



Microsoft Teams



INFOTECHTION WEBINAR

How do you
restore
control when
already
deployed
without
control?

AGENDA

- About Infotechtion
- Information Governance for Microsoft Teams
- Microsoft Teams governance product updates
- Lessons learned by early adopters
- Emerging best practices for governing Microsoft Teams



Master of Ceremony:
John Mancini
Chief Evangelist
Infotechtion



Speaker:
Tina Ying
Product Marketing Manager
Microsoft



Speaker:
Vivek Bhatt
Chief Technology Officer
Infotechtion

ABOUT US

Infotechtion specializes in improving and automating information management processes: retention, protection & governance, leveraging Microsoft Cloud.

We are Microsoft partners, and since 2013 the leading consultants pioneering the design of Microsoft advanced data governance roadmap and making it relevant to our global clients.

Our team is proud to be the pathfinders, to have successfully transitioned several large and global enterprises to modern automated information governance standards in Office 365.

We work closely with Microsoft engineering to define and improve Microsoft information governance and protection offerings for Office 365 and beyond.

We do not sell any additional software or licenses; we only focus on bringing maximum value of what you already got- Microsoft Office 365.

Most of our clients are large enterprises with up to 300,000 users operating in highly regulated industries.

Infotechtion has offices in the US, UK, and EU.

ARE YOU A LEADER OR FOLLOWER?

4.5X

the volume of information is expected to grow 4.5 times over the next 2 years¹

5

on average, organizations are wrestling with 5 different content systems and repositories¹

68%

of companies see themselves as “advanced” or “highly advanced” in adopting AI to automate information governance²

¹ AIIM Industry Watch 2020

² Best practices for automating information governance, AIIM, 2019

CONTEXT — WAYS OF WORKING ARE CHANGING

CARE



What: COVID-19, and the wider macroeconomic environment have significantly changed the way people live and work.

How: The way we **connect, collaborate and communicate with our colleagues** has changed — we now need to **work in a virtual community**

RECOVERY



What: We need to continue to deliver products and services around the world, while continuing to earn trust.

How: Identify new **opportunities to try new ways of working**, for example, encouraging quicker decisions that allow to move at pace.

GROWTH



What: Carefully recover, an unprecedented decline in growth.

How: Ensure **efficient decision making, providing solutions and working together** to emerge stronger from this crisis as well as **build stronger effective teams** to ensure a longer-term sustainable future.

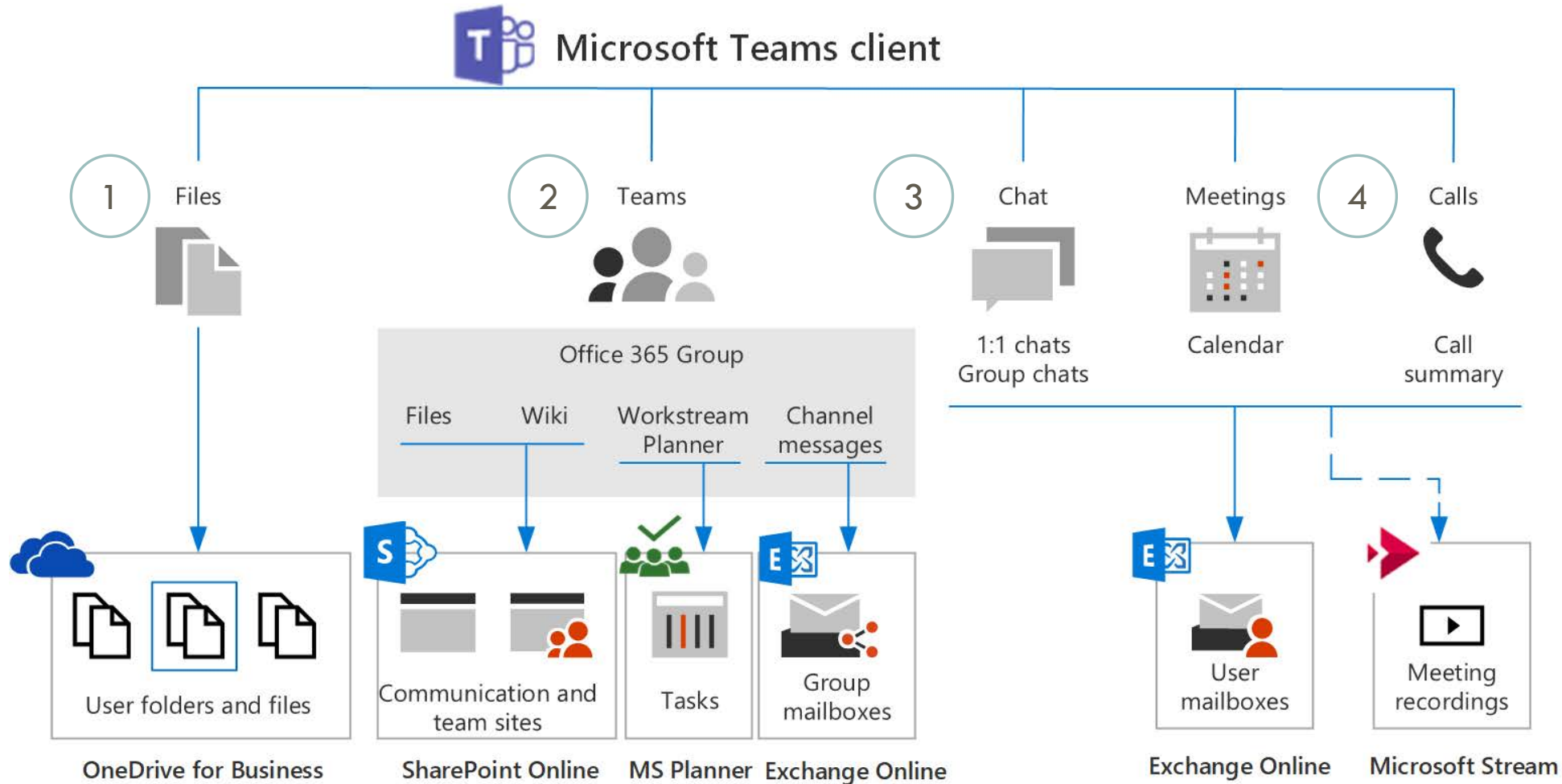
Microsoft Teams has been rolled out at many enterprises to support new and effective ways of working

