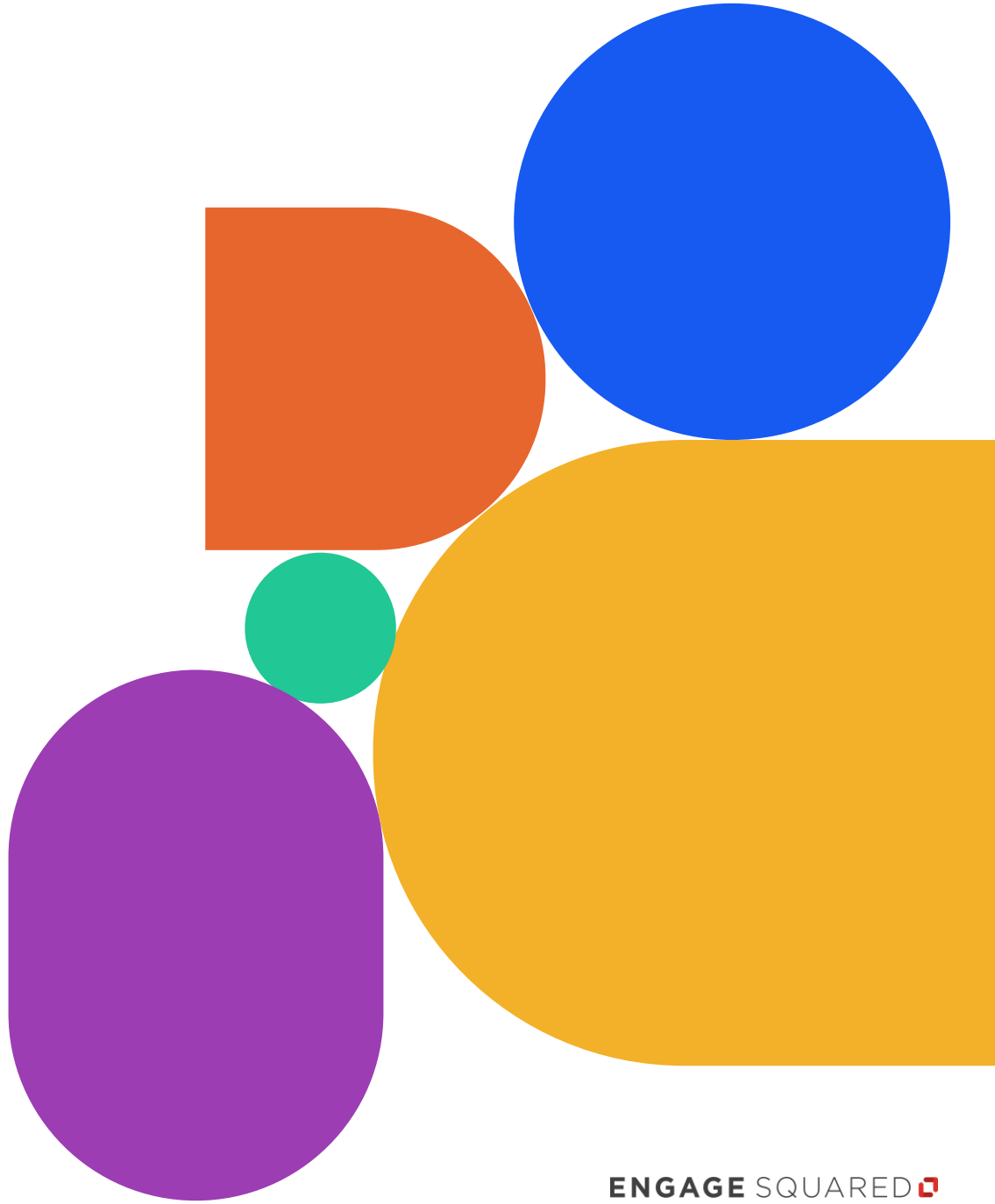
Information Management Roadmap

Equipping you to implement modern information management across your digital environment



ENGAGE SQUARED

About our Information Management practice

The Information Management Practice at Engage Squared is at the forefront of delivering modern approaches to information management and governance. We take a risk-based approach to deliver practical records and information management solutions that meet your compliance needs.

We specialise in helping large complex organisations who are:

- Unsure on the best option or approach to managing information
- Unsure on what capabilities exist within M365
- Looking to reduce the knowledge gap across teams and business units
- Looking to bring consistency to ways of working and information processes

Most importantly, our services can help you minimise common challenges associated with information management, including:

- Reduction in the costs associated with information lifecycle activities
- Responding to RFIs (request for information)
- Increasing efficiency and increased accuracy in common IM processes

Unlike competitors, we have product experts who can connect the dots and address all the dimensions associated with information management - from ideation, through to configuration, change management and ongoing management. We're a full-service Microsoft partner that can help you get the most out of your investment in M365.

