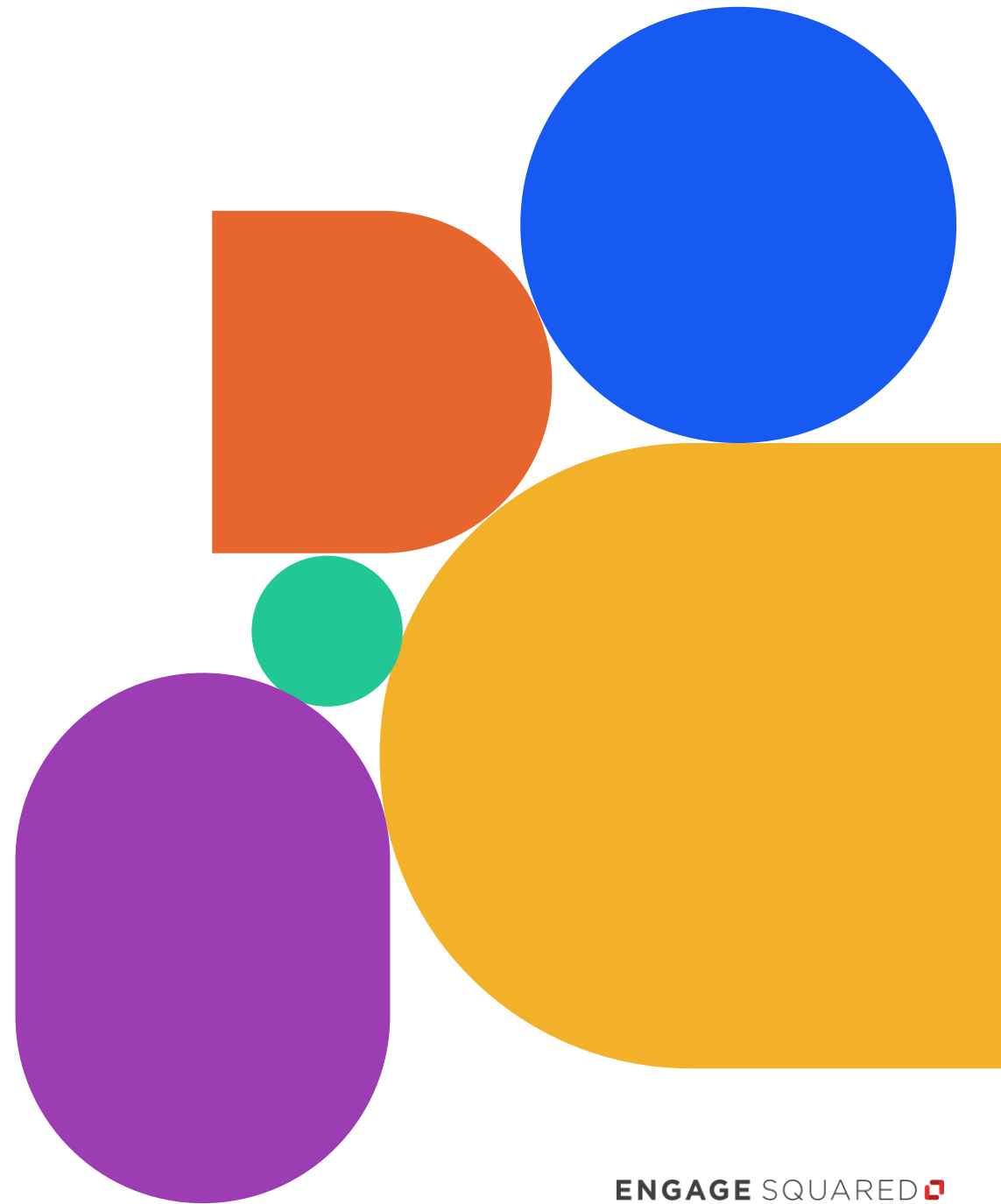


Offer overview

# Information Advisory

Mentoring, leadership and practical support to help manage your information in a secure and compliant way.



## About us

# We are Engage Squared.

Specialists in <people> friendly technology.

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



Yammer  
Adoption  
Specialist



Microsoft Teams  
Collaboration  
Specialist



# Information Management Advisory

Our **Information Management Advisory** engagement is designed to support organisations looking to receive ongoing mentorship and advisory services from the experts in Microsoft 365, but broadly information management.

It is also designed for organisations who don't have a dedicated information management team, or experience with managing Microsoft 365 in the context of information management.

The **Information Management Advisory** engagement involves an experienced information management consultant undertaking regular review of your broader M365 landscape, as well as your M365 security and compliance configuration to provide you with practical and strategic guidance and recommendations.

