



2019

SharePoint Surgery

SharePoint for Professional Services



Richard Poole

CTO EMEA



richardp@harmon.ie



@rtpoole



<https://uk.linkedin.com/in/richard-poole-55a572>

Email Management for Professional Services



Your business runs on email
“Emails You Must Find”



ROT* emails



Important business emails



Email records



Your “Important Business Emails” Needs

- Client correspondence
- Knowledge Sharing and Retention
 - Maintaining and find subject matter and expertise
 - Geographically-dispersed teams
 - Employee turnover
- Proposal building
- Maintain a digital paper trail for every case and project
- Be compliant with corporate records mandates
- Be compliant with industry regulations

Top 4 Email Management Challenges

1. Inconsistent email capture and classification

- Insufficient capture
- Business operations losses
- Liability



2. Inconsistent retention schedules

- Non-compliance
- Over-retention
- Information security breaches

3. Non-standard and ineffective search

- Complicated event/document correlation
- High eDiscovery costs



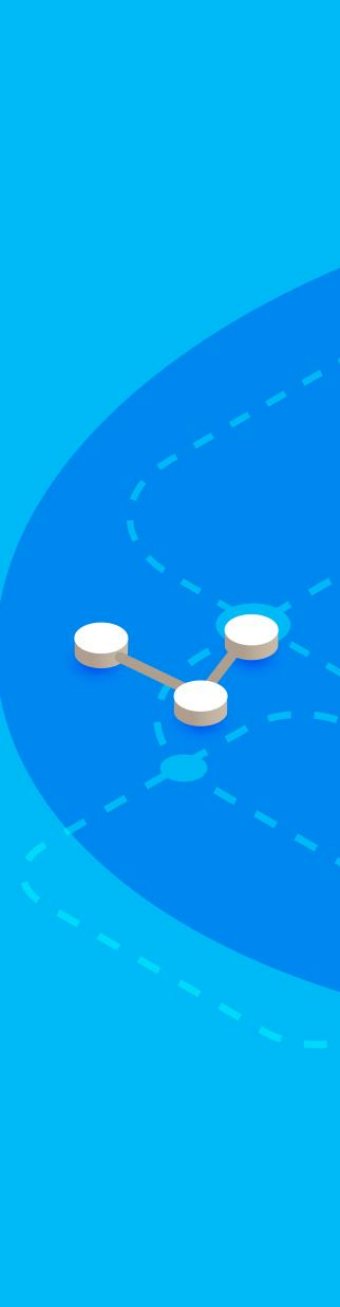
4. Lack of end-to-end governance

- Inability to effect organization changes

Poll Question #1

How do you currently store emails related to client inquiries and requests?

- In SharePoint
- In Exchange
- A different 'off the shelf' document and email management system
- A bespoke solution
- We're looking for a new solution



What's the Right Platform for Managing Client **Emails** (and **Documents**)?

- Dedicated 3rd party solution for email management
- Microsoft-based solutions
 - Exchange for emails, SharePoint for documents
 - SharePoint for emails and documents

Email & Document Management

Microsoft-based Options



TYPE OF CONTENT	EXCHANGE		SHAREPOINT	
	RETENTION	CLASSIFICATION	RETENTION	CLASSIFICATION
Important Business emails	X	X	Labels	Metadata
Email records	Labels	X	X	X
Email Attachments	X	X	Labels	Metadata
Documents	X	X	Labels	Metadata

Accurately classifying emails and documents is the key to finding them later

- Labels define *retention* policies in Outlook and SharePoint
- Metadata in SharePoint provides (the only) descriptive classification, to find information later

