

# Pump Up Your Records Preservation in M365

John Mancini, Content Results  
Lori Ashley, Tournesol Consulting  
Mike Quinn, Preservica

Wed May 11, 4:00 PM - 5:00 PM EDT / 3:00 PM - 4:00 PM CDT

# Welcome & Introductions



John Mancini  
Content Results



Lori Ashley  
Tournesol Consulting



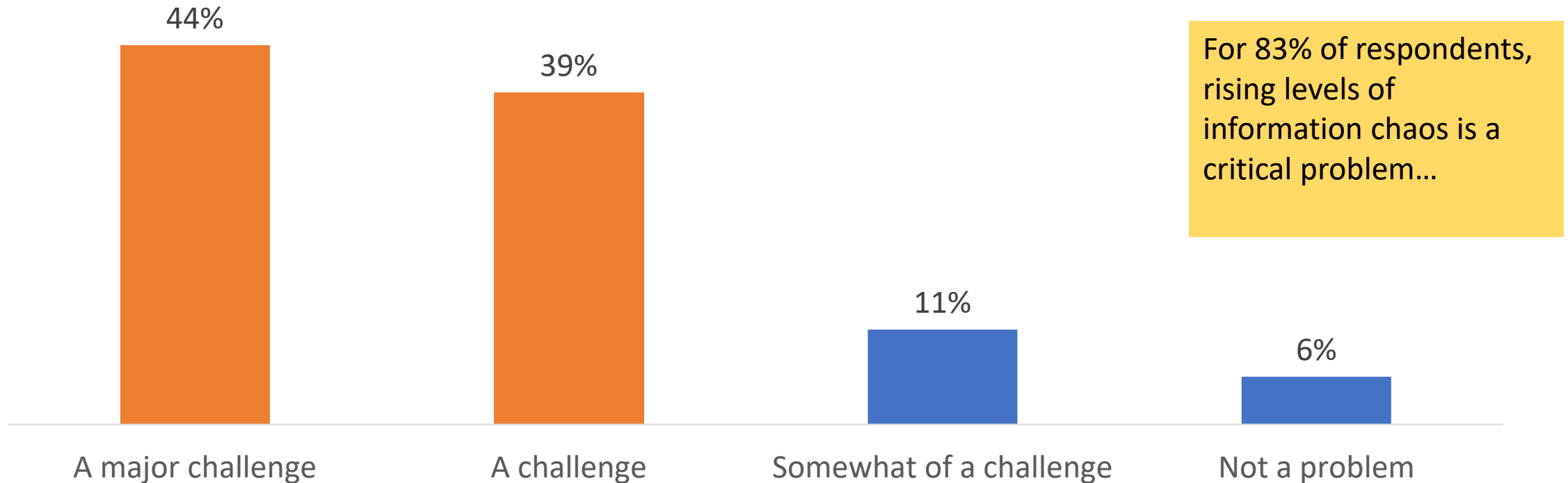
Mike Quinn  
Preservica

# This Session

- M365 Adoption and Deployment – What's the Buzz?
- Records Preservation Capabilities
- Introducing Preserve 365
- Automation and Integration Benefits

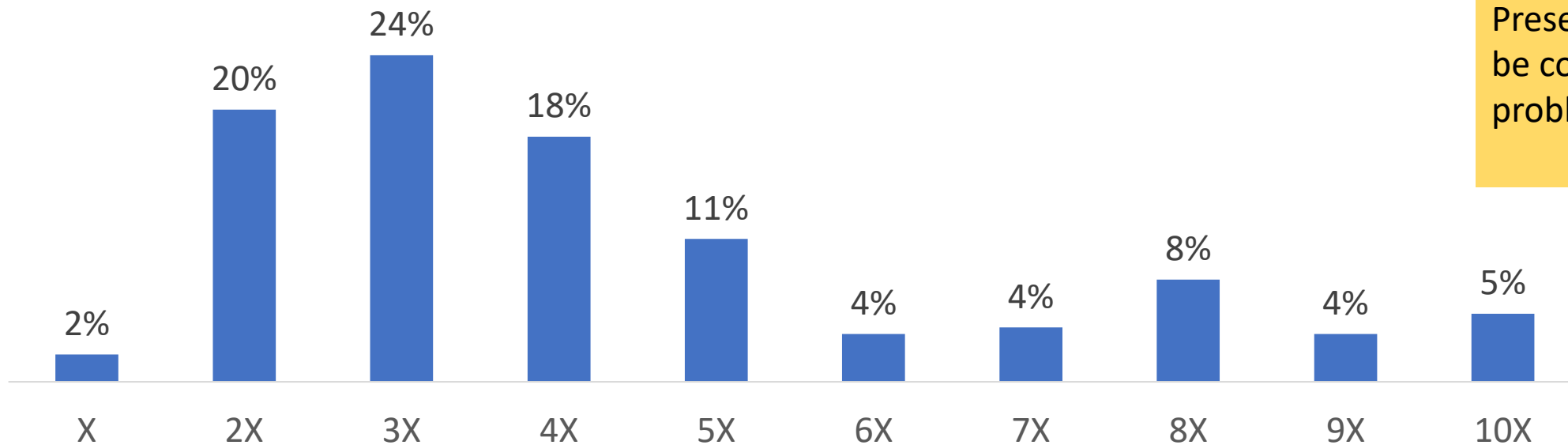
# The context

How significant a problem are rising volumes of information and records in your organization?



# On average, in 2-3 years incoming data flows expected to be 4.4 times current levels.

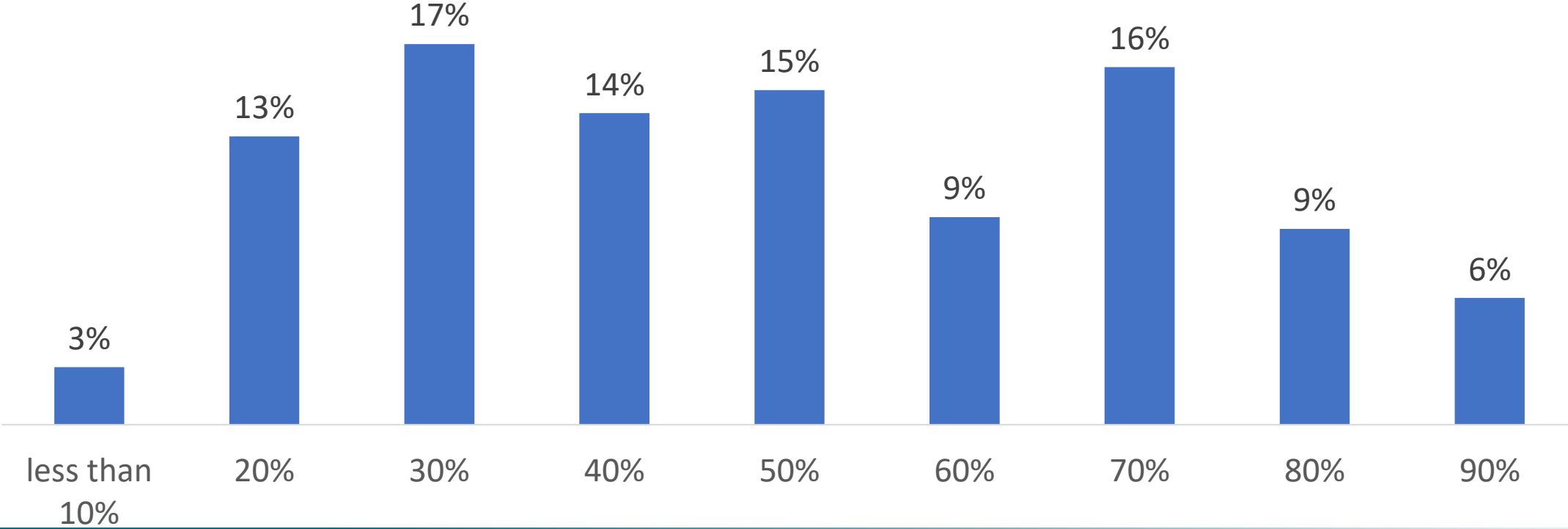
Assume that the current volume of incoming data and information in your organization is X. What do you expect it to be in 2-3 years?



