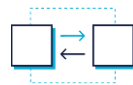


Microsoft 365 GamePLAN

ShareSquared, Inc.



Unify
Your Infrastructure



Manage
People and Teams



Modernize
Business Solutions

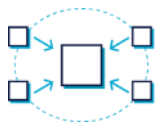
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Transform the way you store, find, govern, and use enterprise content

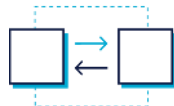
share²

We provide solutions to unify, manage, modernize, and bring intelligence and automation to enterprise content systems.

All of your content is critical; leverage our decades of experience and technology to unite your content, processes and users on a single, modern, enterprise content and records management platform.



Unify
Your Infrastructure



Manage
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Modernize
Business Solutions

GamePLAN: Objectives

Purpose:

GamePLAN is an engagement designed to provide initial guidance around Microsoft 365, SharePoint, and Azure usage and adoption. The engagement consists of multiple envisioning and intake sessions followed by the compilation and presentation of findings.

Objectives:

1. Knowledge Transfer to IT and Business Stakeholders
2. Educate and excite users about Microsoft 365, SharePoint and Azure
3. Inspire a vision for using these technologies to improve business effectiveness
4. Develop an actionable roadmap for continued adoption and value realization
5. Provide budgeting information for planning and procurement purposes

GamePLAN: Typical Goals and Priorities



1. Address existing technical concerns with SharePoint, O365 and Azure
2. Enroll management in viewing SharePoint as a platform for:
 - a) **Content Management:** Document and Records Management, Search, eDiscovery
 - b) **Process Automation:** Electronic Forms, Workflow, Routing and Automation
3. Address concerns around compliance and security
4. Gain useful classification and organization of information
5. Provide greater direction and information governance
6. Support project goal of migrating from other content silos
7. Develop Information Architecture, File Plan, Content Types

GamePLAN: Typical Schedule – Day 1



Sessions focused on...

- **Envisioning:** Designed to show the platform in action and to elicit questions and inspire ideation
- **Functional:** Deep focus on one stage of the content lifecycle with members of the core group
- **Departmental:** Deep focus on the full content lifecycle with members of a single department

Day 1 (Intros and Envisioning)

SESSION 1: GamePLAN Kickoff

Introduction and Kickoff

Goals and Objectives

Review the week plan

Discuss general use cases

Review Risks/Challenges/Outcomes

Audience: Core Team and Executives

SESSION 2: Information Architecture

Intro session and review goals/outcomes

Discuss: Existing IA

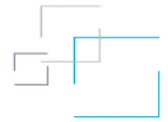
Discuss: IA for ECM/RIM

Discuss: Best practices

Discuss: Taxonomy/Term Sets

Audience: Core Team

GamePLAN: Typical Schedule – Day 2



Sessions focused on...

- **Envisioning:** Designed to show the platform in action and to elicit questions and inspire ideation
- **Functional:** Deep focus on one stage of the content lifecycle with members of the core group
- **Departmental:** Deep focus on the full content lifecycle with members of a single department

Day 2 (Functional)

SESSION 1: Document Management

Intro session and review goals/outcomes
Discuss: Document Management
Discuss: Enterprise Search
Discuss: DMS Structure
Audience: Core Team

SESSION 2: Capture and Imaging

Intro session and review goals/outcomes
Discuss: Electronic Capture
Discuss: Email Integration
Discuss: Third Party Capture Options
DEMO: KnowledgeLake, Imaging, Capture, Capture Server, Unify, Adv. Capture
Audience: Core Team

SESSION 3: Compliance

Intro session and review goals/outcomes
Discuss: Native RIM Functionality
Discuss: eDiscovery and Archiving
Discuss: Third Party RIM Options
Exercise: review RRS/File Plan series
Audience: Core Team

SESSION 4: Dept. Drilldown: Executive Mgmt.

Intro Session and review goals/outcomes
Pains/Challenges/Outcomes
Demo: Lifecycle of a document
Create, Declare, Send to Record Center, Search, Disposition
KnowledgeLake for Capture/Imaging
RIM OOTB
Geared towards high level understanding of SharePoint and Records Center
– Current Environment and Future Environment
– Limit technical details
– Needs to be reviewed with Core Team DAY 1
Audience: Core Team and Executives

GamePLAN: Typical Schedule – Day 3



Sessions focused on...

- **Envisioning:** Designed to show the platform in action and to elicit questions and inspire ideation
- **Functional:** Deep focus on one stage of the content lifecycle with members of the core group
- **Departmental:** Deep focus on the full content lifecycle with members of a single department

Day 3 (Functional/Drill Down)

SESSION 1 Process Management

Intro session and review
goals/outcomes

Discuss: Native WF functionality

Discuss: Native Forms functionality

Discuss: Third Party WF/Forms

Options

Exercise: target top processes

Audience: Core Team

SESSION 2: Dept. Drilldown: IT

Intro session and review
goals/outcomes

Pains/Challenges/Outcomes

Determine Initial Scope

Audience: Core Team

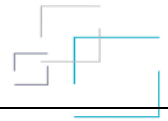
SESSION 3: GamePLAN Closeout

Discuss the week

Review goals and objectives

Audience: Core Team

GamePLAN: Sample SWOT Analysis



Strengths:

1. Invested in Microsoft
2. Vision for leveraging existing Software (SharePoint)
3. Currently using SharePoint
4. Organization flexibility
5. Existing Product knowledge

Opportunities:

1. Ease of use and access
2. Greater classification and organization supports usability and findability and enhances user experience
3. Greater control over information governance
4. Appropriate and automated retention and disposition, including physical records
5. One enterprise platform for collaboration, content, records management and integration
6. Create File Plan, IA, and ERMS to work together

Weaknesses:

1. Multiple content silos (FileNet, File Shares, SharePoint)
2. Content Cleanup
3. Active Directory Uniformity
4. Content is unclassified/ungoverned
5. Lack of Standardization for Records
6. User adoption of existing Retention and Destruction policies

Threats:

1. Perception issues, adoption resistance
2. Ungoverned content
3. Storage of Large Files
4. Do not have full control over Farm
5. Training and adoption

GamePLAN: Sample Solution Phasing

Functionality	PHASE I	PHASE II	PHASE III
Social Features			x
Security and Permissions	x		
Governance and Provisioning	x	x	
Information Architecture	x		
Term Set	x		
User Interface and Experience	x	x	
Site Template Development			x
Document Management	x	x	
Enterprise Search	x	x	
Content Migration - FileNet	x		
Content Migration - Network Shares		x	
Capture and Imaging		x	
Compliance and Records Management	x	x	
eDiscovery			x
Forms and Workflow		x	x
Digital Signature			x
Application Integration			x
Business Intelligence			x
Process Management			x
Training and Adoption Support	x	x	

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