INFORMATION GOVERNANCE FOR MICROSOFT TEAMS

VIVEK BHATT



MICROSOFT TEAMS – AN INTRODUCTION



A common problem is inconsistent use of security, compliance and governance best practices

WHAT HAPPENS WITHOUT GOVERNANCE?



HOW TO GOVERN TEAMS WHEN ALREADY DEPLOYED?



ENABLING TOOLS

1

Teams Provisioning

- Automated Provisioning
- Use pre-defined templates
- Associate metadata
- Sensitivity Labels
- Retention policies

Search

Infotechtion

Teams Hub

Who Can Use It? What Can I Do? What Should I Know? How Do I get a Team? Ways of Working Using MS Teams About

Create a New Team

Approve requests My requests **Request a team**

1 Data classification 2 Team information 3 Membership 4 Review and Submit

Team Information

Team name* Team name is available

Description*

Business reason*

Auto saved on Mar 05 05:50

ENABLING TOOLS

2

Sensitive Data Analysis

- Automated analysis of Teams with sensitive data
- Determine Teams Usage
- Identify Records, apply Labels
- Apply Retention / Deletion Policies
- Plan for creating Information barriers to prevent value leak

New DLP policy

✓ Choose the information to protect

✓ Name your policy

✓ Choose locations

● Policy settings

● Review your settings

Customize the type of content you want to protect

Select 'Find content that contains' if you want to quickly set up a policy that protects only sensitive info or labeled content. Use advanced settings for more options, such as protecting content in email messages sent to specific domains, attachments with specific file extensions, and more.

☒ Find content that contains: ⓘ

- EU Debit Card Number
- EU Driver's License Number
- EU National Identification Number
- EU Passport Number
- EU Social Security Number (SSN) or Equivalent ID
- EU Tax Identification Number (TIN)

[Edit](#)

☒ Detect when this content is shared:

with people outside my organization ▾

☐ Use advanced settings ⓘ

Back

Next

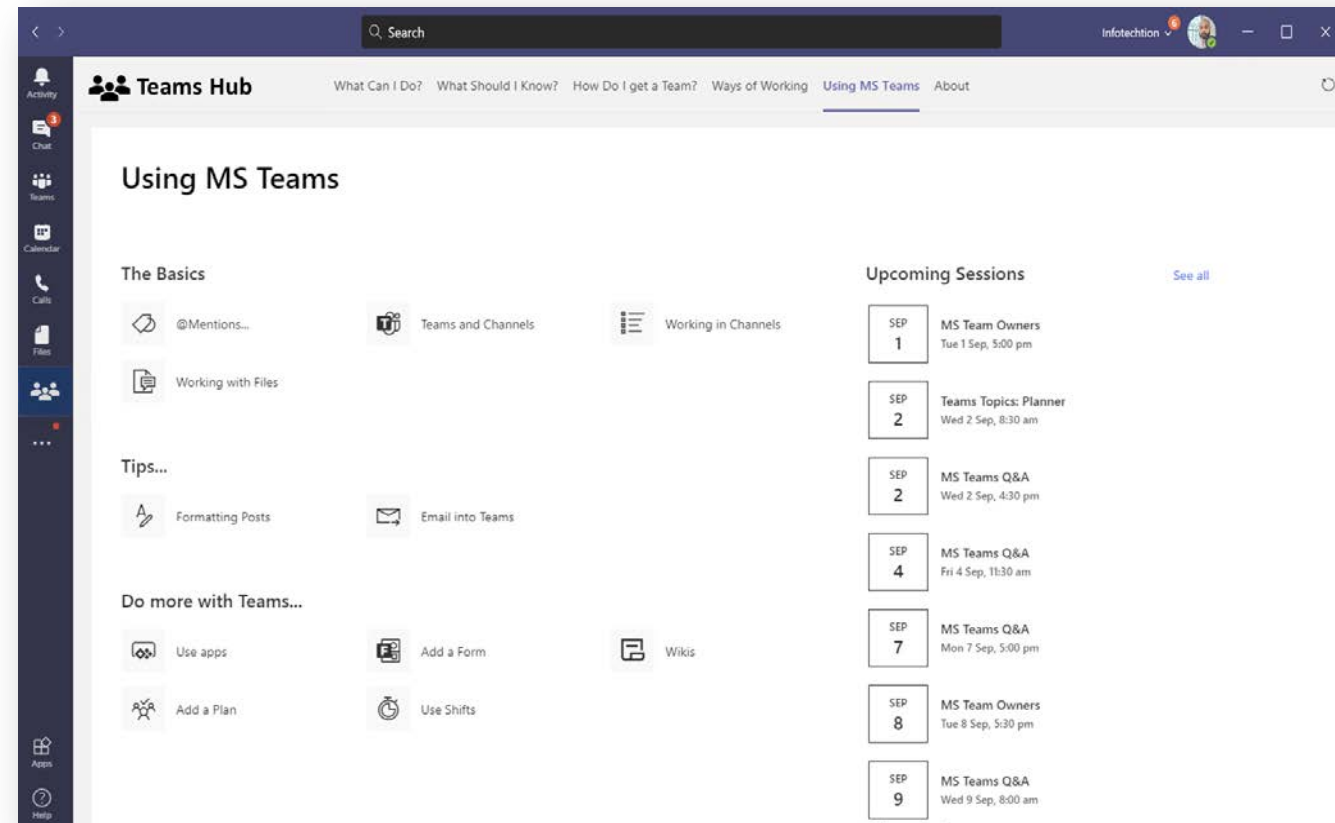
Cancel

ENABLING TOOLS

3

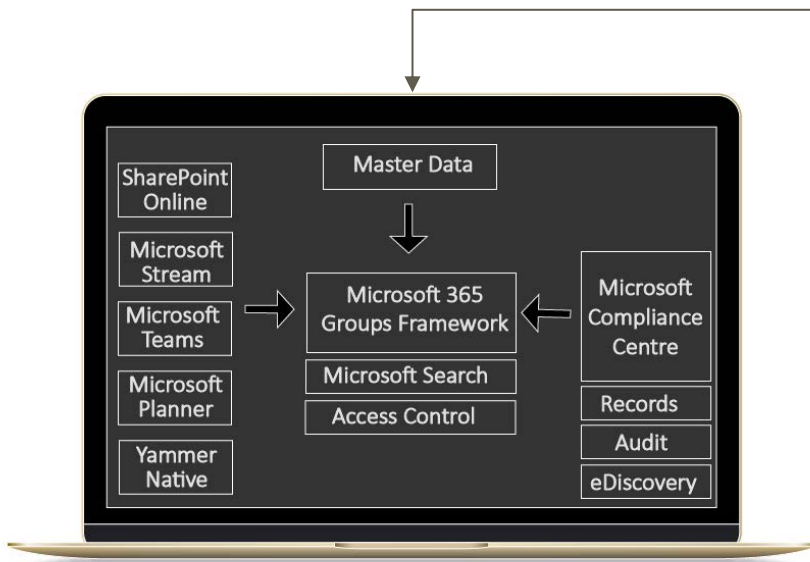
Teams Knowledge Hub

- Integrate user guidance directly in Teams interface
- Information Nudges to embed best-practices
- Bring success stories from wider Community

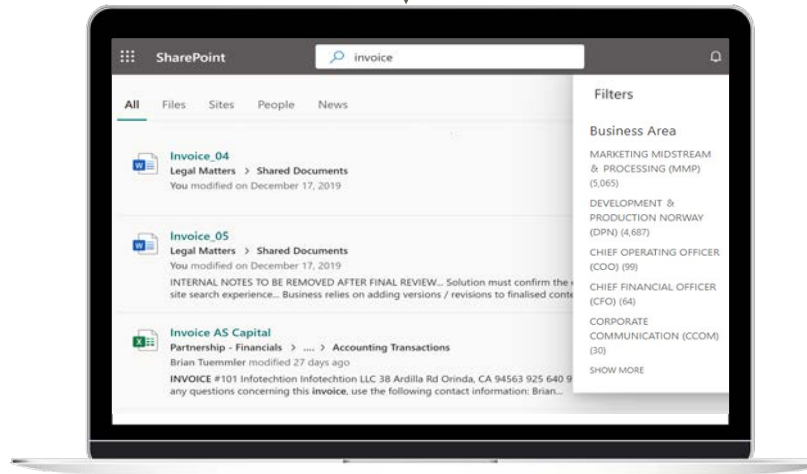


INFOTECHTION VALUE: ARCHITECTURE AS FOUNDATION TO AUTOMATION

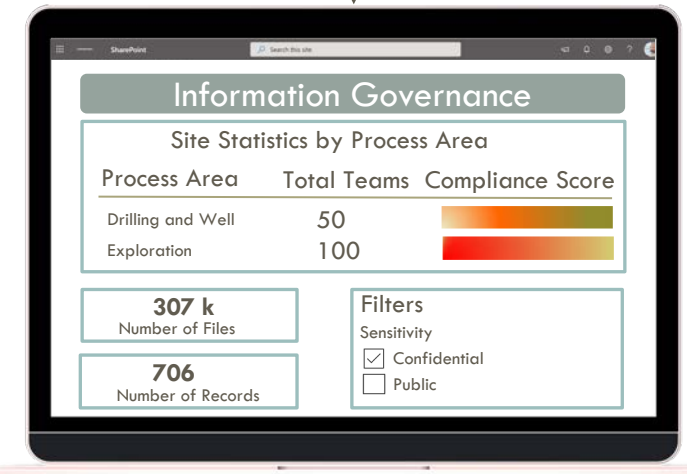
Architecture for Step change in experience and integrated Governance



Metadata model with integrated governance



Improved search with use of metadata filters



Know your information with integrated reporting



MICROSOFT INFORMATION GOVERNANCE

LATEST TEAMS GOVERNANCE UPDATES

TINA YING



MICROSOFT INFORMATION GOVERNANCE

Manage information lifecycle and records intelligently

In-place management

Retain data and manage records where users collaborate to prevent productivity loss and reduce risks