What this means...  
Preservation can no longer be considered a “someday” problem

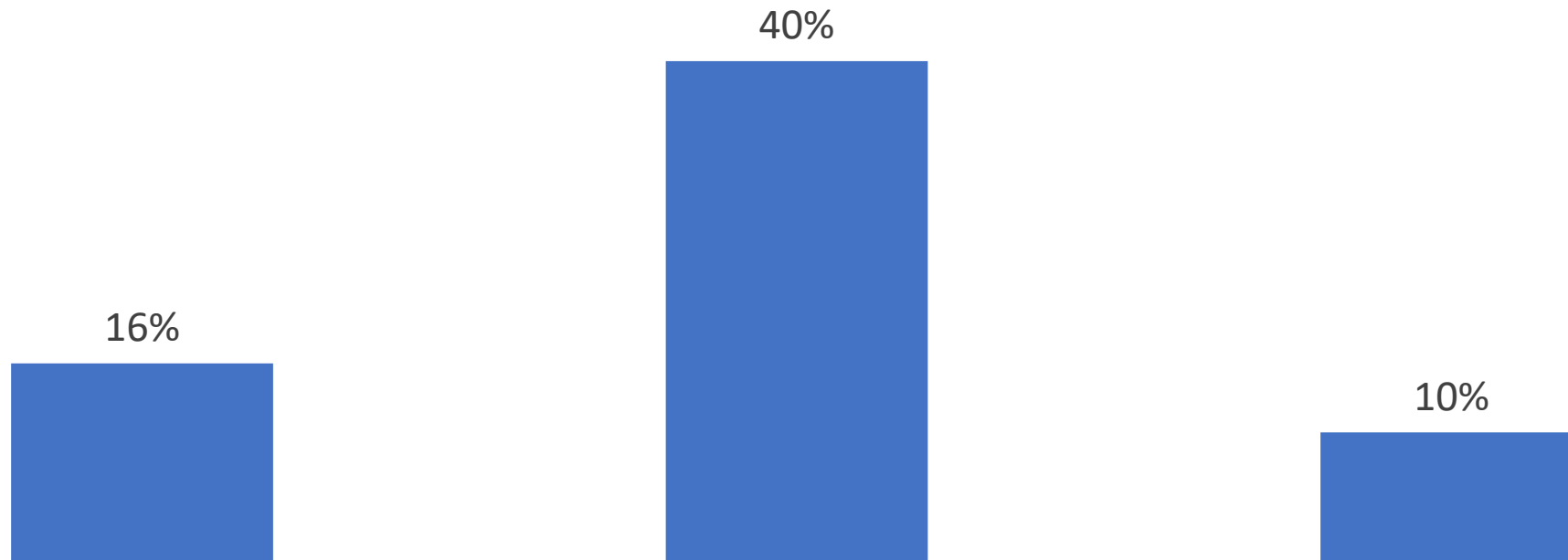
On average, 50% of incoming information is CONTENT, requiring different management skills and strategies than DATA.

What percentage of incoming information is UNSTRUCTURED or SEMI-STRUCTURED (i.e., CONTENT)?



# Those best in a position to know understand that long-term preservation is a major challenge.

"More than 20% of our records have retention periods >7 years or are considered permanent."



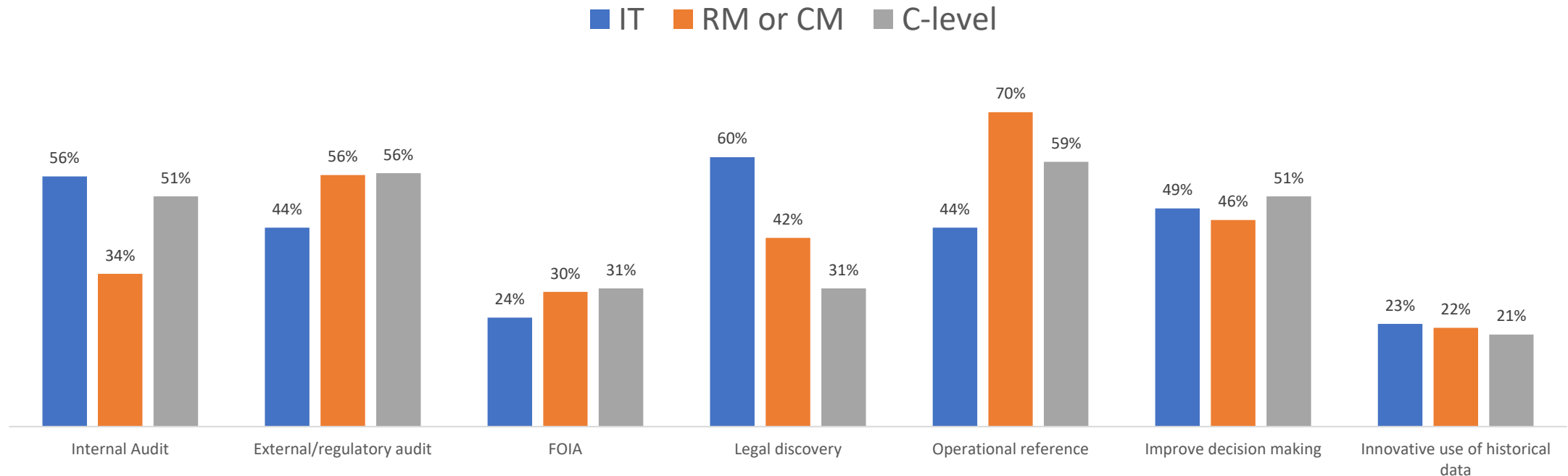
"Experienced" orgs only, >100 employees

RM or CM

C-level

# So-called “inactive” records still have life and need to be managed.

What are the THREE most important reasons that people search, discover, or retrieve inactive information and records in your organization?

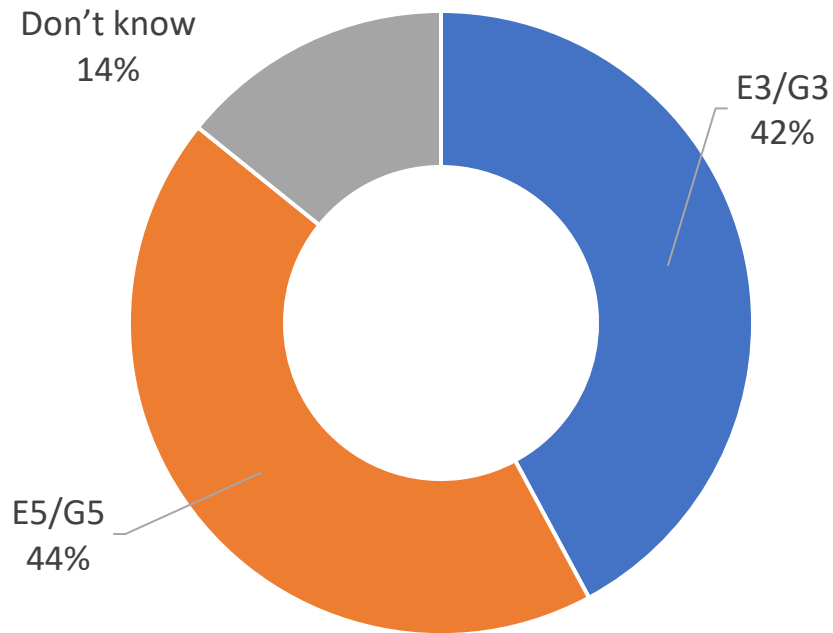




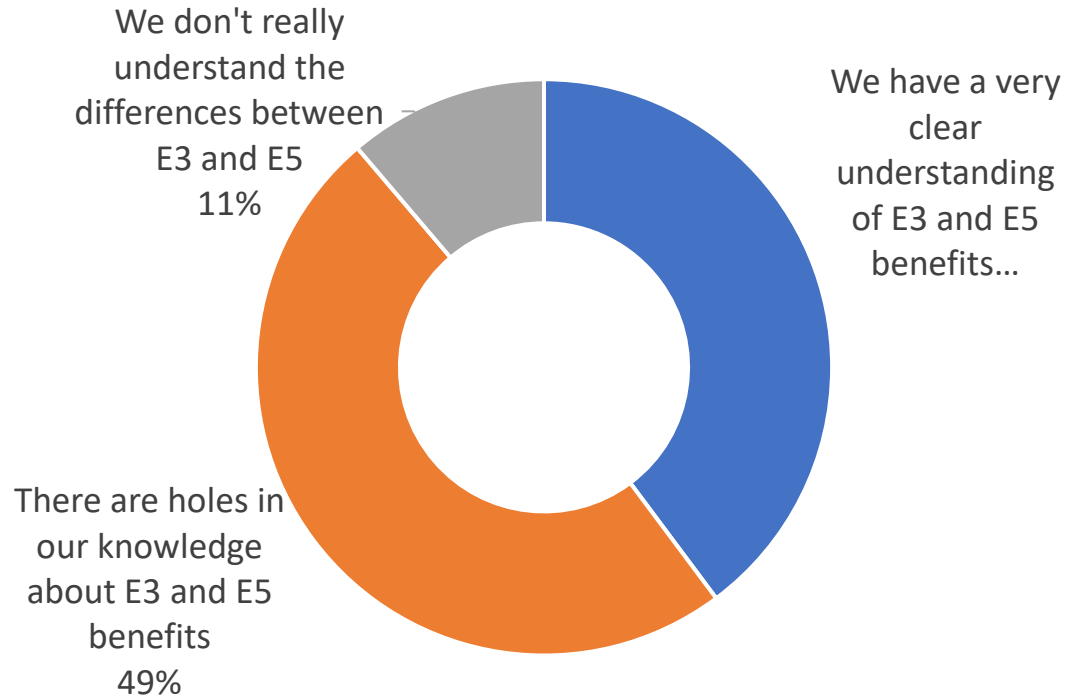
M365 is core to both the problem,  
*and* its potential solution.

# Regarding E3 and E5 benefits, users are confused about what they have and what it does...

Which is the primary M365 licensing model within your organization?

