

FACT SHEET

The M365 with HaystackID[®] Suite for Microsoft 365[®] Services

Proven Expertise in Unlocking the Full Potential for Productivity,
Collaboration, and Security in Microsoft 365

HAYSTACK[®]



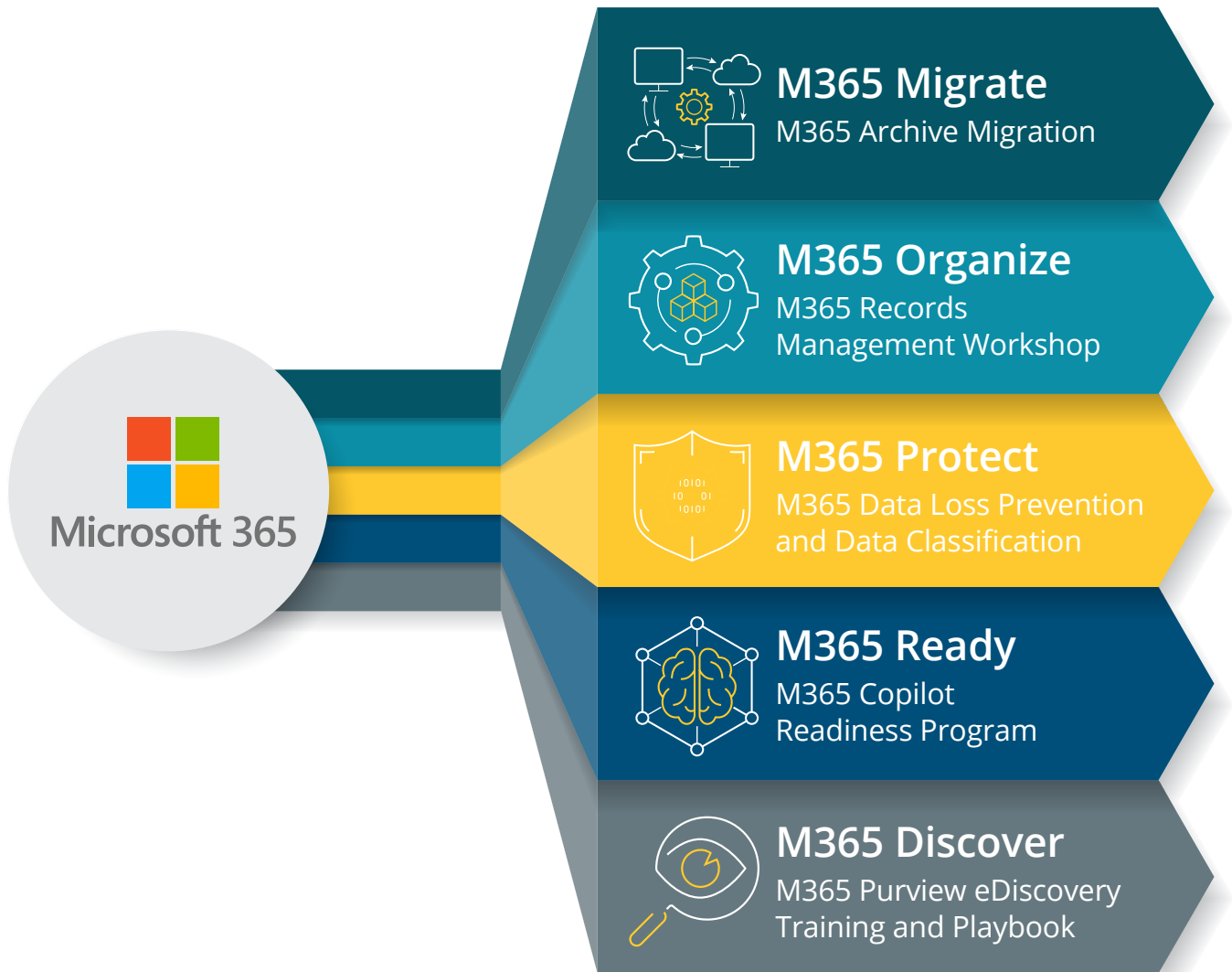
Unlocking the Full Potential for Productivity, Collaboration, and Security in Microsoft 365 with HaystackID®

HaystackID is a specialized data services company with a complete practice dedicated to transforming how businesses leverage Microsoft 365 (M365). With a strong focus on maximizing organizational investments in M365, our experts specialize in crafting tailor-made solutions that align with unique and specific business processes. We understand that each organization has its distinct challenges and opportunities, and our mission is to unlock the full potential of M365 to enhance productivity, collaboration, and security.

