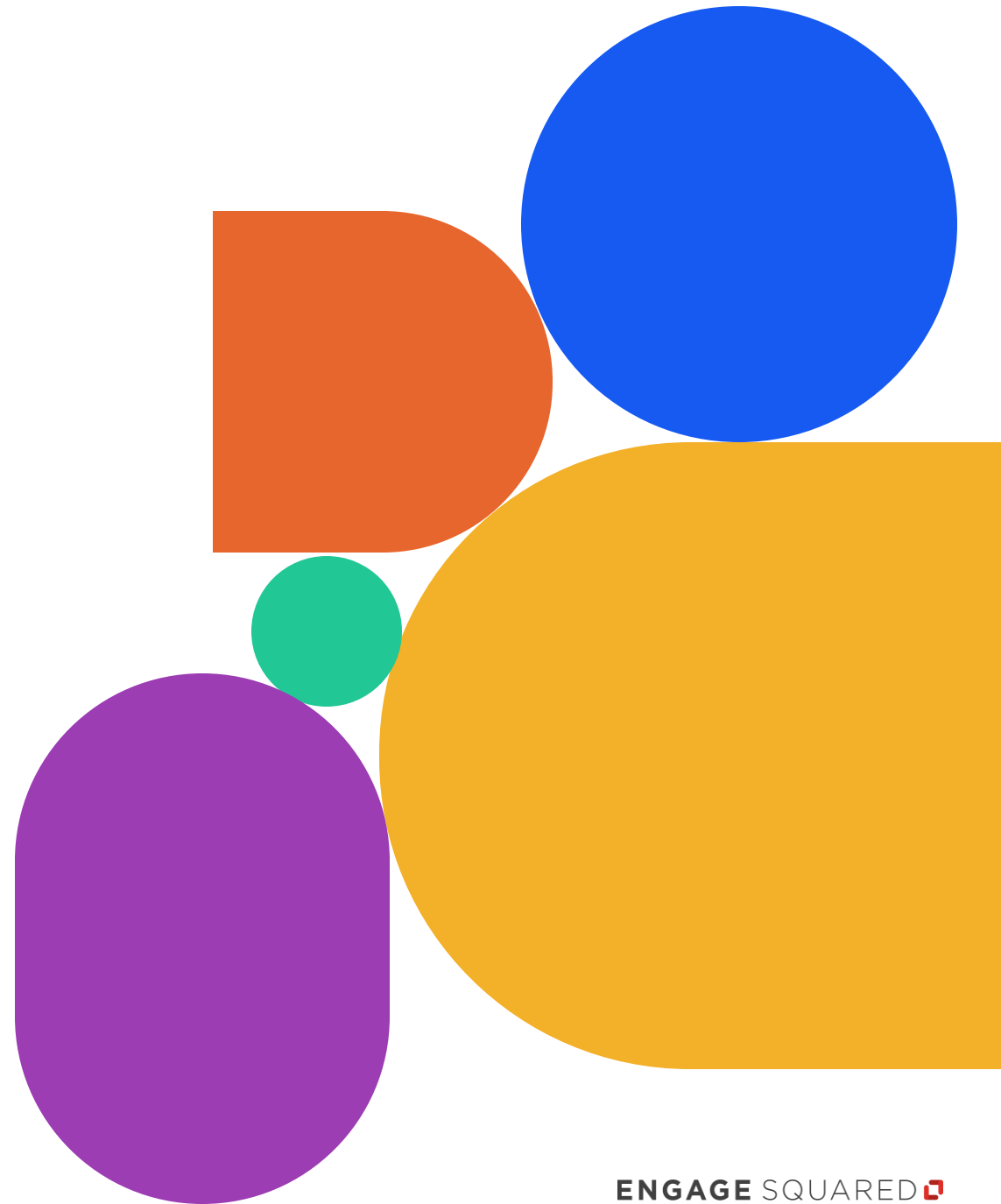


Offer overview

SharePoint Online – Clean-up, Back-up & Governance



Engagement overview

Our SharePoint Clean-up and Governance service is designed for organisations seeking to significantly reduce their SharePoint Online storage footprint, enabling a more streamlined and cost-effective use of their Microsoft 365 investment.

