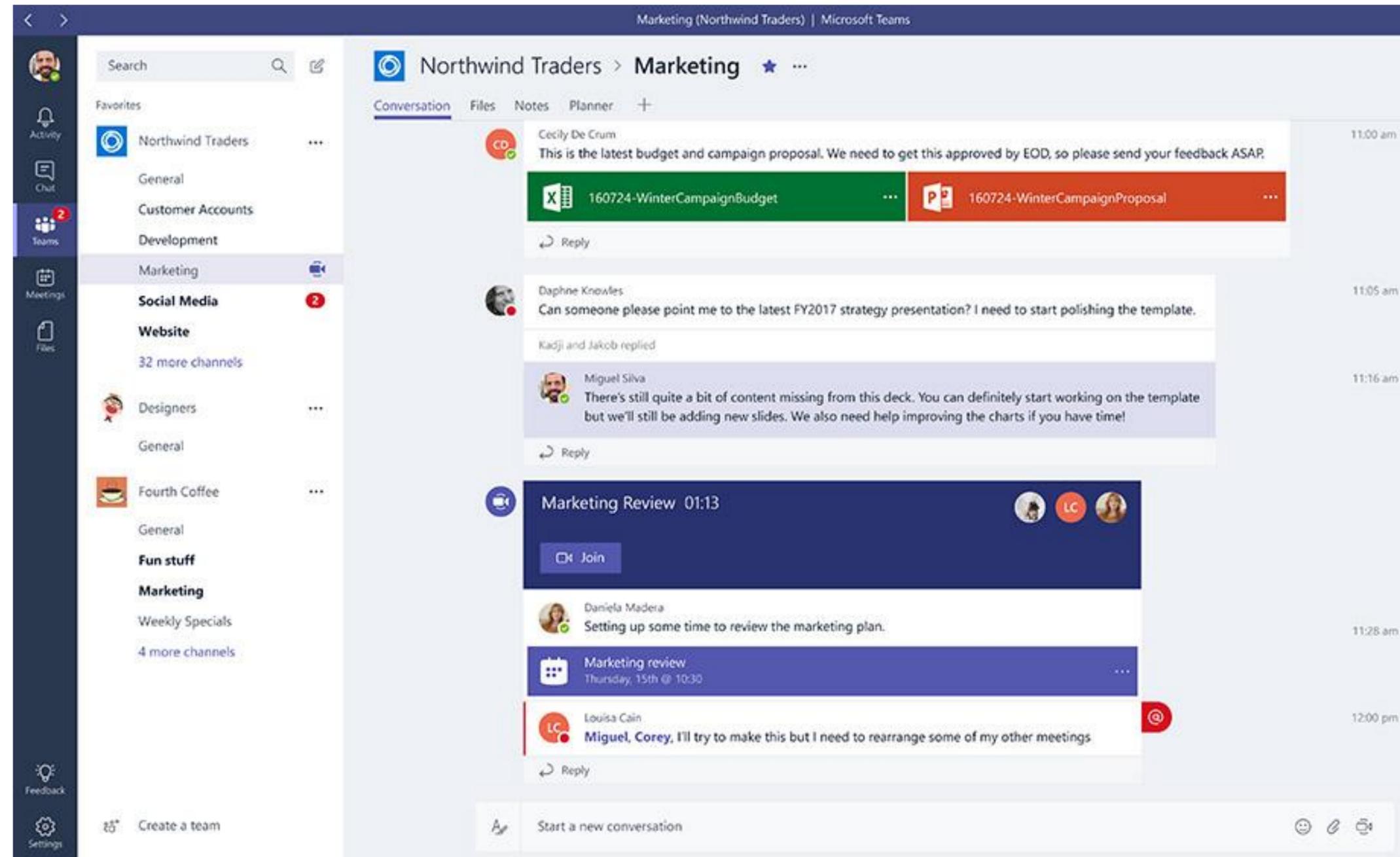
Security and Compliance

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”