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M365 with HaystackID® Suite

Complemented by HaystackID Global Advisory experts, the **M365 with HaystackID Suite** delivers capabilities for a full range of services to help organizations migrate, organize, protect, ready, and discover with Microsoft 365.



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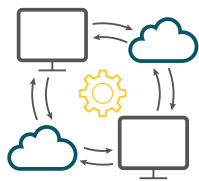
At the forefront of unlocking productivity, collaboration, and security within Microsoft 365, HaystackID delivers tailor-made solutions that transform the way businesses leverage technology. Our dedicated practice is not just about implementing software, but about understanding and aligning with the unique business processes of each organization.

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Nate Latessa

EVP of Advisory Services
HaystackID



M365 Migrate

M365 Archive Migration

Improve data accessibility and meet compliance requirements by migrating data from antiquated systems to modern platforms like M365 and Google Workspace. Most companies see an ROI in the first year. HaystackID specializes in on-premises to-cloud and cloud-to-cloud migrations.

KEY FEATURES

- **Assessment and Planning:** Comprehensive assessment of the current data environment, understanding the scope, complexity, and specific requirements of the migration project. Define the migration strategy, outline timelines, and prepare a detailed project plan.
- **Data Clean-Up:** Perform data cleansing to ensure accuracy and consistency. This step involves removing duplicates, removing data that is beyond its retention period, and standardizing data formats, which is essential for the integrity of the migrated data.
- **Migration Design and Execution:** Design a tailored migration process, choosing the appropriate tools and methodologies based on the client's specific needs. Our team ensures a smooth transition with minimal impact on business operations, executing the migration in stages.
- **Testing and Validation:** Thorough testing post-migration to ensure the data is accurately transferred and fully functional in the new environment. This includes data integrity checks, performance testing, and validation against the original data source.

KEY BENEFITS

1

Enhanced Compliance
Ensures your organization meets regulatory requirements and industry standards for records management.

2

Improved Efficiency
Automates and streamlines records management processes, reducing manual work and the potential for error.

3

Risk Mitigation
Reduces the risk of data breaches and non-compliance penalties.

4

Cost-Effective
Optimizes storage and reduces costs associated with record keeping and information management.

5

Data-Driven Insights
Utilizes analytics for better decision-making and information governance.



M365 Organize

M365 Records Management Workshop

HaystackID's records management service focuses on providing a comprehensive solution for managing records in M365, integrating enhanced security measures, and leveraging the capabilities of Microsoft Copilot. This offering is designed to assist organizations in efficiently organizing, maintaining, and securing their records while also taking advantage of AI-driven insights and automation provided by SharePoint Premium and Copilot.

KEY FEATURES



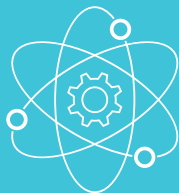
Assessment and Planning

Thorough assessment of your current records management policies and identify areas for improvement.



Customized Solution Design

Based on the assessment, we design a records management solution tailored to your specific needs.



Deployment and Integration

Our team handles the deployment and integration of M365 Purview with your existing systems, ensuring a smooth transition.



Training and Change Management

We provide comprehensive training and support to ensure your team is fully equipped to handle changes and modifications to the records management program.

KEY BENEFITS

- **Automated Record Classification:** Leverage SharePoint Premium to automate the classification of records, ensuring accuracy and consistency.
- **Data Governance:** Implement policies and rules that govern how records are retained, accessed, and disposed of in line with legal and regulatory requirements.
- **Integration:** Integrate with existing Microsoft applications, providing a unified experience.
- **Compliance Management:** Satisfy industry, regulatory, and legal requirements with Purview compliance tools.
- **Secure Access:** Implement role-based access controls to ensure that sensitive records are only accessible to authorized personnel.
- **Lifecycle Management:** Manage the entire lifecycle of records from creation to disposal, ensuring critical information is recovered and handled properly.
- **Customizable Retention Schedules:** Tailor retention schedules to meet specific business needs and regulatory requirements.
- **Audit Trails and Reporting:** Reporting and audit trails ensure transparency and facilitate audits and reviews.

