

Governance O365 Microsoft Teams, SharePoint, OneDrive



Agenda

- Why Governance?
- Governance Plan Focus and principles
- Project Overview
- High Level Engagement checklist and Timeline
- Next Steps

Why Governance?

- The key to successful plans for Microsoft 365 governance starts with having the right conversations with the right individuals at the right time.
- If you start with the right questions, you can build your governance content from the answers.
- This engagement is designed to help guide you through the questions in a series of conversations, designed to cover the “big questions” first and then make more detailed decisions after the big decisions are made.

Governance Plan focus

- For O365, you need to govern:

How Sites and Teams
are requested,
approved and created

Provisioning

How information,
access and containers
are managed

Operations

How to
retain/expire/dispose of
information as
appropriate

Information Lifecycle

Governance core principle for O365

- Our digital workplace includes several “services” offered to users. The vision and goals may be different for each type – along with the governance policies and guidelines.

Me

- Audience: OneDrive (Me); Profile (Organization)
- Focus: Collaboration and Communication
- Model: I am the owner
- Governance: Depends on the content and organizational objectives

OneDrive for Business
Personal Library

User Profile

We

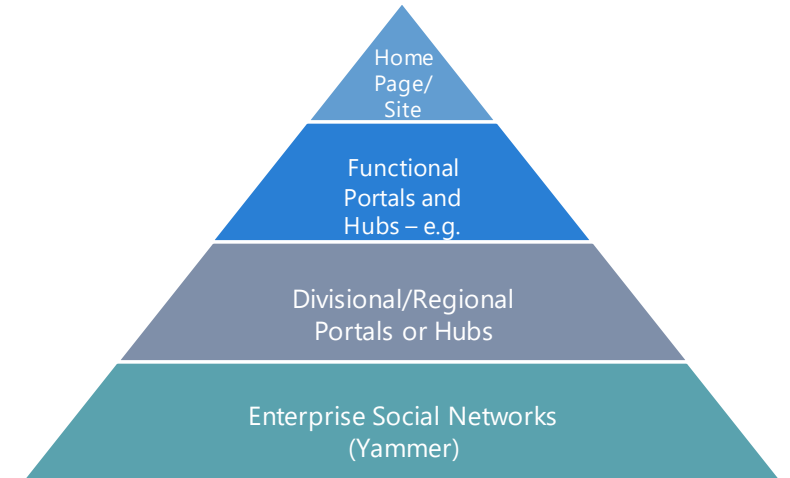
- Audience: Team
- Focus: Collaboration
- Model: Contributors = Consumers
- Governance: May be important when external parties are involved, or knowledge management is a desired outcome; may be less important for teams with a narrow reach

Team Collaboration:

- “Modern” Team Sites
- “Classic” Team Sites
- Teams

Us

- Audience: Organization
- Focus: Communications
- Model: Small number of content publishers; larger number of consumers
- Governance: Most Important



- Communication Sites
- Yammer Communities

You may have different governance policies for different types of sites – with stricter policies for content with broader reach or bigger impact.

Project Overview

- **Immersion experience workshop** of governance concepts for MS Teams, SharePoint and OneDrive. To help Clients to better understand the key features and settings available through MS365 Collaboration Solutions.
- A formal **Governance Plan** document as a base model that enables implementation of controls including:
 - Definition of responsibilities
 - Provisioning approach
 - Operation guidelines
 - Content lifecycle
- An easy and quick start to know how to manage and govern your Microsoft 365 Collaboration Solutions.

Engagement checklist

1

Pre-Engagement

- Pre engagement meeting
- Information gathering and pre-engagement questionnaire
- High level plan
- Assemble a Governance Team

IT Team and Project Sponsor

2

Planning and Kick off

- Customer completed the Pre-Engagement questionnaire
- Kick off meeting
- Get to know the team
- Methodology used and Plan
- Agenda of each interview – decision making sessions
- Schedule next meetings

Governance Team

3

Immersion workshop

- 1 Immersion Workshop Governance concepts for MS Teams, SharePoint and One Drive. (Technical concepts)
- To help Clients to better understand the key features and settings available through MS365 Collaboration Solutions.
- Share 3 Governance Questionnaires with client and schedule next meetings

IT Team and part of Governance Team

4

Decision making sessions

- Customer completed the 3 Governance questionnaires
- 2 to 3 Interview sessions and information gathering.
- Previous Questionnaire for each session.
- Follow up meeting to review key decisions (answers).
- Where none exist, we will provide recommendations on new policies to help enforce O365 Governance posture.

Governance Core Team

5

Build the Governance Plan

- Build the Governance Plan
- Present Final document and review
- Follow up with the customer post engagement
 - MS Teams Implementation of Governance settings or,
 - MS Teams Quick Start or,
 - MS Teams Analysis

Governance Core Team

Session Plan

Session	Topics	Key Goals	Audience	Duration
1	Immersion experience	<ul style="list-style-type: none"> • Overview of MS Teams, SharePoint and One Drive governance concepts • Demo 	IT Team	2 hrs.
2	Governance Guidelines	<ul style="list-style-type: none"> • Vision and Overview • Provisioning and Naming Policies • External Access • Internal Collaboration • Sharing SharePoint and OneDrive • Site Expiration • MS Teams Settings and features • Other MS365 Apps and Services 	Governance Core Team	2 hrs.
3	Compliance	<ul style="list-style-type: none"> • Security and Privacy • MS Teams Compliance • Records and Retention • Enterprise decisions Compliance 	Governance Team (Records Mgmt.) + (Legal)	2 hrs.
4	Enterprise decisions	<ul style="list-style-type: none"> • Roles and responsibilities • Enterprise decisions about • Team Collaboration Decisions • Individual Content, User Profile and One Drive 	Governance Team (Comms representative)	2hrs.
5	Final Governance Plan Document Presentation	Present and review Governance Plan recommendations. Final questions and comments. Define next steps.	Governance Team	1 hr.