- 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

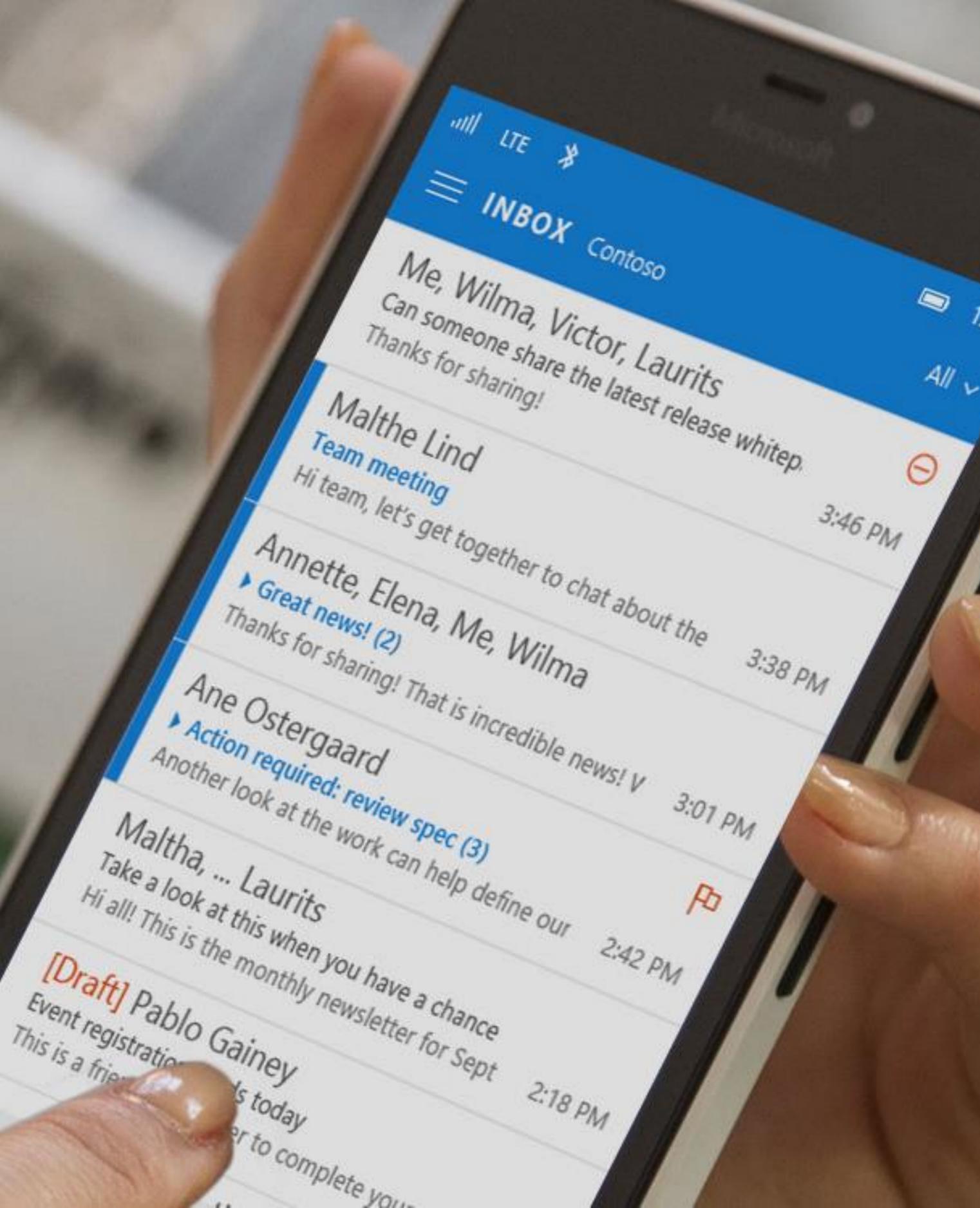
2. Records
Management

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

- 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

