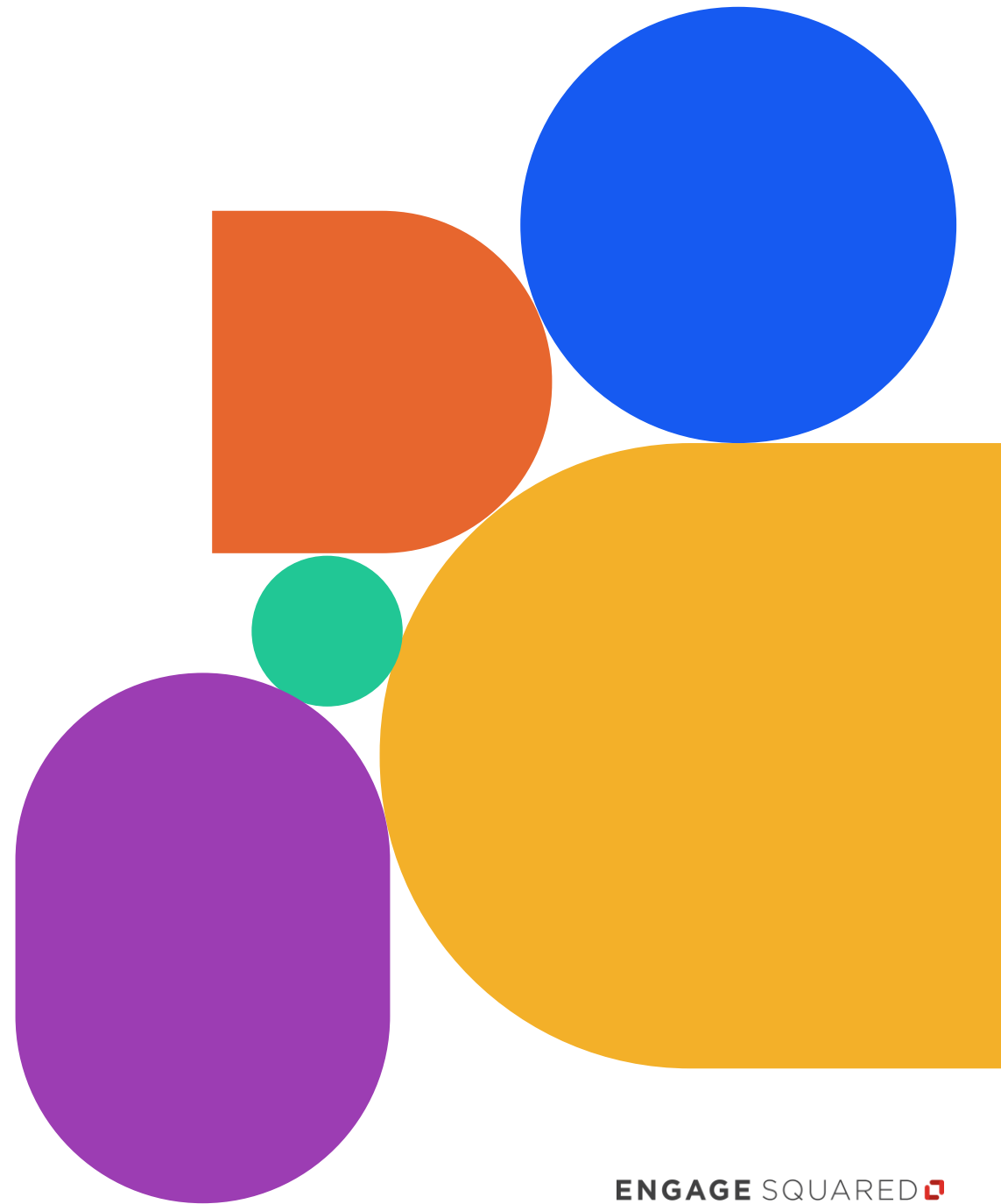


Records Management Compliance with Microsoft 365

# Records Management Capability Assessment and Roadmap



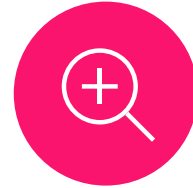
# Engagement overview

## What is the 'Records Management Capability Assessment and Roadmap' engagement?

The key output of the 'Records Management Capability Assessment and Roadmap' engagement is to assist you to strategically implement and evolve your organisational information management requirements using Microsoft 365 tools, such as **SharePoint Online** (intranets and Microsoft Viva), **Microsoft Teams** (including custom solutions where appropriate), the assessment will also introduce **Microsoft Viva** as a tool that can enhance your overall employee experience.

This engagement aims to ensure you understand your current records management capability, how your requirements can be addressed using an appropriate solution and what the implementation roadmap will look like.

We'll design our recommendations based on your vision for the future, stakeholder feedback, our expertise and experience. During the engagement we will share the trends that we are seeing with our other clients and across the industry.