Managing storage limitations is increasingly becoming a common challenge for Microsoft 365 users, primarily due to the rapid accumulation of large volumes of data, extensive version histories in document libraries, and the storage of high-resolution media and video files, all of which can quickly consume available storage space and impact overall system performance.

This engagement will help you to understand your data and make informed decisions about how to manage it.

We'll analyse your environment and utilising best practice, industry trends and our years of experience, develop recommendations and a future focused governance plan. Our team can further support you with execution, communications and automated solutions to implement and support the governance plan.

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



Analyse & recommend

We'll review your data and recommend what you should do with it, aligning to your business requirements, policies and licensing. We'll develop a high-level SharePoint Online data governance plan to support ongoing management of your data including best practice and industry standards.



Clean-up help

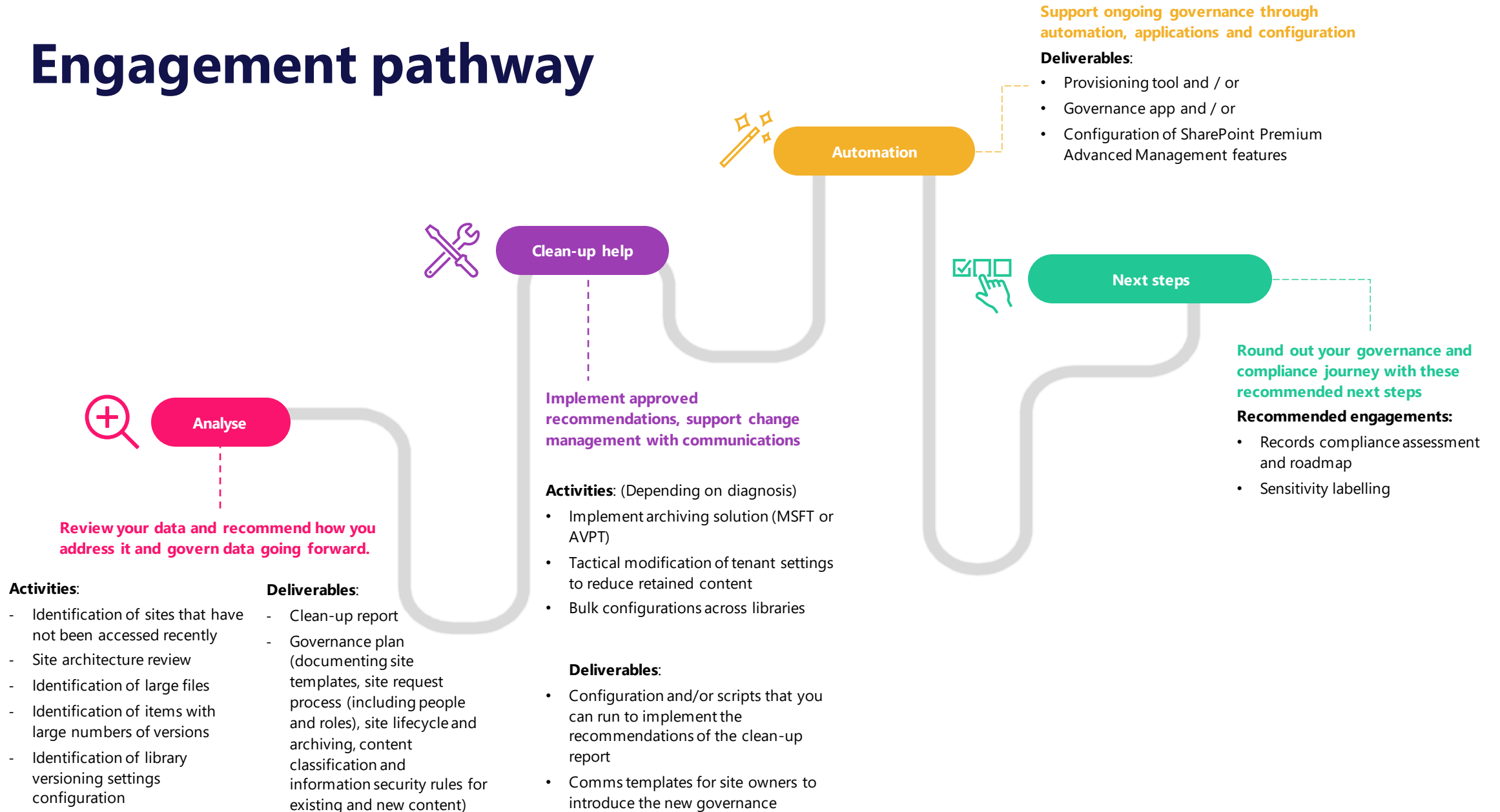
We've included some time to support your team to implement approved recommendations from phase one to reduce to SharePoint Online storage footprint. We've included some time to support change management and communications.



