

Practical Governance for Microsoft Teams



Agenda

- Common Questions and Concerns
- Demo

Common Questions and Concerns



#1 How did we get so many Teams?

#2 How do we manage Teams and Records lifecycles?

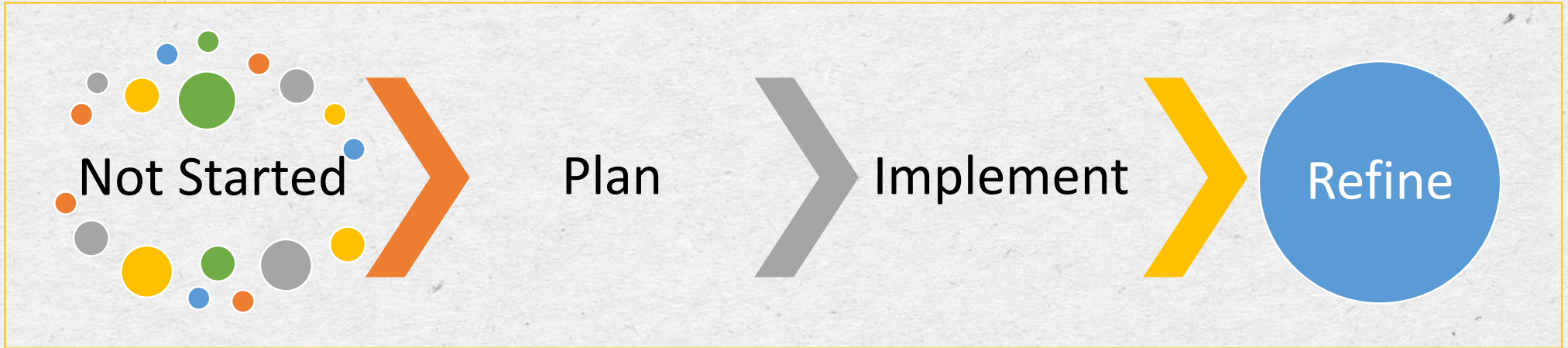
#3 How should we handle external parties?

#4 How do we monitor how Teams is being used today?

#5 What do we do if we already have an uncontrolled mess?

