aiim Industry Watch



Mastering Your Microsoft 365 and SharePoint Investment:

Moving from Rapid Adoption to Sensible Maturity

In Partnership with

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AIIM Industry Watch

As the non-profit association dedicated to nurturing, growing, and supporting the information management community, AIIM is proud to provide this research at no charge to our members. In this way, the entire community can leverage the education, thought leadership and direction provided by our work. We would like these research findings to be as widely distributed as possible.

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AvePoint
525 Washington Blvd, Ste 1400
Jersey City, NJ 07310
United States
www.avepoint.com

creospark Valo

Creospark & Valo
Toronto, ON
Canada
www.creospark.com
www.valointranet.com

EGNYTE

Egnyte
1350 Middlefield Rd
Mountain View, CA 94304
United States
www.egnyte.com

GRAVITY UNION

Gravity Union
605 Robson Street, Suite 1240
Vancouver, BC V6B 5J3
Canada
www.gravityunion.com

Microsoft

Microsoft
One Microsoft Way
Redmond, WA 98052
United States
www.microsoft.com/en-us/microsoft-365

About AIIM's Industry Watch Research

Over three years ago, AIIM introduced the concept of Intelligent Information Management, or IIM, and began researching the connections between IIM and Digital Transformation.

Our 2020 Industry Watch research program looks at the impact of the rising tide of information chaos on the effectiveness of transformation initiatives, the adoption rates of core IIM technology building blocks, and IIM best practices.

We specifically structure this research around the four core IIM capabilities that provide the structure for AIIM's Certified Information Professional (CIP) program:

1) **Creating, Capturing, and Sharing Information**
2) **Digitalizing Information-Intensive Processes**
3) **Extracting Intelligence from Information**
4) **Automating Governance and Compliance**

Unlike some of our previous reports – which take a deep dive into one of these topics – this Industry Watch touches on all of these themes. It does so through two prisms: 1) the COVID-driven rush to remote working; and 2) how Microsoft 365 fits into this challenge.



Our editorial calendar for this year *(with release dates in parentheses)* is as follows:



- ☐ **State of the IIM Industry** (Jan 2020)
- ☐ **Intelligent Capture, assisted by Artificial Intelligence** (Mar 2020)
- ☐ **The Ultimate Guide to Improving Your Business Processes** (June 2020)
- ☐ **Balancing Records Management and Information Governance** (Sept 2020)
- ☐ **Mastering Your Microsoft 365 and SharePoint Investment** (Nov 2020)

About the Survey

We value our objectivity and independence as a non-profit industry association. The results of the survey and the market commentary made in this report are independent of any bias from the vendor community. The data shared in this report is just a small sample of the overall data generated in preparation for each research report, and *distribution of the full set of findings is limited to the underwriters.*

The survey was taken using a web-based tool in September 2020. Nearly 65% of the survey participants were NOT associated with AIIM prior to taking the survey. Non-AIIM survey participants were drawn against the following criteria:

- ☐ Director/Manager, Other decision maker
- ☐ Organization size > 10 employees



Core Survey Demographics:

Number of employees

10–99	***18%***
100–1000	***43%***
Over 1000	***39%***

Headquarters location

US and Canada	***47%***
UK and EMEA	***32%***
Asia/Pacific/India	***3%***
Australia/New Zealand	***3%***
Mexico, Central/South America	***16%***

Role in Organization

RM, DM, CM, or information governance	***20%***
Line of business or horizontal process owner	***26%***
Information technology/IT	***48%***
Other	***7%***

Top 6 Verticals

Finance, Banking, Insurance	***14%***
IT & High Tech	***12%***
Government (National and International)	***10%***
Education	***9%***
Government (State and Local)	***9%***
Manufacturing, Aerospace, Food, Process	***8%***

Note: percentages may not total 100% due to rounding.

All potential survey participants were asked this qualifying question:

Are you broadly familiar with how Microsoft 365/Office 365 (M365/O365) is used within your organization?

- ☐ M365/O365 is not used in our organization.
- ☐ Our organization uses M365/O365, but I am not that familiar with its overall use in the organization.
- ☐ Yes, I am broadly familiar with how Microsoft 365/Office 365 is used within our organization.

Those responding "Yes, I am broadly familiar with how Microsoft 365/Office 365 is used within our organization" qualified to complete the survey. The overall number of survey participants was 238.

It is important to remember this qualification question when considering the data reported in the ebook – *It means the respondents are existing M365/O365 users in some capacity.* At the same time, though, one can argue that this point is not terribly germane given that M365 has been a de facto presence in some form in almost every organization of any scale – *fewer than 10% of potential respondents said they do NOT have M365 in their organization.*





Meet Your Expert Panel

Meet Your Expert Panel

We thank these records management and governance executives – all Certified Information Professionals (CIPs) – for their commitment to share their expertise and time in order to improve the overall level of competence and knowledge within the industry.

Quotes within this report in each **CIP Expert Perspectives** section were made during a special panel discussion of the survey results on September 28, 2020. The intention of the conversation was to cut through some of the wishful thinking that often accompanies conversations about any software platform, and illuminate some of the real issues facing records and governance professionals on a day-to-day basis. To ensure confidentiality and candid perspectives, this discussion was conducted under a variation of *"Chatham House"* rules.

The quotes within the report are intentionally not attributed to the individual participants in the panel and reflect each individual's perspectives rather than those of the organizations they represent.

Note! For those unfamiliar with the CIP Certification, more information is *HERE*.



Mimi Dionne, CIP plays a critical role in McKesson Corporation's implementation of M365. Focus areas of her expertise in records and information management implementations include research, strategy, project management, communications, quality, budget, and change management best practices.



Rick Freeman, CIP is Principal Consultant with Ricoh Canada. Rick is a power-user of M365 within Ricoh. His external practice application areas include access to information, privacy, legal matter management, healthcare, higher education, and business information technology focusing on business process automation.



Everett Gauthier, CIP is a Senior Records Officer and a former Information Privacy Officer responsible for the coordination and delivery of records and information management services within a sector of the Government of Alberta. He has a keen interest in collaboration, content services, and compliance under the M365 cloud-computing platform.



Ellie Kim, CIP is a Senior Consultant within the Health Evidence and Innovation team at Alberta Health Services. Ellie has a track record of successful execution of digital transformation and ECM projects. She is also an expert in corporate policy and forms management, intranet, process optimization, and information governance. Ellie believes that information management is a multi-faceted discipline. Ellie currently serves as the ARMA Canada Director of Strategic Partnerships.



Debra Mestemaker, CRM, ERMM, CIP is the Information Management Compliance Manager for Shell's downstream businesses globally. She has extensive experience designing and implementing information and records management strategies and programs, and assessing and deploying IM tools, including Microsoft 365, in a complex environment to deliver legal and regulatory compliance and extract value from the organization's information.



Eric Sedwick, CIP is Compliance Director and Records Management Program Owner at TIAA and TIAA Bank. In that role he is responsible for policy, schedule, training, and monitoring of records lifecycle management, including retention and disposition.



Jill Stelter, CIP is the IG Program Manager and Compliance Functional Lead, and founding member of the Data & Information Governance Office at Snohomish County PUD. By building a large network of IG stewards, utilizing education, technology, and change management she ultimately reduced key areas of risk while increasing collaboration. Her previous experience as a Senior Paralegal gives her a unique perspective into the world of information governance and compliance in the highly regulated public utility industry.



Larry Wischerth, CIP recently retired as Director, Enterprise Information and Records Management at Healthfirst. He is expert in designing, implementing, and managing Enterprise Content Management systems using document capture, workflow, recognition, and regulatory storage technology. Larry is a former AIIM Chair and is a member of the AIIM Company of Fellows.



