
Maintaining Operational Continuity for Legal, Compliance, and eDiscovery Workflows within Microsoft 365

INTRODUCTION

Enticed by the benefits in scalability, speed, security, and functionality offered by Microsoft 365, a large energy company was excited to adopt Microsoft's cloud software suite. Additionally, considerations around legal, compliance, and ediscovery were very important for the company given the highly regulated nature of their industry. In an effort to get the most from their investment in Microsoft 365, the team wanted to utilise as many of the software's in-place tools for ediscovery and information governance as possible; however, the team was concerned about how best to deploy these tools to support their current workflows and business processes – not only in the immediate term, but also over time.

CHALLENGE

Seeking expert support, the energy company engaged Lighthouse to help them plan and design implementation specifics for Microsoft 365 that would meet the needs of their legal and compliance workflows. Working closely with their legal, compliance, ediscovery, and IT stakeholders, we defined the exact requirements and designed workflows across three primary workloads – Exchange Online, SharePoint Online, and OneDrive for Business – to constitute an MVP for how Microsoft's native ediscovery and information governance tools could be utilised.

After the successful implementation of the MVP, the team was confident in its ability to make full use of the Microsoft suite of tools to meet legal and compliance needs; however, because of the constantly evolving state of cloud software, the client was concerned about how those workflows would scale over time. Given the thousands of updates published every year, only a few have impacts to legal and compliance; however, the nature of these impacts and their potential implications could be far-reaching and costly if not identified and actioned upon.

While the IT department at the energy company had a regular cadence of reviewing and testing updates, its evaluation criteria and priorities did not adequately address legal's – in part because they did not have line-of-sight or full responsibility for the affected business processes. In addition, IT was looking for end-user impacts or security risks, not updates that presented impact to individual business operations, including those that might have an impact on downstream eDiscovery or necessitate an information governance policy change. The legal and ediscovery teams that would be impacted lacked the resources and knowledge to monitor the software updates, let alone to identify the updates that could affect their workflows and policies.

IMPACTS

Given the suitability of CloudCompass to meet the client's needs, Lighthouse presented this service as a probable solution. Ultimately, subscribing to CloudCompass gave the energy company's legal team the peace of mind that their carefully designed workflows wouldn't be affected without their knowledge by future software updates – an occurrence that poses a potential risk and may have many downstream impacts, but that could easily go unidentified. Reassured that they would be alerted to changes, the energy company's legal team was able to confidently move forward with the deployment of Microsoft 365 and their adoption of the native eDiscovery and compliance tools, while knowing they were secure in their ability to manage the solution over time. Additionally, the energy company now receives immediate alerts about new features that could improve their operational models or provide an opportunity to expand feature adoption, ensuring that the company can maximise the full use of their software in the future.



Why Lighthouse?

With extensive experience in review efficiency and a trusted Microsoft partner, we help clients get the most from their matter portfolio.

PROACTIVE STRATEGY

Our specialized teams keep pulse on changing technology, hyper focused on both the technical implications and legal, compliance, and regulatory impacts to provide preemptive solutions evolving your organisation's information governance, compliance, and eDiscovery programs.

PROVEN EXPERTISE

With more than 25 years of information governance, compliance, and eDiscovery experience, we provide comprehensive strategies and best practices to ensure your programmes surpass stringent legal and compliance requirements while reducing risk and costs.

ELITE PARTNERSHIP

Lighthouse is the premier Microsoft partner for information governance, compliance, and eDiscovery. Our deep-seated partnership with Microsoft is built on trust and a more than 20-year collaboration, resulting in exclusive access to product insights and roadmaps.

Contact us to find out what Lighthouse can do for your business.

(206)223-9690 | lighthouseglobal.com | channelsales@lighthouseglobal.com