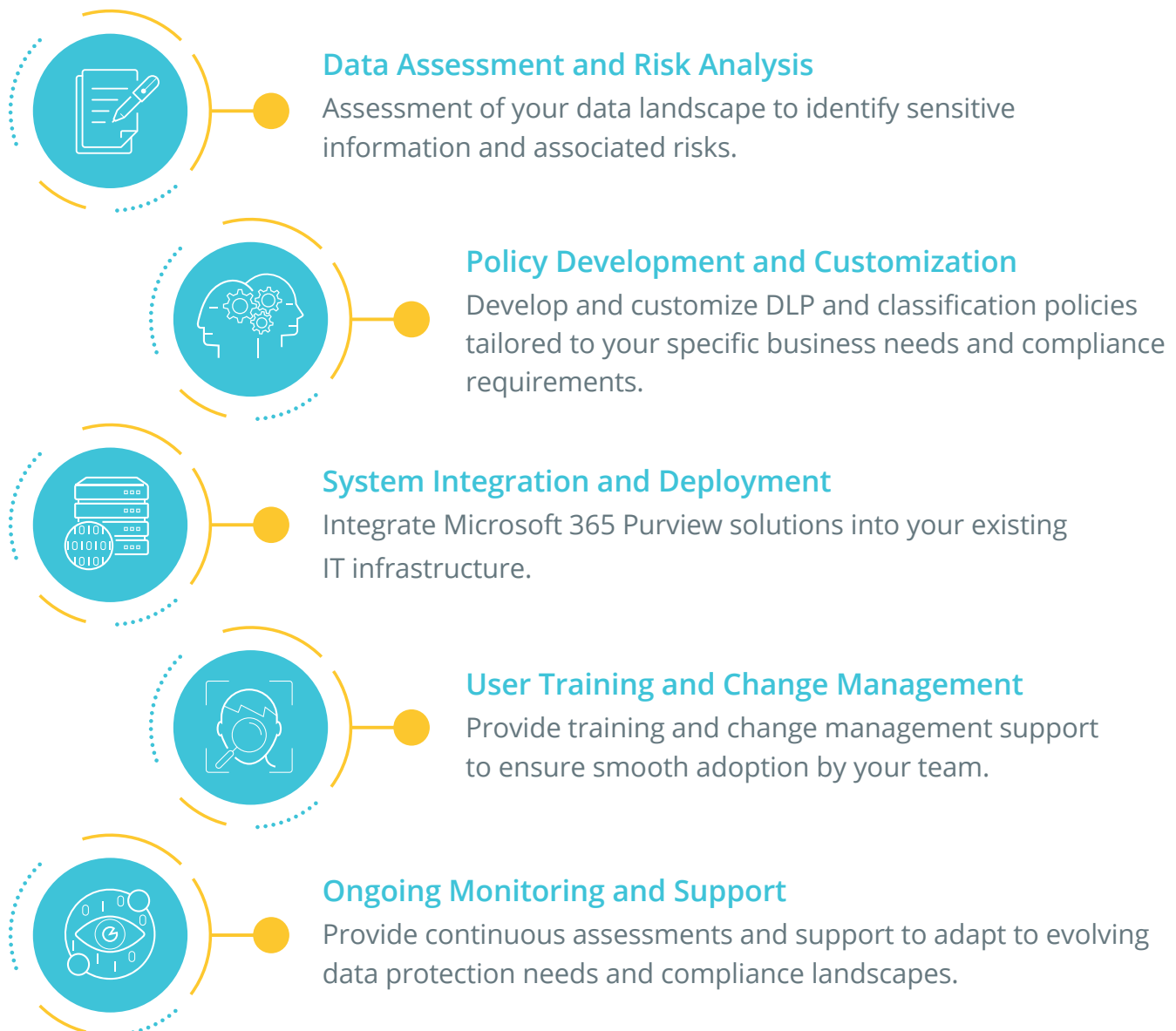


M365 Protect

M365 Data Loss Prevention and Data Classification

HaystackID's Data Loss Prevention (DLP) and Data Classification offering, powered by Microsoft 365 Purview, provides a comprehensive solution for safeguarding sensitive information and ensuring data integrity within your organization. This offering is designed to help you identify, monitor, and protect sensitive data across various locations, such as M365 services, on-premises environments, and third-party applications.