We start the engagement with a discovery of your current state including workshops, data immersion and provide you with a report and recommendations roadmap. We then move into the reoccurring cadence of reviews and updates to ensure that your team is supported to keep your information managed, secure and compliant.

We have designed this engagement at 3 investment/time levels: **Bronze**, **Silver** and **Gold**.





# Engagement overview

We'll assign a dedicated consultant who will thoroughly examine your existing M365 security and information management implementation, assessing the existing measures against your organisational goals and (if applicable) the regulatory of compliance rules that your organisation is subject to. Additionally, during the engagement initiation phase, they'll work with your team to understand the organisation priorities and goals to support the development of a recommendations roadmap. Once the initiation phase is complete, your dedicated consultant will review and iterate with you on a regular cadence ensuring ongoing management of your information.

## Roadmap review

During the initiation phase, the assigned consultant will develop a recommendations roadmap with you. Throughout the Information Management Advisory engagement, you'll review the roadmap together to discuss progress and updates. Reviewing the roadmap involves analysing the planned changes/enhancements, upgrades, or new features to be implemented.

Your consultant can provide feedback on the feasibility, relevance, and potential impact of these planned enhancements. They can also offer recommendations on prioritisation, the effort required, and identify any gaps or opportunities.

## Mentoring & guidance

Consultants are advisors that can guide your information management team, record managers, security team or M365 administrators. They can share best practices, industry insights, and their expertise in broad information management. This guidance can be on key items such as sensitivity labelling, retention policies, content types, data classification schemes, information architecture, archiving, security and disposal and more.

Your advisor will also have insight into the Microsoft feature roadmap and can provide you with demonstrations of new features as well as advice of implementation of new features as they align with your roadmap.

