



repstor 

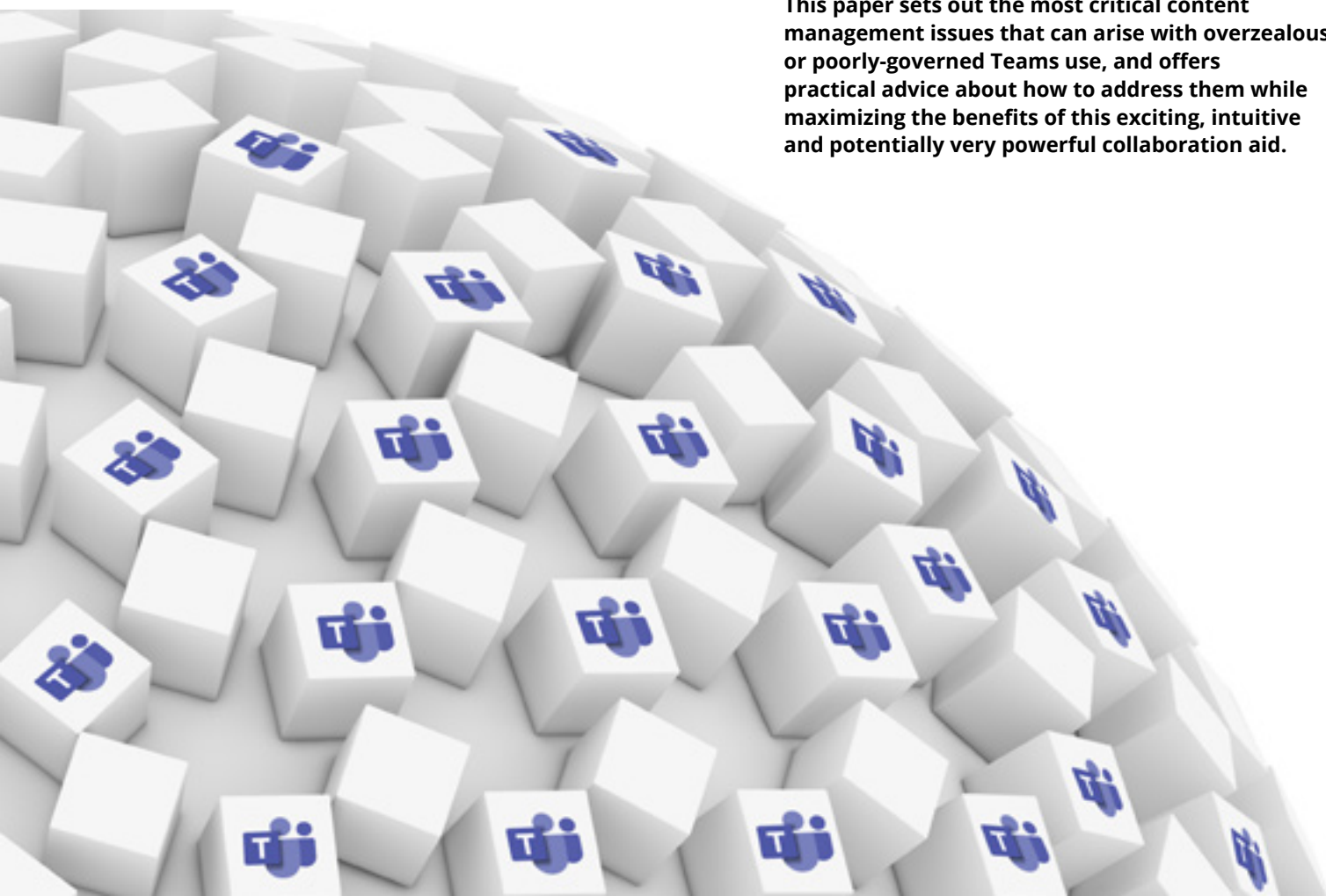
**5** ways to maximize  
**Microsoft Teams**  
& avoid information  
compliance headaches

Microsoft has made no secret of its ambitions for Teams. Since its launch in 2017, Teams has won the Best in Show award twice at the company's annual Enterprise Connect event, continuing to elevate its profile. Microsoft's aim is to promote Teams' widespread use across organizations, as a secure central hub for teamwork and for everyday communication and collaboration, both internally and externally with clients and business partners.

Already, Teams is fast becoming the business world's default collaboration environment for ad-hoc groupings and short-term chats, as well as more in-depth project-based discussions and content sharing. Microsoft has reported explosive growth: over 13 million people now using Teams daily; and 19 million people use it every week<sup>1</sup>. These users span more than 500,000 organizations around the world, including 91 per cent of the Fortune 100<sup>2</sup>.