Teams Journey

Path



Alternate
Path

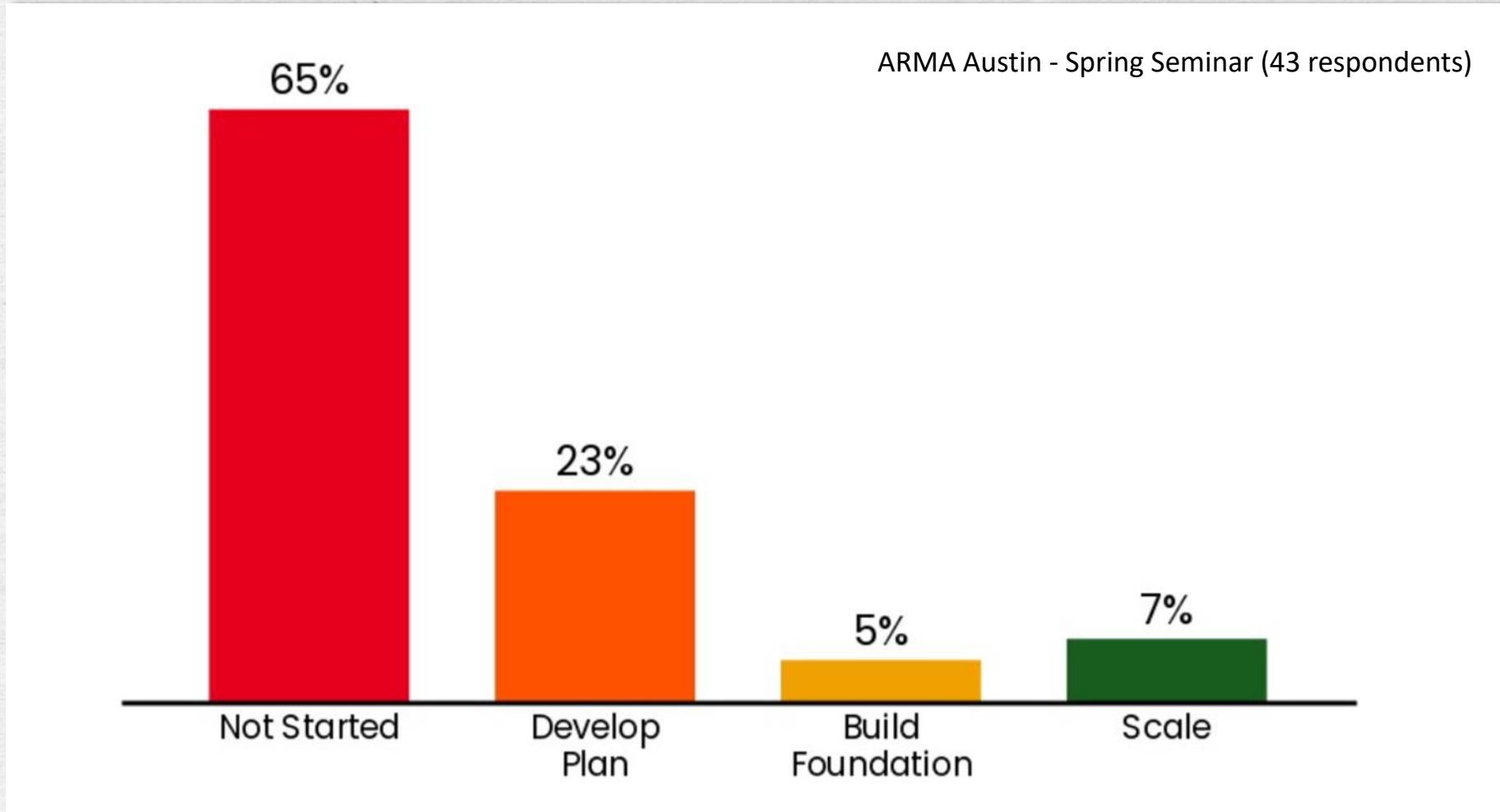


