



Cloud discovery: Office 365™ migration services

A smart, defensible move to the cloud

The move is on

With three-quarters of organizations having adopted some degree of cloud computing technology, migration to the cloud is in full swing. One particular note has been the adoption of Microsoft Office 365. In October 2016 monthly active users of Office 365 commercial exceeded 85 million, up more than 40% year-over-year.

However, because application suites such as Office 365 are designed to enhance collaboration between workers, they may create challenges from a legal discovery perspective. For example, documents created in Office 365 may have multiple authors. E-mail attachments may be separate from the e-mails themselves, connected by a link. Chat functionality captures "conversations" that are often linked to specific documents. These capabilities and activities can lead to new, more complex issues associated with defensible identification, preservation, and collection for discovery purposes.

A chance to redefine discovery

In spite of these challenges, opportunities do exist. A well-planned migration to cloud technology can incorporate processes, procedures, and controls designed to facilitate discovery. Moreover, an organization that is moving to a cloud-based application may take the opportunity to defensibly dispose of archived data and adopt a new data management methodology with the potential for considerable cost savings and to reinforce data management practices going forward.

If your organization is considering a move to Office 365 in a cloud environment or another cloud-based collaboration platform, how prepared are you for that migration?

Deloitte can help.

¹"Raising the game: The IBM Business Tech Trends Study," IBM Center for Applied Insights, August 2014, <http://www.ibm.com/ibmcai/biztechtrends>.

²Office 365 is a Microsoft Inc. product. Please see microsoft.com for additional information.

³Microsoft, Earnings Release FY17 Q1, October 20, 2016. <https://www.microsoft.com/en-us/Investor/earnings/FY-2017-Q1/press-release-webcast>

Our solution

Deloitte can assist your organization each step of the way as you plan for and migrate to Office 365. We can work with your team to assess your environment and requirements and map them to Office 365 to identify potential gaps and new requirements. Our approach includes the following phases:

Assessment

We can work with your team, leveraging experienced cloud specialists and forensic resources within Deloitte Touche Tohmatsu Limited member firms around the world, and we are also able to help evaluate applicable legal, regulatory, and business requirements—as well as technical infrastructure—to identify potential risks and gaps and offer recommendations for your Office 365 migration.

Planning

Our professionals bring extensive experience with large-scale cloud deployments and e-Discovery to help organize your efforts around meeting legal and regulatory requirements. Using a tailored Office 365 Discovery Framework, we approach discovery preparedness as a collaborative effort involving IT, compliance, legal, business, and Office 365 professionals, who:

- Establish program objectives aligned with legal and regulatory requirements
- Develop strategies for identifying and preserving data based on leading practices, including the maintenance of legacy legal holds, as well as process for managing holds post-migration

- Write policies and procedures for Office 365-specific features to avoid preservation and collection gaps
- Establish controls over data retention and disposition to reduce storage costs

Defensible disposition

A key part of information lifecycle management is disposing of data that no longer needs to be retained. Migrating to Office 365 provides an opportunity to defensibly dispose unnecessary data can help decrease data breach exposure and data storage and data management costs. We can help:

- Forensically collect data and associated metadata
- Preserve and defensibly dispose of Office 365 data
- Archive data on standard evidence drives in a format that can be processed by Office 365 discovery tools or other leading discovery platforms.

Our experience

Deloitte was engaged by a large Oil & Gas client to scope the requirements for moving their on premise Exchange environment to Office 365. Utilizing a framework to understand the existing legal discovery needs within the current environment, Deloitte was able to work alongside our client and counsel to map its current processes and procedures to Office 365 to define a future state environment. Leading practices were leveraged to build out and document defensible processes within the legal hold, preservation and collection workflows.



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