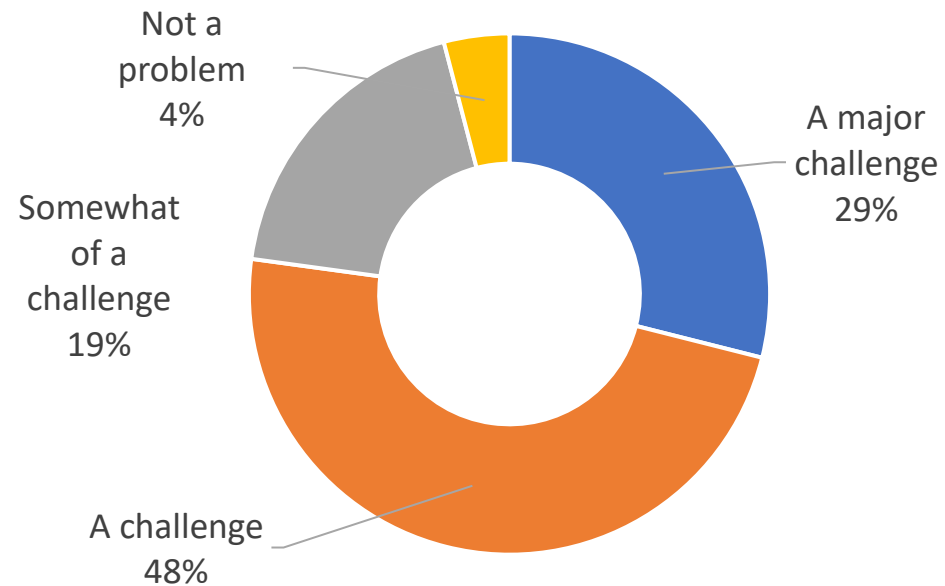


How well does your organization understand the differences between the benefits of E3 and E5 licenses?



# We need a roadmap...

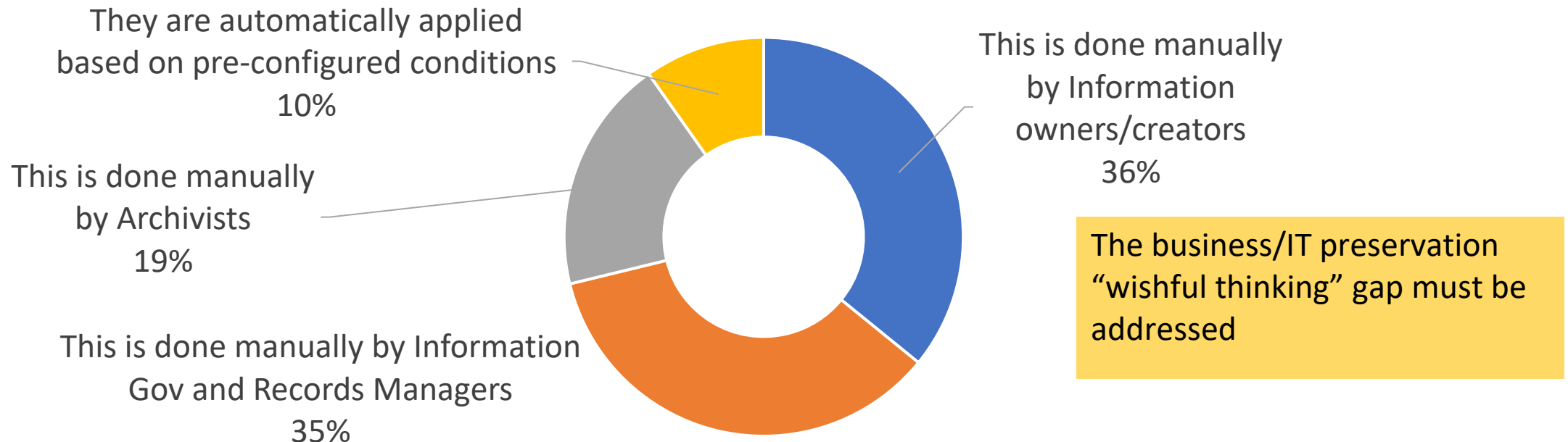
How big a challenge is the pace of change of M365 cloud-based governance and compliance capabilities?



Preservation in M365 must be automated – or it won't get done.

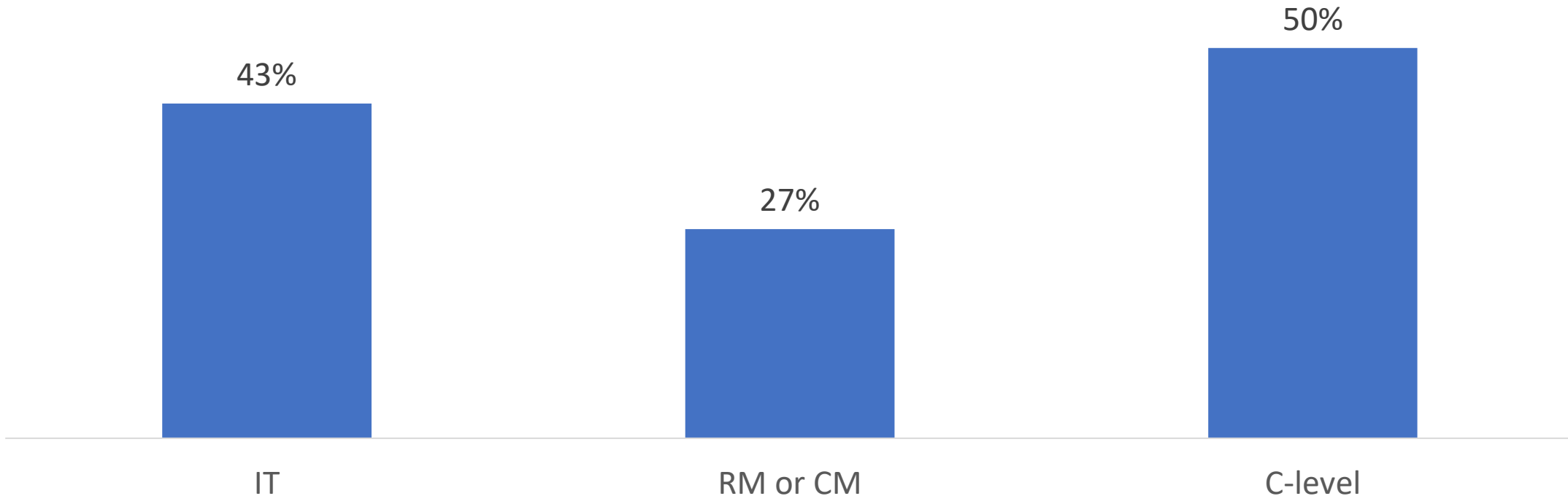
# Automated governance capabilities exist in M365, but 88% of organizations still rely on manual approaches.

Who is responsible for applying retention periods/labels to content in M365 in your organization?



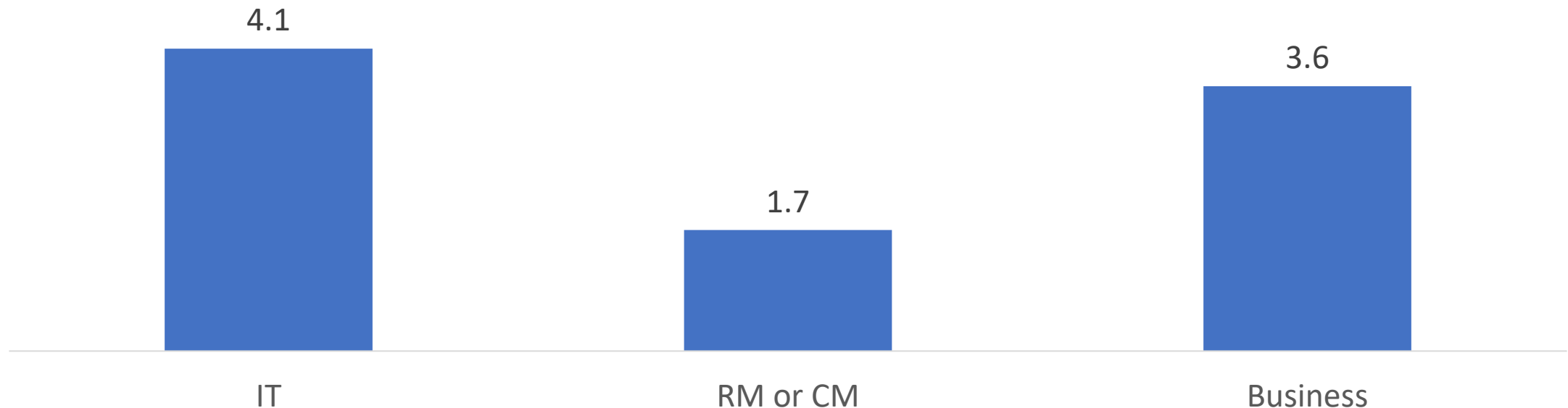
# The journey from E3 to E5 is complicated.

"We have a very clear understanding of E3 and E5 benefits."