Automation

We've included some options to support ongoing governance through automation, applications and configuration of SharePoint Premium Advanced Management features.

Engagement pathway



Part 1: Current state analysis & recommendations report

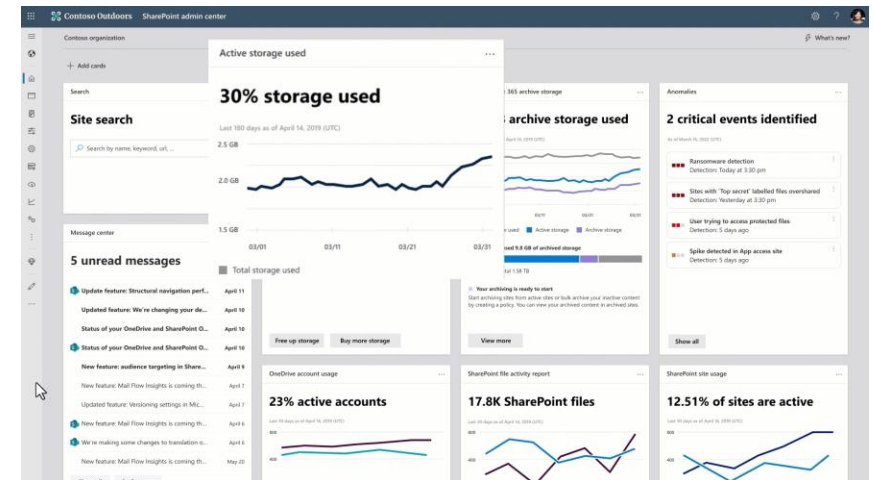
Discovery activities focus on understanding your current SharePoint environment and storage, as well as understanding any existing data management practices and policies, including retention policies.

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

Our analysis will result in the development of the following documents:

- 1. Recommendations report:** The report will document our recommendations for reducing the existing storage footprint including archiving, back-up etc.
- 2. Governance plan:** The plan will document site templates, site request process (including people and roles), site lifecycle and archiving, content classification and information security rules for existing and new content

Your consultant will play back the report and the plan to your team providing an interactive walkthrough, where you'll have the opportunity to ask questions to ensure that your team fully understand the plan, the recommendations, the required actions and the implications.



Part 2: Clean-up

We've included some time to implement approved recommendations from phase one to reduce to SPO storage footprint.

We'll provide you with guidance to support your team to implement the recommendations of the clean-up report and if needed we'll spend some time supporting your team to run the scripts.

Communication

We know that ongoing content governance is best achieved when all content owners are across the policies and expectations. We've included communication templates for site owners to introduce the new governance measures and their role in better content/data management. Our Adoption & Change Management Consultant will meet with you to plan any changes to our tried and tested communications templates, before updating the templates for you to send to your content owners.