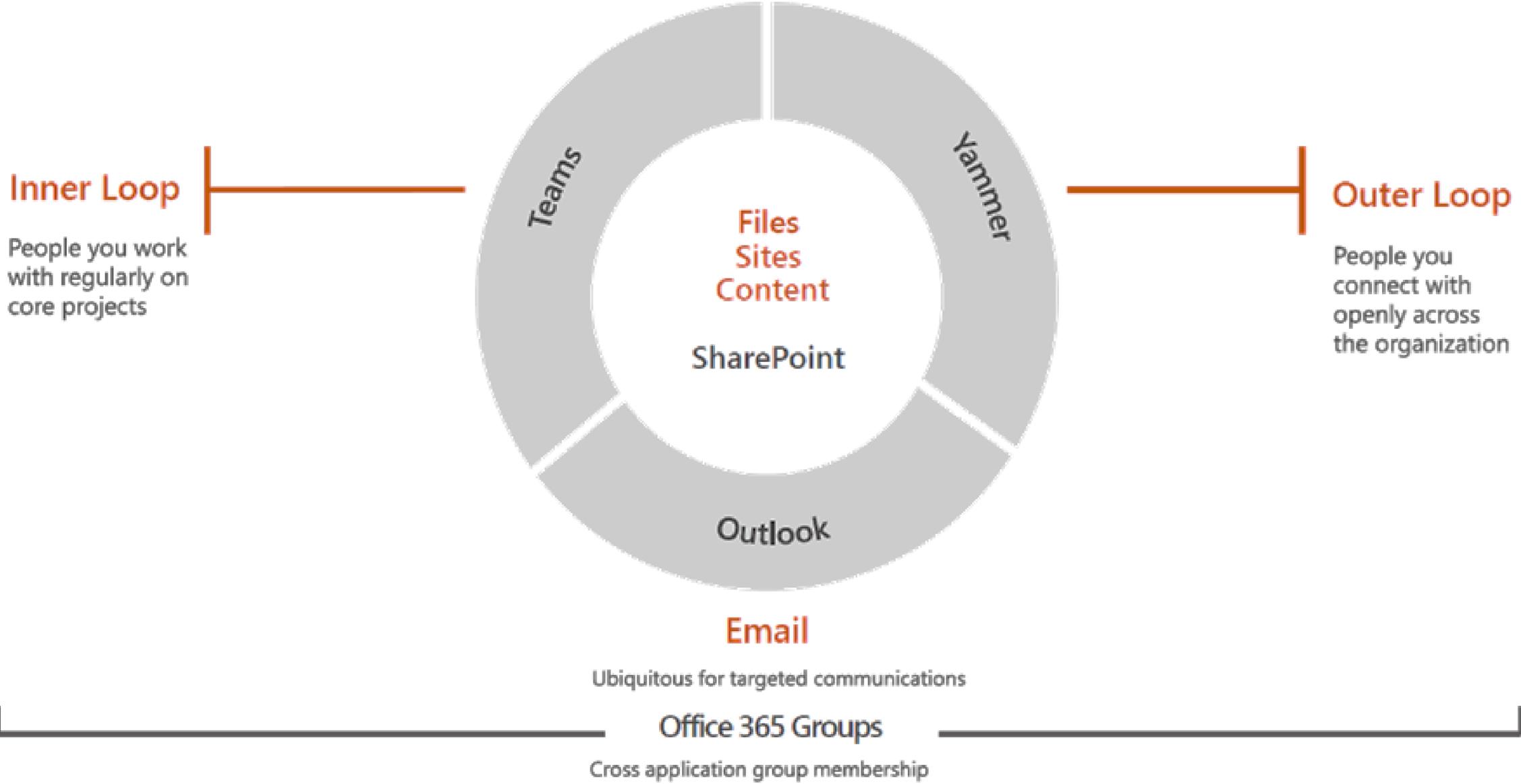


Understanding Groups and Graph

Understanding the Groups Construct



Using the Right Tool, at the Right Time



Office 365 and Digital Transformation