Key Data Points

[Note: Feel free to use any of the following data points in presentations, blog posts, or articles, with this attribution: *AIIM, Mastering Your Microsoft 365 and SharePoint Investment: Moving from Rapid Adoption to Sensible Maturity, 2020*]

1. M365 enterprise presence is ubiquitous – only 7% say they do not have it in their organization.
2. As recently as 2013, 24% of organizations using SharePoint said they had no plans to move to the cloud, and another 43% were undecided. Those days are gone forever.
3. Only 1 in 3 organizations said they were "very prepared" for remote work prior to COVID.
4. Three out of four organizations say their use of Microsoft Teams has "increased" or "increased significantly" as a result of COVID.
5. Overall preparedness for COVID-driven remote work demands – likely also a reflection on organizational attitudes toward employee engagement and remote work in general – directly impacts a variety of measures relative to M365 effectiveness.
   - ☐ Overall M365 effectiveness for COVID-prepared organizations almost a full letter grade higher than those who were unprepared (2.80 vs. 2.19).
   - ☐ Prepared organizations report significant Microsoft Teams use prior to COVID (49%) vs. only 23% for unprepared organizations.
   - ☐ Nearly 60% of COVID-prepared organizations say their average knowledge worker is knowledgeable about Microsoft Teams capabilities vs. only 22% at unprepared organizations.
   - ☐ Project Cortex familiarity (AI capabilities within M365) is 45% at COVID-prepared organizations vs. only 19% at unprepared organizations.
6. The top RM challenge in M365 for users (42%) is information chaos: "Records are everywhere – Information volume and variety expanding too quickly."
7. Nearly 63% see a continuing role for 3rd party solutions in maximizing the impact of their M365 investment. Top priorities are governance and records management (42%), integration with back-end processes like HR or finance (38%), and integration with key industry-specific processes (34%).
8. Over 50% of organizations say that when support ends for existing on-premise versions of SharePoint, they will migrate this content into M365. For those committed to the M365 platform (it's either their only or primary content platform), 61% plan to migrate existing SharePoint on-premise content into M365 as these platforms go out of support. For those less committed to the M365 platform (it's not their main platform or M365 used only for collaboration), only 44% plan to migrate this kind of content into M365.
9. Overall self-evaluation "report card" of M365 governance effectiveness is between a B- and a C+. The biggest weakness is "governing your data – automatically retaining, deleting, and storing data and records in a compliant manner" (2.67 on a 4-point scale). There is a significant "grading gap" across the board between RM/CM professionals and their business and IT colleagues, suggesting the need for greater focus on change management and multi-disciplinary governance teams.
10. The most important collaboration priorities are: 1) storing, accessing, and sharing files (54%); 2) convening video meetings with colleagues and partners (42%); and 3) working together to create and finalize a document (40%).
11. AI capabilities are still emerging for M365 users – 2 out of 3 are not very familiar with Project Cortex.



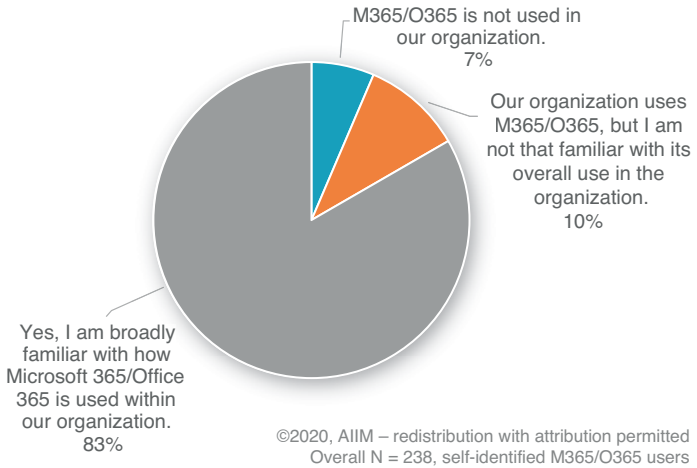
What Role Should Microsoft 365 Play?

What Role Should Microsoft 365 Play?

M365 enterprise presence is ubiquitous

How M365 is used varies; but it is present in most organizations.

Are you broadly familiar with how Microsoft 365/Office 365 (M365/O365) is used within your organization?



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Overall N = 238, self-identified M365/O365 users

It is worth noting how much the Cloud landscape has changed over the past few years. It wasn't that long ago that "the cloud" was viewed among many informational professionals (particularly those concerned about governance in the AIIM and ARMA communities) as some sort of exotic alternative to on-premise storage capabilities, reserved only for organizations desiring to skate on the edges of information management responsibility. As recently as 2013, 24% of organizations using SharePoint said they had no plans to move to the cloud, and another 43% were undecided.

Those days are gone forever.

In 2019, Forrester presciently described the evolution of the ECM (Enterprise Content Management) market into two distinct – but overlapping – sets of capabilities. This split is useful in thinking about the changing role of M365 within organizations, how it is governed, and how it connects with other content management solutions.

1. *Enable information worker productivity with **collaborative content services.** Key capabilities include flexible user interfaces, document management, team collaboration, and secure file sharing – inside and outside of the enterprise. Look for packaged integrations for major office productivity suites as well as common enterprise applications, allowing users to find and consume content in their preferred interface.*

2. *Deliver high-volume automations with **transactional content services.** Structured processes support high-volume activities, such as accounts payable or claims processing, where the goal is automation and reduced human intervention. Transactional content includes scanned documents or print streams generated from back-office applications. Many companies mine these customer interactions to find patterns and trends to help predict how these customers might behave in the future. Key capabilities include multichannel capture, e-forms, and digital process automation.*

The purpose of this market research is not to endorse Microsoft 365 nor contend that it is the only content and process management solution in the marketplace. Far from it. But if 93% of organizations are using M365 in some fashion – particularly relative to **collaborative content services** – then it is worth understanding how this presence is maturing. More particularly, given the remote working demands created by COVID, it is important to understand how these new demands are changing the role that M365 specifically plays in collaboration and knowledge management.

This report combines key data points that describe the current state of M365 adoption and implementation with insightful analysis of those data points and real-life perspectives by our **CIP Expert Panel.**

The analysis is organized into five key recommendations, designed to help organizations better understand how to master their M365 and SharePoint investment – and move from rapid adoption to sensible maturity:

1. Take advantage of demands for remote working and leverage the growing C-Suite awareness that information management matters.

2. Focus on Microsoft 365 ARCHITECTURE as the foundation for your ability to automate Microsoft 365 GOVERNANCE.

3. Reassess the approach that you take to third-party solutions given the rapid pace of innovation in Microsoft 365.

4. Learn from past "SharePoint Sprawl" mistakes in the 2010s and get ahead of the Microsoft 365/Microsoft Teams content explosion.

5. Use the popularity of Microsoft Teams to get users to do what they usually resist – manage their documents in a controlled environment.



Office 365: A cloud services platform that offers Microsoft products like Word, Excel, PowerPoint, and OneDrive, along with other productivity services like Microsoft Teams, either online or on-premises via a subscription plan. This research is only concerned about commercial users of Office 365; as of February 2020, there were over 200 million commercial users.

Microsoft 365: An all-in-one bundle that includes the Office 365 suite, Windows 10 Pro, and Enterprise Mobility+Security for a complete, interconnected experience. The enterprise version of Microsoft 365 is designed for organizations that need a single platform to share and collaborate without risk, which offers data security built on top of Windows 10 Pro and Office 365.

On April 21, 2020, the consumer and small business plans of Office 365 were renamed Microsoft 365, which emphasizes productivity features and services outside of the core Microsoft Office software suite. The Office 365 brand remains in use for plans catered towards enterprise markets, and as a term for the rolling release version of the Microsoft Office software that is distributed as part of the services.

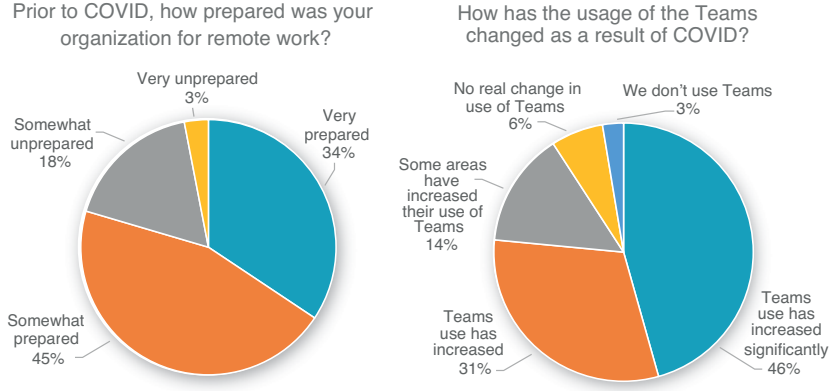


1 – Take Advantage of Demands for Remote Working and Leverage the Growing C-Suite Awareness that Information Management Matters

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Take advantage of demands for remote working

A growing C-Suite awareness that information management matters.