### 1. Analyse your current state and priorities

We'll seek to understand your current records management landscape, undertaking a maturity assessment, and a series of discovery workshops to uncover your vision and priorities.



### 2. Develop action plan and roadmap report

We'll highlight key themes and findings, recommending areas for improvement and suggested activities for what this could look like in practice.



### 3. Present and deliver the report

We'll play back our findings, and recommendations to your team in a report. We will assist to create a roadmap to translate the report findings into an achievable action plan.



**Duration:** 3-5 weeks



**Investment:** \$24,500 (AUD ex GST)

# M365 for Records Management

## Why use Microsoft 365 for records management and how does it save time and money?

- Fewer systems to manage, easier adoption and less work required from staff
- Uniting document and records management in a single platform increases efficiency and reduces adoption effort
- Under Microsoft 365, the records management process becomes almost invisible to end users
- Azure Information Protection and M365 Data Loss Prevention help provide security and compliance
- The M365 ecosystem meets regulatory and legislative requirements reducing the need for third party and traditional electronic records management systems

## Unified capture

Utilising M365 as an in-place records management system reduces the risks associated with poor recordkeeping.

## Seamless user experience

Microsoft 365 can maintain an organisation's documents and list items in a near-compliant state, without altering the daily user experience.

## Low effort

The experience for end users is minimised. End users need only create and capture a record, email or document in an appropriate folder, the system takes care version control, metadata management, and disposal.

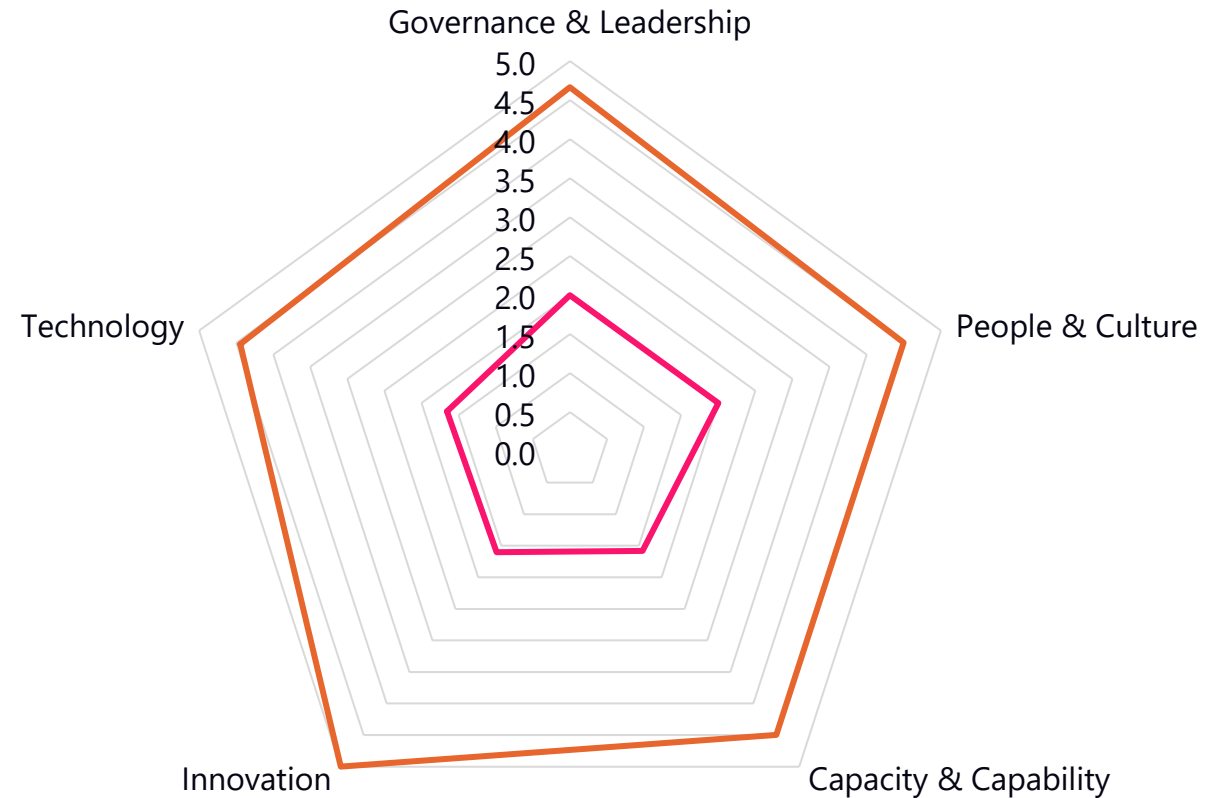
# Part 1: Analyse your current state and priorities

Through workshops, we'll seek to fully understand your current state digital landscape and maturity while uncovering your vision for the future, business drivers and key challenges.

We'll conduct a maturity assessment to define your current state and articulate what the destination state looks like from a regulatory requirements perspective. We'll use our assessment tool to audit your current state, ensuring that the appropriate legislative considerations have been reflected and applied.