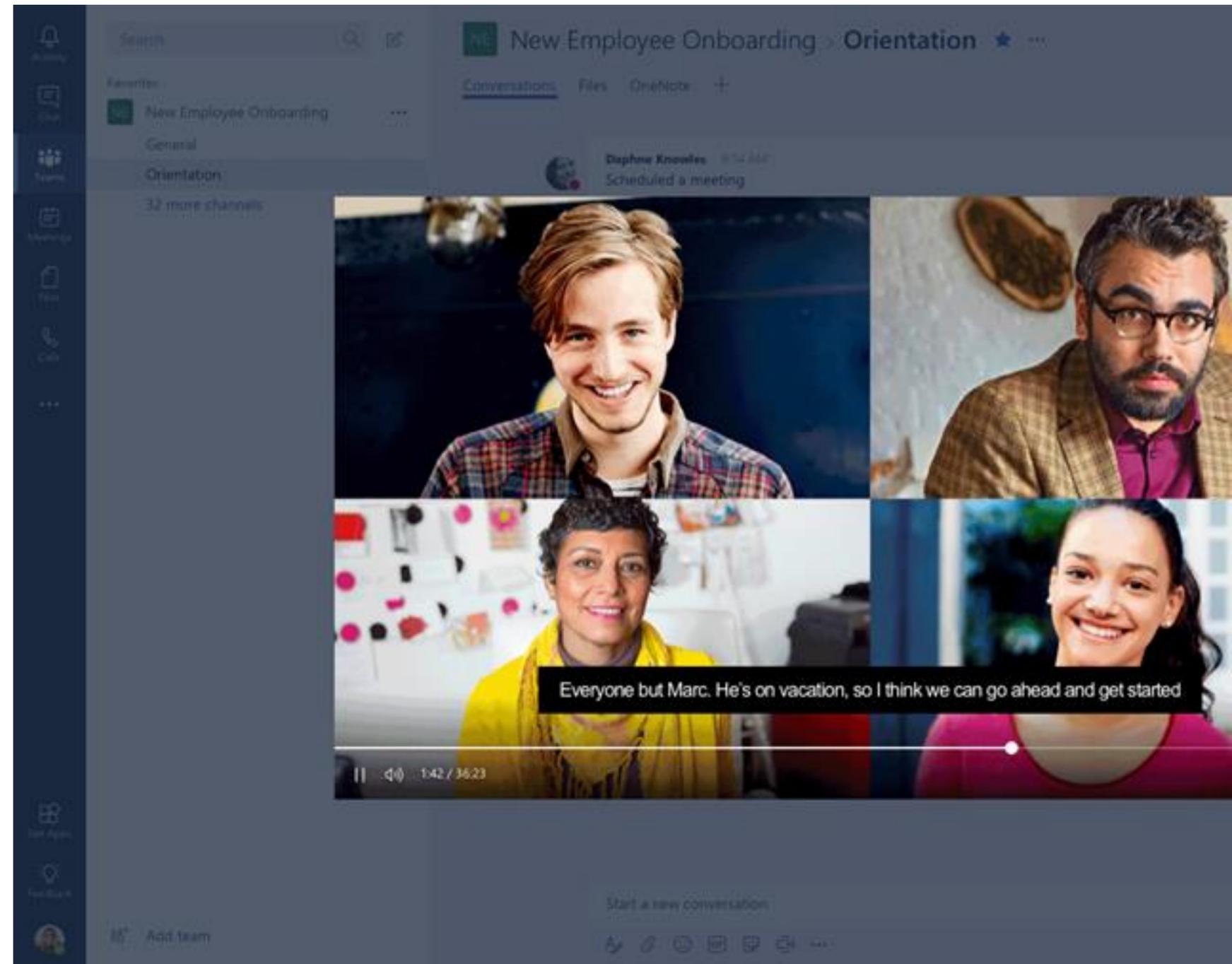


Microsoft Cognitive Services and the Microsoft Graph will transform how content, conversations, and data are captured, classified, and surfaced