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Analysis:

The COVID crisis has forced organizations to rethink how they view remote work, remote workers, and the systems used to support them. Consider the following:

> *Some 75% of employees said that during the first few months of the pandemic they have been able to maintain or improve productivity on their individual tasks (such as analyzing data, writing presentations, and executing administrative tasks). On collaborative tasks (including exchanges with coworkers, working in Microsoft Teams, and interacting with clients), the number is lower. (Boston Consulting Group, What 12,000 Employees Have to Say About the Future of Remote Work)*

> *The number one reason employees say they go into the office is to collaborate with other team members (50%). Difficulty collaborating is also the number one reason people give for being unproductive as they sheltered in place (39%), along with balancing work with home duties such as childcare (38%). (PWC, A Flexible Workweek has Broad Support)*

> *...even when faced with similar circumstances – more than 80% of respondents say the crisis is materially affecting their daily work lives – people have widely varied experiences, perspectives, and outcomes. (McKinsey & Company, COVID-19 and the Employee Experience: How Leaders Can Seize the Moment)*

> *The CPS [Current Population Survey] estimates indicate that, overall, employment fell by 16% from February to April, and the unemployment rate increased by 11%. However, employment fell by 21% in occupations in which telework is not feasible, compared with 8% in occupations in which telework is feasible. Over the same period, the unemployment rate increased by 14% in occupations in which telework is not feasible, but only by 6% in occupations in which telework is feasible. (Bureau of Labor Statistics, Ability to work from home: evidence from two surveys and implications for the labor market in the COVID-19 pandemic)*

The performance premium that remote work, collaboration, and agility provides – particularly in times of emergency – is even more evident when looking at particular types of work. Overall, the BLS estimates that 46% of those employed have the *potential* to telework (US data). Among those *able to work remotely*, there was a 6.2 percentage point increase in the unemployment rate between February and April; for those *unable to work remotely*, the percent point increase in unemployment was 14.3 – a significant difference.

Of course, not every job lends itself to remote work. But some organizations were unable to adjust to remote work not because of the nature of the work, but because they were inadequately prepared and they lacked the core systems to support collaborative work.

Clearly, organizations that were able to make as large a percentage of their work "remote-able" as quickly as possible benefitted from that agility. Only 34% of the organizations we surveyed reported that their organization was "very prepared" for remote work prior to COVID.

Microsoft 365 – and Microsoft Teams in particular – have benefitted from the rush to fill in this gap, with 77% of the organizations saying that Microsoft Teams usage had "increased" or "increased significantly" as a result of COVID. On an earnings call in early May, Microsoft CEO Satya Nadella noted that during April, driven by the need for organizations to quickly come up with a remote working and collaboration platform, *the Microsoft Teams platform added 31 million new daily users – in a single month*. The numbers undoubtedly have continued to rise dramatically since then, although Microsoft has not released any additional daily usage figures since the end of April.

- ☐ 04/29/2020 – 75 million active daily users.
- ☐ 03/18/2020 – 44 million active daily users.
- ☐ 03/11/2020 – 32 million active daily users.
- ☐ 11/19/2019 – 20 million active daily users.

Overall preparedness for COVID-driven remote work demands – likely also a reflection on organizational attitudes toward employee engagement and remote work in general – directly impacts a variety of measures relative to M365 effectiveness.

- ☐ Overall M365 effectiveness for COVID-prepared organizations is almost a full letter grade higher than those who were unprepared (2.80 vs. 2.19).
- ☐ Prepared organizations report significant Microsoft Teams use prior to COVID (49%) vs. only 23% for unprepared organizations.
- ☐ Among COVID-prepared organizations, 59% say their average knowledge worker is knowledgeable about Microsoft Teams capabilities vs. only 22% at unprepared organizations.
- ☐ Project Cortex familiarity (AI capabilities within M365) is significantly higher at COVID-prepared organizations (45%) vs. 19% at unprepared organizations.

The collective impact of all of this on the C-Suite is a rising appreciation for the importance of how remote working and collaboration actually work. There is also a rising awareness that much of what has been done out of necessity during COVID has highlighted the many governance, security, and accountability gaps that need to be addressed. *This combination provides an opportunity for those who have long sought attention for effective information management as a prerequisite for digital transformation.*



Additional reading from Gravity Union:

Learn the Top 10 mistakes organizations make in Office 365 digital transformations… and how to avoid them! In this *webinar recording*, you will take away: the common mistakes we see with Office 365, how to address the issues, and process recommendations to set you up for success.

CIP Expert Panel Perspectives – What It's Really Like:

- ☐ In the federal government in Canada, we had 280,000 people knocking on the VPN door within a week and a half, so this caused a lot of problems and a lot of concerns. Which led to another problem. Because of the lack of VPN access and things like email quotas, people started reverting to their personal email to send documents and records, including some which may have a protected status, and started scanning documents with cell phones and attaching the images to emails. Nobody had access or knowledge as to where this information was going or how it was being used.
- ☐ The first thing that everybody should be focusing on is digital optimization. How do we get information digitized so that we can then "digitalize" the processes that surround the information?

- ☐ A lot of people didn't have remote access into legacy systems at all. Information was being pulled from these systems, typically through Excel sheets and then going willy-nilly everywhere. The results? Loss of records.
- ☐ We now have an opportunity. A lot of the infrastructure and business process management issues we've been dealing with during COVID have always been with us; they've always been on our plate. We've just never had the priority to address them before.
- ☐ The thing that nobody thought about was home printers. I was witness myself to both a financial analyst and a lawyer who were sending their confidential business documents to their spouse, saying "Please print this on your printer," and then later coming back – maybe – and asking "Oh, by the way, you deleted that document, right?" We had no idea where this information was going or how it was being managed. Meanwhile, our peers are asking us if big box storage companies can swing by the house and pick up their shredding.
- ☐ I think what COVID has done is elevate and prioritize the reality that there are records we need to manage, whether people are working in the office or from home. The business really doesn't care or understand if something is a record or not. They just want to get access to their files, and all of this is much more complicated when working from home. This is our opportunity to automate information management.
- ☐ The executives are listening. The executives are paying attention now when we come to the table with a training requirement or an information management requirement. Those old business cases are getting pulled out and dusted off and getting a second look. It's the information worker that's really bolstering these business cases moving forward and executives are realizing this isn't just an "admin" problem – it is core to the business and on their radar now.
- ☐ With COVID, the groups that resisted our efforts to get things off of shared drives and into a repository are paying the price now – they are struggling.
- ☐ The companies that invested in digitization and collaboration technologies long before COVID are the big winners. These companies were able to easily pivot to remote working when their offices were shut down. All of the benefits that organizations like AIIM and ARMA have been emphasizing for years were realized after the pandemic disrupted normal business operations.
- ☐ M365 has become one of the most significant organization-wide technologies that enable effective remote work and collaboration. M365 is the result of an evolution that Microsoft has been undergoing for over a decade. For Microsoft, as they say, timing was everything.



Additional reading from AvePoint:

The value of operational governance in Office 365 and Microsoft Teams derives from allowing users to access the powerful features of Groups, while also having mechanisms for keeping risks in check.

AvePoint's *"The Value of Automated Office 365 & Microsoft Teams Governance"* eBook is an all-encompassing guide that will greatly accelerate your understanding, and provide solutions for, challenges organizations experience in Office 365 and Microsoft Teams.



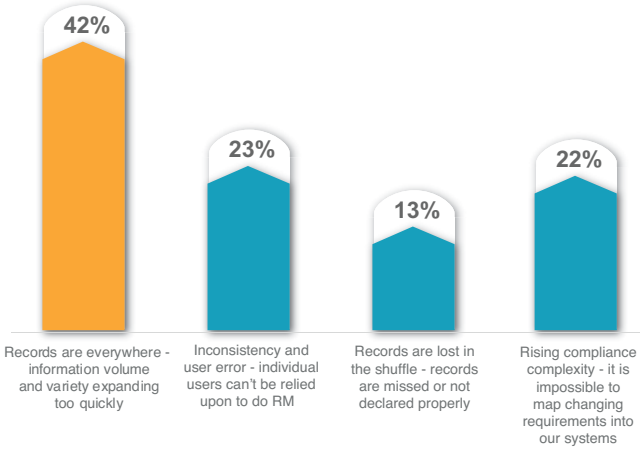
2 – Focus on Microsoft 365 ARCHITECTURE as the Foundation for Your Ability to Automate Microsoft 365 GOVERNANCE

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Focus on M365 Architecture…

…it's the key to automated M365 Governance

Specifically in the context of M365, which of the following is most problematic in your organization?



