



How the Pandemic Can Affect IG in Positive Ways

By Brian Tuemmler

We are in the midst of some major societal changes because of this pandemic. Whether you are struggling with staying at home or struggling with having to go to work, one thing is sure — we are all learning new ways to work with the resources we have. I see two big shifts that could impact the way corporations see and leverage information governance (IG): 1) The pandemic has made us more aware of our individual need for privacy and protection, and therefore more responsive to others' needs. 2) The pandemic has pushed the growth of video communications and therefore inadvertently led many of us to adopt some powerful IG tools related to capture, categorization, and collection. This heightened awareness around our information has the potential to positively impact our ability to govern it, if we take advantage of this moment.

Many of us were taken abruptly away from our normal work environments, and we suddenly faced an amazing new array of ways to act. Here are a few ways the pandemic has changed the manner in which many of us interact and how we understand and value our own privacy:

- Our usual physical channels for buying things have been shut down, and we have given credit card details to a variety of new entities while shopping.
- We may have been involved with contact-tracing ourselves or have had someone else track our locations to see whom we might have infected.
- When we walk down a pathway, we have to decide how far in advance to tighten our mask or what to do if the other person does not have a mask. We are much more aware of others' needs within our locus of control.
- If we have cleaned the redundant, obsolete, and trivial from our garages or closets, we may have found some amazing memories that have surprised us — perhaps only surprising us that we actually kept them all these years. We have uncovered old passports, medical bills, and phone numbers and become aware of how poor information hygiene can build risk over time.
- Some of us have had discussions about the benefits and detriments of carrying an antibody certificate card.

All of the things we have had to do on the fly in a new manual, inconsistent, non-compliant, non-automated world of ad-hockery make many of us yearn for an organized and predictable way to do what we, as IG professionals, really want our employees to do — govern our privacy and information better.

We have faced resistance in the past. For example, it has always been a challenge to get employees to care about others' privacy and security. But perhaps all of these behavioral jolts

tied to *personal* privacy and security can get us to reconsider how we think about these issues in the *workplace*. The personal challenges we have faced could serve as a catalyst to a long-overdue re-examination of how we automate the processing, privacy, and security of organizational information. Maybe these examples can serve as a catalyst for a serious conversation about IG.

The second big shift results from the explosion of video conferencing and how it provides integrated access to some amazing governance enablers. A large number of us are now video-meeting in our personal lives, whether for family video conferences, church services, or cocktail hours with friends. Many of us are now relying on these tools if we have shifted to working from home. Video communications will be the way we connect even after the pandemic wanes.

On a recent earnings call, Microsoft CEO Satya Nadella noted that during April the Teams platform added 31 million new daily users – *in a single month*. See the numbers of users, below:

- 04/29/2020 -- 75 million active daily users
- 03/18/2020 -- 44 million active daily users
- 03/11/2020 -- 32 million active daily users
- 11/19/2019 -- 20 million active daily users

This video conferencing adoption, when integrated with privacy and retention capabilities, provides a single path to governance and compliance that we have been struggling with for

years. And, it is going viral (pun intended). True work collaboration does not involve only video, of course. It also involves processes *and* documents *and* data *and* content — *and records*. *We need to bring all these tools together.*

We have tried integrated solutions before. Traditional ECM systems, for example, were an excellent way to capture and manage records, but it was hard to do all the *other* related and valuable things we did at the same time, like manage the chat sent to set up a phone call to inform someone of the email that was coming that actually contained the record. For years we have struggled with how to get people to either *not* use emails, chats, channels, videos, or odd attachments because they could not be managed as records, *or else* to move those things to a system of record so they could be retained appropriately. A common solution in recent years has been to integrate a system of record into a collaboration tool like SharePoint to build a collaboration platform on the front end integrated into a compliant repository on the back end.

Integration is a good start, but it requires development and multiple systems. It also still leaves out all the other ways that we now communicate and collaborate.

