



CASE STUDY

FTI Technology Guides Global Manufacturing Company Through Microsoft 365 Governance and Deployment

A manufacturing company needed to mature its IG posture and data management hygiene. They desired to leverage the cloud and its capabilities to utilize newer applications and available features to increase cross-functional enterprise collaboration. In doing so, they required enhancements to their data governance program and policy adoption of related tools.

SITUATION

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OUR ROLE

FTI Technology experts created a multi-step plan to enable governance in their environment. Microsoft 365 was the central factor to adopt these new capabilities, including retention policies and replacing local file servers with Microsoft 365 cloud capabilities.

Retention Schedule Refresh & Data Disposition Recommendations

A data map cataloged enterprise data types and FTI advised on record categories/labels to apply retention periods. The record retention schedule was updated accordingly.

Governance for Labels with Retention Settings

Label definitions identified how labels were used and what the label policies could be applied to, e.g. Exchange, SharePoint, OneDrive, Office 365 groups, etc. Labels were subsequently created and published in Microsoft 365.

Labeling Workflow Created

A labeling workflow enabled admins to create and publish labels. End users classified the document by applying a label. Microsoft 365 enforced retention rules on the document based on the applied label policy.

Creation of an Information Governance Advocate Network

Defined the IG roles and responsibilities and governance structure to support an IG advocate program - inclusive of training, records management knowledge, how to become a departmental advocate - to support the rollout of Microsoft 365 and the company's new IG practices.

Advanced E-Discovery Capabilities

Microsoft 365 provided improved e-discovery workflow capabilities to perform more efficient review across all data store in Exchange Online, SharePoint Online, Skype and Microsoft 365 Groups and Teams.

OUR IMPACT



Implemented governance and discovery capabilities across cloud data



Solidified retention and deletion rules, taking account of complex regulatory requirements and retention timeframes.



Advisory of security hardware management, mobile device management and automated updates of software pushed to end users.



Developed framework for business users to request access to applications (e.g. Teams, Delve, Slack)



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