Automated policies

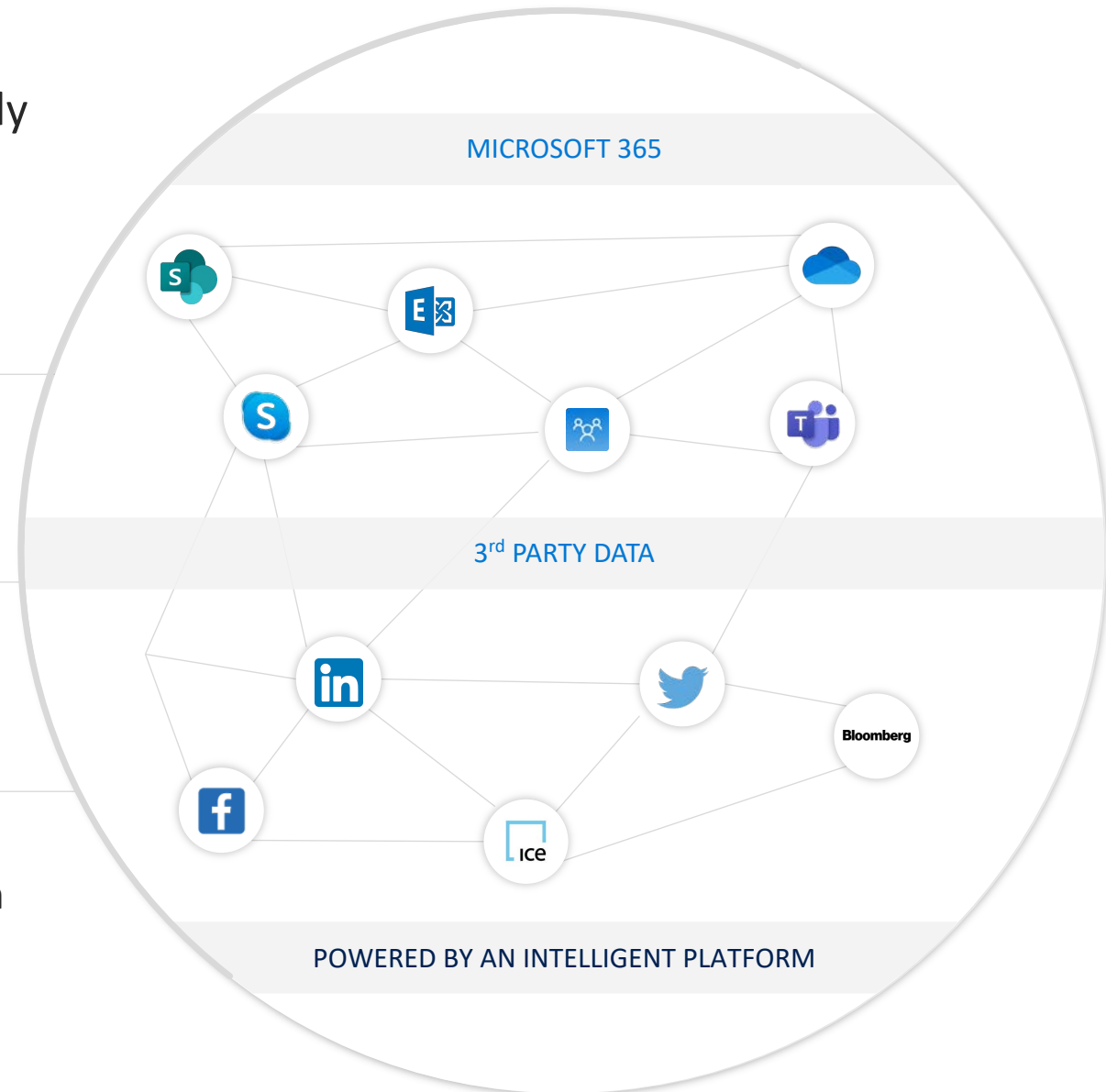
Classify and govern data at scale with file properties, pattern recognition, and trainable classifiers

Defensible processes

Demonstrate compliance with label analytics insights, defensible disposal, and rich audit trails

Pre-built data connectors*

Manage third-party chats, social, and collaboration data with high-fidelity and ongoing data import



PRE-BUILT DATA CONNECTORS

PROTECT, GOVERN, AND MANAGE YOUR DATA BEYOND MICROSOFT 365

Ongoing and high-fidelity data import

Integrated solutions on one AI-powered platform

Guided setup to get started easily

Information
Governance



Records
Management



Advanced
eDiscovery



Communication
Compliance



Compliance
Score



Information
Protection



Insider Risk
Management



Microsoft 365 Compliance

Microsoft 365 Intelligent Platform



Microsoft 365





Pre-built data connectors





Bloomberg

Information governance > Create retention policy

 Name









 **Locations**

 Retention settings

 Finish

Choose locations to apply the policy

The retention settings you'll specify next will be applied to all content that's stored in the locations you choose.

Status	Location	Included	Excluded
<input type="checkbox"/> Off	 Exchange email		
<input type="checkbox"/> Off	 SharePoint sites		
<input type="checkbox"/> Off	 OneDrive accounts		
<input type="checkbox"/> Off	 Office 365 groups		
<input type="checkbox"/> Off	 Skype for Business		
<input type="checkbox"/> Off	 Exchange public folders		
<input checked="" type="checkbox"/> On	 Teams channel messages	All Choose team	None Exclude team
<input checked="" type="checkbox"/> On	 Teams chats	All Choose user	None Exclude user

Create an in-place retention policy for Teams

Home

Compliance score

Data classification

Data connectors

Alerts

Reports

Policies

Permissions

Solutions

Catalog

Information governance

Records management

Settings

More resources

Customize navigation

Show all

Information governance > Create retention policy

Decide if you want to retain content, delete it, or both

☒ Retain items for a specific period

Items will be retained for the period you choose.