# A huge gap exists between the REALITY of M365 automated governance and IT and Business perceptions.

On a scale of 5 “Fully Optimized” to 1 “We Have Not Yet Begun,” how would you describe your organization’s utilization of the automated compliance, governance, and records management capabilities in M365?





# Records Preservation Capabilities

IG and RIM practitioners have a vital role to play in rationalizing executable and defensible disposition triggers and preservation actions in the M365 environment

# How Long is Long Term?

- “...long enough to be concerned with the impacts of changing technologies, including support for new media and data formats, or with a changing user community. Long Term may extend indefinitely.”

ISO 14721:2012

- Long-term, by consensus, came out to be anything beyond 10-15 years because that is the time-frame beyond which they begin to lose control of logical and physical migration

SNIA 100 Year Archive Study Requirements Survey, January 2007



Image Source: The New York Times

## Kewaunee Power Station

- Kewaunee, Wisconsin
- Operated December 1973 - May 2013
- Major Decommissioning Activities
  - Scheduled to begin: 2069
  - Estimated Date for Closure: 2073



\*Source: Are Your Organization's Long-Term and Permanent Records and Information Future-Proofed? Webinar, April 29, 2021



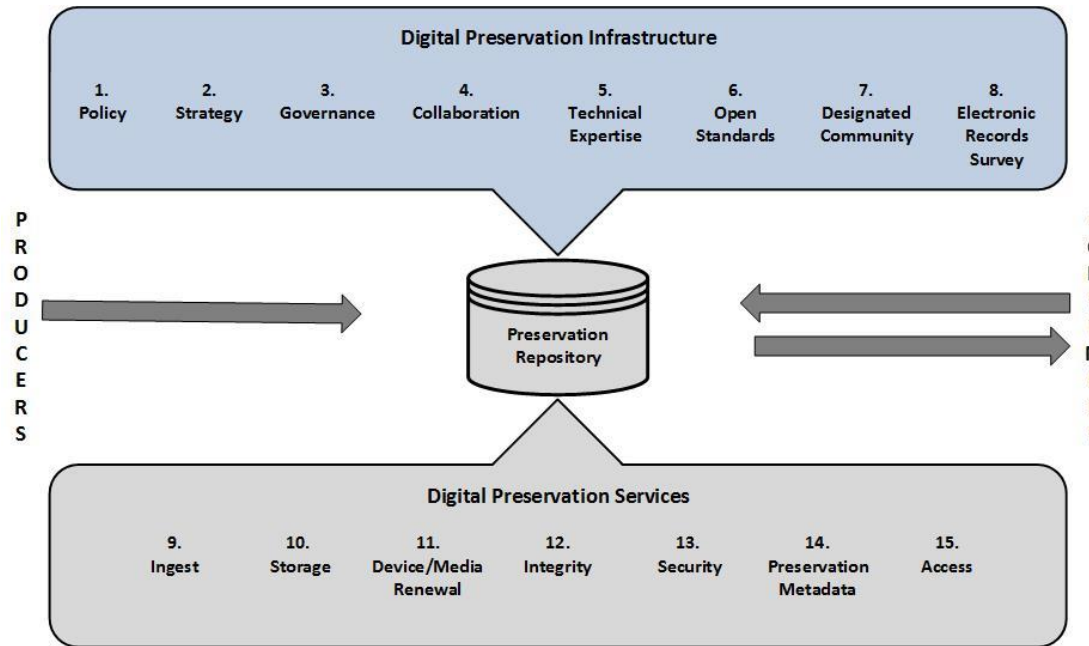
# Electronic Records Preservation



Cornell Digital Preservation Management Workshop and Tutorial



Enterprise Records Officer  
State of Wisconsin – Dept of e-Gov



Digital Preservation Capability Maturity Model (DPCMM)

Continuous Improvement Frameworks



# Common Retention Schedule Examples

BU1000 BUSINESS ORGANIZATION  
Formation and Management  
Organization Documents

Records related to the creation and formal proceedings of the Company and its subsidiaries including articles of incorporation, by-laws, meeting minutes and notices from the Board of Directors meetings. Also includes copies of applications to regulatory bodies for authority to issue securities, including copies of exhibits in support of such applications.

Recommended Minimum Retention Period: **Permanent**

HR3300 HUMAN RESOURCES  
Health & Safety  
Medical & Hazardous Exposure

Medical treatment, examinations and history records, plus records which document employee exposure or possible exposure to hazardous or toxic substances, such as records of environmental and biological monitoring for toxic substances, sampling and collection records, and calculations, as well as industrial hygiene and respirator fit testing.

Recommended Minimum Retention Period: **Duration of Employment + 30 Years**

STATE AGENCY RECORDS RETENTION SCHEDULE		
Series	Records Title and Description	Function and Use
U0243	Capital Construction Disbursements and Receipts File	This series documents the disbursement of undertaking which is to be financed or funded by federal funds; (b) any undertaking which is construction item, or combination of items resulting in equipment estimated to cost \$200,000 or more; (c) any item of movable equipment if the total cost of purchase, upgrade, or replacement of an information system exceeds the Capital Planning Advisory Board of the state as to state spending for capital projects.
	Access Restrictions	None
	Contents	Series may contain: Date of progress payment; it also may contain supporting documentation.
	Retention and Disposition	Retain permanently in creating unit

**04560 Governor's Executive Order File - Miscellaneous - (Includes employment contracts, court orders, non-merit appointments, paroles, re-organizations, special notaries) (V)**

This series documents the written action or order of the Governor, which has the force of law, and which is based upon his authority as the chief executive of the Commonwealth. The state's Constitution requires that the Secretary of State receive the original order signed by the Governor. After signature by the Secretary of State, the state seal is then affixed. This series incorporates orders categorized as miscellaneous. These include Writs of Habeas Ad Testificandum/Ad Prosequendum, court orders, employment contracts, non-merit position appointments, conditional releases, paroles, special commission notaries, re-organization of executive branch offices, activation of the National Guard, resignations, and removals from office. The orders are initially created by the General Counsel, Office of the Governor. Much of the reference activity to Executive Orders is by courts requiring certification of the official acts of the state. This series reflects original signatures not included in the Executive Journal (04564).

Access Restrictions None

Contents Series contains: Original order; supporting documentation

Retention and Disposition Retain in Agency four (4) years after the end of the gubernatorial term; transfer to State Archives Center for permanent retention

### 1. Duration of Archiving – Company Requirements

Study materials should be retained for **as long as there is a likelihood that they will need to be referred to for regulatory purposes**. Review of the various international GLP and regulatory requirements concerning archiving indicate that the requirements regarding the duration of archiving vary considerably. For example:

- Switzerland: All study materials must be retained in a GLP accredited archive for a minimum period of 10 years after finalization of the report;
- USA FDA: All study materials must be retained for a minimum period of 5 years following the date on which the results of the study are submitted to the FDA in support of an application for a research or marketing permit;
- Germany: All study materials must be retained in the archive of the test facility for a minimum period of 15 years after finalization of the report;
- Japan: All data and materials must be retained for a minimum of 11 years after NDA approval and 15 years after NDA approval for orphan drugs.

## Department of Transportation

### Retention Schedule – ALL Entries

Record Series Title/Description	Time Held in Dept	Time Held Off-Site	Data Privacy Level	Vital Record	MHS	Storage Media Type	Disposal Method	Schedule Number	Schedule Date	Page #	Item #	Cost Center #	Division/Section
AUTOMATIC TRAFFIC RECORDER DATA SUMMARY - *Retain until no longer get requests for a copy. Retain 1 copy at Records Center permanently.	10*	P	Public	N	N	Paper, Maps, Blueprints, Plans, Cards, Checks	Transfer	85-194	08/01/1989	6 of 35	2	6130	Traffic Data and Analysis
BRIDGE INVENTORY FILES (BRIDGE INSP. RPTS, STRUCTURE INVENTORY, ETC) - *Until bridge is removed.	*	P	Public	N	N	Paper, Maps, Blueprints, Plans, Cards, Checks		85-194	08/01/1989	6 of 35	4	6130	Traffic Data and Analysis