Teams Journey

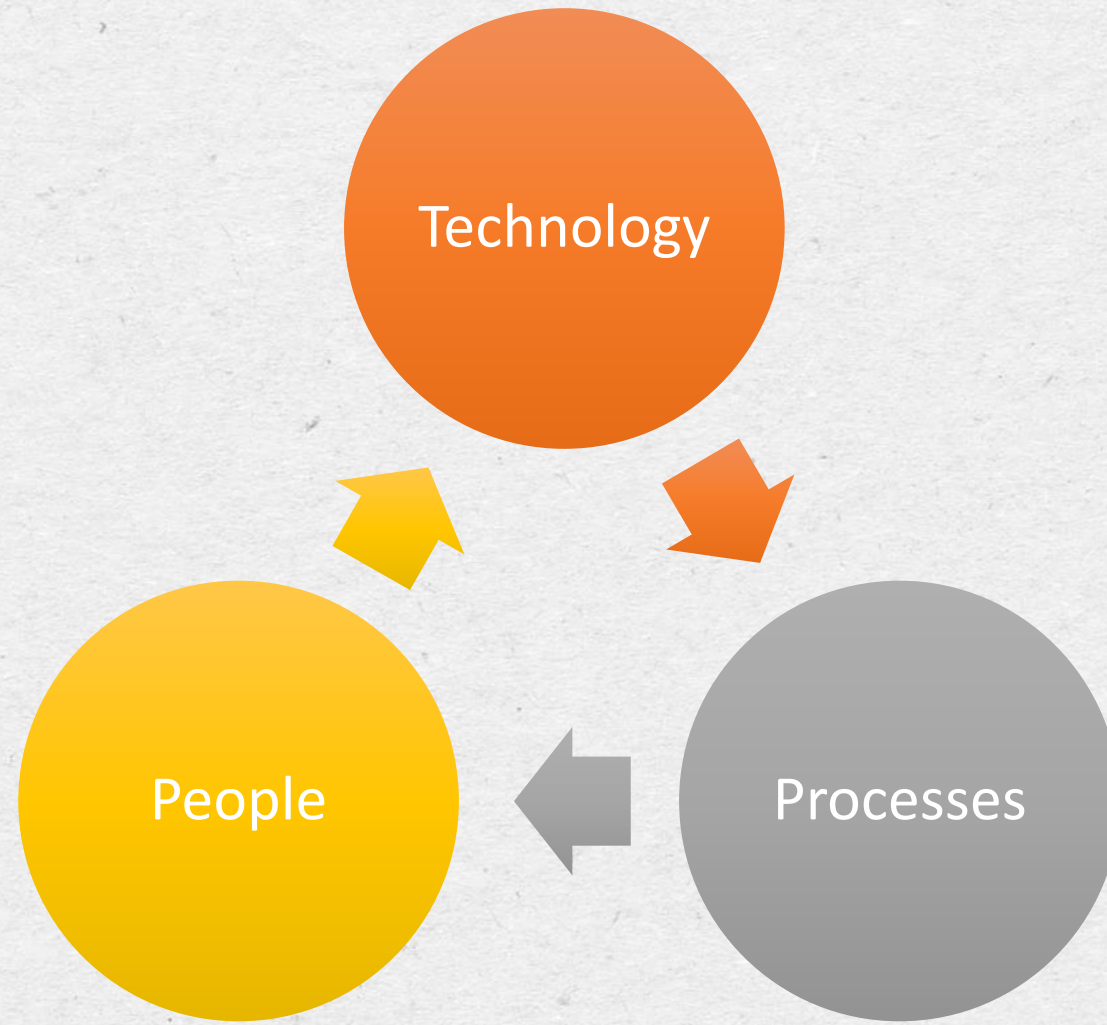


What stage are you in?