Retain items for a specific period

Custom

of

2

years

0

months

0

days

Start the retention period based on

When items were created

At the end of the retention period

☒ Delete items automatically

☐ Do nothing

☐ Retain items forever

Items will be retained forever, even if users delete them.

☐ Only delete items when they reach a certain age

Items won't be retained, but when they reach the age you choose, we'll delete them from where they're stored.

Customize your retention policy

Back

Next

Cancel



Data loss prevention detects sensitive information and blocks the message

Your message has been blocked
Chat with Allan Deyoung

☰

Home

Compliance score

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Show all

Communication compliance > Policies > Offensive messages

Offensive messages

Overview Pending (182) Resolved (106)

Saved filter queries

Resolve Tag as Notify Escalate Escalate for investigation

	Subject	Sender	Recipients	Date
		Lidia Holloway...	Megan Bowen...	Apr 16, 2020 10:...
✓		Lidia Hollowa...	Grady Archie ...	Apr 16, 2020 10:...
		Grady Archie ...	Adele Vance <...>	Apr 16, 2020 10:...
		Grady Archie ...	Lidia Holloway...	Apr 16, 2020 10:...
	Working with ...	Lidia Holloway...	Alex Wilber <...>	Feb 20, 2020 5:1...
	You and I are ...	Lidia Holloway...	Alex Wilber <...>	Feb 20, 2020 5:1...
	Moron	Lidia Holloway...	Alex Wilber <...>	Feb 20, 2020 5:1...
	I really don't u...	Isaiah Langer ...	Irvin Sayers <L...	Feb 20, 2020 5:1...
	Hey there	Irvin Sayers <L...	Isaiah Langer ...	Feb 20, 2020 5:1...
	Quick message	Isaiah Langer ...	Irvin Sayers <L...	Feb 20, 2020 5:1...
	Things I need ...	Irvin Sayers <L...	Isaiah Langer ...	Feb 20, 2020 5:1...
	Working with ...	Lidia Holloway...	Alex Wilber <...>	Feb 20, 2020 5:1...
	You and I are ...	Lidia Holloway...	Alex Wilber <...>	Feb 20, 2020 5:1...

Summary

Text view

Annotate view

User h

Grady Archie

April 16, 2020, 10:40 PM

useless piece of shit, go back to your o

Lidia Holloway

April 16, 2020, 10:42 P

I'm going to hurt myself and hope you

Grady Archie

April 16, 2020, 10:44 PM

Fuck off and die you old timer

Send a notice

Send an email to the sender of the specified messages. You can use a saved email template or create a new one if needed.

Send notice to:

Lidia Holloway
Product Manager

Choose a notice template

Code of conduct violation

Send from: *

A

admin@M365x525973.OnMicrosoft... X

Cc:

Start typing to find users or groups

Bcc:

Start typing to find users or groups

Subject *

You have violated Contoso's code of conduct policy

Message body: *

<!DOCTYPE html>
<html>
<body>
<h2>Action required: Contoso Code of Conduct Policy violation</h2>
<p>You have violated the Contoso code of conduct policy.</p>
<p>You are required to re-take the Contoso Code of Conduct training within the next 14 days.</p>
<p>Thank you,</p>
<p>Human Resources</p>
</body>
</html>

Send Cancel

Communication Compliance helps you detect code-of-conduct violations

1 item selected. 182 items total.

Custodial Data













Review sets

Filter

Clear allSave the queryFilters

Labels: Yes

Tag documentsNew queryActionIndividual results

	Subject/Title	Status	Date	Sender/Author
		Tagged	10/23/2019, 4:36...	Alex Wilber <Ale...
		Tagged	11/1/2019, 11:10...	Alex Wilber <Ale...
		Tagged	10/25/2019, 4:02...	MOD Administra...
	Project Obsidi...	Tagged		
	ACP - Guidanc...	Tagged	10/21/2019, 2:13...	Alex Wilber
		Tagged	10/21/2019, 2:16...	Alex Wilber <Ale...
		Tagged	11/1/2019, 11:08...	Alex Wilber <Ale...

SummaryText viewAnnotate view



Alex Wilber October 23, 2019, 4:33 PM

Hi all! I wanted to check in on the status of Project Obsidian. When is our ETA for the engineering costs?



Irvin Sayers October 23, 2019, 4:35 PM

We're currently drafting the details as we speak, we are looking at anywhere between 2 to 6 months



Alex Wilber October 23, 2019, 4:36 PM

Wow - that's a wide estimate. We really need to focus on delivering the customer value as soon as possible. We have a lot of competitors entering the space and this is critical to our strategy

Advanced eDiscovery helps thread conversation to conduct investigation

Custodial Data

Review sets

Filter

Clear allSave the queryFilters

Labels: Yes

Tag documentsNew queryActionIndividual results

	Subject/Title	Status	Date	Sender/Author
		Tagged	10/23/2019, 4:36...	Alex Wilber <Ale...
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	ACP - Guidanc...	Tagged	10/21/2019, 2:13...	Alex Wilber
		Tagged	10/21/2019, 2:16...	Alex Wilber <Ale...
		Tagged	11/1/2019, 11:08...	Alex Wilber <Ale...
		Tagged	10/25/2019, 4:05...	MOD Administra...