	KY	MD	NC	PA	TX	VA	WA
<b>Short Description</b>	Records of Governor Matthew Bevin Administration	MDLANDREC- Land instruments recorded at Circuit Courts	GIS Records beginning with the GeoMAPP Program	Bonus Files of the Veterans of the Persian Gulf War	Records of Governor Rick Perry Administration	Records of Governor Terry McAuliffe Administration	Washington State Superior Court Case Files
<b>Transfer Dates</b>	2018-2019	2001-Present	2008-Present	2019	2014-2015	2018-2019	2015-Present
<b>Creating Branch</b>	Executive	Judicial	Executive	Executive	Executive/Legislative	Executive	Judicial
<b>Producer Agency</b>	Office of the Governor	Circuit Court	Center for Geographic Information and Analysis	Department of Military and Veterans' Affairs	Office of the Governor	Office of the Governor	Superior Court
<b>Existing Series? (New/Accretion)</b>	New	Accretion	Accretion	New	New	New	Accretion
<b>Record Schedules (Yes/No)</b>	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Schedules Updated as of</b>	2017	2005; 2019	2017	2019	2016	2018	2019
<b>Producer Agency Staff Roles Assigned?</b>	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Communications</b>	Yes	Yes Court Clerks	Yes Agency IT	Yes Agency Staff	Yes Agency Staff (Records Officer)	Yes Office of the Counselor	Yes
<b>Authorizers</b>	No	Yes Judicial Information Bureau	No	Yes Agency Staff	Yes Agency Staff (Asst. Chief of Staff)	Yes Office of the Counselor	Yes
<b>Technicians</b>	Yes	Yes Court Clerks	Yes AgencyIT	Yes Agency/IT	Yes Agency Staff/ Agency IT	Yes Agency Staff	Yes
<b>Initiation Method (Automatic/Manual)</b>	Manual	Manual	Manual	Manual	Manual	Manual	Automatic Daily
<b>Initiation Timing</b>	Scheduled	Scheduled Daily	Scheduled	Ad-Hoc	Scheduled	Scheduled End of Term	Scheduled Daily
<b>Initiated By (Agency/IT/Archives)</b>	Archives	Agency Court Clerks	Archives	Archives	Agency	Archives	Agency
<b>Reason (Retention/Space/Access)</b>	Retention	All	Access	Retention	Retention	Retention	Retention/ Access
<b>Archives Pre-Transfer Records Survey</b>							
<b>Scope/Extent</b>	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Technical Specifications</b>	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Access/Legal Restrictions</b>	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Digital Transfer Procedures at Archives (at outset)</b>	Yes	No	Yes	No	No	Yes	Yes
<b>Vendor-Supported Technology Involved</b>	Yes	Yes Individual vendors at courts	Yes ArcGIS	Yes	Yes	Yes	Yes Individual vendors at courts
<b>Size of Transfer</b>	275+ GB	40 TB+; and counting	100+ GB total; most recent transfer 36.7 GB, and counting	4.46 GB	8 TB	3 TB	36 million+ digital objects; and counting

	KY	MD	NC	PA	TX	VA	WA
<b>System(s) of Origin</b>							
<b>Social Media</b>	Yes Facebook, Twitter	n/a	n/a	n/a	n/a	Yes	n/a
<b>Email</b>	Yes iConstituent	n/a	n/a	n/a	Yes	Yes Intranet Quorum (IQ)	n/a
<b>Text Messages</b>	n/a	n/a	n/a	n/a	n/a	n/a	n/a
<b>Structured Data</b>	Yes	Yes	Yes	Yes	Yes Internal CRMs	Yes	Yes
<b>Web server</b>	Yes State of KY Websites	n/a	n/a	n/a	Yes Governor's Websites	Yes	n/a
<b>Proprietary system</b>	Yes	Yes	Yes	Yes	Yes	Yes IQ	Yes
<b>Unstructured Data</b>	Yes	Yes	Yes Geo-imagery	Yes	Yes	Yes	Yes
<b>Responsible for Packaging</b>	Agency/ Archives	Agency	Agency	Agency	Agency	Agency	Agency
<b>Additional arrangement performed before transfer</b>	Yes (agency)	Yes Packages according to "book" system established for paper records	Yes	No	Yes	Yes Agency selection and organization	Yes
<b>Additional Description prior to transfer</b>	Yes Archives- webcrawls	No	Yes	No	Yes	Yes Additional information added where needed	Yes
<b>Modification/ Reformatting prior to transfer</b>	Yes Webcrawls, extracts from vendor platforms	Yes Some reformatting from original microfilm/ paper records	No	Yes Reformatting	Yes	Yes Extracts from proprietary systems	Yes
<b>Tools Used for Packaging</b>	Proprietary Systems, Windows Explorer	Reformatting from paper (scanner); Windows Explorer	Bagger	Windows Explorer; Proprietary RM system used by agency	Checksum hashes, extracts from proprietary CRM	Windows Explorer	ArchiveIT
<b>Specifications Used in Packaging</b>	Preservica SIP	Fixity	BagIT	n/a	md5	n/a	n/a
<b>Method of Transfer</b>	Media	Network	Network Shared network space	Media	Media	Media	Network Initially media
<b>Tools Used for Transfer</b>	External HDD	SFTP	Windows Explorer	External HDD	External HDD	External HDD	ArchiveTThis
<b>Number of Transfer Packages/Events (One/Multiple)</b>	One	Multiple Daily	Multiple	One	Multiple	Multiple Individuals added files to external HDD provided by Archives	Multiple Daily
<b>Intellectual Verification by Archives</b>	No But extensive consultation before transfer	Yes	Yes	No Planned during processing	Yes	Yes	No
<b>Integrity Verification by Archives</b>	Yes	Yes Quality assurance and completeness	Yes	Yes	Yes	Yes	Yes
<b>Virus/Malware Scan</b>	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Custody Transfer Agreements</b>	No Standard "receipt" provided	Yes Major MOU governing MDLANDREC program	Yes	Yes Form STD-59	Yes Specifically for funding, otherwise conformed to state standards	Yes Chain of Custody forms	No Transfer information plan serves as transfer template



# A Shared Passion



## Achieving a Step Change in Digital Preservation Capability

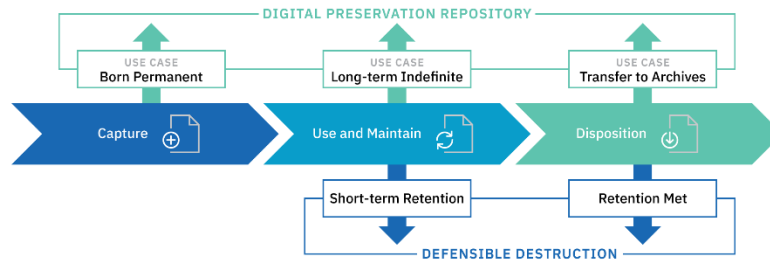
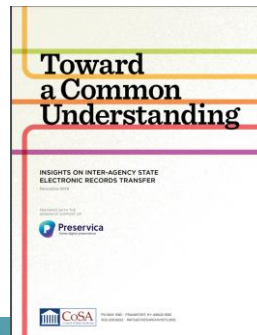
An assessment of Preservica using the Digital Preservation Capability Maturity Model (DPCMM)®



### Records Management Custodians

Records Managers have traditionally filled a vital custodial role with regards to the protection of permanent records stored on paper and film. Key responsibilities relating to the authorized retention and defensible disposition of vital and long-term inactive business records include:

- Paper file and box storage in climate-controlled environments
- Vendor relationship management
- Records search and retrieval, documenting chain of custody and ensuring proper handling
- Legal hold support
- Facility moves and business reorganization support
- Audit support
- Digitization and content migration initiatives
- Microfilm and microfiche preservation and management
- Certified records destruction processes and controls
- Maintain records inventory
- Administer enterprise records retention schedule
- Advise business units and content owners on recordkeeping requirements



**SMALL GROUP ACTIVITY**  
Make New Friends. Get Deep on the Info. Use a survey and form collection.

**DIGITAL PRESERVATION RESOURCES**  
Standards, tools, templates and good practice guidance materials to advance your digital preservation program are available from the great community of practitioners including:

**2018 BUSINESS ARCHIVES SECTION COLLOQUIUM**  
Bringing Transparency to Global Collections  
August 14, 2018

**THE GOVERNANCE OF LONG-TERM DIGITAL INFORMATION**  
Preservation from organizations, large and small, private and public, report a variety of practices why they keep long-term records and information.

**TODAY'S PRESENTATIONS**  
Presentations and handouts are available, via Zoom, at the location, via the website, and via the mobile app.

**HAS MIXER**  
Watch the Has Mixer following the Colloquium at 10:30am Eastern Standard Time.

**REALISE VALUE**  
By supporting business value, managing information and digital preservation and digital transformation.

**MIGRATE RISK**  
By ensuring compliance, regulatory and digital transformation, and business continuity and disaster recovery.

The Governance of Long-Term Digital Information  
IGI 2016 BENCHMARK

Information governance outside. Preservica logo.

TRAINING Preservica | February 23rd 2021

## Real-world Digital Preservation training: Building your Digital Archive with Preservica Starter

Preservica  
From digital preservation

Essential Guide

### Preserving electronic government records

Integrate active digital preservation into government information management practices to ensure electronic records are findable, readable and useable when required.

**DIGITAL Preservation**

Is your current approach to long-term digital information killing the business?