Teams Journey Poll Results 02.2020



Governance

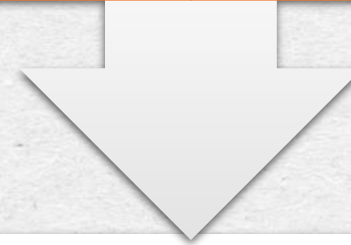


Overcoming Challenges

What's necessary depends on

Risk & Compliance

Vision & Strategy



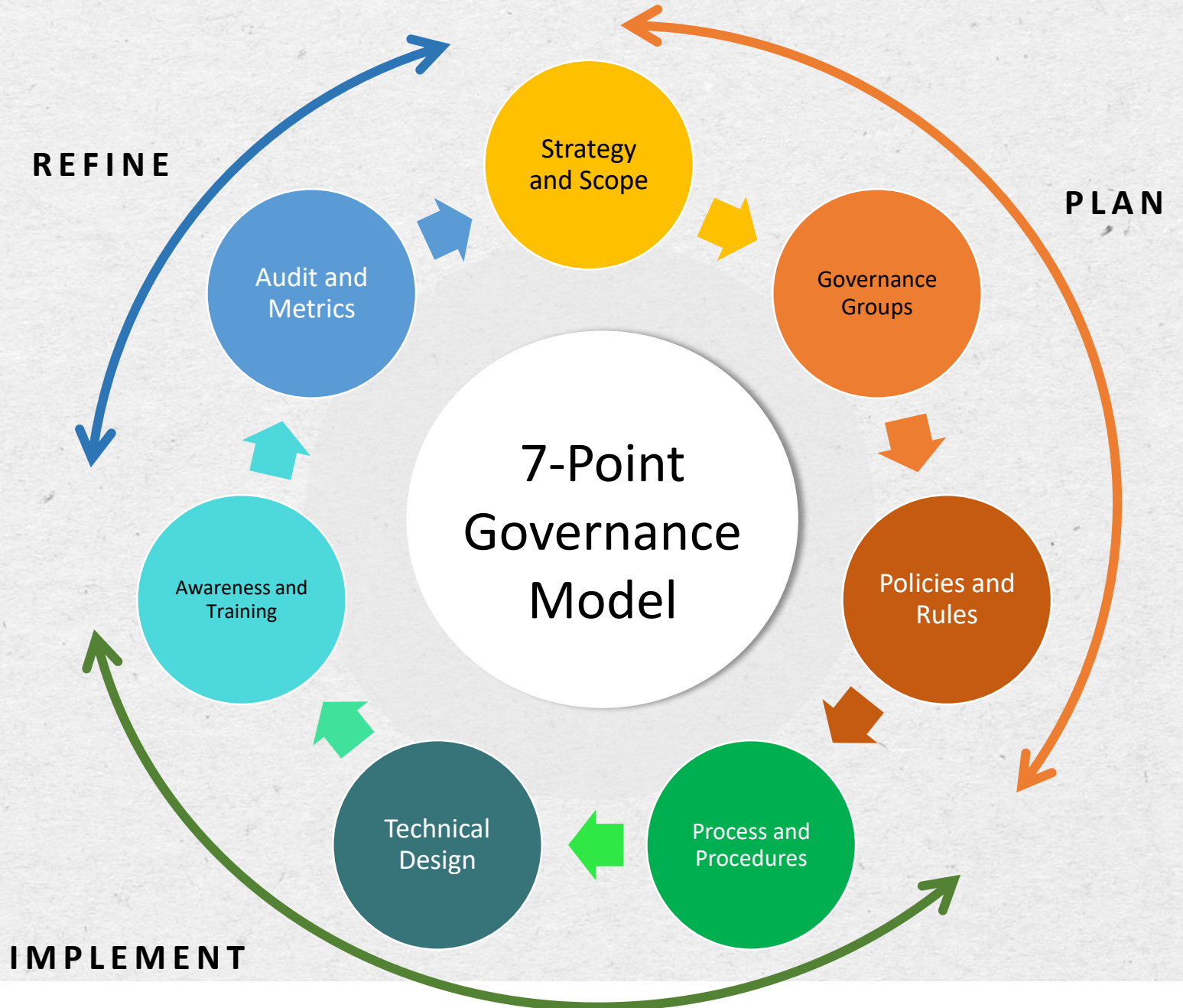
What's practical depends on

Time

Budget

Resources

Governance Framework



Answers to Common Questions and Concerns



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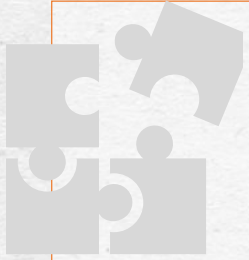
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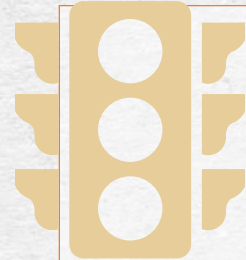
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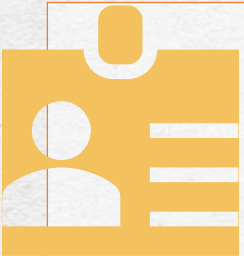
#1 Team Sprawl