Support for the
implementation
of agreed
recommendations

Communication
templates to
introduce
governance



Part 3: Automation

We've included some options to support ongoing governance through automation, applications and configuration of SharePoint Premium Advanced Management features.

In many cases, implementing the Advanced Management features in SP Premium will provide enhanced information lifecycle and governance control. Where an organisation requires more, and a 3rd part governance app is indicated or chosen, we can support your implementation. For organisations looking to manage new content, our provisioning solution is useful for capturing requests, applying templates, and capturing metadata which can power governance workflows and more.

We've detailed the 3 options in the following slides.



Configuration of SP Premium Advanced Management

For organisations with SharePoint Premium licensing, we'll configure Advanced Management features in-line with your governance plan from phase 1.



Governance app

We'll support you to configure your selected governance tool, in-line with the governance policies agreed in your Governance plan from Phase 1.



Provisioning solution

Our provisioning solution allows teams to create sites (MS Teams or SharePoint) based on a site template. We'll deploy and configure the solution to support ongoing governance of site/team creation, including using site templates.

Optional: Configuration of SP Premium Advanced Management features

For organisations with SharePoint Premium licensing, we can include time to configure Advanced Management features including:

- **Site lifecycle management:** policies to manage inactive sites across your tenant
- **Site owner notifications:** notifications inform SharePoint site owners that a site has been inactive for a designated number months
- **Block download policy for SharePoint sites and OneDrive:** block download of files from SharePoint sites or OneDrive without needing to use Microsoft Entra Conditional Access policies

We've included up to **3 days effort** to configure the Advanced Management features in-line with your governance plan from phase 1.

More information on SharePoint Premium Advanced Management features can be found here: <https://learn.microsoft.com/en-us/sharepoint/advanced-management>

Site lifecycle management PRO

Use this page to create and manage policies that automate tasks across the life cycle of your sites, like finding inactive sites.
[Learn more about managing the life cycle of your sites](#)

+ Create policy Refresh

Policy name	Policy type	Mode	Last run ↓	Inactive sites	Report
Communication Sites Inactive Policy	Inactive sites	Active	-	-	-
Classic Site Policy	Inactive sites	Active	Running (this might take a few days)	-	-
Test	Inactive sites	Active	8/18/23	0	Download

How long after the last activity should a site be considered inactive?
Includes activity on the site, files, and any connected resources like Microsoft Teams, Viva Engage, or Exchange.
6 months

What type of sites should be checked for inactivity? *
Sites with a retention policy, sites without owners, and OneDrive sites are excluded automatically. Any other sites that aren't in this policy can be included in other inactive site management policies.
[Learn more](#)
Team sites without Microsoft 365 group, Teams connected sites

Filter by site creation source
SharePoint Home, SharePoint admin center, Teams

Filter by sensitivity label

Exclude sites
 Exclude specific sites from this policy

Optional: Governance app

As part of your governance plan, we may recommend a 3rd party governance tool to support automated and supported ongoing data governance.

We've included an optional module in the engagement to support you to configure your selected governance tool, in-line with the governance policies agreed in your governance plan from phase 1.

We've included up to **3 days effort** to perform initial configuration and hand over the implementation to your team.



We are Engage Squared.

Our mission is to make work better. We empower employees to enjoy work more - using Microsoft tools to make work more productive, collaborative and connected.

We work with large organisations to:

- **enable teams and individuals** to adopt new ways of working through our organisational change and transformation campaigns;
- help leaders, communications, and HR teams to **uplift culture and engage staff** by building integrated digital workplaces that use the latest features in SharePoint Online and the Microsoft Viva suite;
- create a more **secure and compliant environment** to better manage, retain and protect their information landscape; and
- **boost productivity** with automation, digitization, and app modernisation (using all of the Microsoft 365 suite, including Teams, PowerApps and Power Automate on M365 and D365).

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 take partnerships seriously and were proud to be named Microsoft's 2022 global Partner of the Year for Employee Experience.



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



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Adoption
Specialist



Microsoft Teams
Collaboration
Specialist



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