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

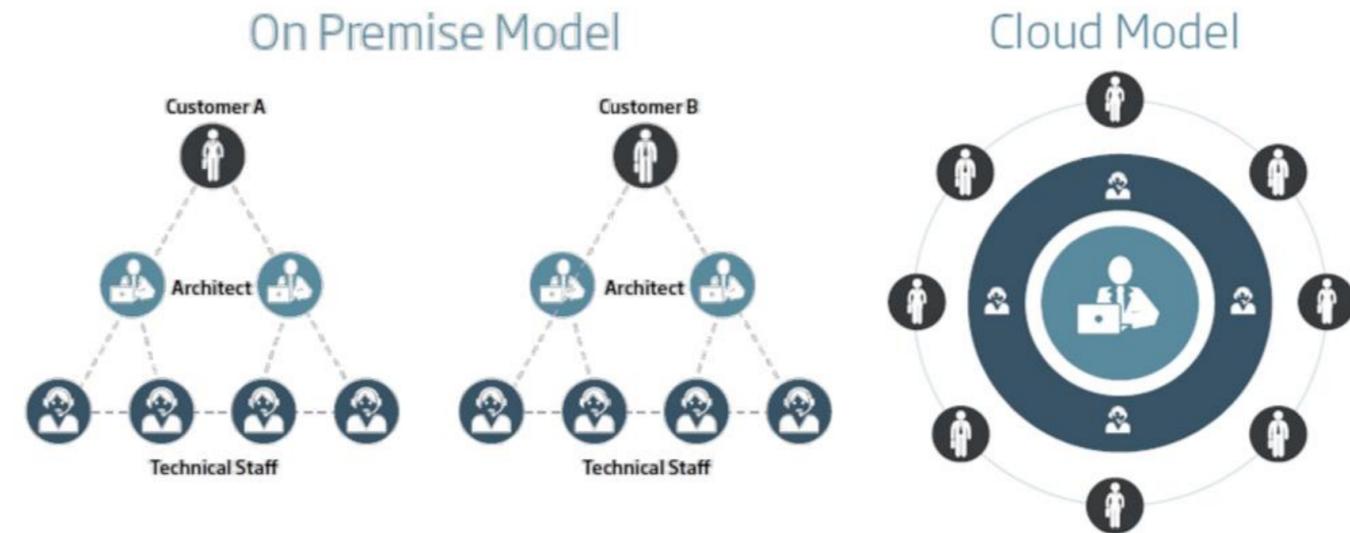
Artificial intelligence will auto-generate notes and next steps based on company, team, or individual methodologies and best practices, and make suggestions to optimize and improve



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			
						
Tabs Surface rich content within Teams	Bots Help users get tasks done in conversations	Connectors Post rich updates to channels	Actionable Messages Add rich interaction to your connector cards	Activity Feed Engage users via feed notifications	Compose Extensions Allow users to query and share rich cards in conversations	Office store 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
USE CASES				
<ul style="list-style-type: none"> • Iterate quickly on a project with your team • Share team files and collaborate on deliverables • Connect developer tools into your workspace 	<ul style="list-style-type: none"> • Create a community of practice around research or trends • Crowdfund ideas on how to solve problems • Foster two-way conversations between leadership and staff 	<ul style="list-style-type: none"> • Upgrade your DL to a group inbox with shared assets • Share updates with your group in email • Keep your group in sync with a shared calendar 	<ul style="list-style-type: none"> • Create a company intranet for news and resources • Customize your Team Site to automate document workflows and share lists • Collaborate on your individual files in OneDrive 	<ul style="list-style-type: none"> • Set up meetings with audio, video, and web conferencing • Hold Town Hall meetings with up to 10,000 people • Make business calls using the Internet or phone network



Insights from the Field



Audience Poll

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">• Advanced data governance features have been introduced to SCC• Centralized content labeling capabilities across workloads• Traditional records management processes will still have a place for some
<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">• Custodial vs. non-custodial workloads• Teams changes the way people work, but migration will take time• Clients tell us they want content in one centralized repository
<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">• Barriers to adoption include complexity and accuracy• Workers are most concerned about ease of use• Give simple and familiar interfaces across the Office 365 experience

Introducing Colligo Email Manager for Office 365



It works where you work.