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Analysis:

Switching gears from broad remote working challenges to the role of M365 in meeting those challenges, there is clearly a rising awareness that rapid adoption of M365 and Microsoft Teams creates records management challenges. The sheer variety and volume of information being created in M365 – "Records are everywhere!" – are a top problem for 42% of organizations.

Most organizations came to the conclusion in the early days of SharePoint that additional tools were needed to handle their records management and governance challenges. A lot has changed since then. Going back to the market dichotomy described by Forrester – **collaborative content services** and **transactional content services** – it is clear that a lot of the content being created in collaborative content applications is M365 content. Some organizations are now considering whether new M365 governance, records, and security capabilities – if planned properly – are sufficient to natively handle at least this part of their information chaos challenge.

Microsoft has made significant investments in the four core governance capabilities that are now the foundation for M365, under an *Intelligent Compliance and Risk Management* umbrella.

1. **Protect and govern data wherever it lives** – Identify risks by locating data and understanding how it's used. Help safeguard data wherever it lives by configuring protection and retention labels.
2. **Identify and take action on critical insider risks** – Identify critical insider risks and take the appropriate action. With built-in privacy controls, use native and third-party signals to identify, investigate, and remediate malicious and inadvertent activities in your organization.
3. **Simplify compliance and reduce risk** – Continuously assess, improve, and monitor control effectiveness. Map regulatory requirements to global regulations and take recommended actions.
4. **Investigate and respond with relevant data** – Advanced Audit and Advanced eDiscovery—tools to help your organization find relevant data quickly and cost-effectively.

Many organizations at large scale do not yet understand these new governance capabilities, how to deploy them, how to optimize them, and how to put guardrails around the explosion of their new Microsoft Teams deployments. Some leading organizations are

concluding that these new capabilities – if implemented effectively – could provide an opportunity to govern M365 information *natively* and are refocusing around using these new M365 out-of-the-box capabilities (included with an E5 license).

This is also creating pressure within organizations to migrate content from on-premise SharePoint repositories into M365 in order to take advantage of these new capabilities; 53% of organizations say that when support ends for existing on-premise versions of SharePoint, they will migrate this content into M365. In this environment, getting the M365 architecture right becomes a *strategic* priority. Given advancements and innovation on the technology side, this is now less of a technology challenge (although the challenges are still significant) and more of a business strategy and information management challenge.

CIP Expert Panel Perspectives – What It's Really Like:

- ☐ It's important to remember that Microsoft built O365 Records Management functionality on top of a system designed for collaboration, and some key information governance principles were missed in the design phase. One key example is the way retention rules work; records age from the date they are labelled as a record in SharePoint rather than from their actual create date which results in over retaining information. This can be a real challenge when dealing with legacy content, particularly for a global organization who must comply with strict data privacy regulations (GDPR, CCCP, POPI, etc.).

- ☐ Content migration has been more or less left to the users. Most of the content that will be in M365 is legacy Office files. ERP/CRM and other systems remain and will continue to operate as-is for the foreseeable future.

- ☐ The avoidance of "information sprawl" is different from the avoidance of "SharePoint sprawl" or "collaboration sprawl." I had an executive who would ask me all the time "How many SharePoint sites do we have?" I would rattle off a number and he would reply, "That's great. It means my teams are collaborating." The executive was correct, but that was the wrong question to ask an IM professional. The right question to ask was about the automation of information management and governance within the sites. We're working closely with our M365 implementation teams to ensure all sprawl is governed.

- ☐ If I have to choose between having information that is managed consistently and with the proper metadata vs. managing or limiting the number of Microsoft Teams sites, I'll take the former every time. We are working with IT to identify a limited set of required information management policies that won't negatively impact the business when they need to add content. We don't want to tell the business when they can and can't use Microsoft Teams. We want them to use Microsoft Teams and expect that the governance needs will be automatically addressed and be consistent with the business needs.

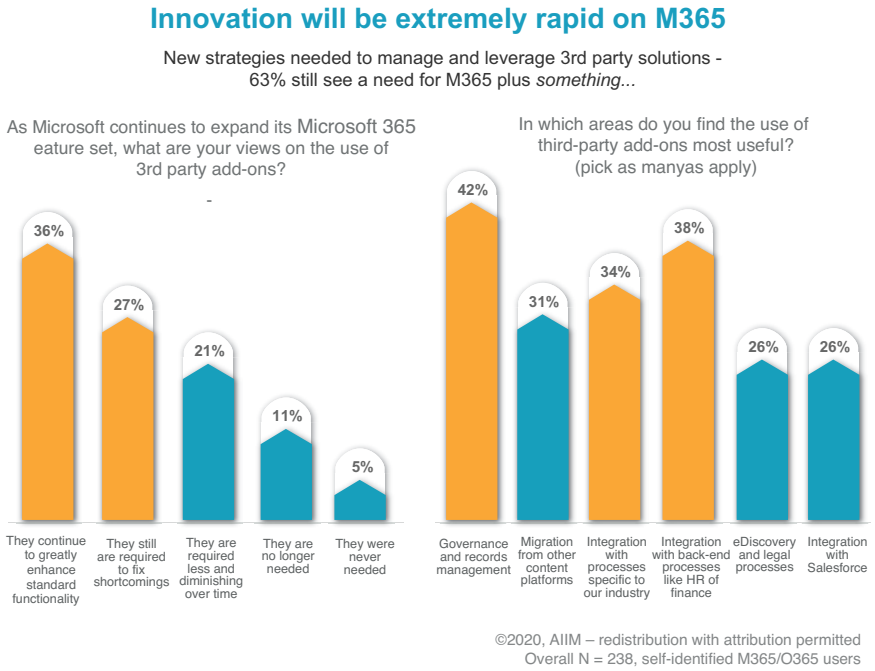
- ☐ We are having discussions about whether Microsoft can be the supplier of most or all of our governance capabilities, even though some of those may not be the best-of-breed. Licensing costs of multiple platforms add up, and it's incumbent upon us to take a closer look. Is this a platform that we actually want to put our chips down on?

- ☐ Information governance and collaboration are almost conflicting concepts. Collaboration implies that there is a free sharing of information and ideas without any encumbrances or rules that restrict the free flow of ideas. Information governance is designed to put rules around how content is defined, shared, classified, restricted, and protected. Information governance tools in M365 were added to the platform, not built in, mainly because the original concept was to provide information to whoever needed it wherever they were. While information governance capabilities in M365 have improved, it is still lacking somewhat for highly regulated industries.



3 – Reassess the Approach that You Take to Third-party Solutions Given the Rapid Pace of Innovation in Microsoft 365

3 – Reassess the Approach that You Take to Third-party Solutions Given the Rapid Pace of Innovation in Microsoft 365



Analysis:

As a *platform*, SharePoint (and now M365) are the foundations for a rich ecosystem of third-party solutions that build upon and leverage the capabilities of the platforms. This has particularly been the case with governance and records management, where many end user organizations concluded that the native records capabilities in SharePoint were just not sufficient to handle complex (often unnecessarily so, but that's another question!) retention and disposition requirements.

"Governance" is more complex than it seems, and it is more than just magic software.

> *Software is not a silver bullet for information governance. Look beyond vendor hype – information governance is not something to go buy so you can say your company has it. Look at information governance as an evergreen corporate objective, enabled by programs, policies, people – and yes, a range of technologies. (Cheryl McKinnon, Forrester)*

For those committed to the M365 platform (it's either their only or primary content platform), 61% plan to migrate existing SharePoint on-premise content into M365 as these platforms go out of support. For those less committed to the M365 platform (it's not their main platform or M365 used only for collaboration), only 44% plan to migrate this kind of content into M365. Specialized file analysis and file migration capabilities are often necessary when it comes to migrating information from other repositories (including on-premise SharePoint repositories) into M365.