KEY FEATURES



KEY BENEFITS

- **Enhanced Data Security:** Protect sensitive information from unauthorized access and potential data breaches.
- **Regulatory Compliance:** Ensure adherence to legal and regulatory standards for data protection, reducing the risk of penalties.
- **Reduced Risk of Data Loss:** Minimize the chances of accidental or malicious data loss, preserving organizational integrity.
- **Improved Data Management:** Gain insights into data usage and flow, leading to better data management and decision-making.
- **User Awareness and Responsibility:** Foster a culture of security and responsibility among employees through effective training and real-time alerts.
- **Operational Efficiency:** Automate data protection processes, freeing up resources and reducing manual errors.
- **Customization and Flexibility:** Tailor data protection strategies to fit the unique needs of your organization.

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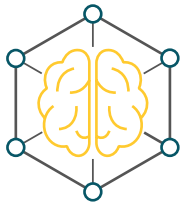
HaystackID's distinction lies in our holistic approach, where we offer not only the technical expertise to migrate, manage, and protect data but also ready organizations for the future with our advanced eDiscovery training and playbooks. We ensure that investments in Microsoft 365 yield tangible benefits while maintaining the highest standards of data security and compliance.

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Matt Miller

SVP of Information
Governance and Data Privacy
HaystackID



M365 Ready

M365 Copilot Readiness Program

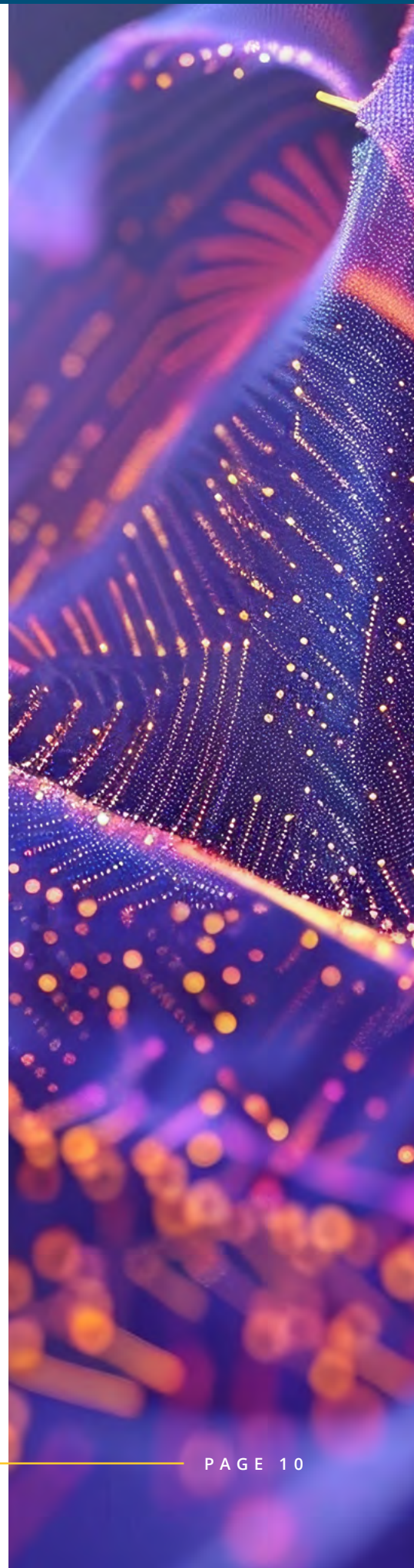
HaystackID's Microsoft 365 Copilot Readiness Program is designed to guide companies through the secure adoption and integration of Microsoft Copilot and SharePoint Premium into their business environment. This service emphasizes not only the operational benefits of Copilot and SharePoint Premium, but also prioritizes the critical aspect of security, ensuring that the adoption of this technology aligns with the highest data protection and compliance standards.