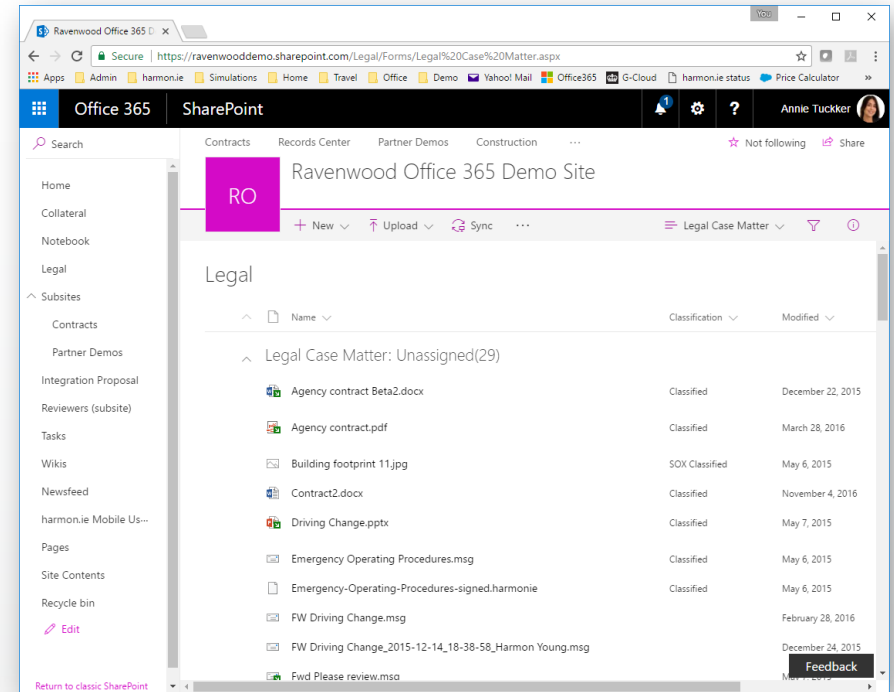
Poll Question #2

Do you use Microsoft labels to apply retention policies?

- Yes, 'in-place' – emails in Exchange, documents in SharePoint
- Yes, - emails and documents in SharePoint
- Yes, but only for emails in Exchange
- Yes, but only for documents in SharePoint
- No

SharePoint is the best solution, but...

- Users may have come from a bespoke system, that meets specific needs
- Those systems typically have a tight e-mail integration
- On its own, SharePoint isn't the single interface that business users need / like / want to use – people spend their worktime in Outlook



SharePoint is the best solution

It's the ideal **single platform** ✓

- Manage e-mail communication and documentation together – in context
- Metadata can be utilized to organize and classify
- Search all data together

Is **SharePoint** the best solution?

YES



with Outlook and harmon.ie



harmon.ie helps “Make the right thing the easy thing”

How do you collaborate?

With clients

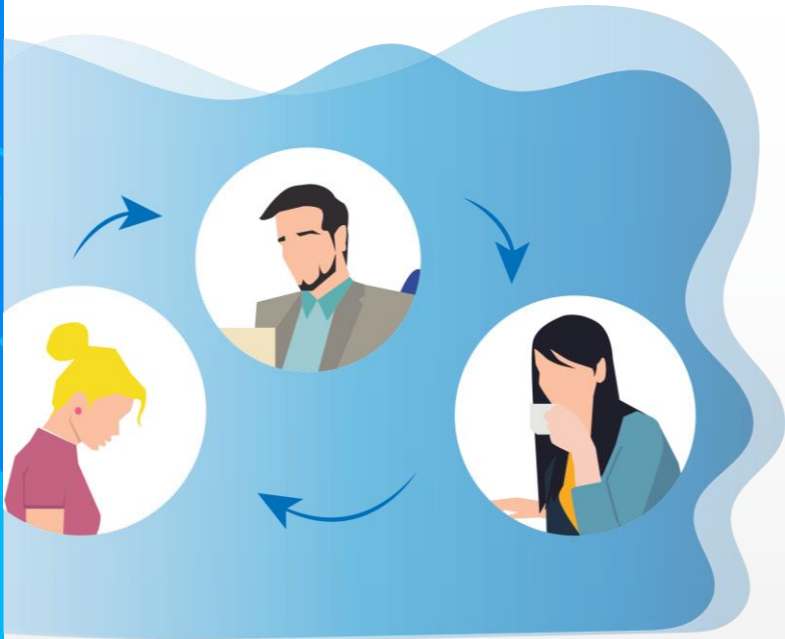
- Capturing documents and e-mails
- Sending and receiving documentation
- Maintaining document versions



How do you collaborate?