The **collaborative content** and **transactional content** duality is useful when thinking about the role of third-party solutions. Even for organizations that are making M365 their main content solution and seeking to leverage native M365 capabilities, there are still many areas of governance in which the requirements are so complex that augmenting M365 native capabilities with third-party solutions makes sense. This is reflected in the 42% that find additional governance and records management solutions useful. **Transactional content** processes are likely driving the 38% that seek additional third-party solutions to help integrate M365 into core line of business processes and the 34% that seek the same for industry-specific processes.

As organizations consider their use of partner solutions to augment native M365 capabilities, they should consider these factors, all of which are being changed by the dramatically accelerated rate of change on cloud vs. on-premise platforms.

- ☐ How fast is the M365 platform changing in the areas you care about? (hint, very fast)
- ☐ How complicated are your compliance requirements and how quickly are they changing?
- ☐ What is the strategy of the partner to keep up with this pace of change?
- ☐ How likely is it that the specific capabilities you are buying from the partner will be incorporated into the core M365 platform? How soon?
- ☐ How much easier and quicker is it to buy these capabilities from a partner than to figure out how to do it yourself?
- ☐ How do the capabilities of the partner fill in gaps that you have in your own staff?
- ☐ How likely is the partner to be acquired?



CIP Expert Panel Perspectives – What It's Really Like:

- ☐ As systems shift to the Cloud, the power for technology decisions is shifting to the business. We have worked long and hard to show that we deserve a seat at the table, but we still struggle. For a long time, information management and information governance weren't really included in technical conversations and now we have to be.
- ☐ We don't know exactly where the M365 platform is going to go relative to governance, but the rate of change is going to be so fast in the Cloud that we're going to go along for the ride and do as much as we can on the platform. Let's face it, even records professionals really don't understand what it takes to have a stable, reliable ECM product. I think there is a lot of room for error that Microsoft is going to take advantage of.
- ☐ Not only can you not sleep on 365, but if you don't have a Microsoft Teams site with Planner mapped to the 365 roadmaps, and a column for emerging functionality in Planner for each application, you're going to fall behind. Because each of these changes – which are occurring more and more rapidly – carry information governance implications. Reviewing the Roadmap together is a great opportunity to collaborate with IT.
- ☐ The reality is that the collaboration space is becoming more, not less, complicated. At Ignite, Microsoft basically said, "We're going to give you a bunch of add-ons to all of these different platforms so you can take the decisions you've made around governance and deploy them out if you choose to." But if you're using automated disposition first and then applying retention elements appropriately, you're going to make an impact and reduce those Azure storage costs. Right-sizing Azure alone is a serious financial reward.
- ☐ We are focused on managing as much as we can using the new out-of-the-box governance capabilities in the E5 platform. We understand it may not meet every need we have but it will help mitigate many of our governance concerns. Ultimately, we also think it's the best way to save money by consolidating spending on multiple platforms.
- ☐ Technology is simply an enabler for information governance. The information governance technology is only as good as the people that are applying the rules. Organizations, that train and reinforce governance rules until they become another Standard Operating Procedures for how work is performed, will have the most success at applying and enforcing governance.



Additional reading from Creospark & Valo:

Special Olympics Canada's (SOC) complex structure includes a national body, 12 provincial chapters, and over 20,000 volunteers. They chose Creospark & Valo to provide a *platform with flexible security and architecture* which would allow them to share the right information, to the right people, at the right time, across the different layers of the organization.



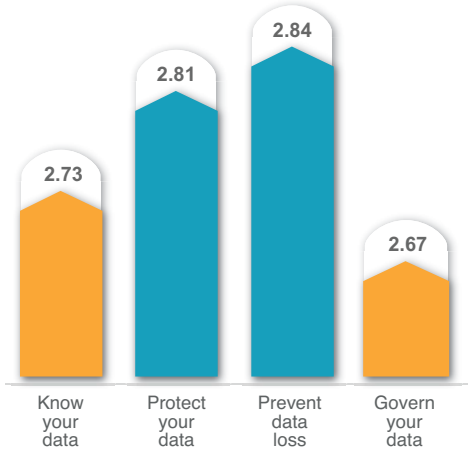
4 – Learn from Past "SharePoint Sprawl" Mistakes in the 2010s and Get Ahead of the Microsoft 365/Teams Content Explosion

4 – Learn from Past "SharePoint Sprawl" Mistakes in the 2010s and Get Ahead of the Microsoft 365/Teams Content Explosion

Learn from past "SharePoint Sprawl" mistakes

Get ahead of the M365/Teams content explosion.

Effectiveness rated between A (Excellent) and F (Non-existent)
Overall self-evaluation = Between B- and C+



Specifically in the context of M365, how would you rate your organization's effectiveness in addressing each of the following?

- **Know your data** – Understand your data landscape and identify important data across your hybrid environment
- **Protect your data** – Apply flexible protection actions including encryption, access restrictions and visual markings
- **Prevent data loss** – Prevent accidental oversharing of sensitive information
- **Govern your data** – Automatically retain, delete, and store data and records in a compliant manner

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Overall N = 238, self-identified M365/O365 users

Analysis:

As New York Yankees Yogi Berra catcher once said (in the context of witnessing Mickey Mantle and Roger Maris repeatedly hitting back-to-back home runs in 1961), "It's like déjà vu all over again."

Ten plus years ago, we all went through the deployment of a product – SharePoint – that was just there for those with Microsoft licenses. It conveniently solved a persistent problem for IT – giving groups a tool with which to share documents. It was deployed in many organizations without a lot of forethought, and as a result, we spent a decade cleaning up "SharePoint sprawl." And organizations spent tens of millions of dollars trying to restore order to the chaos.

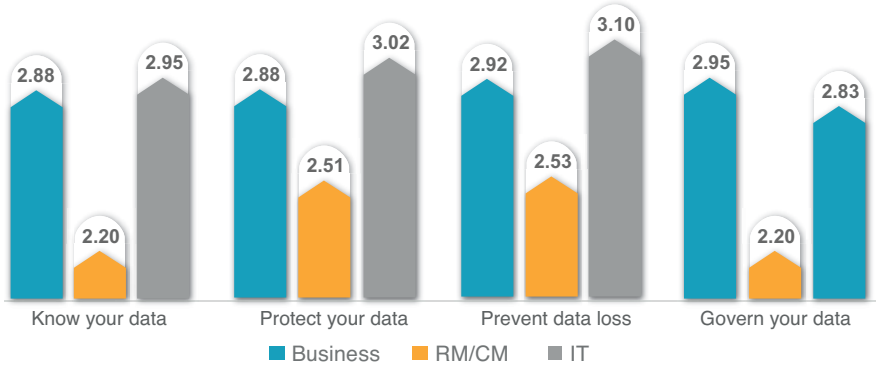


Unless we're careful now, the rapid deployment of Microsoft Teams is going to create a "Teams sprawl" problem.

The M365/Teams content explosion is certainly being driven by a lot of the same factors – incredible functionality that is included in a platform that most organizations already have. This explosion is even more dramatic than the original SharePoint growth because it is being amplified by the unprecedented remote working demands created by COVID-19.

A disconnect between RM/CM and the Business and IT

Specifically in the context of M365, how would you rate your organization's effectiveness in addressing each of the following issues? (4-point scale)



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Overall N = 238, self-identified M365/O365 users

As might be expected, records management and content management professionals are more skeptical about their handling of M365 information than either business or IT executives. This suggests the importance of establishing better communication across the board, and likely a key reason why so many organizations struggle with change management.

The same dichotomy exists among organizations committed to the M365 platform (it's either their only or primary content platform) compared with those less committed to the M365 platform (it's not their main platform or M365 used only for collaboration). Not surprisingly, the self-evaluation grades are about a half a grade higher for the former than the latter.

When it comes to establishing governance around this growing volume of information, organizations face some fundamental choices:

- ☐ Should I try to do governance and records management for M365 content within M365?
- ☐ Should I treat M365 as a collaborative space and move records into a dedicated repository?
- ☐ Should I be migrating content from other repositories into M365?
- ☐ How do I integrate M365 content into core line of business applications?
- ☐ How do we educate the business about the role of M365?
- ☐ How do we manage legacy-based requirements and modern cloud capabilities at the same time?