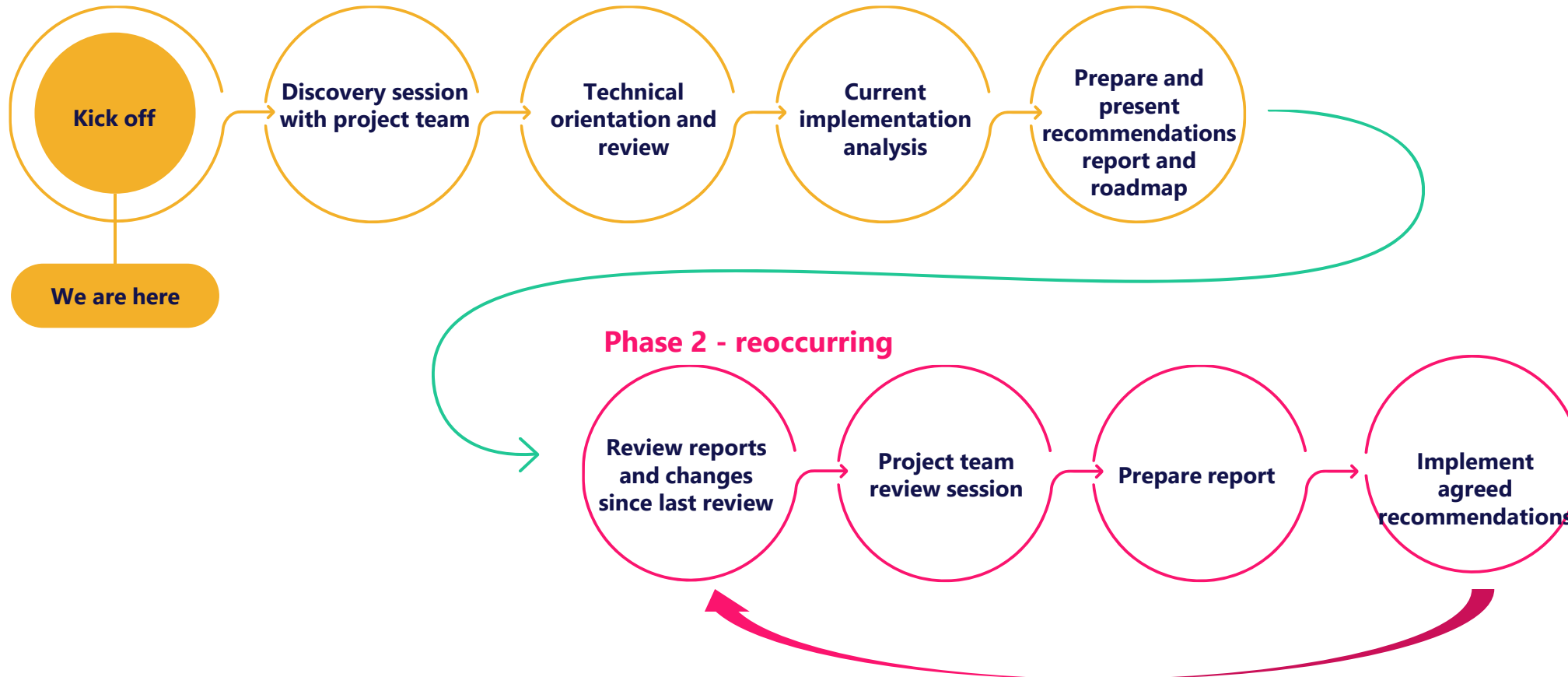
## Configure & assess

Your consultants can assist in configuring your Purview Compliance Portal and any other agreed configurations (in-line with your licensing entitlements). They can analyse reports provided through the Microsoft Purview Compliance Portal to support updates and changes that align to the roadmap and organisational information management goals.

Keeping organisations updated on the latest features and enhancements in the information management domain is crucial. Your consultants can proactively provide information about new features, emerging trends, and innovative practices in information management.

# Engagement approach

## Phase 1



# Recommendations and roadmap report

We will develop and present your insights, findings and recommendations report, including a high-level implementation roadmap.

Designed (in part) to support organisational project teams to develop internal business cases (or RFPs), the recommendations report and roadmap will articulate your current state and the target state and what we have learned during our discovery and regular review activities.

The report will act as your playbook for ensuring your information continues to remain managed, secure and governed.

**KEY FINDINGS**

### Top challenges

Through our research, we identified several challenges with the current employee experience, which can be grouped into the following areas:

**How do I get started in my new role and contribute quickly?**

- I need my technology before day one
- We need to improve our onboarding process
- Contextual and relevant learning pathways

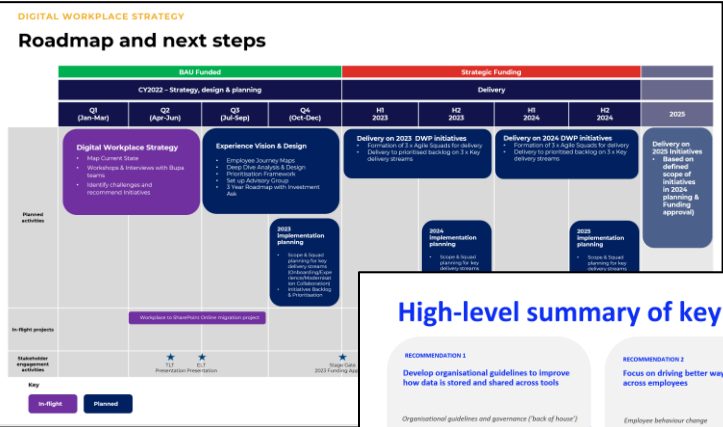
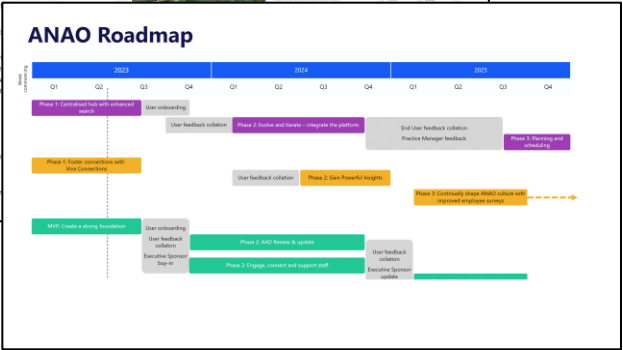
**NEXT STEPS**

### Which recommendation to address first?

**Key recommendations for RELEASE 1**

We recommend starting with the following:

- Engaging homepage** to delight a2 users and connect them to the tools and information they need
- Re-invigorate News** to understand address the universal desire for more a2 news – including separate organisational and team news
- Update Navigation** to provide more content you may find on the pages
- Viva Connections and the dashboard** to be intranet into Teams and delivering an improved experience. The dashboard connects a2 users and provides a platform for future evolution of employee experience.



### High-level summary of key recommendations

**RECOMMENDATION 1: Develop organisational guidelines to improve how data is stored and shared across tools**

**RECOMMENDATION 2: Focus on driving better ways of working across employees**

**RECOMMENDATION 3: Design and build a digital workplace portal that integrates key systems with MS Teams as the "front door"**

What this supports: IT governance & security, Data organization, Processes & protocols.

Expected outcomes: Improved governance for managing data and information – e.g. less Teams sprawl, Clear guidelines around which tool when.

# Value inclusions

## Think Tank

We want to bring together the collective brains trust and inspire the 'art of the possible' based on our years of experience delivering award-winning digital workplace solutions, our customer stories and share best practice advice in the hope that it helps you and your organisation with your employee experience efforts.