Master Plan



Process controls

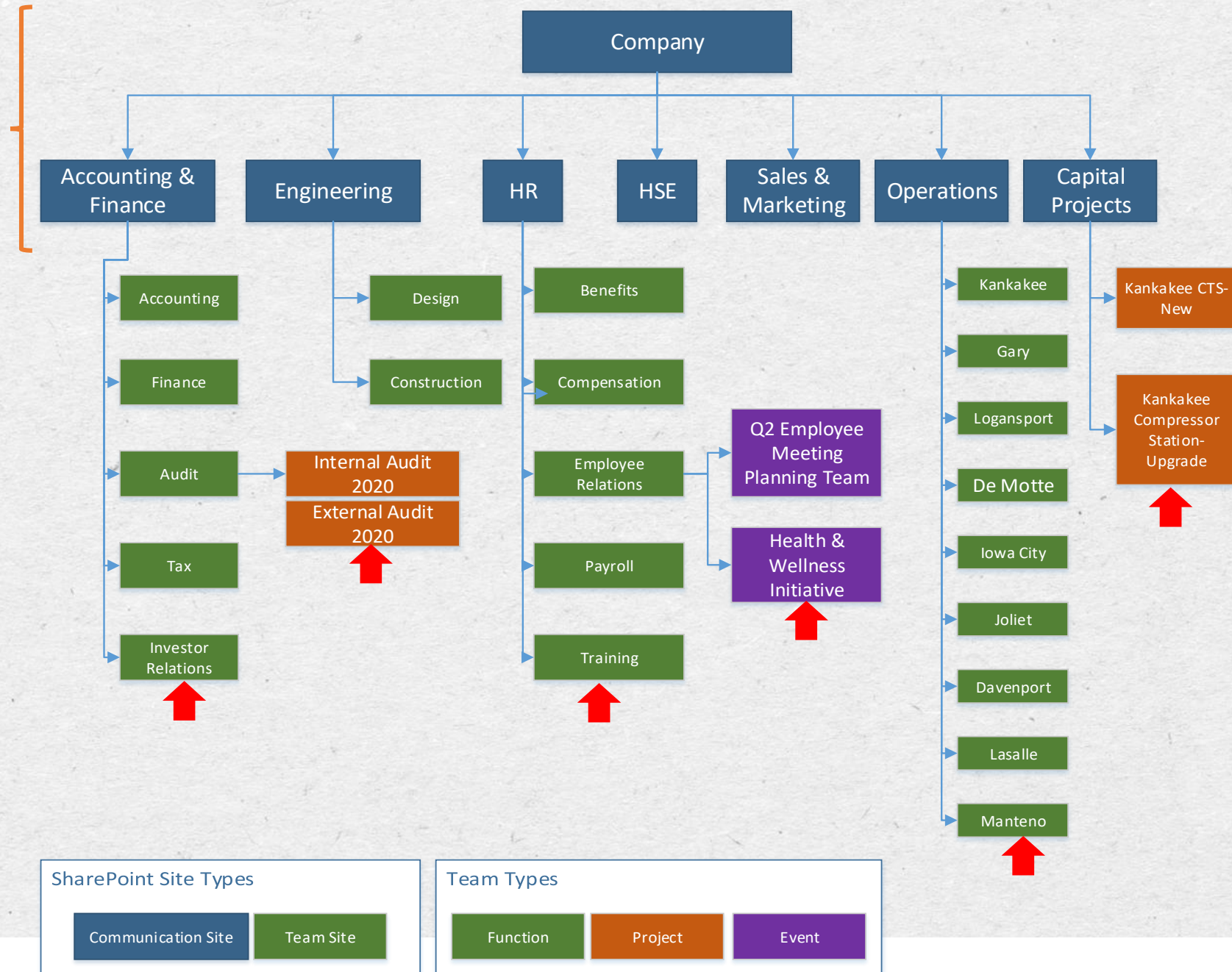


Naming Standards



Training

Sample Information Architecture



#1

Team Sprawl – Guidance

Managed Creation Process

- Disable self-serve creation
- Teams creation process using PowerAutomate to apply consistent templates, remove duplication, apply naming standards

Information Architecture

- Define how Teams work with SPOL – new or existing sites, hub association
- Encode team name with business, type, purpose - better search

Educate Users

- Group chats instead of Teams
- Pin, hide
- Let meetings die!
- Search

Fully Automated Creation Process

- PowerShell scripts to apply RM policies to SharePoint
- Private channels for teams with vendor, client collaboration