CIP Expert Panel Perspectives – What It's Really Like:

- ☐ We have now implemented an 'auto-delete' policy on OneDrive. Anything with a last modified date of three years (or more) is automatically queued up for disposal. If people need to keep anything (like records) longer than three years, they have to move it to SharePoint. We have set the same policy on most of our SharePoint Online sites as well, although labelling an item (document, folder, library) as a record overrides the auto-delete policy (hence we refer to the policy as Non-Record Disposal or NRD). IT is now working to deploy this policy at the tenant level, hoping it will be in place by year end. Interestingly, despite implementing these policies over six months ago, we are not seeing vast amounts of non-records being deleted. I hear that Microsoft is working on its engine to speed this up, otherwise it will take years to clear out the backlog of old stuff!

- ☐ Our approach for migrating content into M365 is to first run an assessment for each department summarizing how existing SharePoint sites are being used. It is the department managements' responsibility to review the content for records and respond if further steps are needed to retain those records, and if we do not hear from them, we assume it is all ROT (redundant, obsolete, trivial) and can be deleted. Their lack of response is our approval to delete.
- ☐ We are embarking on the email records journey and are creating new "label-enabled" Shared Mailboxes as well as deploying labelling capability on a number of existing Shared Mailboxes. There are some very interesting limitations which have resulted in a number of our business units opting to store their email records in SharePoint…which of course presents its own challenges!
- ☐ We are using the external facing SharePoint capabilities in Microsoft 365 to replace our FTP sites. I manage a team of 80 records liaisons that we've started using as gatekeepers and auditors of our Microsoft Teams implementation. I don't know the individual projects or people or timelines, but they do. If a Microsoft Teams site has been inactive for six months, it is their job to say, "I see this project is inactive. Is that project on hold or can it go away? Did you move the records to the right repository?"

Additional reading from Egnyte:
Learn the essential skills every IT department must master to control sprawl in Microsoft 365 environments in this *ebook* from a leading SharePoint expert.

- ☐ Our company is using M365 tools to manage unstructured electronic information, including email. It's been decided that information can only be labelled as a record in 'shared' O365 spaces (SharePoint, Shared Mailboxes) so content created in Personal Mailboxes or OneDrive has to be moved to SharePoint, or to a Shared Mailbox if email, and tagged with a Record Type to apply the associated retention period. This is logical as records belong to the company and should be accessible by more than one person. However, an "auto-delete policy" will dispose of unlabeled items three years past their last modified date requiring staff to move (and label) important information/records from OneDrive and Personal Mailboxes to a shared space. The education, training, and support needed to upskill "front line" staff to identify records, move them to the right shared space, and label them with the correct record type should not be underestimated.





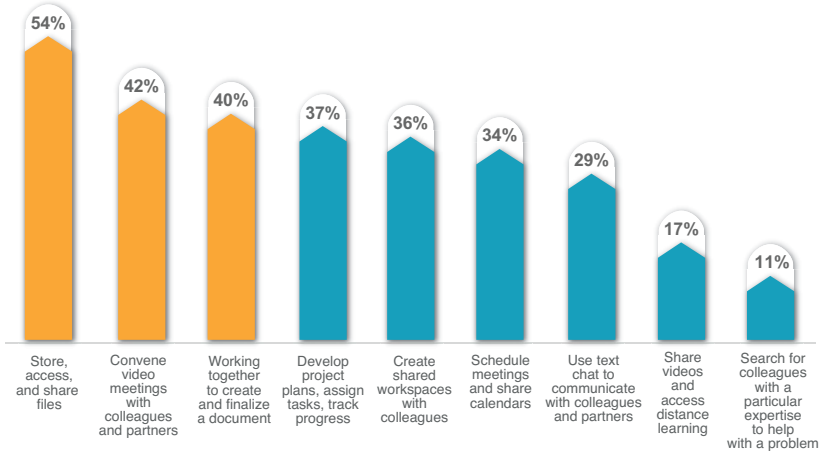
5 – Use the Popularity of Teams to Get Users to Do What They Usually Resist – Manage Their Documents in a Controlled Environment

5 – Use the Popularity of Teams to Get Users to Do What They Usually Resist – Manage Their Documents in a Controlled Environment

Use Teams to get users to do what they resist

Manage their documents in a controlled environment.

Which three of the following collaboration activities are the MOST critical to your organization in achieving its business goals?



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Analysis:

The good news and the bad news – the number of Microsoft Teams users is exploding.

As noted earlier, some of this is due to the same factors that drove SharePoint deployments in the early 2010s. Back then, many IT staffs were struggling with how to provide a document sharing solution to project teams, and, well...SharePoint was there. And it was a safe way to get some of those pesky business users off their back.

The same thing has occurred in many organizations as a result of COVID. Suddenly, EVERYONE needs video conferencing. And while Zoom had a wild ride in the consumer arena, many enterprise decision makers were worried about some of the security and scalability concerns that began to pop up in the press. And voila! Microsoft Teams became an easy way for M365 customers to solve this problem.



As we exited our traditional work environments, many core collaboration problems – 1) storing, accessing, and sharing files (54%); 2) convening video meetings with colleagues and partners (42%); and 3) working together to create and finalize a document (40%) – didn't vanish, they just changed venues and became even more imperative. The core opportunity that Microsoft Teams represents is best understood by thinking about what it would mean if convening video meetings with colleagues and partners *could be used to share files and work together to create and finalize documents.* Organizations have long struggled with how to get users away from their file shares. What if cool backgrounds and a compelling video experience could be used to drive content governance?

"The pandemic has pushed the growth of video communications and therefore inadvertently led many of us to adopt some powerful IG tools related to capture, categorization, and collection. This heightened awareness around our information has the potential to positively impact our ability to govern it, if we take advantage of this moment... True work collaboration does not involve only video, of course. It also involves processes and documents and data and content — and records…

For years we have struggled with how to get people to either not use emails, chats, channels, videos, or odd attachments because they could not be managed as records, or else to move those things to a system of record so they could be retained appropriately. A common solution in recent years has been to integrate a system of record into a collaboration tool like SharePoint to build a collaboration platform on the front end integrated into a compliant repository on the back end."

Brian Tuemmler, How the Pandemic Can Affect IG in Positive Ways

THAT is what Microsoft Teams is, and its potential impact is far greater than most organizations realize. The lack of understanding of the role of Microsoft Teams as a gateway to a host of integrated content management capabilities is at the root of both why organizations are: 1) underestimating its long term impact and 2) failing to understand that Microsoft Teams governance is more complicated than just "deleting transient chats after 30 days."

When organizations think about M365 governance, they intuitively understand the OneDrive and SharePoint repositories will ultimately require some sort of governance. But they often fail to realize that when you work in Microsoft Teams and store a document, it does so in SharePoint or OneDrive. Which means that without even realizing it – lured by the siren call of cool video backgrounds – users will find themselves working in a managed content environment rather than on file shares and random chatting platforms.

If governance is set up right – a big if, although now more of an information architecture and business strategy challenge than a technology challenge – the content can be managed without any of the users even knowing they are actually doing "governance."

Lastly, even among aggressive M365 and Microsoft Teams users, there is still much room for education about the potential impact of Project Cortex capabilities.

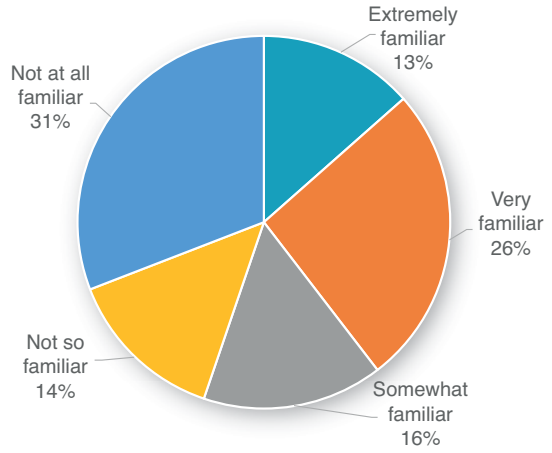
AI capabilities still emerging for M365 users

Build a strategy to get M365 AI capabilities on the radar.

How familiar are you with Project Cortex?

What is Project Cortex?

