

Reduce Risk & Maximize Compliance with Microsoft 365 Deployment & Integration

Legal stakeholders at a multi-national and heavily regulated bank sought to ensure it was leveraging the Microsoft 365 toolset fully and appropriately to address eDiscovery needs; that its business processes aligned with emerging industry standards; and that it was aware of risks that may exist associated with modern productivity and proliferation of data in the cloud.

This challenge is compounded by the continuing evolution of cloud technology and the fact that legal and compliance teams often struggle to keep up with the latest product updates, new features and impacts on existing processes and workflows.

Key components included consideration for eDiscovery operational workflows, integration with relevant systems, automation of processes, incorporation of controls for reporting, monitoring and auditing, the development of workflow and standard operating procedure documentation and training.

Lighthouse provided the client with an extensive roadmap for all key stakeholders to help them progress towards the future state model. The client could take advantage of the features of Microsoft 365 and reduce their overall risk and provide a defensible strategy.



**DEFENSIBLE
MIGRATION**



**TECHNOLOGY
CONFIGURATION**



**TECHNOLOGY
INTEGRATION**



**PROCESS
AUTOMATION**

At-a-glance

Lighthouse Customer

Customer Size: Mid-size multi-national bank with approximately 9,000 employees

Country: United States

Industry: Banking

Products and Services: Microsoft 365 Lighthouse Deployment and Integration

Lighthouse helps banking client manage eDiscovery and information governance

Customer Challenges

A heavily regulated corporation found Microsoft 365 adoption challenging due to perceived and actual legal and regulatory risk associated with migration and the lack of an appropriate strategy to navigate these issues.

Collaboration features and functionality pose unique challenges – either because the data cannot be retained, preserved or collected, or because the underlying architecture requires consideration of workflows that are, at times, conflicting with current industry standards.

Partner Solution

Lighthouse global advisory team conducted an assessment of the bank's eDiscovery operating model (e.g., people, process, technology) to identify gaps and risks, taking into account their pending migration and deployment. Lighthouse recommended a future state model to address these gaps and risks to satisfy the client's desire to use Microsoft 365 to support eDiscovery activities.

Additionally, Lighthouse provided a high-level document setting forth relevant design elements and considerations for legal and compliance stakeholders, to enable the implementation of Microsoft 365 for eDiscovery.

The Results

The stakes were high for this multi-national brand. Lighthouse worked with the customer's legal stakeholders to develop a well-defined operating model that helped the bank adhere to best practices; to test, validate and document workflows; to train eDiscovery staff; to stay abreast of product changes.

Learn More

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