In partnership with Preservica

Digitize. Preserve. Access. eBook

# How to Future-Proof Electronic Records



**Preservica**

How ELECTRONIC RECORDS become future proofed

# The Same but Different

- Requirements and techniques for preserving the authenticity and trustworthiness of [long-term or indefinite] temporary electronic records are identical to those for permanent records
- Essential differences involve legal custody and access:
  - Temporary records remain under the legal custody of the originating business entity and this same entity controls access
  - In an archive the institution has legal custody of the records and controls access in accordance with established rights and permissions
  - Transfer of ownership and access rights occurs when electronic records in a logical temporary records repository are transferred to the logical permanent records repository



Figure 2. Distribution of Digital Preservation Capability Index Scores for All Respondents to the CoSA Pre-Interview Survey and Interviews

DPCMM Component	Nominal	Minimal	Intermediate	Advanced	Optimal
Policy	42	5	1	0	0
Strategy	41	5	1	1	0
Governance	39	5	4	0	0
Collaboration	31	13	4	0	0
Technical Expertise	34	13	1	0	0
Open Source Neutral Formats	31	5	0	2	0
Designated Communities	33	4	0	0	0
Electronic Records Survey	48	0	0	0	0
Ingest	37	10	1	0	0
Storage	32	5	1	0	0
Device/Media Renewal	33	4	1	0	0
Integrity	42	6	0	0	0
Security	33	13	2	1	0
Metadata	43	5	0	0	0
Access	39	9	0	0	0

Dollar/Ashley - Mapping of CoSA SERI Phase 1 to the Digital Preservation Capability Maturity Model – September 2011

Table 3. SERI Self-Assessment Scores by Component

Component	2012	2015	Increase	% Increase
Digital Preservation Policy	47	64	17	36.2%
Digital Preservation Strategy	64	99	35	54.7%
Governance	34	58	24	70.6%
Collaborative Engagement	101	110	9	8.9%
Technical Expertise	70	109	39	55.7%
Open Standards/Neutral Formats	76	114	38	50.0%
Designated Community	29	55	26	89.7%
Electronic Records Survey	63	76	13	20.6%
Ingest	58	86	28	48.3%
Archival Storage	47	72	25	53.2%
Device/Media Renewal	52	83	31	59.6%
Integrity	13	47	34	261.5%
Security	86	126	40	46.5%
Preservation Metadata	43	73	30	69.8%
Access	51	74	23	45.1%
Totals	834	1246	412	49.4%

**A NATIONAL RISK:**

The State of State Electronic Records Report, 2017

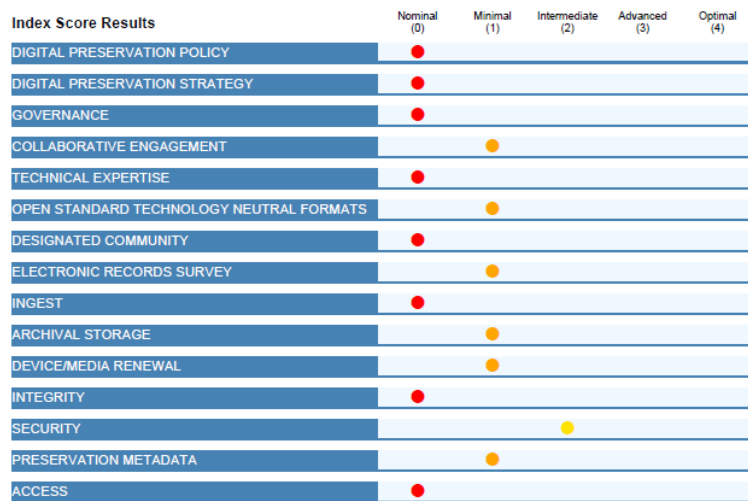


# The Texas Digital Archive Story ... so far

- The mission of the Texas State Library and Archives Commission (TSLAC) is to “safeguard significant resources, provide information services that inspire and support research, education and reading, and enhance the capacity for achievement of current and future generations.”
- In order to fulfill this mandate TSLAC is developing the Texas Digital Archive (TDA), the infrastructure needed to manage, preserve, and provide access to records of Texas state government agencies in a variety of digital formats.

# What a Difference 10 Years Can Make

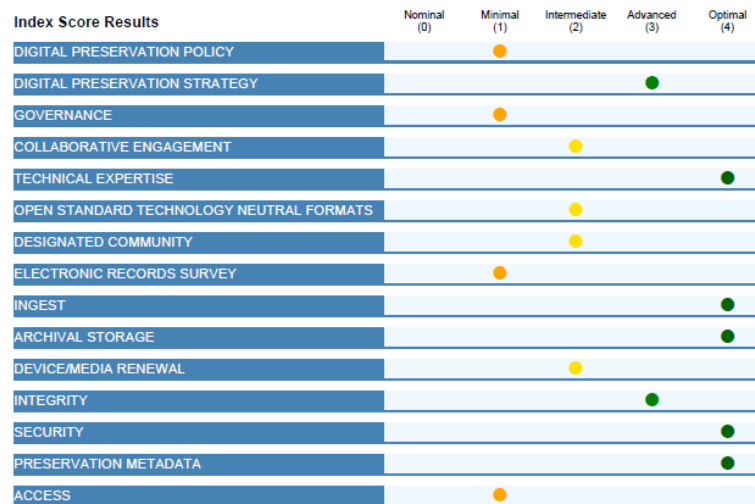
## 2012 DPC Self-Assessment Scorecard



Index Score: 8/60

Based upon your responses, the digital preservation capabilities and services of your archive/records management unit falls into the 1 Stage (Minimal). Digital preservation capabilities are rudimentary and most electronic records that merit long-term retention are at risk.

## 2015 DPC Self-Assessment Scorecard



Index Score: 38/60

Based upon your responses, the digital preservation capabilities and services of your archives/records management unit falls into the 3 Stage (Advanced). The organization has a robust infrastructure and the preservation of electronic records is framed within a collaborative environment and few electronic records that merit long-term preservation are at risk.

## Texas Digital Archive (TDA)

The Texas Digital Archive (TDA) is built on the Preservica (<http://preservica.com/>) preservation system. Designed around international archival and digital preservation standards, Preservica is a comprehensive suite of preservation tools and workflows that allow for the:

- ingest of records in virtually any format;
- management of content as well as the descriptive, administrative and structural metadata associated with stored objects;
- integrity checks to allow for long-term preservation of objects;
- normalization and migration to new formats to insure objects do not become obsolete;
- controls to insure timely and proper access to objects stored in the system.

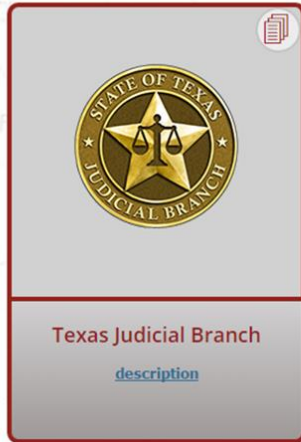
<https://tsl.access.preservica.com/tda/tx-gov-perry/>

# Perry Gubernatorial Records Collection



[Home](#) > [Root](#)

Search Archive



Date range: 1979-2015

Formats of the original electronic files included: text files (.doc and txt), databases (.mdb), spreadsheets (.xls), graphic images (.jpg, .ai, .gif, .eps and .bmp), emails, PDFs, ppt, web-ready images (.htm) and calendars (.pst).

<https://www.tsl.texas.gov/texasdigitalarchive>

## Texas State Library and Archives Commission Launches Texas Digital Archive

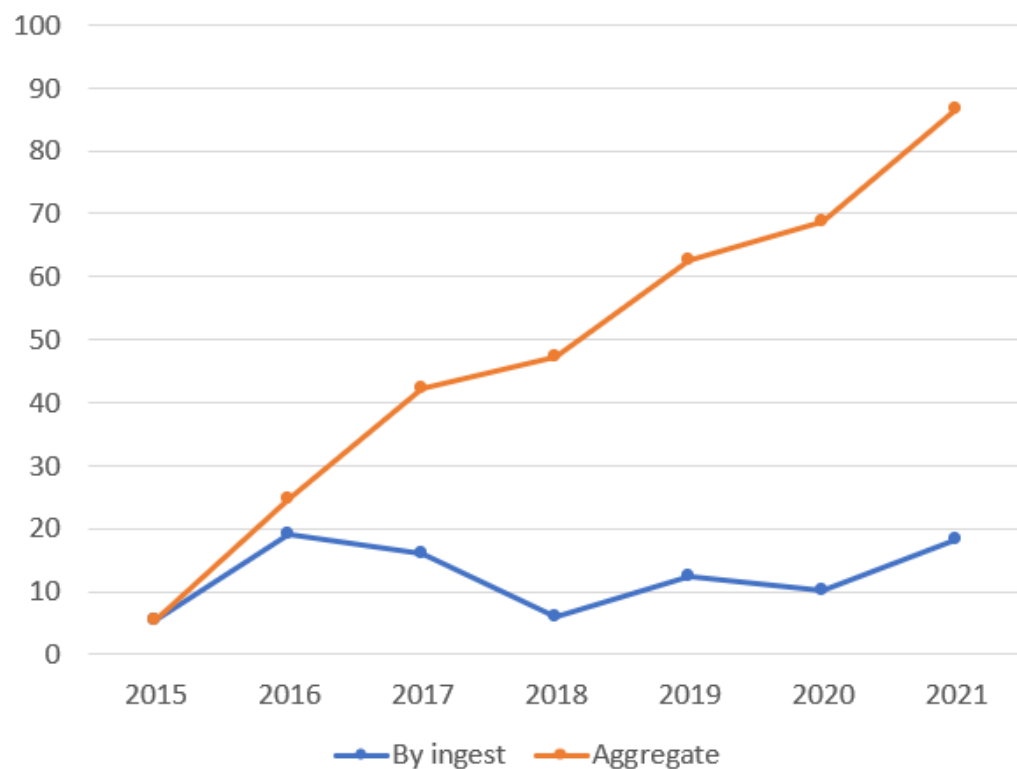
Wednesday, January 20, 2016 • Austin, TX • News Release

**AUSTIN, TX** – The Texas State Library and Archives Commission (TSLAC) announces the launch of the Texas Digital Archive (TDA), a searchable online repository designed to manage, preserve, and provide access to the electronic records collections held at the Texas State Archives. Virtual visitors are invited to explore our shared heritage through digitized prints, photographs, documents and manuscripts made available through a \$706,593 appropriation for the 2016-2017 biennium from the 84<sup>th</sup> legislative session.