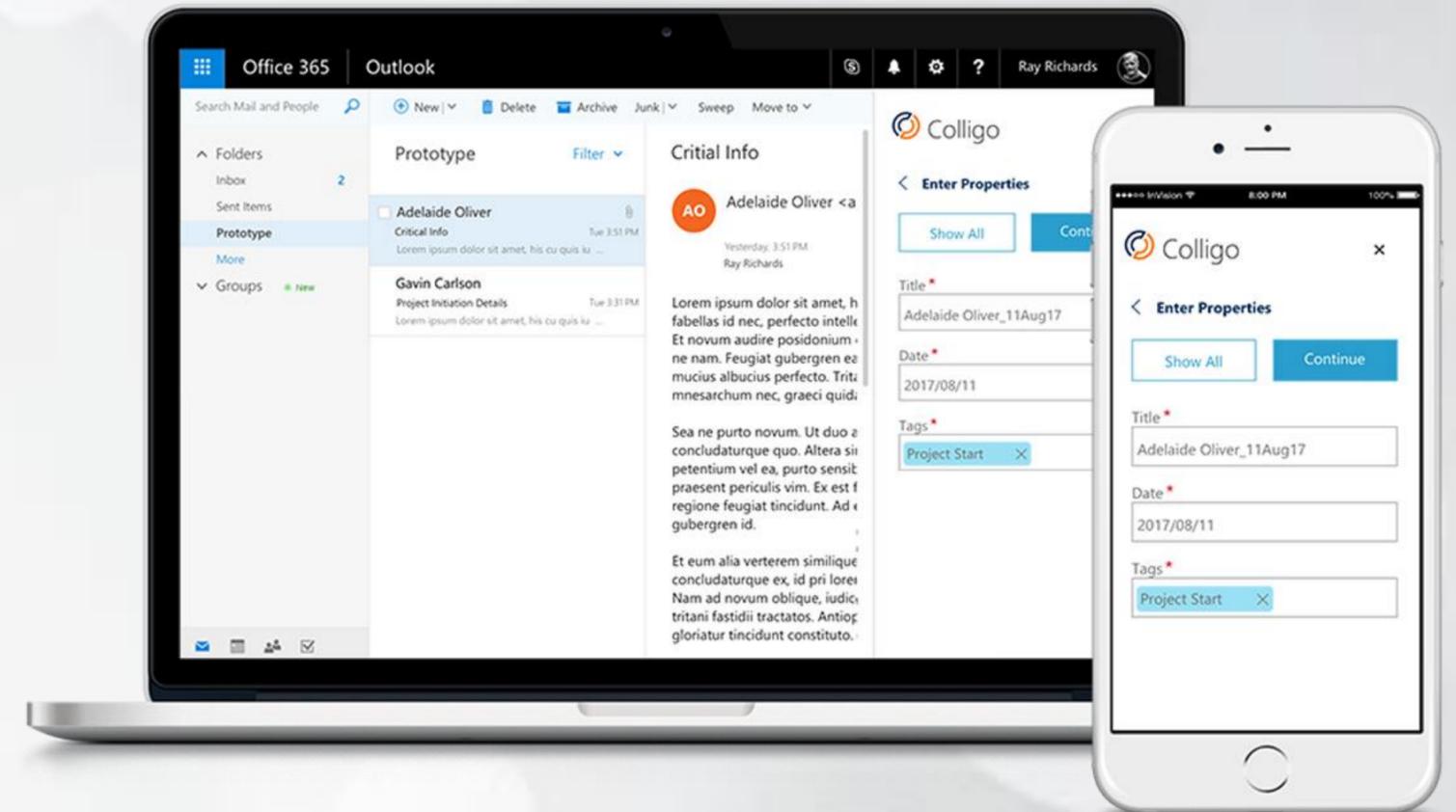
Access from anywhere Outlook or O365 goes