SummaryText viewAnnotate view

Alex Wilber11/01/2019 03:10 PM

I have back to back meetings and so won't have time today

Alex Wilber11/01/2019 03:10 PM

if you need a corp card, you can charge it to mine

Alex Wilber11/01/2019 03:10 PM

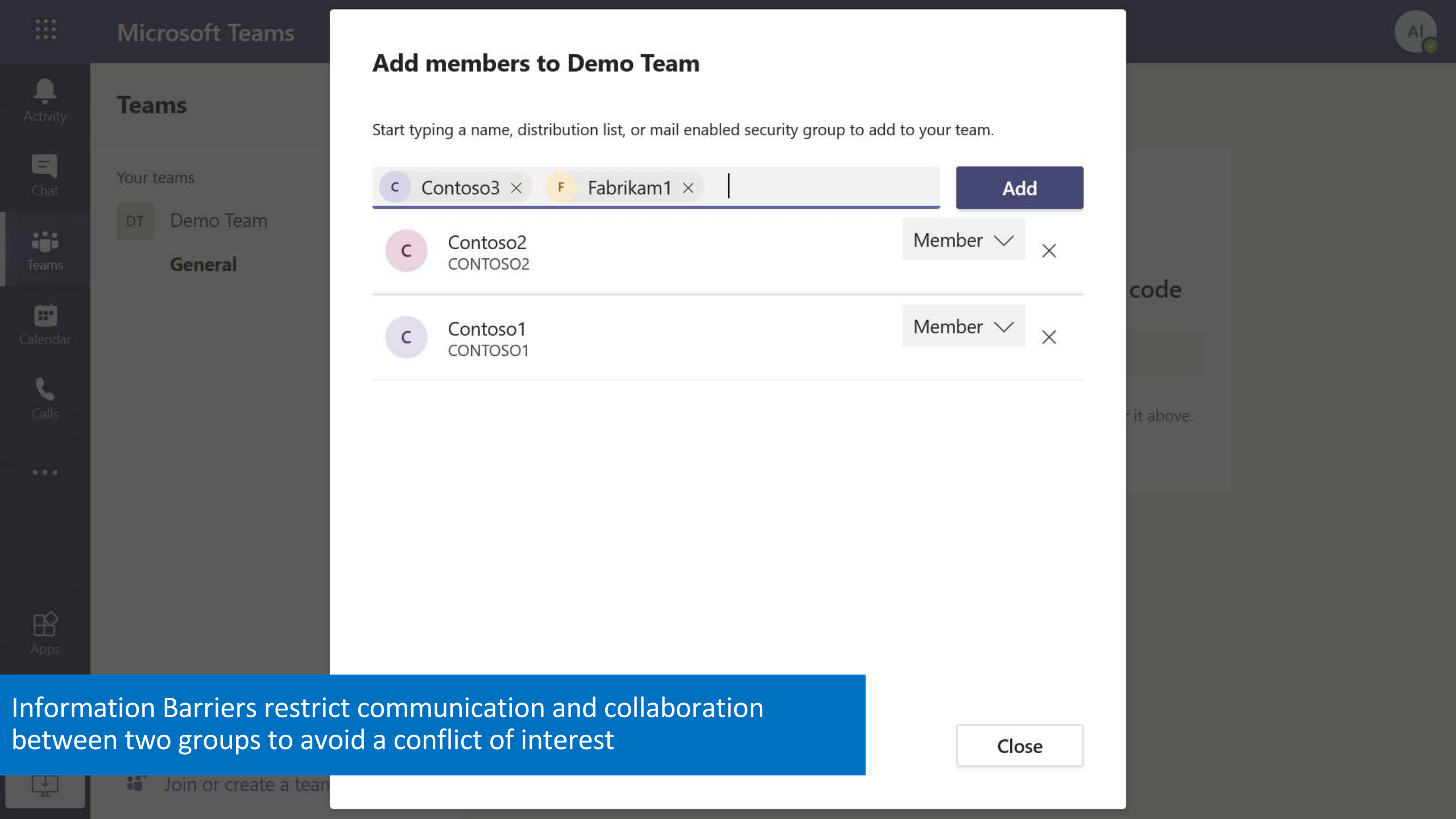
Redacted

Alex Wilber11/01/2019 03:10 PM

1 of 1

Redact and highlight message before exporting

1 item selected. 35 items total.



Add members to Demo Team

Start typing a name, distribution list, or mail enabled security group to add to your team.