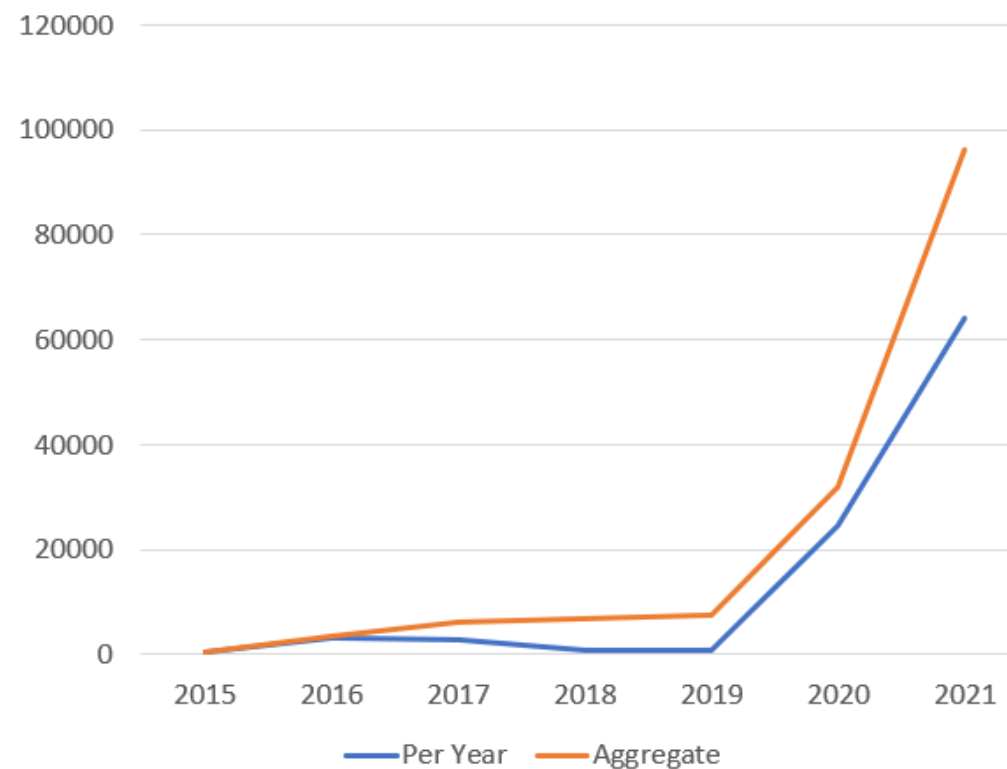


# TDA trajectory

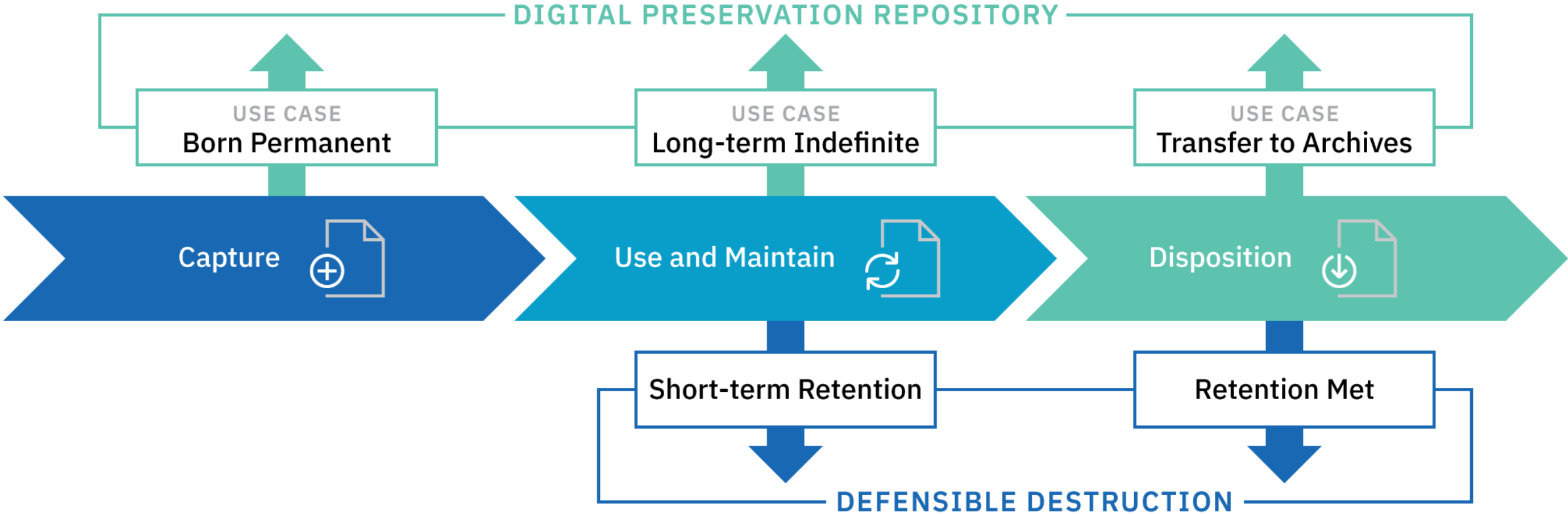
### Storage (in TB)



### Ingests



# Records Preservation Re-imagined



# Introducing Preserve365

# We are Preservica



Leaders in Active Digital Preservation™ archiving for compliance and long-term value protection



 **350M+**  
Assets protected

 **1,094**  
Formats preserved

 **2,500+**  
Organizations worldwide

**Microsoft Partner**



**aws partner network**

Advanced Technology Partner

- ✓ ISO 9001
- ✓ ISO 27001
- ✓ ISO 14721
- ✓ SOC 2 Type II

Instant access to trusted, actionable information over decades – independent of the originating application.



# Microsoft 365 is core to both the problem, and its potential solution



**83%** said the rising volume of content was a major challenge\*



**73%** expect volumes to rise 2 to 5 times over next 3 years\*



**20%** of that content needs to be retained for more than 7 years\*



Rise in need to find and access “inactive” records\*



Assured access to long-term records needed for: FOIA, regulatory and internal audits, operational reference, litigation\*



\* “Optimizing the Automated Governance Capabilities of Microsoft 365” – MER, 2022

Protecting long-term records need to be an integral and automated part of your Microsoft 365 governance program





Introducing **Preserve365** - seamless and automated archiving and Active Digital Preservation™ for Microsoft 365

# Use familiar M365 compliance & discovery tools to ensure critical long-term records are automatically protected & always immediately accessible



Minimize compliance risk with automation



Ensure critical information is actionable over decades



Easily find & use archived content from within M365



Maximize investment in M365 governance



Reduce storage costs

# Developed & piloted with public and private organizations



**Tanya Marshall**  
Vermont State Archivist  
and Chief Records Officer

Streamlining state agency to  
archives transfers

Long-term & perm. public records



- Board & commissioner meetings
- Legislature records
- Land records
- Infrastructure



**Anne Archer**  
Head of Heritage  
& Archives

Compliance & brand value  
protection

30+ years and life-time of corporation



- Business strategy records
- Corporate policies & governance
- End-of-life SharePoint sites
- Strategic brand assets