View All Teams


- PowerAutomate solution using Graph API call to show All My Teams with descriptions

SharePoint Search

- Custom Search Scopes using Teams URL

Answers to Common Questions and Concerns

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Teams and Records

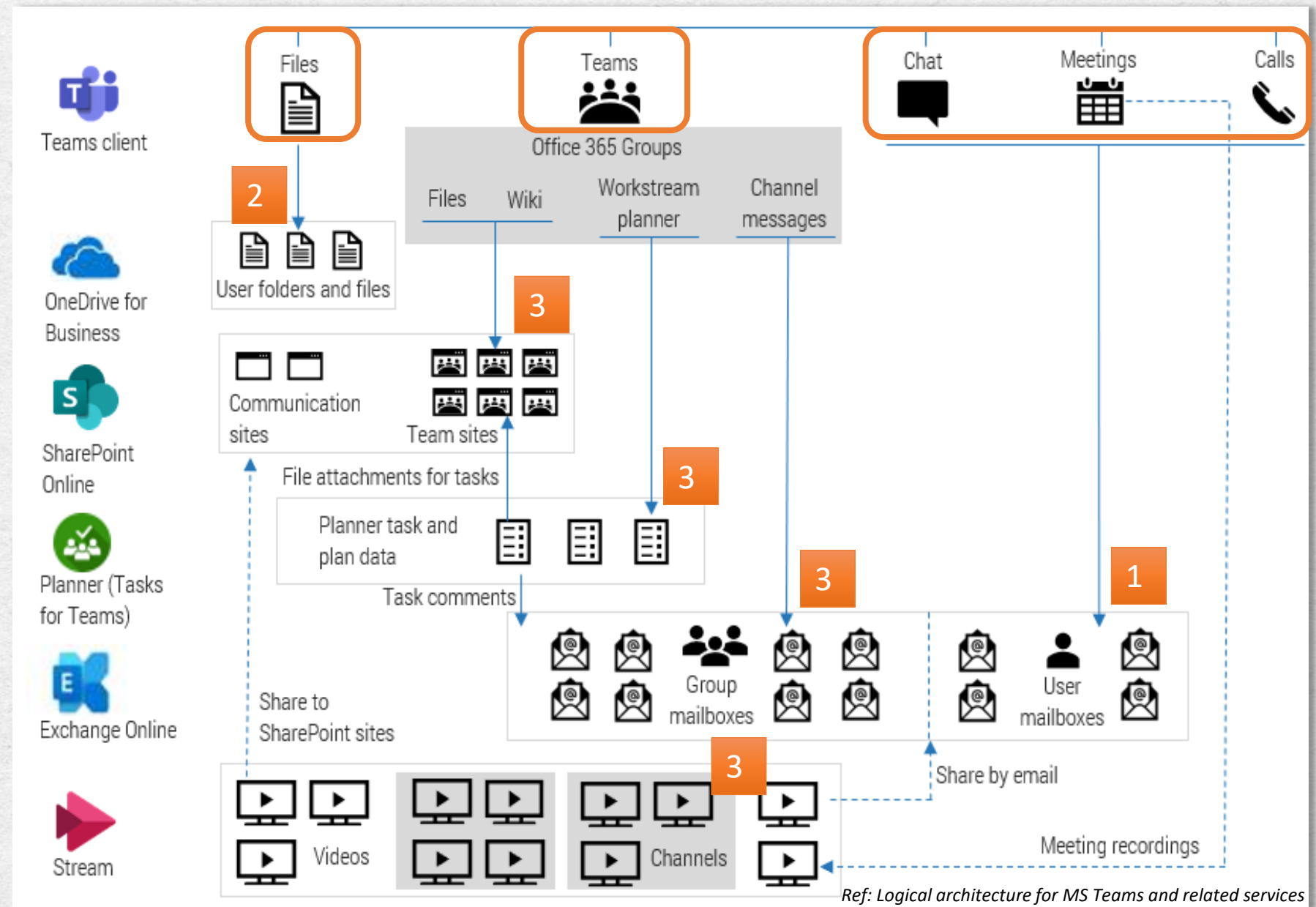


Group
expiration policy



Retention
Policies

What are Teams components?