C Contoso3 X

F Fabrikam1 X

Add

C Contoso2
CONTOSO2

Member V

X

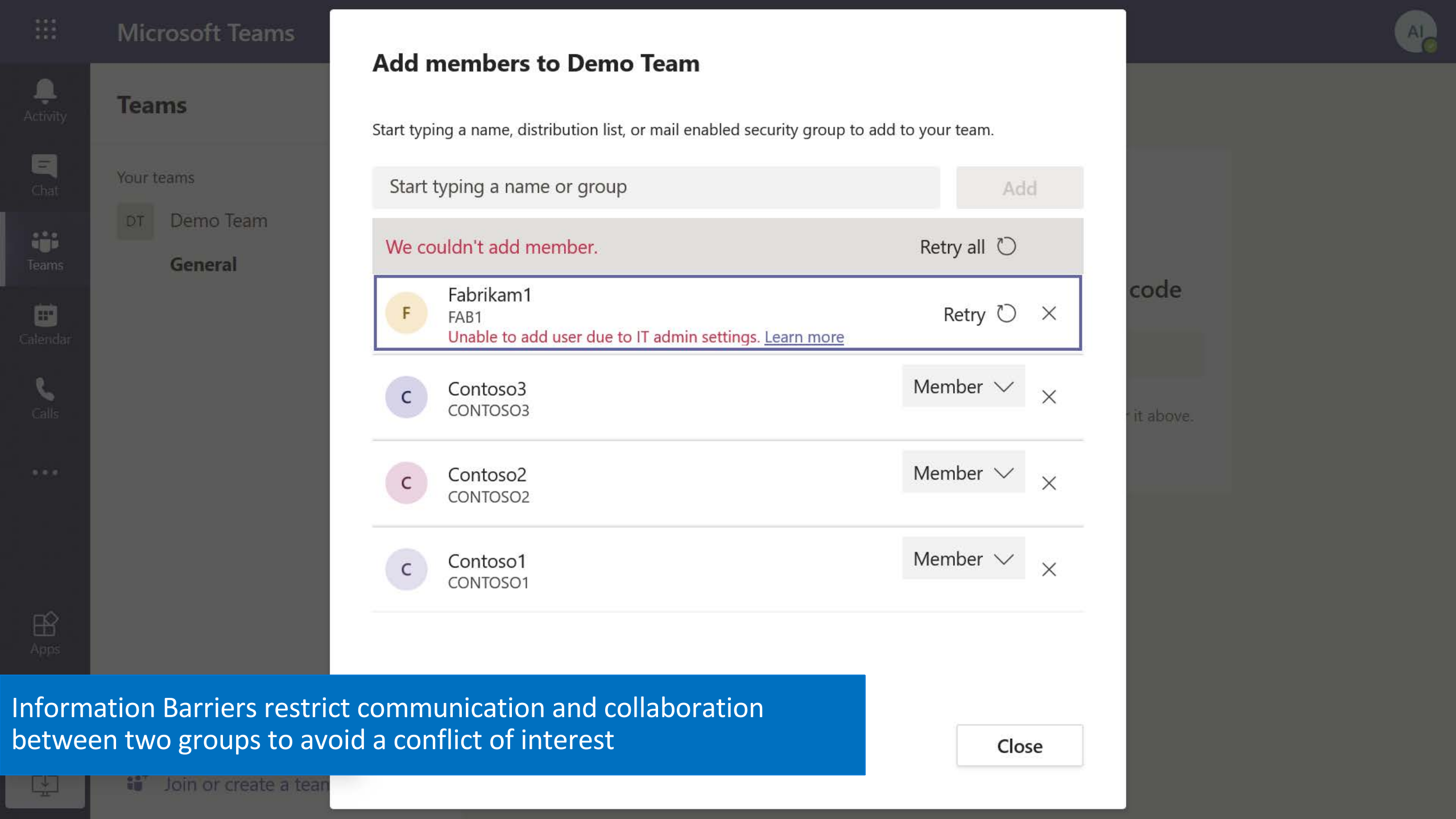
C Contoso1
CONTOSO1

Member V

X

Information Barriers restrict communication and collaboration between two groups to avoid a conflict of interest

Close



Add members to Demo Team

Start typing a name, distribution list, or mail enabled security group to add to your team.

Add

We couldn't add member.

Retry all

F

Fabrikam1
FAB1

Unable to add user due to IT admin settings. [Learn more](#)

Retry

×

C

Contoso3
CONTOSO3

Member

×

C

Contoso2
CONTOSO2

Member

×

C

Contoso1
CONTOSO1

Member

×

Close

Information Barriers restrict communication and collaboration between two groups to avoid a conflict of interest

Microsoft Compliance Score (preview)

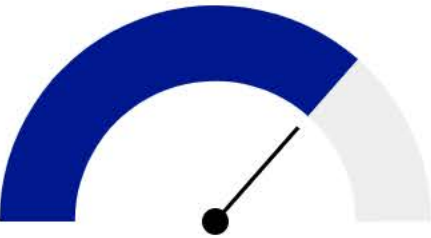
OverviewImprovement actionsSolutionsAssessments

Microsoft Compliance Score measures your progress in completing actions that help reduce risks around data protection and regulatory standards. [Find guidance and documentation](#)

Filter

Overall compliance score

Your compliance score: 73%



16961/23095 points achieved

Your points achieved ⓘ

168/6302

Microsoft-managed points achieved ⓘ

16793/16793

Compliance Score measures your progress towards completing recommended actions that help reduce risks around data protection and regulatory standards.

[Learn how Compliance Score is calculated](#)

Key improvement actions

Not completed70Completed14Out of scope0

Improvement action	Impact	Test status	Group	Action type
Limit Consecutive Logon Failures	+27 points	<div></div>	Default Group	Operational
Limit Consecutive Logon Failures	+27 points	<div></div>	EU	Operational
Declare Data as Records by Creating & Publishing a Record La...	+27 points	<div></div>	Default Group	Technical
Manage Calendar Details Sharing	+27 points	<div></div>	Default Group	Technical
Implement Account Lockout	+27 points	<div></div>	Default Group	Operational
Implement Account Lockout	+27 points	<div></div>	EU	Operational
Enforce Security Configuration Settings	+27 points	<div></div>	Default Group	Documentation
Establish Initial Authenticator Content	+27 points	<div></div>	Default Group	Technical
Establish Initial Authenticator Content	+27 points	<div></div>	EU	Technical

[View all improvement actions](#)

Solutions that affect your score

Taking key actions in your compliance solutions will increase your overall score.

Solution	Score contribution	Remaining actions
Audit	0/134 points	24
Azure Active Directory	0/853 points	47
Azure Information Protection	0/54 points	2

[View all solutions](#)

Compliance Score helps assess your compliance maturity

WHAT WE'VE SHIPPED & FUTURE ROADMAP

Currently available



Records Management

- Records label and file plan manager
- Disposition reviews
- Declare records manually or automatically
- Records versioning
- Proof of disposals and audit logs
- Data classification dashboards

Information Governance

- Pre-built data connectors – LinkedIn, Instant Bloomberg, Facebook, Twitter
- Retention policies and labels for SPO, EXO, OD4B, Group, Teams

Roadmap priority



Records Management

- Regulatory record label – enhanced immutability
- Multi-stage and reviewer-tailored disposition review
- Use Project Cortex to auto-apply retention labels
- Ability to trigger a Flow at end of retention period
- Guided onboarding and getting started

Information Governance

- Retention policy for Yammer, Teams meeting recording
- Better performance and reliability for SPO/OD4B
- More investment in pre-built connectors

LESSONS AND BEST PRACTICES

VIVEK BHATT



EARLY ADOPTER — CUSTOMER CASE STUDY



A global energy company looked for a solution to transform information governance and make it easy for users to do the right thing while managing information to meet regulatory obligations.