To cement the successful use of Teams in their own organizations, however, information managers need to ensure they have sufficient control over Teams activity to deliver all of the benefits, without introducing new pain. Without easy ways to connect Teams content to existing corporate information, or for users to find and access Teams-based materials and data, information management within Teams will become a new governance nightmare.

**This paper sets out the most critical content management issues that can arise with overzealous or poorly-governed Teams use, and offers practical advice about how to address them while maximizing the benefits of this exciting, intuitive and potentially very powerful collaboration aid.**





## What need does Microsoft Teams address?

Microsoft Teams aims to make workplace collaboration more inclusive, effective and secure. It makes it possible for organizations to move from having arrays of disparate applications and towards a single, protected hub which brings together everything teams need - including chat, meetings and calling - all with native integration to other Office 365 apps. Users are able to customize and extend their Teams experience too, with third-party apps, processes and devices, so they can work more effectively, productively and efficiently. Combined with a modern, intuitive interface, these powerful features make Teams the ideal vehicle for collaborating on projects of all types.

An enterprise study<sup>3</sup> conducted for Microsoft in early 2019 found that the appeal of Teams spans five business priorities, with fairly equal weighting.

The vast majority of respondents either agreed or strongly agreed that, since deploying Microsoft Office 365, using Teams has:

- 1 Helped create time savings because all solutions are in one place
- 2 Improved the efficiency and effectiveness of meetings
- 3 Made it easier to understand conversation context, via persistent/open chat
- 4 Created more clarity and removed confusion from collaboration and communication
- 5 Enabled the organization to make better, smarter, more informed decisions.

Among the numerous quantified benefits (extrapolated to several millions of dollars over three years, across a composite organization of 5,000 users) are:

- Substantially reduced meeting time & travel
- Consolidated communications & collaboration costs
- Accelerated decision-making
- Improved employee satisfaction/ lower staff turnover
- Increased productivity – time saved due to easier information location, reduced switching between applications, and readier collaboration with external parties
- Lower overall IT costs

<sup>1</sup>Microsoft Teams Reaches 13 Million Daily Users: Microsoft reveals daily user numbers for the first time, UC Today, July 2019

<sup>2</sup>Microsoft Teams: Celebrating 2 Years of Continued Growth, Microsoft, March 2019

<sup>3</sup>The Total Economic Impact™ Of Microsoft Teams: Improved Employee And Company Performance - A Forrester Total Economic Impact™ Study Commissioned By Microsoft, Forrester, April 2019

## The flipside of fast adoption: **loss of control**

For IT budget-holders and decision-makers, and information compliance officers, mass, high-speed adoption of Teams is a mixed blessing. Although Microsoft will continue to enhance native Teams functionality and controls over time, the strategy to promote swift, viral take-up and default use of Teams for all aspects of workplace collaboration brings some concerns about information management compliance. After years of perfecting policies, balancing controls and adhering to the latest Data Protection requirements, organizations risk inadvertently undermining those efforts by allowing employees to freely embrace Teams as their primary communications and knowledge and content sharing tool.

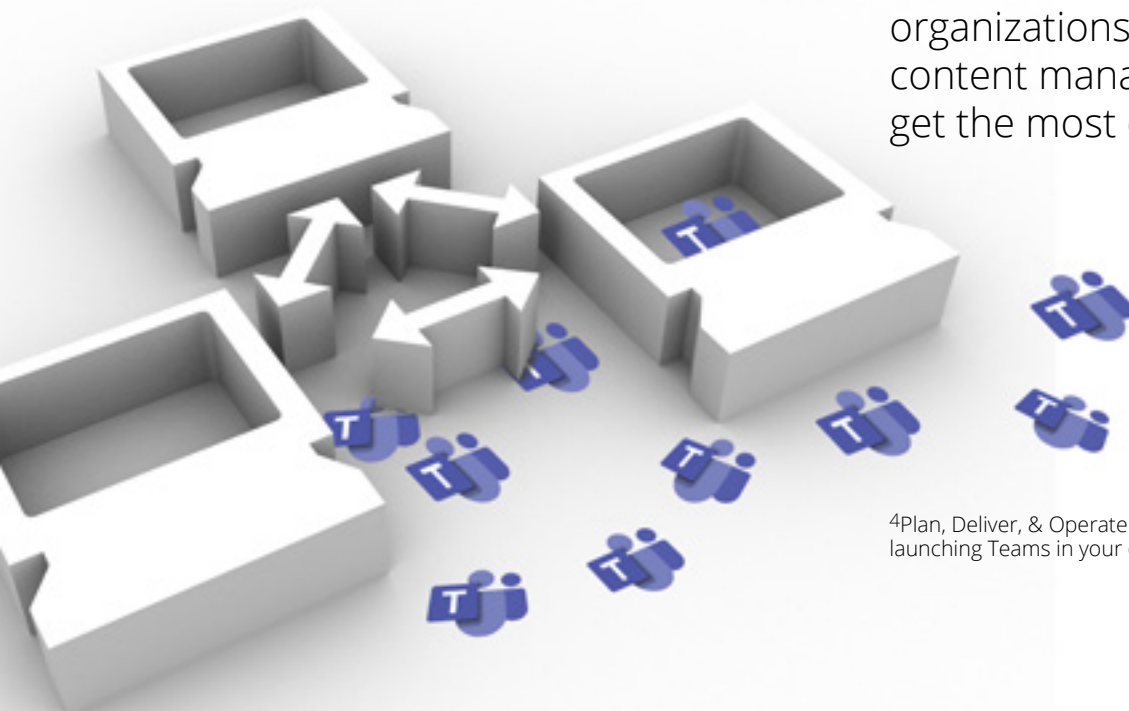
On launching Teams, Microsoft itself urged companies to allow its use to “grow organically, led by empowered users enhancing how they collaborate and get things done.”<sup>4</sup> And the product has been designed to proliferate in exactly this way. So, where information compliance managers have been working to bring order to how and where company information is stored and shared, here is a mainstream software solution with mass user appeal which, on the face of it, could be seen to promote new content management challenges.