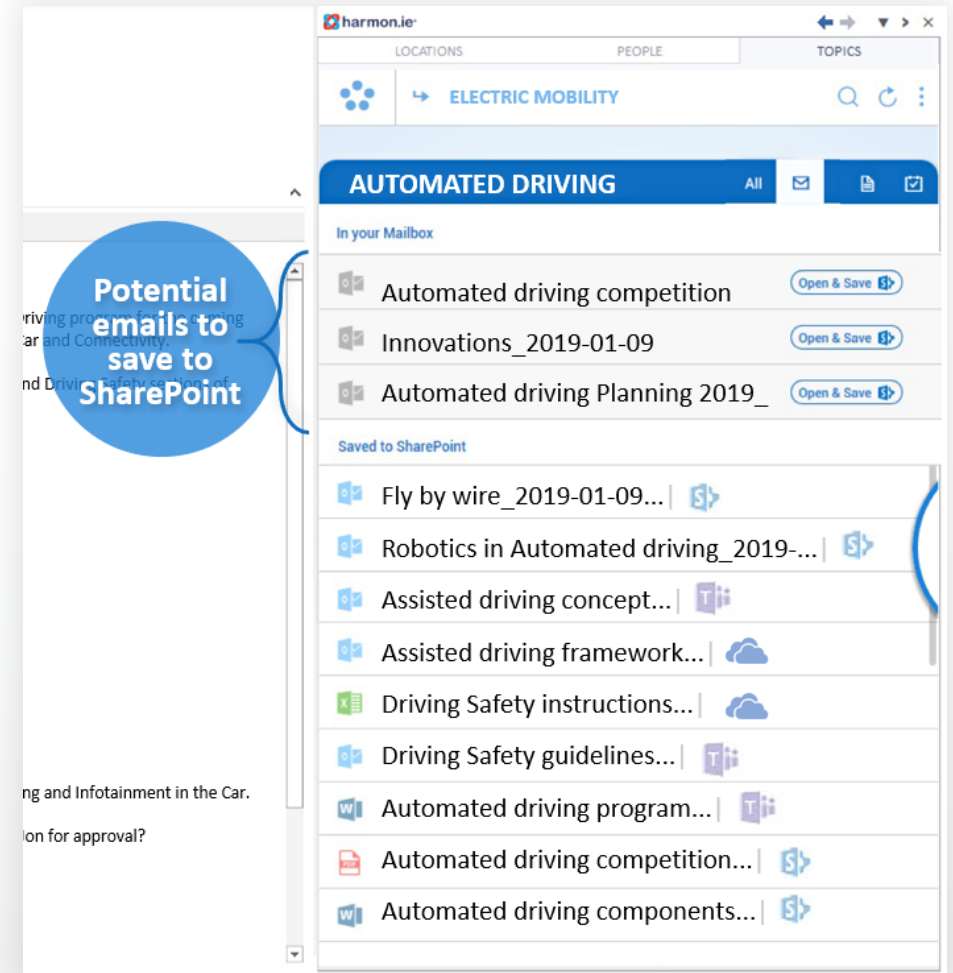
With colleagues

- Sending and receiving links
- Identifying duplicates
- Updates
- How do I know if someone else has already filed this e-mail?



How do you know **what** content should be saved?