"Project Cortex is a new Microsoft technology that acts as a knowledge network within your Microsoft 365 apps. The technology takes existing tools like Microsoft Graph, Search, and SharePoint and introduces AI to change the way data is processed."



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Overall N = 238, self-identified M365/O365 users

CIP Expert Panel Perspectives – What It's Really Like:

- ☐ We are looking at all the elements within Microsoft Teams. Exchange and SharePoint are the software development kits of Microsoft Teams. Microsoft Teams stores chats, messages, videos, files – and we're deciding how we will apply retention to each of them. This is all a lot more complex than people think. To give you an idea, in my previous position I inherited a retention schedule of 17,000 records series, which I consolidated into 135, and from there into 30 big buckets. Consolidating into 3-5 buckets and deploying a retention framework across the various Microsoft Teams storage locations that we're interested in right now is serious business. That's the kind of complexity we need to think about and get ahead of relative to Microsoft Teams deployments.

- ☐ There is now less reliance on email with Microsoft Teams, and yet many organizations do not have proper governance around Microsoft Teams records. Valuable information is potentially mishandled as organizations make decisions such as "Microsoft Teams is a transient medium, so all chats/files are deleted after X days." Little has been done to include Records in Microsoft Teams. There is also a lack of understanding as to how Microsoft Teams stores information, thereby making it challenging to apply good records management principles.

- ☐ I was surprised that Microsoft's Ignite conference did not offer more case studies of Microsoft Teams in the time of COVID – what a slam-dunk that would have been.

- ☐ Organizations don't understand how Microsoft Teams stores information. Companies make the broad assumption that they're just going to delete everything off Microsoft Teams after 30 days because it's just transient information and therefore not a record. Wrong.

- ☐ During the very first week of lock down a group of records persons surveyed themselves and asked, "Does Microsoft Teams even contain records?" And I was surprised at the number of tenured records persons who responded that Microsoft Teams doesn't contain records at all. They weren't even thinking through the question of where the documents in Microsoft Teams were being stored. I can absolutely guarantee you that there are records in Microsoft Teams. Microsoft Teams must make a better attempt to understand records architecture.

- ☐ Skype and Zoom have experienced some issues globally. Microsoft Teams seem to be holding out better, but not everyone has migrated. The technology was rolled out fairly quickly, but no one provided training on how to maximize its effectiveness. Nor did anyone think about what we want to do with all of the content that is accumulating there.

- ☐ COVID has impacted us in ways that will be permanent. We will not be 100% back to work. We see the ongoing cohort stream continuing for the foreseeable future. People are adapting to remote working skills, but this is taking the time. The office is becoming a smaller/less integral place. New skills are needed in most organizations (AWS/AZURE, Analytics/ Data Science, Security).

- ☐ Like the old saying goes, "the more things change, the more they stay the same." Microsoft Teams is just another evolution of Microsoft technologies, this time adding video to the suite of services and capabilities. The same problems and challenges that businesses have grappled with in the past are still there. Managing video just adds one more layer to an already challenging landscape for those who are charged with establishing information governance and managing Records.



Final Thoughts

Final Thoughts

A lot has changed since the release of SharePoint Portal Server 2000 (source: History of SharePoint - 9 version history from the year 2000 to 2020):

SharePoint Portal Server 2000: *Released in 2000*

SharePoint 2003: *Released in 2000, 2003*

SharePoint 2007: *Released in 2006*

SharePoint 2010: *Released in 2010*

Office 365: *Released in 2011 (with SharePoint 2010 interface)*

SharePoint 2013: *Released in 2012*

Office 365 Upgraded: *2013*

SharePoint 2016: *Released in 2016 (14th March)*

SharePoint 2019: *Released in 2018 (22nd October)*

As late as 2010, many end users and many solution providers viewed SharePoint as useful for project groups and document sharing – but more of an interesting tangent to the world of content management than "real" ECM.

As the platform has evolved – and particularly with the maturation of Office 365 and Cloud versions of SharePoint – this assumption has been turned on its head. Half of those surveyed now say that M365 is their "only" or "main" content management system. These organizations need to understand how the platform will evolve and build strategies to push the out-of-the-box capabilities as far as possible with a minimum of customization. They also need to build strategies to pull other repositories under the M365 governance umbrella and when and how they will do it. These are likely organizations that are focused on **collaborative content services**.

CERTIFIED INFORMATION PROFESSIONAL

We asked each of our Expert Panel members for one final piece of advice they would give to organizations as they leverage their Microsoft 365 investments and seek to move from rapid adoption to sensible maturity. Here is their advice:

1. In this chaotic time, let's not waste the opportunity. We should take full advantage of this opportunity, especially if we have the ear of some executives. Where can we get our best value? Where can we lessen risk? Where can we improve compliance? Don't waste this opportunity

2. Pick a use case and start small and see what lessons you learn from there.

3. Make absolutely sure that you have an in-house development environment for whatever you are implementing or proposing. That's where the rubber hits the road and where you get your real learning lessons, marrying policy to technology.

4. We jump up and down and say, "Hey, we have licenses! We have training! We have to support in place!" But what matters most is where the stakeholders are going. We simply can't put all of our eggs into one basket and say it's going to be Microsoft Teams. Unfortunately, we have lots of different collaboration and information sharing tools that have got to be available depending on what our stakeholders are doing.

5. The COVID pandemic forced most organizations into many knee-jerk reactions. A quick rollout of Microsoft Teams helped facilitate the need to support remote work. Planning, planning, and more planning will be the key to successfully controlling and managing the explosion of M365 and Microsoft Teams across most organizations.

The other 50% of those surveyed – “M365 is not our primary content management system” and/or “M365 is used for collaboration, but not for process-centric content management” – also face decisions. These are decisions on which platform(s) they will use to handle the federation of governance requirements across multiple repositories and how they will bridge the hybrid world of on-premise and Cloud that will be with us for the foreseeable future. These organizations are likely more focused on **transactional content services** and process integration.

Regardless of where M365 fits in their priorities, M365 cannot be ignored.

It is time for many organizations to determine how to best leverage their investment on the M365 platform and move from *rapid adoption to sensible maturity.*



Additional reading from Microsoft:

Visit the *Microsoft Project Cortex resource center* to learn more about empowering people with knowledge and expertise in the apps you use every day. Building on the leading content services of SharePoint, Project Cortex connects content in Microsoft 365 and external content and enables you to manage your information and streamline processes with advanced security, compliance, and automated workflow.



What Role Does Microsoft 365 Play In Your Organization?

- As recently as 2013, **24%** of organizations using SharePoint said they had no plans to move to the Cloud and another **43%** were undecided. Those days are gone forever.
- Microsoft 365 enterprise presence is ubiquitous, only **7%** say they do not have it in their organization.

Key 5 Recommendations

1



Take advantage of demands for remote working and leverage the growing C-Suite awareness that information management matters.

Only **1 in 3** organizations said they were "very prepared" for remote work prior to COVID.

Three out of four organizations say their use of Teams has "increased" or "increased significantly" as a result of COVID.

2

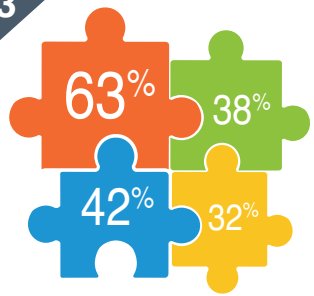


Focus on Microsoft 365 ARCHITECTURE as the foundation for your ability to automate Microsoft 365 GOVERNANCE.



Over **50%** of organizations say that when support ends for existing on-premise versions of SharePoint, they will migrate this content into Microsoft 365.

3



Reassess the approach that you take to third party solutions given the rapid pace of innovation in Microsoft 365.

Nearly **63%** see a continuing role for 3rd party solutions in maximizing the impact of their Microsoft 365 investment. Top priorities are governance and records management **(42%)**, integration with back-end processes like HR or finance **(38%)**, and integration with key industry-specific processes **(34%)**.

4



Learn from past "SharePoint Sprawl" mistakes in the 2010s and get ahead of the Microsoft 365/ Microsoft Teams content explosion.

The top RM challenge in Microsoft 365 for users **(42%)** is information chaos – "Records are everywhere – Information volume and variety expanding too quickly."

5



Use the popularity of Microsoft Teams to get users to do what they usually resist – managing their documents in a controlled environment.