70+ TB of records migrated from legacy records system to Microsoft 365

400 million+ files managed through automated information governance policies in OneDrive, SharePoint, and Teams

12,000+ SharePoint Online site collections upgraded to the modern experience of records management



“

*The previous methods of managing our compliance require the information to be moved into archives and lock the information for a certain period of time. With the new solution, **all data is in place**. People know where the information is, and it's **super easy for users** to declare and manage the information.*

”

WHAT DID WE LEARN?

01

Develop a strategy to build strong co-creation

02

Be agile in the face of technology constraints

03

Simplify the message to your users

04

Proactively manage resistance and exceptions

BEST PRACTICES FOR GOVERNING TEAMS SPRAWL

Prevention

Proactive
Management

Governance

Planning



DO NOT TEST IN PRODUCTION!!

CALL TO ACTION + Q&A

JOHN MANCINI



CALL TO ACTION



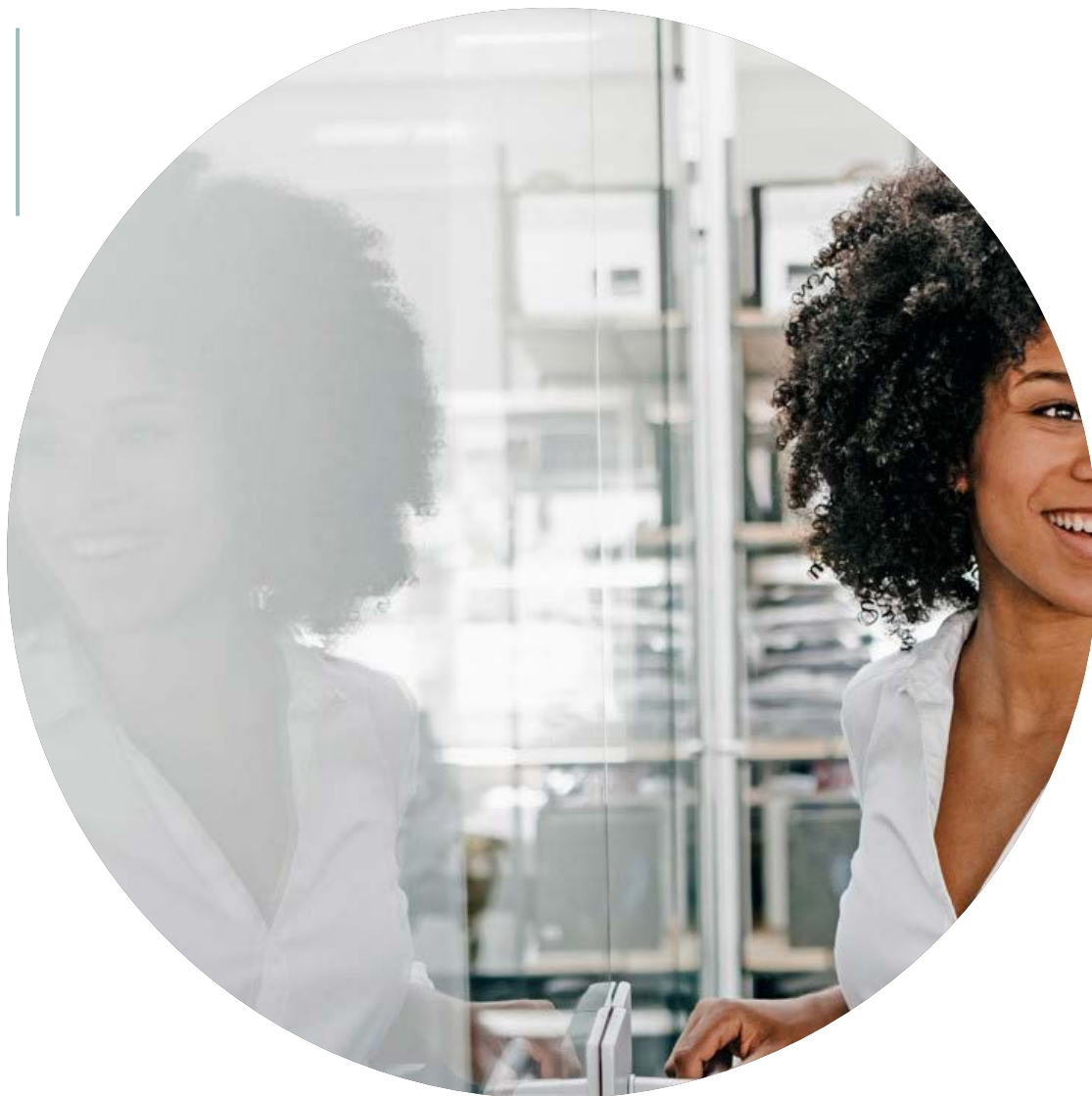
Information Governance
strategy workshop



Automate Governance
– Proof of Concept



Teamwork business
adoption



THANK YOU



INFO@INFOTECHTION.COM



[HTTPS://INFOTECHTION.COM/](https://infotechtion.com/)