No employer wants to hamper workplace cohesion or creative freedom across its workforce. Yet there are risks with giving users carte blanche to set up Teams for any purpose or topic, and without an agreed format or naming convention. If there are no controls around Teams’ lifecycle management, keeping track of all that activity will be impossible. Eventually, without structure and rules, even users themselves will come unstuck. They will soon become frustrated if they cannot readily navigate between Teams, or locate the information they need – perhaps because related content is dispersed or duplicated across different Teams, or information volumes have spiralled.

In the meantime, business owners, directors and compliance teams run the risk of regulatory transgression if the organization loses control over personal or otherwise sensitive data.

To ensure that history doesn’t repeat itself (similar issues arose with earlier versions of Microsoft SharePoint), companies need to ensure they lead the way with best-practice governance, fostering optimal team productivity but without any of the risks of poor information hygiene.

Here are some proactive measures organizations can take to avoid content management anarchy and get the most out of **MS Teams**:



<sup>4</sup>Plan, Deliver, & Operate Microsoft Teams: Workshop for launching Teams in your organization, December 2017

# 1 Governance/Team creation

From a governance perspective, the ideal should be to treat Teams as any other collaborative workspace – with equivalent consideration to who can create them, where and what for, and with appropriate controls, templates and rules.

If it is agreed that anyone can set up a Team, for example to discuss a customer project, it's important that this doesn't infringe any policies about the use or sharing of client information, and that there is structure to manage any connections and overlap between related Teams. For instance, if Sales and Support are discussing the same client accounts separately, those Teams will be linked in a logical way.

It might be an idea to restrict who can set up Teams, or place conditions/limits on the types of Teams different users can create. Another option is to put in place approval-based workflows, so that employees have to register a request to start a new Team, or a particular type of Team. This approach would ensure that information compliance managers have oversight of Team activity, and can step in with/or set up appropriate reminders – for example about Team naming conventions and categorization, templates to use, and even pointers to other related Teams if appropriate. Further prompts could be set up too, such as automated reminders across a Team's lifecycle – along the lines of 'This Team has been inactive for X weeks/months: do you want to archive or delete it?'

Good governance will also include setting privacy rules to define whether a Team can be searched for within Microsoft Teams, and by whom. Companies can streamline this process by setting classification rules which can automatically apply sensitivity and retention labels for all content within the Team.

**All of these controls can be set within Repstor Custodian products, which provide comprehensive and intuitive information governance natively from within Office 365 – across Microsoft Teams and SharePoint.**

As well as locking down the process of creating new Teams, with a customizable approvals mechanism (submitting a request triggers the governance and provisioning processes), Custodian provides the means to discover and manage existing Teams retrospectively – by ensuring that content owners complete all of the information about them. This facility is important not only to organizations whose employees have already used MS Teams extensively over the last two years, but also to those companies which prefer to leave Teams creation fairly open, rather than delay users' spontaneity through an enforced approvals process.





## 2 Naming conventions and classifications

Applying standard names and classifications to Teams helps enormously with governance, in Teams discovery, and for housekeeping and overall lifecycle management – for instance the level of privacy that needs to be applied, and the relevant retention rules (how long content should/can be kept for, before it is archived or deleted).