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

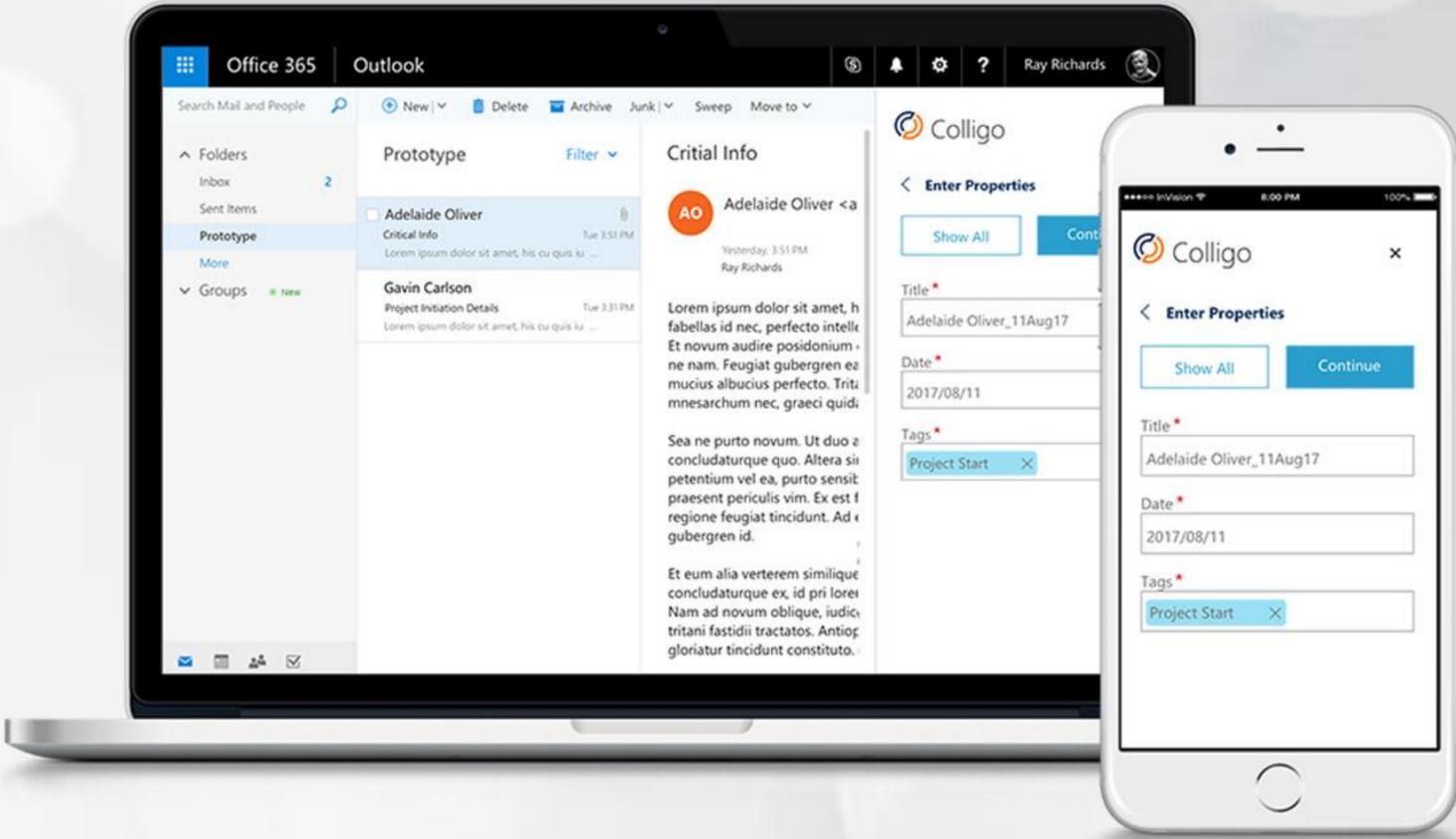
Colligo Email Manager for Office 365



To request a demo visit

www.colligo.com/O365

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



Microsoft Partner
Gold Application Development
Silver Cloud Platform

Help us improve our webinars!