A lack of integration means that we captured and classified all the valuable stuff so we would know when to delete it, but all the other collaborative stuff was ignored and perhaps, by default, kept forever. It is a bit like cleaning out your garage by getting rid of your grandmother's china first while keeping all the paint cans and bubble wrap.

Now, suddenly, this viral video communication method *can also* be the channel through which your employees connect with advanced governance tools. Organizations should be asking how they can leverage the adoption of remote styles of communicating, driven by short-term communication needs, into long-term IG value, and how they can take advantage of our new-found comfort with personal video chats and turn it into a compliant approach to organizational collaboration.

In my current role, I think about how these issues apply to business content tools like Microsoft 365. Here are five things organizations can now achieve by viewing the video communication explosion of Microsoft Teams as an opportunity to drive IG. Some of these can be achieved with other tools or combinations of tools, but in Microsoft 365 they are now integrated better than ever before.

When a consolidated communications/collaboration/content system is leveraged effectively:

1. **Employees rely less on email.** Fewer tools for communication make IG easier. Email systems are notoriously hard to classify since every email looks like every other one, and everyone's taxonomy is different. Not that moving away from emails is Microsoft's intent – I don't know – but chats and channels (Channels are where you hold meetings, have conversations, and work on files together) are an easier way to keep all the information about a particular issue in one place. When that happens, classification and disposition get more accurate and complete. People on the same team use the same

organization structure for the content. Additionally, you can apply automatic retention on the chats and channel content without going to a third-party system of record. If users use email less and chats or channels more, you have begun to eliminate one IG problem.

2. **Discussions are tied directly to ECM (SharePoint).** When you send a document to someone to channel about it, it is accessed in Teams through a SharePoint site. Therefore, it can be managed as a digital object with other SharePoint content. If the system is configured properly, it is also classified. You no longer have the issue of people sending a document in email and forgetting to make sure it gets into the records system as well. If users use channels in Teams as their ECM, you have begun to eliminate a second IG problem.

3. **Auto-classification happens.** Everyone is searching for good IG opportunities for artificial intelligence and auto-classification. Because of the first two items in this list, you are sure to have your unstructured content in a location where auto-classification can happen without additional capture or indexing. By itself, that does not help you with the 30 years of historical knowledge you have stored on your shared drives, but there are other solutions for that. If you use auto-classification and not electronic records management to manually classify records, you have begun to eliminate a third IG problem.

4. **Content doesn't get lost if it leaves the organization.** When a document captured in a video meeting (or even the recorded meeting itself) is labeled as a record, the label stays with the content with Azure Information Protection (AIP) regardless of where it goes. Protection and security can be applied to the document anywhere with rights management. If you use protection labels rather than a separate data loss prevention program, you have begun to eliminate a fourth IG problem.

5. **Protection and retention are provided by a Microsoft substrate in the cloud that connects governance across many Microsoft products.** If it is not clear already, the set of governance tools that sits under the collaboration tools is in the same substrate as what sits under your email. *Because people are having video meetings, at the same time they are connected to all their governed enterprise information, they are also no longer in functional silos for governance purposes.* That begins to solve your fifth IG problem.

The opportunity for IG professionals is that these capabilities, available as part of your video communications tool, are consistent across governance functions, largely invisible to the user, and in an attractive package. The goal is no longer to move the content to the system, but to move the system to the content.

There are other ways to implement an integrated information ecosystem, and this does not absolve organizations from building a strategy and getting guidance to make sure labeling and functionality meet compliance criteria. But it can now happen without custom integration. This

does allow organizations a way to think strategically about automating a variety of governance functions across multiple and varied information inputs.

Organizations need to capitalize on these two trends: 1) an increased sensitivity to privacy and security and 2) the explosion of video conferencing. And they must use them to drive better IG.

Crisis spawns disruption and innovation. The risk you face is to ignore this transformation. Do not let this opportunity fly by.

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