The Think Tank series are exclusive round table discussions, designed to give our clients access to our collective brains, guest speakers, and other clients covering varying topics of interest related to intranets and the digital workplace.

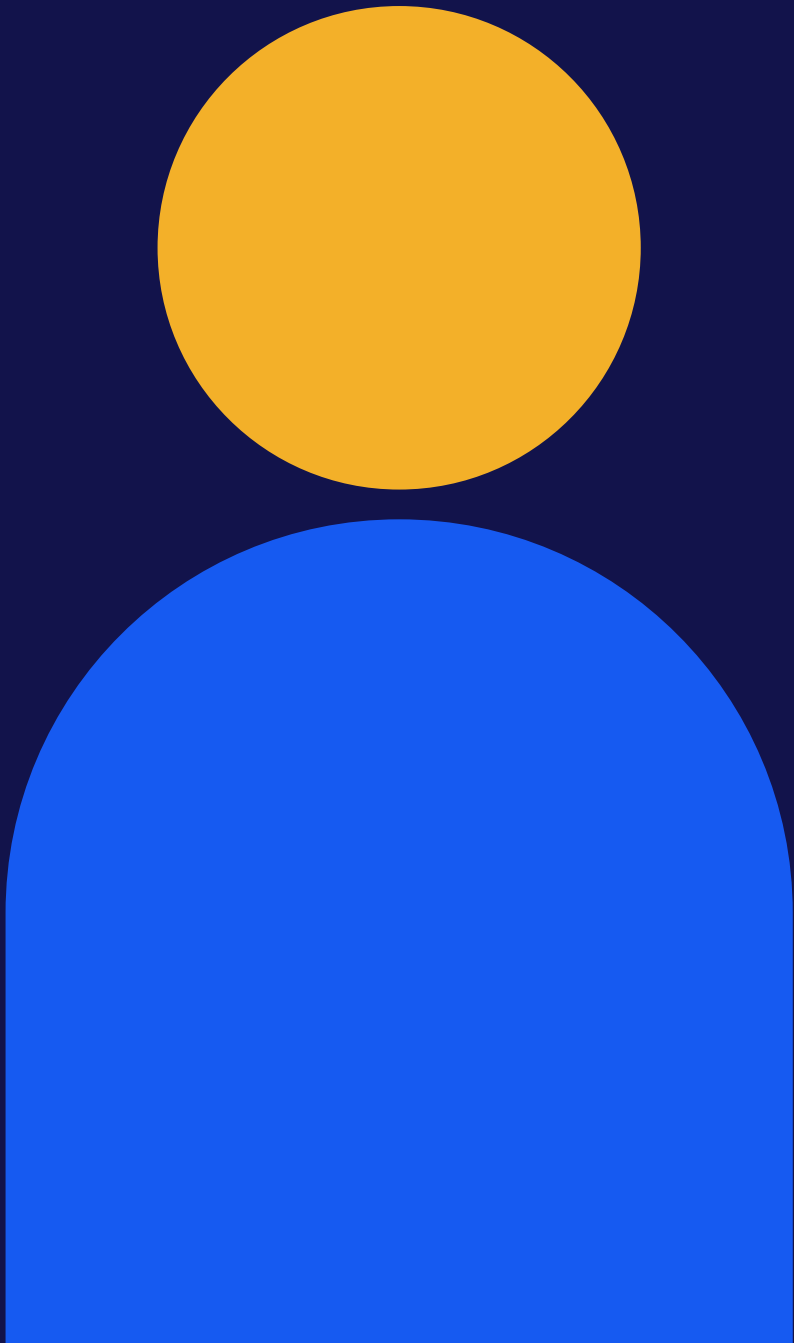
Recent Think Tank sessions were run on how the Viva suite will change the digital workplace, best practice for intranet governance, and preparing for artificial intelligence in the workplace. From time to time one of our clients will provide a sneak peek or demo of their intranet or recent solution implementation.

## Evergreen Webinar

One of the benefits of Microsoft 365 is Microsoft's continuing investment in improvement and new feature releases. We know that keeping up with the changes can be a tricky task.

By investing time to continually engage in the analysis of upcoming changes, risks and additional offerings pushed from Microsoft, undertaking the key actions outlined in this report will drive your organisation to realise and sustain a worthwhile return on investment, whilst giving end users the latest tools and technologies to complete their jobs.

The monthly Evergreen webinar series is an invite only exclusive presentation, during which one of our adoption and change management experts will present a summary of upcoming updates to Microsoft 365 including our recommendations for the top 5 most important updates to M365.



<people>  
friendly  
technology

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