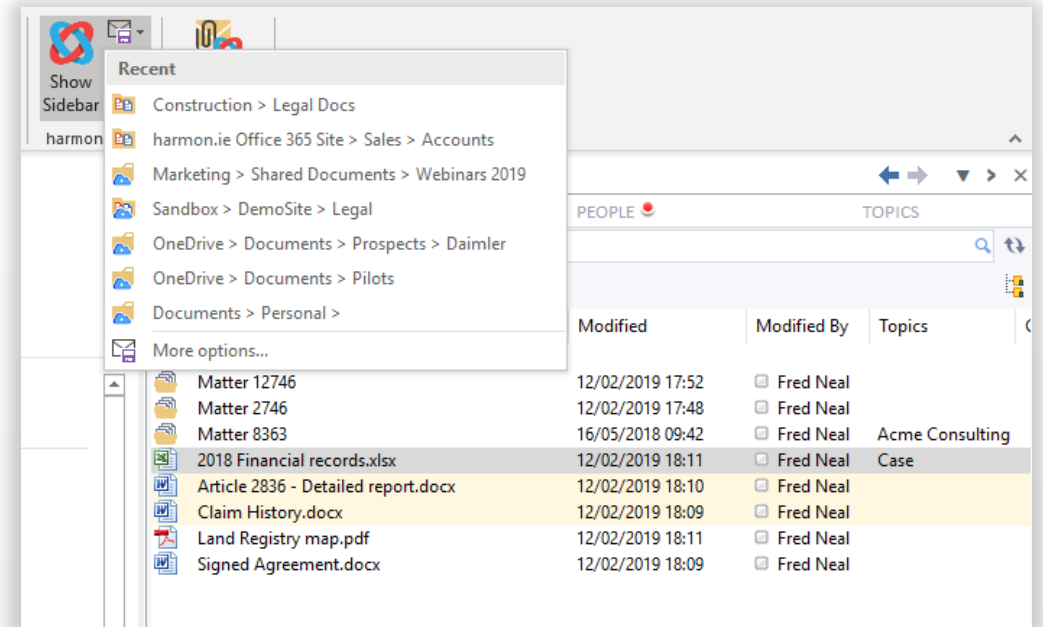
- Identify relevant Topics from e-mails you receive
- Use Topics to find related content
- Identify other content to save