2

Teams and Records – Guidance

Private/Group Conversation – Chat, Calls, Meetings

- Retention Policy – Exchange Online (e.g. 60 days)
- Meeting recordings – manual deletion

Private/Group Conversation - Files

- Retention Policy – ODFB (e.g. 90 days)

Teams – Channel Chat, Calls, Channel Meetings

- Group Expiration Policy –short duration Teams 30-days grace
- Teams Retention Policy – defined end date - *not private channels
- Advanced Retention Policies – not available yet

Teams- Shared Files

- Retention using Labels – SharePoint (E3) – created/modified/labeled or event-based (custom date, manual apply)
- Retention using Content Type IM Policies – time or event-based (custom date, manual apply)
- Apply to libraries on provisioning
- Advanced Retention policies – SharePoint(E5) – auto-applies labels (dynamic labeling) on event
- Apply event triggers by PowerAutomate

Educate

- Managing documents and records
- Team owners to remove content of significance from expiring teams

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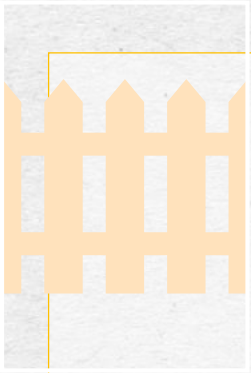


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#3 External Collaboration



External access



Guest access

3

External Collaboration – Guidance

Guest Access Compliance

- Terms of use
- Quarterly guest reviews
- Web-only access
- Session timeouts

Teams for External Collaboration

- Provision a Private channel for internal use

Educate Team Owners

- Sharing files via SharePoint
- Adding guests
- Removing guests

Data Loss Prevention


- Sensitivity labels – “do not share”
- Auto-assign labels based on keyword
- Auto-remove guests from labeled documents

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#4 Monitor Teams Activity



Teams Admin center



Compliance center

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Monitor Teams Activity – Guidance – Teams Admin Center

Teams Admin Center

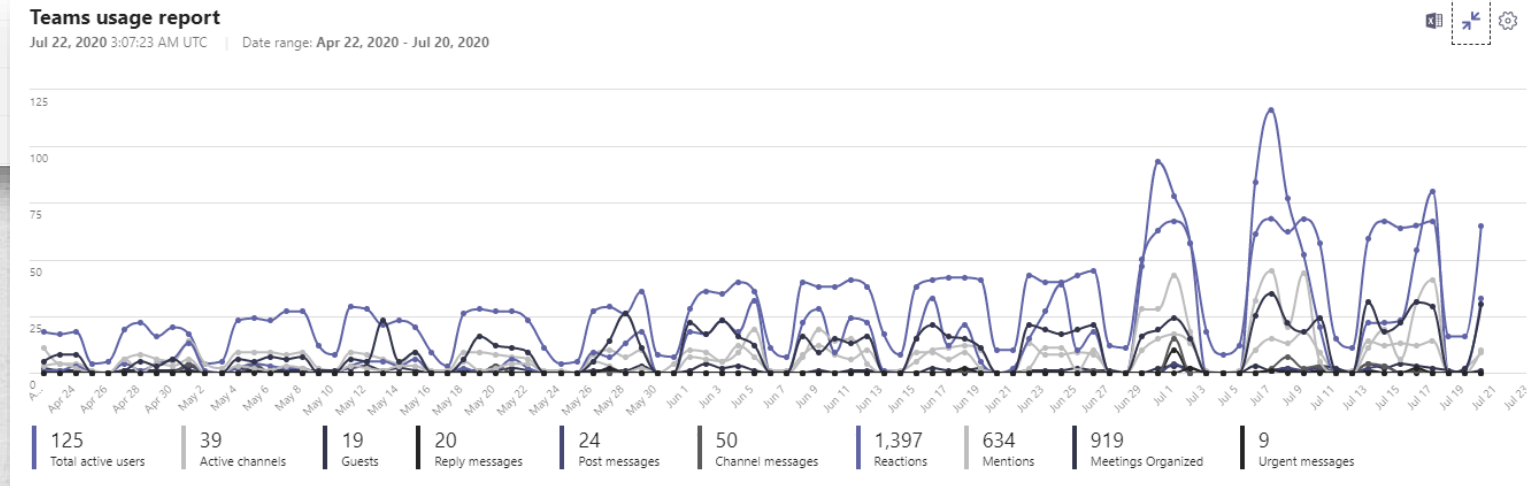
- Dashboard: Number of Teams, Guests in Teams
- Teams Usage Report: Meetings, Chats
- User Activity Report

