



FTI Technology Deploys Relativity Purview Sync to Streamline Collection

As part of an ongoing engagement to support legal and compliance transformation, FTI Technology helped a large, global financial services institution deploy Relativity Purview Sync alongside its legal hold overhaul, helping to provide a secure solution for faster data collection from Microsoft 365.

Situation

The client has faced ongoing challenges with legal hold and data collection from cloud data sources, with Microsoft 365 being the largest source of critical data in scope for legal and compliance reviews. Previously deployed technologies did not provide reliable legal hold and collection capabilities, and some would have introduced security exposures for the bank's sensitive data.

Without a secure, streamlined toolkit to support data collection, the client faced cumbersome data conversions and other manual steps that slowed review prep.

Our Role

FTI Technology has a longstanding relationship with the organisation, supporting its broad, ongoing legal transformation initiatives and providing deep technology and law department process improvement expertise. These efforts are helping the client establish more control and reduce costs and risks associated with legal and compliance workflows. The work to streamline collection processes within Microsoft 365 included:

- Evaluating, testing and deploying Relativity Purview Sync as the organisation's default collection tool for Microsoft 365, across all regions where the client uses Relativity One.
- Elimination of conversion steps for data pulled from Microsoft 365.
- A permission-based access model, allowing collection while limiting data exposure via defined permissions, reinforcing the client's security controls.

- Advising on the implementation and support needs and building an internal playbook for how to use the tool moving forward, informed by FTI Technology's deep expertise with Relativity software.
- Incorporation of upstream data governance, pairing collection workflows with Microsoft 365 native capabilities, including sensitivity labels, data classification and retention policies, to reduce data volume and risk.
- Forward-looking road mapping to help the organisation integrate new generative AI features in its toolset with collection workflows.

OUR IMPACT

The client is now able to quickly and securely collect from Microsoft 365 Purview in-platform, with more robust data prep for review. The deployment has established a repeatable model to enable improvements across many matters, while upholding strong security.

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