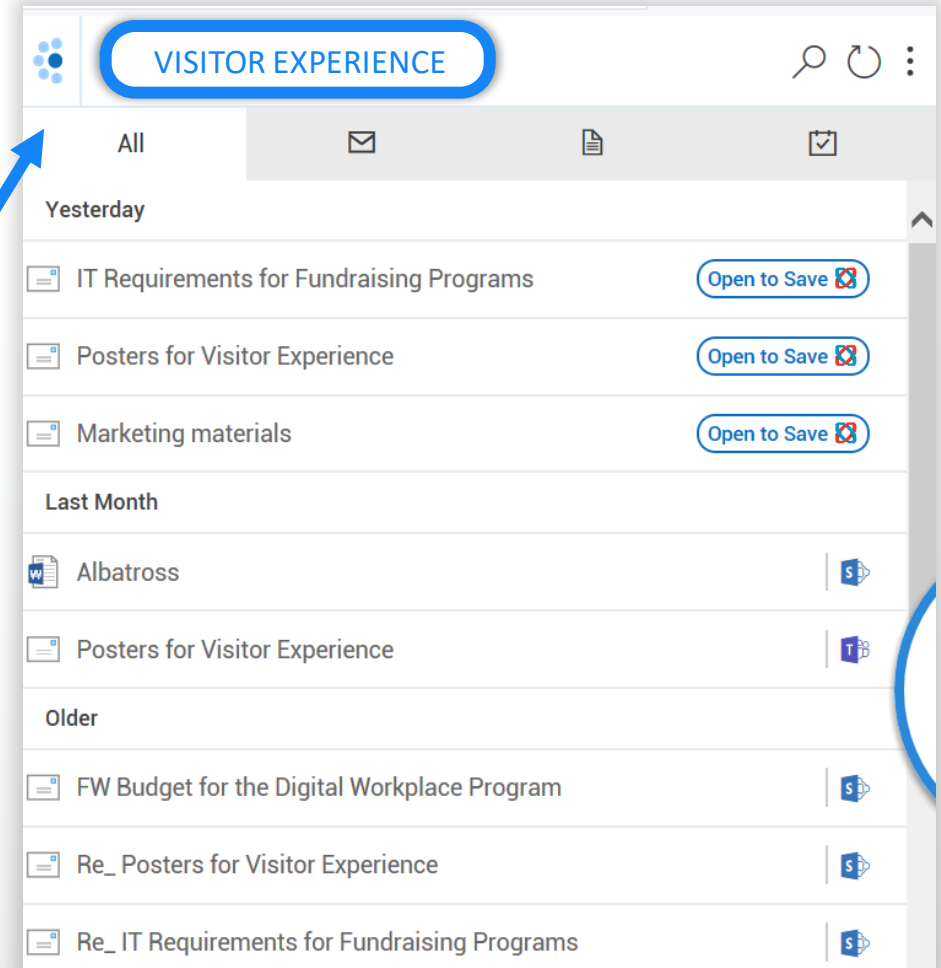
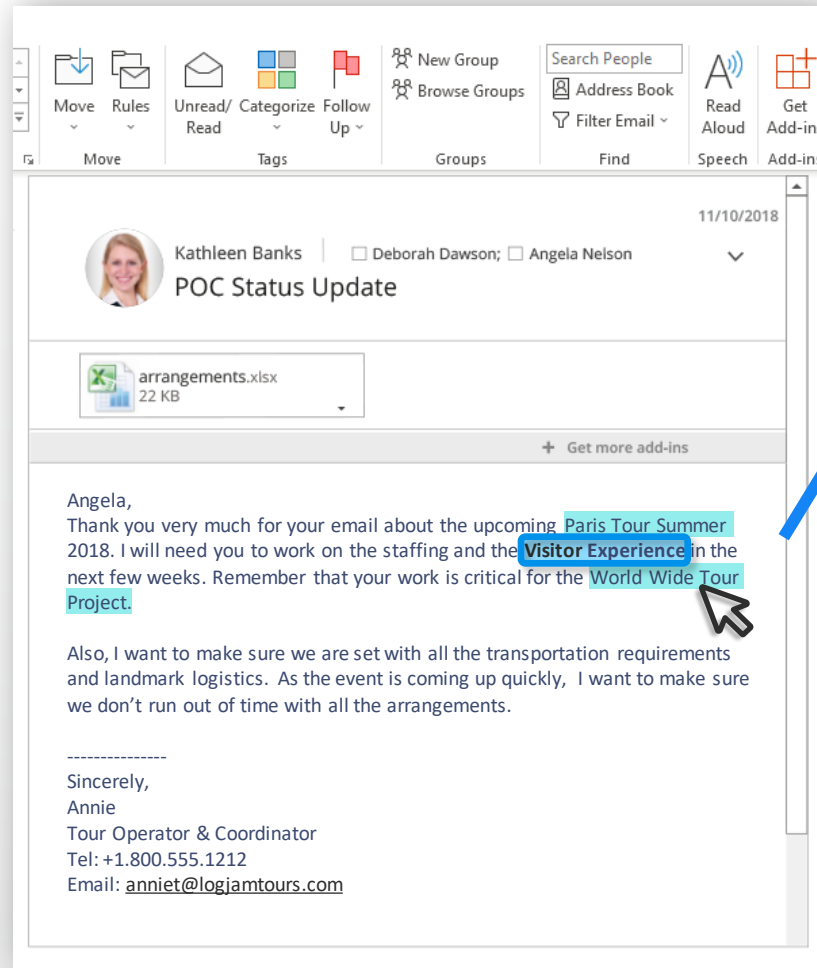
How do you know
where the content
should be saved?

Suggest locations based on:-

- Where related content has already been stored
- Where you have recently been working



Finding Related Information Using Topics



Customer Case Study

- harmon.ie is a fundamental part of EYOS solution for both document and mail management
- included in standard EYOS training material
- POC with initial group of global representatives, to gather requirements and test deployment
- Global push to 40,000 EY Tax workers
- Planning to use OWA solution for Mac and web



Poll Question #3

Would you like to be contacted
by a harmon.ie representative?