Users summary

51 Total users 37 Internal users 14 Guests

+ Add Edit Archive Delete 16 teams Search

✓	Name ↑	Standard channels	Private channels	Team members	Owners	Guests ⓘ	Privacy ⓘ
	NewTeamsGroup	1	0	1			
	OP-FCN-A new team	2	0	2			
	OP-PRJ-Kankakee Dam Rebuild 2020	2	0	2			
	OP-PRJ-Plan for Project Controls	2	0	2			



4

Monitor Teams Activity – Guidance – Audit Log Search

Teams Activities

- User and admin activity, for example:
 - Team creation
 - Team deletion
 - Added channel
 - Changed setting
 - A team owner adds members
 - Changed name
 - Installed an app
 - User signed in

Related Activities

- File and page
- Folder
- SharePoint list
- Site Permissions
- Sharing and Access Requests
- Exchange Mailbox

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#5 Where to Start

Clean Start?

<https://aka.ms/SuccessWithTeams>

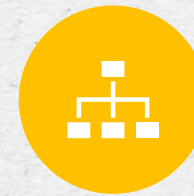
Focus on point forward first; then assess and remediate what you have.



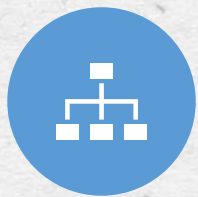
Teams Admin Center
report



Confirm owners



Suggest classification
based on keywords



Map to template



Collaboration - apply
expiration to site



Records - create new
and migrate

Summary

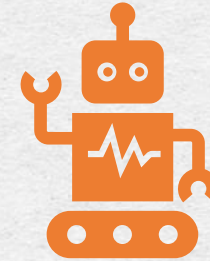
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Demo

Organizing Teams

Records in Teams

Change Management

Bots!

Current Challenges / Future Topics Poll

Executive Buy-in and Agreed Strategy

- Communicating value and defining how Teams will fit into current strategies

Change Management

- Building awareness, delivering Training, creating a Support Model

Teams and Records Lifecycle Management

- Creation, retention, disposition processes and automation

Advanced Security & Compliance

- eDiscovery, monitoring user behaviors, DLP, security, compliance policies

Other

- New features, e.g. Trainable Classification, E5 compliance features

Access Answers Podcast



- **Ep. 1** Questions About Microsoft Teams
- Airing Wednesday, Aug. 5
- Led by Renu Hall

Webinar: Change Management from the Executive Perspective



- How to successfully execute the change management piece of a company-wide Microsoft Teams rollout from the executive-level perspective.

- Wednesday, Aug. 26

- Led by Linda Baldwin and Sondra Ludwick

- Donations to the Barbara Bush Houston Literacy Foundation



The background of the slide features a light gray, textured surface. Overlaid on this are several hexagonal shapes. Some are solid yellow with a honeycomb pattern and contain small images of bees. Others are outlined in orange or yellow. The pattern is concentrated in the top-left and bottom-right corners.

Questions?



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