As for other preferred content sharing and collaboration workspaces, Custodian encourages the use of agreed/standardized names and details of Team properties, making it easy to locate and link related Teams, and apply discrete controls to certain types of Teams, as appropriate.

Rather than ‘hide’ less recent Teams which have seen less or no activity recently, as an aid to finding current activity quickly, Custodian provides easy, intuitive navigation using a hierarchical approach to related Teams such as sub-Teams related to particular client activities, and use graphical dashboards to present these to the user, for easy at-a-glance viewing.

A financial organization selling pensions and investments might associate related Teams in a ‘hub’ with links between all of a client’s activities, or all clients by a particular territory, and so on. (Teams can be grouped based on defined business logic.) Importantly, the organization can tailor the dashboards to the groupings they want to see, and decide how to structure the links between related Teams.

Benefits of this structured approach include rapid access to clients and client engagements, and scope to add links to external portals and information, such as training videos. Custodian also supports integration with Power BI reporting to provide an interactive reporting portal, driving proactive insights from Team activity where beneficial.

## 3 Content management

While the use of Teams is predicted to drive a seismic downward trend in the use of email, email as a means of communication is not going to go away. Certainly, users will still need to be able to file emails and any attachments easily to Team collaboration spaces and/or a defined corporate content repository, so it is important that this is easy and seamless to manage, to ensure compliance with information management policy.

Custodian, in conjunction with its Repstor Affinity automated email filing capability, managed natively from within Outlook, encourages users to file and access content centrally in the designated workspace/Team collaboration area. This provides the best of both worlds – automatic compliance with company policy on information management, but without forcing users to change their behavior or switch between applications.

Custodian also provides links to existing document management systems that constitute an organization’s main systems of record. Connecting all collaboration back to this definitive repository is essential to maintaining information governance. Custodian allows for the free flow of documents between existing systems and Teams – with a complete audit of changes within the system of record.



## 4 Security and sharing

Increasingly business users want to be able to collaborate routinely or in ad-hoc ways with external parties as well as across their own organization. But this introduces additional privacy and security implications without the right safeguards in place to lock down certain content. Even when employees are using private channels to share content, it is necessary to secure commercially-sensitive documents or information, or GDPR-protected data.

By applying structure and governance, whether via approvals and/or strict classifications, companies can offer employees the freedom to collaborate productively across organizational boundaries, without risk of policy or regulatory infringement – ensuring the wrong information does not leak from the organization.

## 5 Lifecycle management/ classification continued

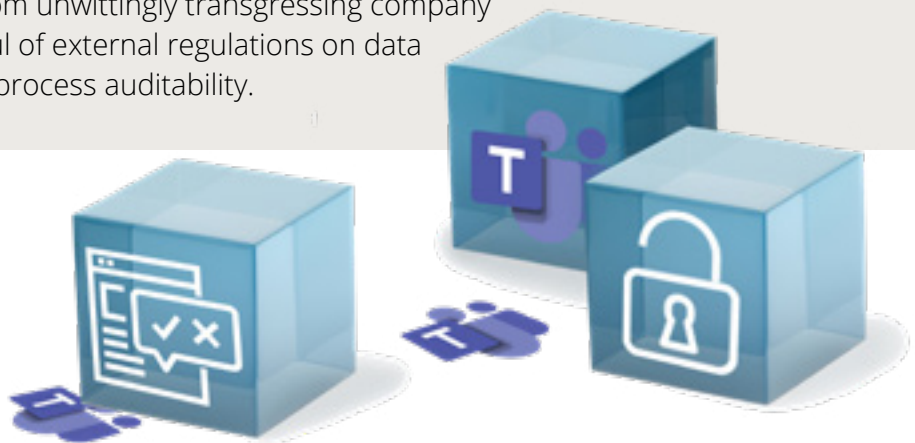
Whether from an IT/Teams decluttering perspective, or for regulatory compliance reasons, it's important that Team workspaces and the information within them are not allowed to linger indefinitely on servers or in archives.

Strong, structured classification and automated, rules-based lifecycle management, as available through Repstor Custodian, ensure that nothing is left to chance and that Teams are archived or deleted at the right time. This can include timely reminders to the content owner to update a Team's classification or move to the next lifecycle action if the Team is now redundant.

## Freedom through control

The more control and peace of mind that information compliance and IT managers feel they have with Teams, the more they can relax and let users follow their instincts and work in a way that feels natural and productive to them – getting the most out of a product they already love.

Ultimately, ensuring good governance around Teams is about allowing employees the freedom to communicate and collaborate spontaneously as well as systematically, supported by a structure that will serve them well in the future. That means keeping users connected to the information they need, while protecting them from unwittingly transgressing company information policy, or falling foul of external regulations on data protection, data retention and process auditability.





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natively within Office 365.

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