We'll conduct and Q&A deep dive with your project team to you allow your key stakeholders to discuss with our consultants how the findings and recommendations can be articulated into an achievable action plan.

— Current state — Target state



# Part 2: Develop action plan and roadmap report

The 'Records Management Action Plan and Roadmap' will provide you with a blueprint for turning insights into action. We'll outline our key recommendations as well a recommended supporting initiatives.

**The analysis and recommendations report will include:**

Detailed key themes and findings from discovery

Benchmarking and maturity levels between your organisation and those of similar size/industry

Prioritised key recommendation and initiatives including identifying quick wins

Maturity benchmarking and compliance against appropriate legislation and regulations such as GDPR.

Actionable records management roadmap

# Part 3: Present and Delivery

Your consultant will play back the report and roadmap to your executive team providing a summary of the findings and provide a recommended course of action to increase information maturity and capability across the organisation.

In this interactive walkthrough, you'll have the opportunity to ask questions to ensure that your team fully understand the report, the recommendations, the required actions and the implications.



# High level timeline



# About us



**2,000,000+**  
people use an intranet  
built by us



**150+**  
Digital Workplace  
transformations



**70**  
Our intranets are  
used in 70 countries



**6,000,000**  
Records migrated



Melbourne  
Sydney

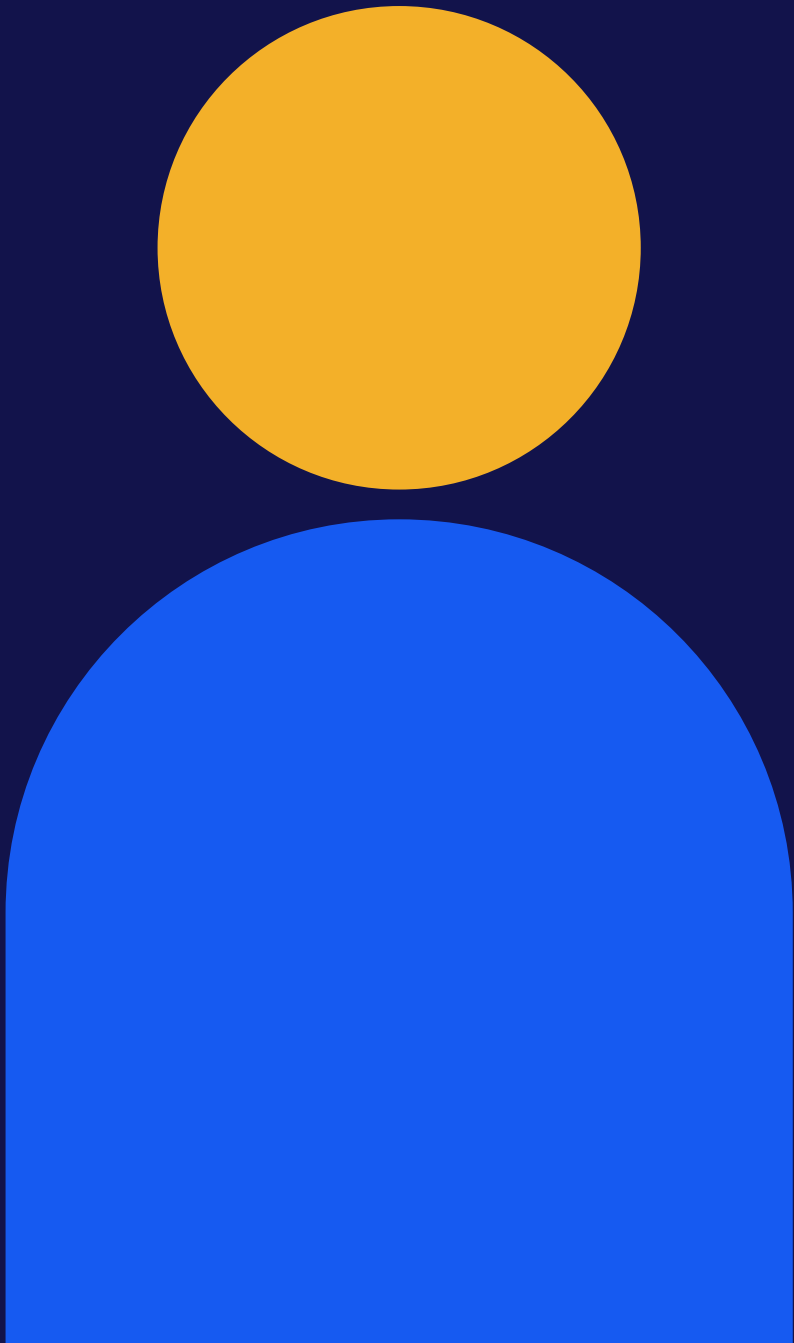
Brisbane  
Perth

Canberra  
Auckland

Wellington  
Minsk







<people>  
friendly  
technology