KEY FEATURES

- **Security-Centric Readiness Assessment:** Evaluate security posture and IT infrastructure to determine readiness for a secure Copilot and SharePoint Premium deployment. Identify potential security challenges and compliance requirements specific to the industry and region.
- **Implementation Planning:** Create a tailored plan for the secure integration of Copilot and SharePoint Premium, focusing on maintaining data integrity and privacy. Strategy formulation includes risk assessment, mitigation plans, and compliance with relevant regulations (such as GDPR and HIPAA).
- **Technical Setup and Security Integration:** Assistance with secure installation and configuration of Copilot and SharePoint Premium. Ensuring that the integration adheres to your organization's security policies and standards.

KEY BENEFITS

- **Automated Content Creation:** M365 Copilot can help quickly generate documents, reports, and presentations within SharePoint, reducing the time and effort needed for content creation.
- **Intelligent Search:** Advanced AI-driven search capabilities make it easier to find documents, data, and insights, improving efficiency and productivity.
- **Real-Time Collaboration:** Teams can work together on documents stored in SharePoint with real-time updates and AI-enhanced suggestions for content improvement.
- **Customizable Workspaces:** SharePoint Premium allows the creation of customized sites and portals tailored to specific project or team needs, enhancing collaboration.
- **Secure Document Sharing and Storage:** SharePoint Premium provides secure and scalable document storage and sharing capabilities, ensuring that sensitive information is protected.
- **Automated Workflows:** Both platforms offer automation of routine tasks and workflows, streamlining processes and reducing manual workloads.
- **AI-Powered Analytics:** M365 Copilot can analyze data stored in SharePoint, providing actionable insights and recommendations to support informed decision-making.
- **Enhanced Reporting:** Generate detailed reports and dashboards within SharePoint to visualize data and track key performance indicators.
- **Advanced Security Features:** SharePoint Premium has advanced security features, including sensitivity labels and advanced threat protection.
- **Compliance and Governance Tools:** Organizations can manage compliance and governance policies more effectively with tools designed for data retention, information barriers, and audit logs.





M365 Discover

M365 Purview eDiscovery Training and Playbook

HaystackID's Microsoft 365 Purview eDiscovery service offers practical training, utilizing real-world examples to ensure organizations can effectively leverage eDiscovery tools within Microsoft 365 Purview. The service emphasizes creating and implementing eDiscovery playbooks, providing structured, repeatable processes for managing and responding to legal investigations and compliance requirements efficiently.

KEY FEATURES

- **eDiscovery Assessment:** Evaluation of your current eDiscovery processes and how Microsoft 365 Purview can enhance these practices, as well as the identification of specific organizational needs and challenges in the context of eDiscovery.
- **eDiscovery Playbook:** Custom eDiscovery playbook for your organization, ensuring structured, defensible, and efficient response to legal requests.
- **Real-World Training:** Training sessions using real-world scenarios and case studies to illustrate effective eDiscovery strategies. Training will focus on best practices as well as limitations and workarounds. Each training also includes the latest case law updates affecting M365.

KEY BENEFITS

Enhanced capability to manage complex eDiscovery requests efficiently within the Microsoft 365 environment.

Reduced risks and costs associated with legal and compliance challenges.

Empowered teams with practical skills and tools to handle eDiscovery tasks confidently.

Development of standardized eDiscovery playbooks, leading to consistent, repeatable processes across all legal inquiries.

Learn More. Today.

[Contact us today](#) to learn more about how M365 with HaystackID Suite can help your organization unlock the full potential for productivity, collaboration, and security in Microsoft 365.

About HaystackID®

[HaystackID](#) solves complex data challenges related to legal, compliance, regulatory, and cyber events. Core offerings include Global Advisory, Data Discovery Intelligence, HaystackID Core® Platform, and AI-enhanced Global Managed Review powered by its proprietary platform, ReviewRight®. Repeatedly recognized as one of the world's most trusted legal industry providers by prestigious publishers such as Chambers, Gartner, IDC, and Legaltech News, HaystackID implements innovative cyber discovery, enterprise solutions, and legal and compliance offerings to leading companies and legal practices around the world. HaystackID offers highly curated and customized offerings while prioritizing security, privacy, and integrity. For more information about how HaystackID can help solve unique legal enterprise needs, please visit [HaystackID.com](#).