Find out more about our risk-based approach in our M365 Modern Records whitepaper

Engagement overview

We'll help you formulate an approach to modern information management in M365.

We understand that you're looking to evaluate and improve the information management capabilities in Microsoft 365. The Microsoft 365 environment hosts a range of information including documents, emails, and chats that are created and captured across a multitude of information activities.

This offer has been designed for organisations who are looking to use existing Microsoft products and licensing investment to develop a scalable approach to enterprise information management, reduce risks and meet compliance needs.

The particulars

Timeframe: 3-4 weeks

Price: $44,000 (ex GST)

Engage Squared resources: 1

By the end of this engagement, you'll have:

Firsthand understanding of Microsoft 365's Information Management capabilities

We'll spend time understanding your IM needs, including your regulatory and/or legislative obligations, and reviewing your existing policies, systems and processes to inform your recommendations report. We'll demonstrate concepts within a working sample Microsoft 365 environment providing the opportunity to experience features and capabilities firsthand.

A clear understanding of how you can use M365 to meet your Information Management needs

Including where to begin your journey, steps required and indications of effort and investment with respect to bring greater information governance and lifecycle management to your Microsoft 365 environment. The plan will outline recommended configurations, gaps and options to achieve modern records management capability that supports your compliance needs.

Project pathway

PHASE 1:
Discovery

Discovery activities focus on developing a shared understanding of your current IM environment (people, policy, process, platform), and your IM obligations.

Consultation will take place with people within the organisation who are able to represent IM, KM, RM and DM needs.

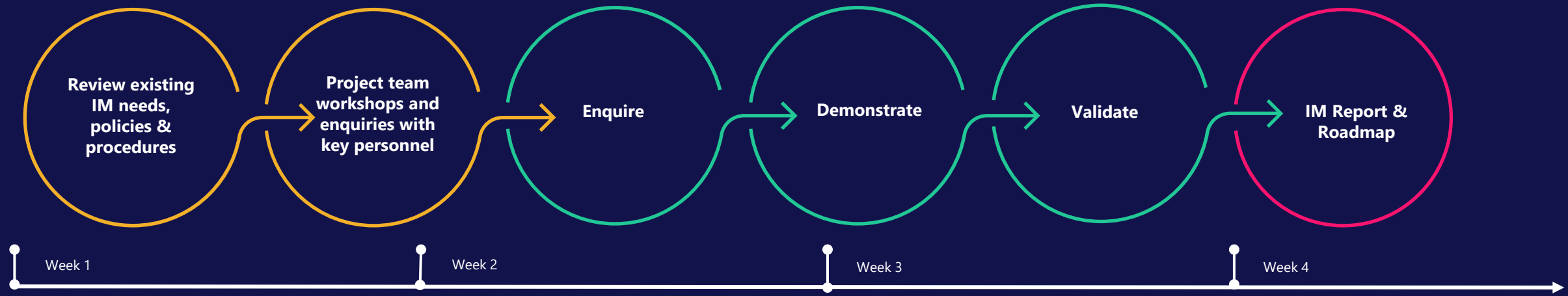
PHASE 2:
Analysis

Analysis is an interactive and collaborative process. We explore and validate findings and regularly include demonstration points to educate, clarify and identify the most suitable approaches for utilizing the M365 platform for your information management needs.

PHASE 3:
Deliverables

We'll deliver a report that details options, gaps approaches and recommendations for implementation of Microsoft 365's information management capabilities.

This effort includes a presentation/Q&A session of the roadmap to ensure all stakeholders understand recommendations, options and next steps.



What we offer in the Microsoft information governance space

Discovery
Understood & experience

Know what's possible, answer your questions, ask new ones

Roadmap
Define & prioritise

+ Change Strategy

Prioritised requirements, implementation plan, sequencing, change and adoption strategy

ENABLE	**Information Architecture** (Organise and Structure)	**Self-Service Team Provisioning** (Smart Defaults, Efficiency & Consistency)	**Automated classification** (Trainable classifiers, Syntex and 3rd party products)	**Migration** (Migration, Reorganisation / Remediation)
RETAIN	**Retention Policies** (Safeguard & Preserve)	**Retention Labelling and Classification** (Retain & Dispose)	**Enhanced RM** (3rd party products / Connectors, Provisioning)	**Integration** (Custom integrations/ Connectors, Provisioning)
PROTECT	**Sensitivity Labelling** (Classifications & markings)	**Data Loss Prevention** (Protect against loss)	**Information protection** (Protect, secure, encrypt)	**Enhanced Protection** (3rd party products)
MANAGE	**Governance** (People, policy & process)	**Monitoring and Reporting** (Supervise, take action)	**eDiscovery** (Discover & Respond)	**Insider Risk Management** (Address threats on the inside)

About us

We are Engage Squared.