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





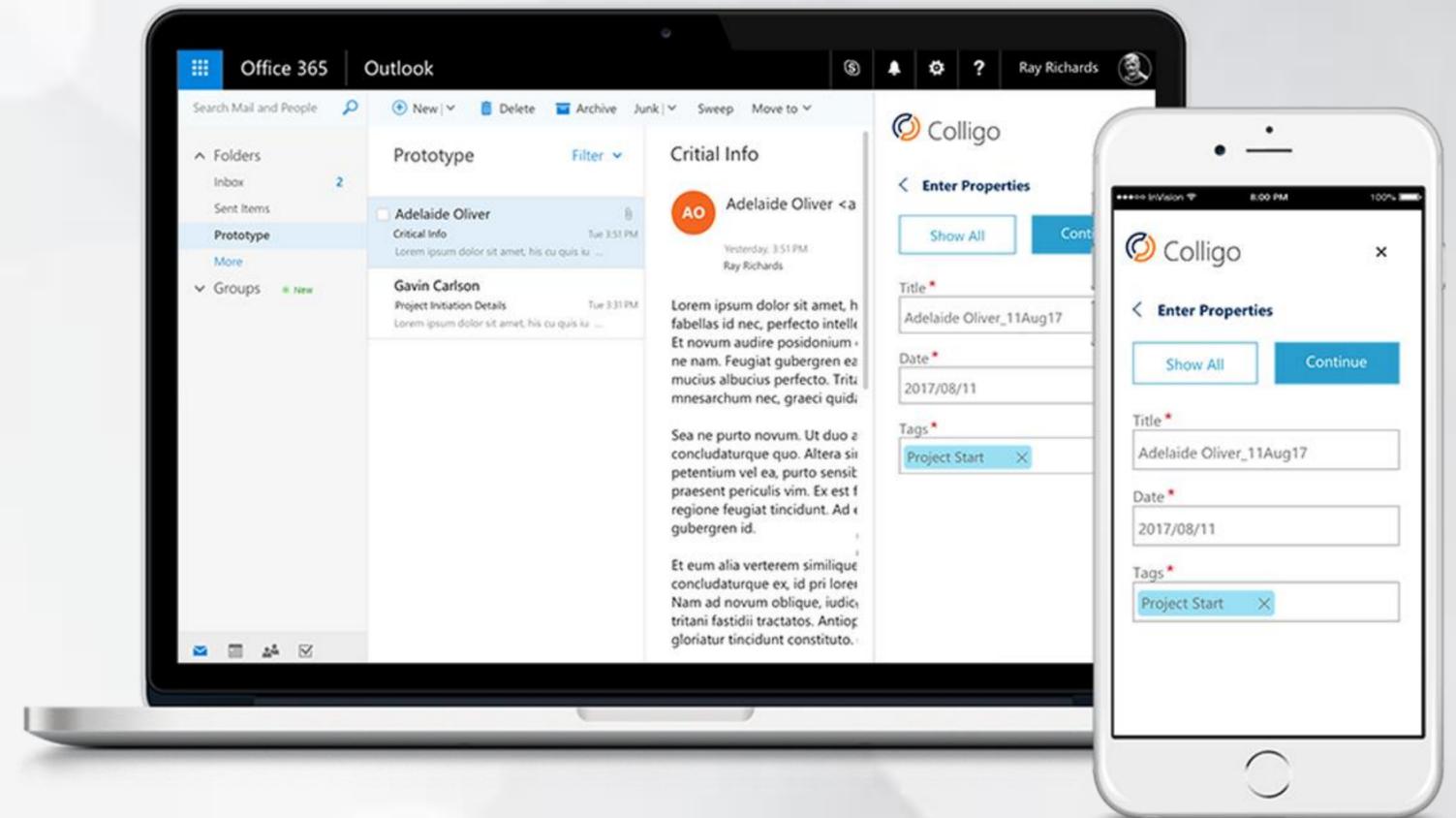
Colligo Email Manager for Office 365

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



To request a demo please visit

www.colligo.com/O365



Microsoft Partner
Gold Application Development
Silver Cloud Platform

Thank You!