The most important collaboration priorities are; 1) storing, accessing, and sharing files **(54%)**; 2) convening video meetings with colleagues and partners **(42%)**; and 3) working together to create and finalize a document **(40%)**.

Overall Microsoft 365 effectiveness for COVID-prepared organizations almost a full letter grade higher than those who were unprepared **(2.80 vs. 2.19)**.

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AvePoint

AvePoint enables you to collaborate with confidence. Our data management solutions help our diverse, global customer base overcome complex transformation, governance, and compliance challenges in the Microsoft Cloud. A five-time winner of the Microsoft Partner of the Year award, AvePoint offers the only full suite of SaaS solutions to migrate, manage, and protect data in Microsoft 365. More than 7 million cloud users, including a quarter of the Fortune 500, rely on our solutions. Our SaaS solutions are also available to managed service providers, so they can better support and manage their small and mid-sized business customers. Our multi-tenant solutions are available from over a dozen distributors in more than 100 cloud marketplaces worldwide.

Learn more at: www.avepoint.com/



Creospark & Valo

Creospark's goal is to transform your workplace into an enthusiastic environment for your people to work better, faster, and smarter. Our focus is Strategic Consulting around Modern Teamwork (Microsoft 365, Teams & SharePoint), Power Platform, and Microsoft Azure. Creospark believes that in the ever-changing digital environment, it is extremely important to harness the power of the cloud.

Make your workday shine with the award-winning Valo Digital Workplace products built on Microsoft 365 – Valo Intranet, Valo Teamwork, Valo Ideas, Valo Connect, and Valo Entrance. The Valo Digital Workplace solutions have been awarded with the coveted Microsoft "Partner of the Year" honor, multiple "Best Intranet/Extranet" as well as "Best Mobile Solution" from the European SharePoint Community Awards, and "Most Value-For-Money" from reputable industry reports. Our product family is a perfect match for your Microsoft 365 ecosystem. All our products are made with #ValoLove by experienced SharePoint and Microsoft Teams professionals, and deployed around the world by our Valo Partners. Are you ready for a digital workplace experience that drives communication, collaboration, and co-innovation and brings together the tools and people you love?

Visit us at www.creospark.com and www.valointranet.com

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For more information, visit www.egnyte.com

Gravity Union

Gravity Union is passionate about helping clients adopt Microsoft Office 365 as a platform for document management, collaboration, and business solutions all while adding a strong dimension of compliance through Microsoft 365 compliance capabilities or Collabware. We achieve our goals around compliance with user-focused solutions involving SharePoint, Microsoft Teams, OneDrive, Power Apps, Power Automate, and Power BI. We recognize that the biggest component of any systems implementation is people – and we place appropriate focus on addressing change in an organization's culture, behaviors, and day-to-day processes needed to achieve operational effectiveness. Throughout our projects, we remain focused on ensuring goals are met without burdening staff with a greater workload. An information governance implementation should not be another task on your staff's to-do list; it should be achieved naturally by following the right processes for getting their jobs done. Gravity Union is founded by Michael Schweitzer, one of the world's few Collabware MVP's. Our consultants have on average 10 years of experience in Microsoft information technology and carry industry-leading credentials including Microsoft Certifications, PMP Certifications, and Prosci Certifications for change management.

Learn more at: www.gravityunion.com

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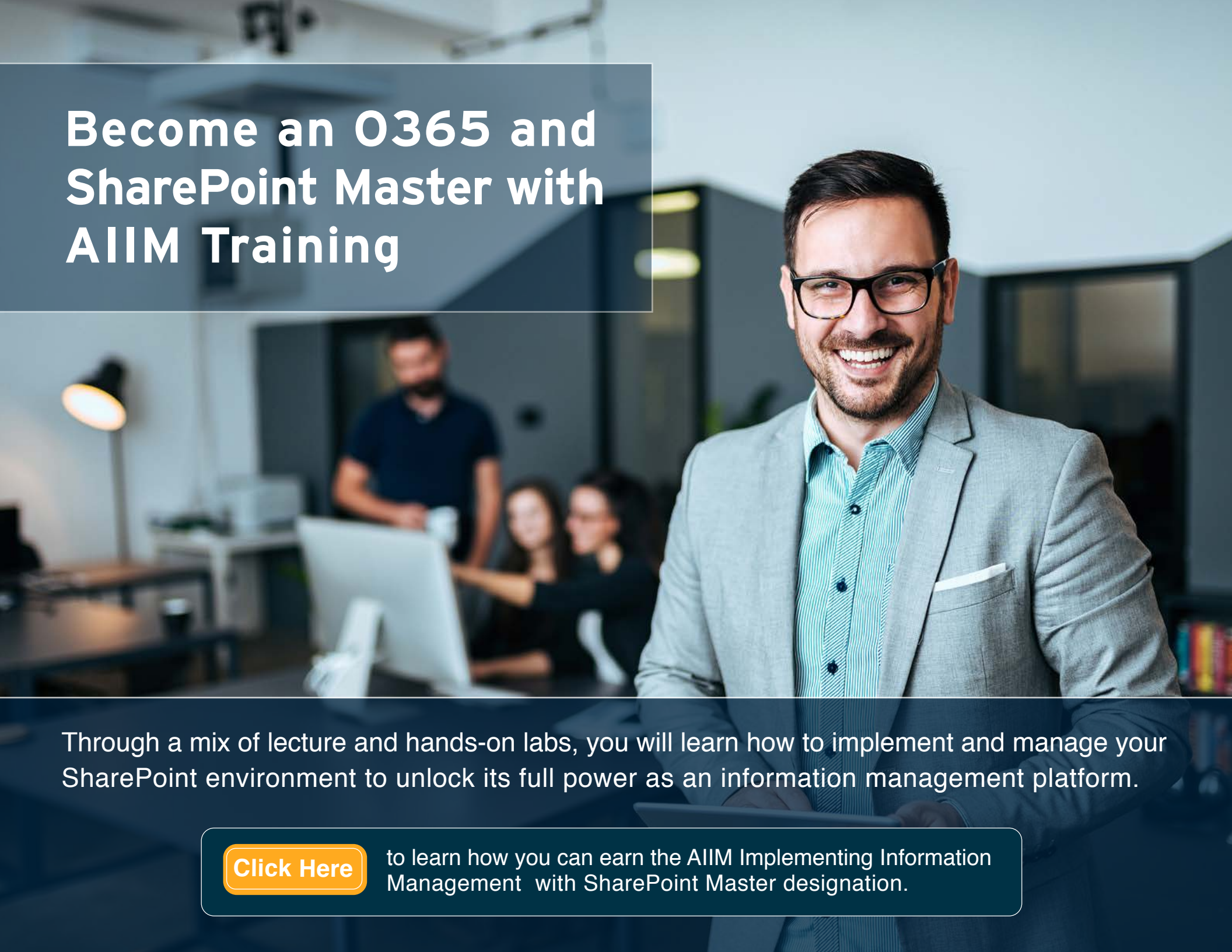
Microsoft enables digital transformation for the era of an intelligent cloud and an intelligent edge. Its mission is to empower every person and every organization on the planet to achieve more.

Microsoft 365 brings together Office 365, Windows 10, and Enterprise Mobility + Security to deliver a complete, intelligent, and secure solution that empowers people. It's designed to effectively unleash the power of creativity in the enterprise with Office 365 productivity tools, while Windows 10 helps streamline management of company devices and data across a range of environments.

Microsoft 365 helps your team perform at its best, whether in the office, working from home, at a client site, or on the road.

Learn more at: www.microsoft.com





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Click Here to learn how you can earn the AIIM Implementing Information Management with SharePoint Master designation.



About AIIM

Here at AIIM, we believe that information is your most important asset and we want to teach you the skills to manage it. We've felt this way since 1943, back when this community was founded.

Sure, the technology has come a long way since then and the variety of information we're managing has changed a lot, but one tenet has remained constant — we've always focused on the intersection of people, processes, and information. We help organizations put information to work.

AIIM is a non-profit organization that provides independent research, training, and certification for information professionals.

Visit us at www.aiim.org.

Written by AIIM

Contributions by:

John Mancini, CIP

Content Strategist and Past President of AIIM



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aiim

+1 301 587 8202
hello@aiim.org
www.aiim.org