Specialists in **<people> friendly technology.**

Our mission is to make work better. We are one of a small number of technology consultancies in APAC that provide end-to-end support for our clients, helping to tackle issues ranging from employee experience, business process automation, compliance and records management, technology adoption and more.

From design, to technical build, our team of experts use their broad range of skills across project delivery, cloud strategy, user experience design, governance, agile development, change management, and security to help our clients get the most of technology.

We specialise in a range of technologies, and partner with leading providers such as Microsoft, ServiceNow, AvePoint, Glint, SWOOP Analytics and many others. We take partnerships seriously and were proud to be named the **2022 global winner of the Employee Experience Microsoft Partner of the Year award.**

Microsoft Partner
Microsoft
2022 Partner of the Year Winner
Employee Experience Award
2021 Partner of the Year Winner
Australia

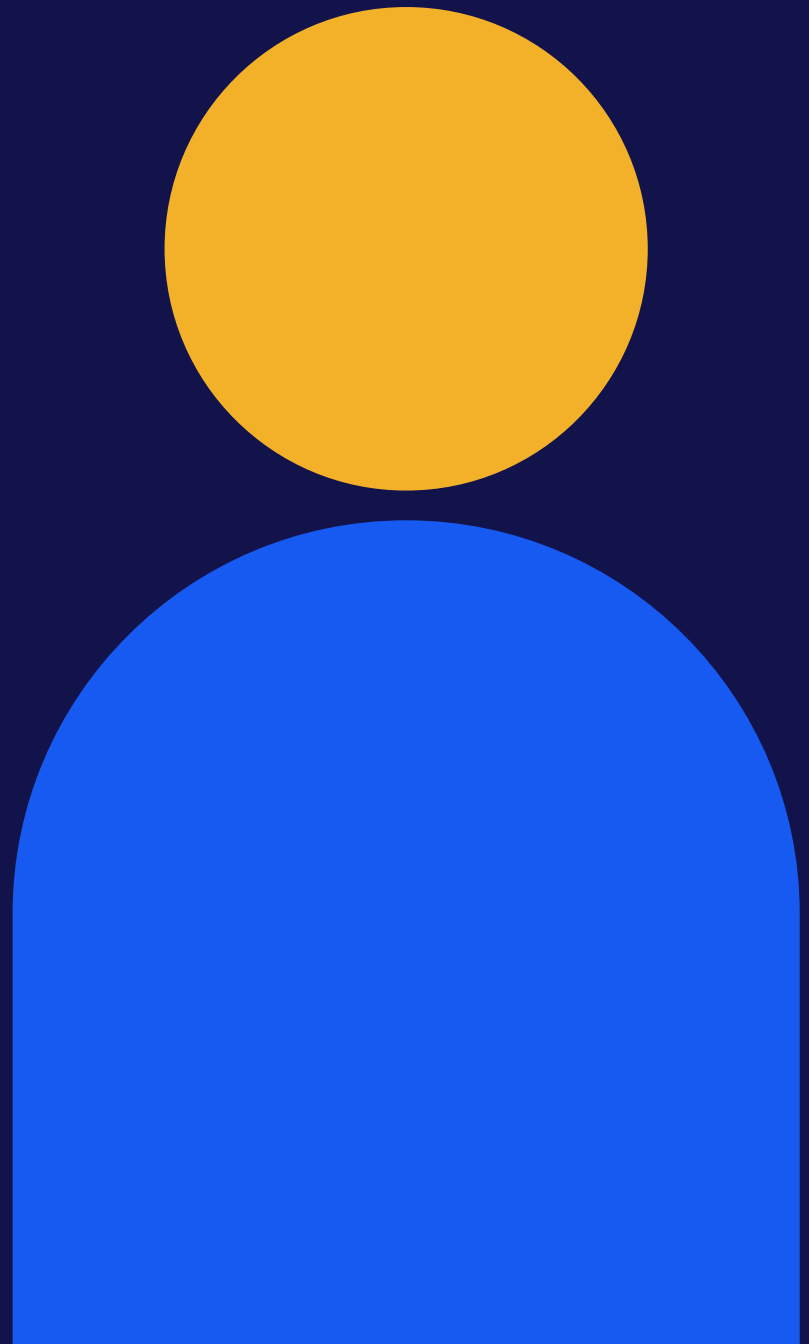
Microsoft Preferred Business Applications

Microsoft Preferred Content Services

CHANGE PRACTITIONER
Prosci CERTIFIED

Yammer Adoption Specialist

Microsoft Teams Collaboration Specialist



<people>
friendly
technology

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