Major central bank



Records & Information  
Governance Manager

Migrating off legacy CMS to M365

Maintain access to long-term “inactive” records



- Policies and agreements
- Strategic decision making
- Market data

# DEMO: Automated archiving and embedded preservation in action

Get started with embedded preservation

Extend M365 with embedded search

IG compliance & preservation at scale



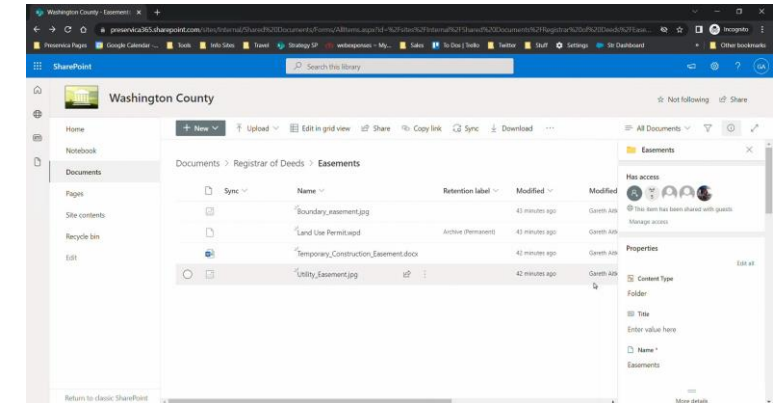
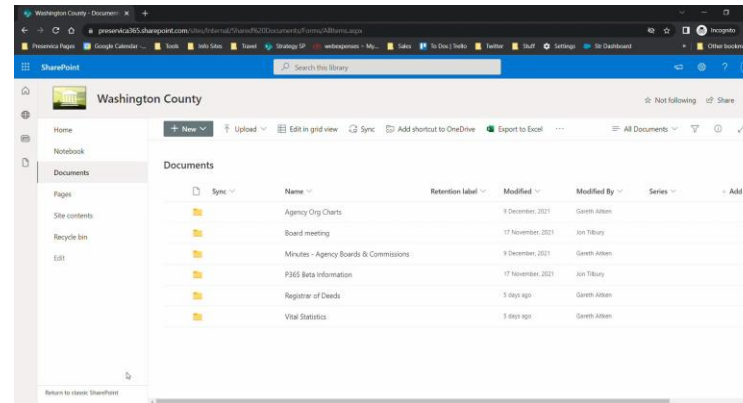
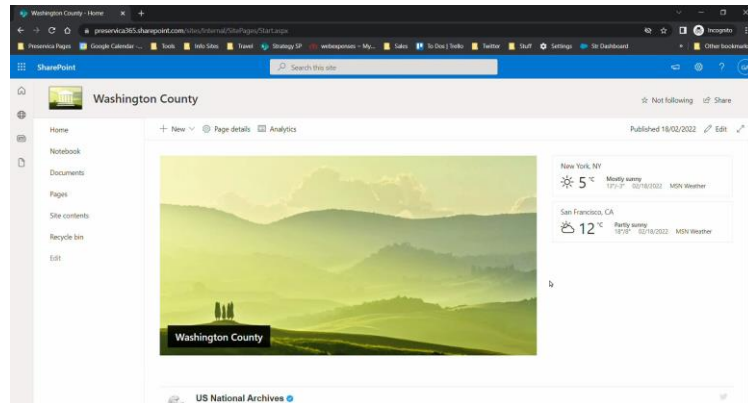
Easily preserve records using manual move or copy from inside M365



Enable users to retrieve archived content using familiar Microsoft tools



Use predefined M365 record labels to boost user productivity and compliance



# Join our early access group and learn more about Preserve365



Build your M365 and records preservation expertise



Collaborate with like-minded organizations



Keep up to date with the latest innovations

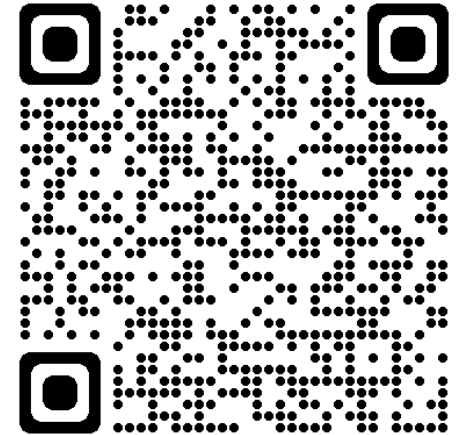


Get hands-on: be part of our Preserve365 product trial

Visit us at the  
Preservica stand!



[preservica.com/mer-2022](https://preservica.com/mer-2022)



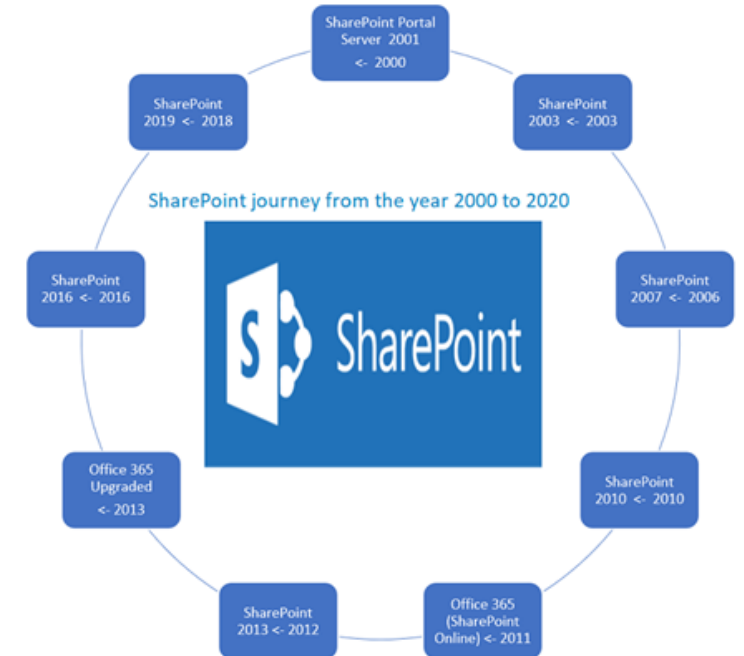
# Automation and Integration Benefits

Automating long-term records retention in M365 can potentially ease the burden on users, deliver access and integrity protections across the lifecycle, and future-proof digital objects before they fall prey to neglect, bit rot or obsolescence.

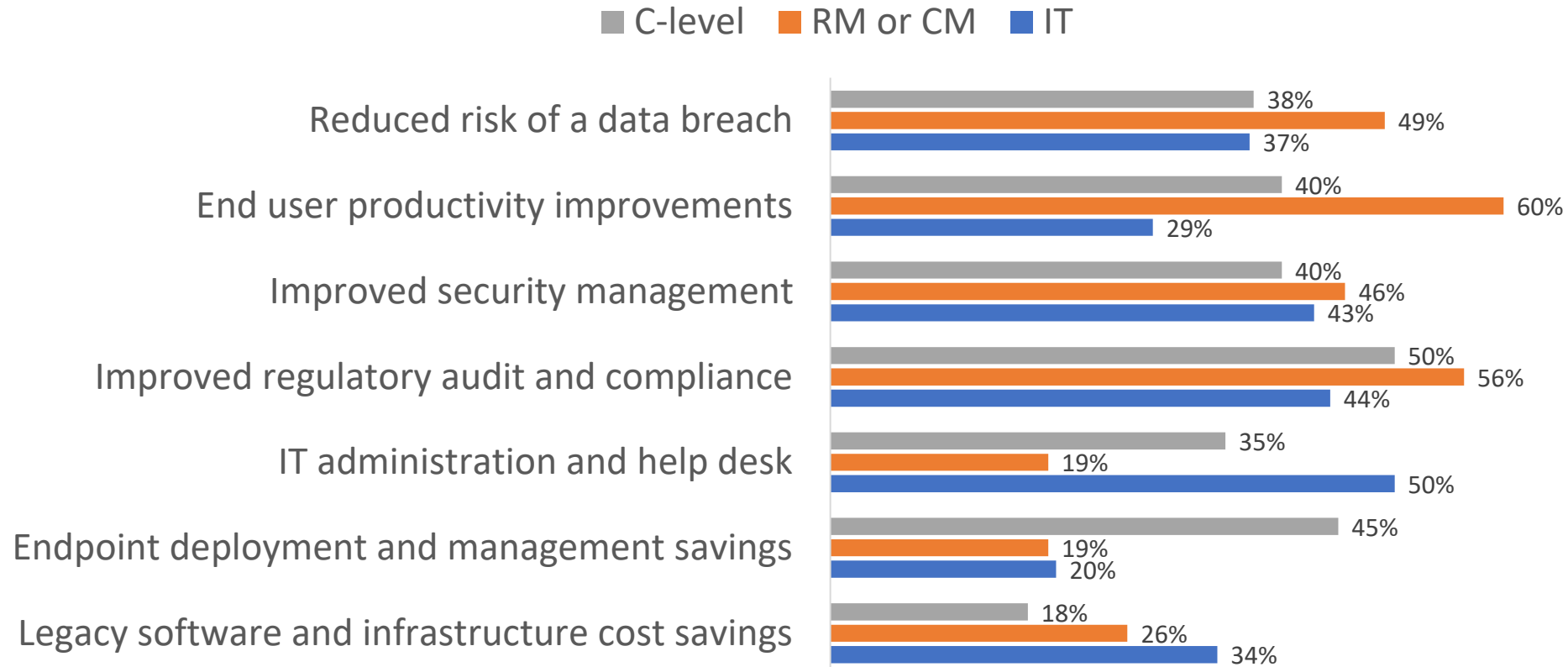


# MER Insights: Survey Findings

- Alignment of business, IG, and M365 governance is increasingly critical but sorely lacking in most organizations
- The pace of change in M365 is a significant challenge making effective change management more important than ever before
- Most organizations have not caught up with automated governance and compliance capabilities of the M365 platform



In a recent analysis, Forrester outlined the following user benefits of M365. Which are most important in your organization?





# Stakeholders

- Lines of Business - Content/Record Owners
- Staff/Knowledge Workers & Contractors
- Information Governance/Records Management
- Information Management/Information Technology Services (internal and third party)
- Legal & Compliance
- Privacy & Cybersecurity
- Archives
- Leadership including elected officials
- Citizens & Customers

# Final Thoughts

# Thank You!

Please share your questions and feel free to contact the speakers regarding their remarks:

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