

# Osterman Research

## WHITE PAPER

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## **eDiscovery and Information Governance for Microsoft Teams**

## Executive Summary

Organizations are embracing modern tools for collaboration, such as Microsoft Teams, Slack, and Zoom. This raises significant eDiscovery and information governance challenges for organizations because the native capabilities for eDiscovery and information governance offered within each product are lacking or non-existent, have low maturity, and have not been designed to offer a consistent experience across data from multiple key applications. This leaves organizations exposed to risks from process failures in eDiscovery and internal investigations, where responsive data cannot be found without costly manual processes.

Third-party solutions offer organizations a better approach to meeting their eDiscovery and information governance responsibilities across a wide collection of modern tools, such as Microsoft Teams, Slack, and Zoom.

### KEY TAKEAWAYS

The key takeaways from this research are:

- Organizations are adopting new tools for collaboration**  
 People have rapidly adopted Teams, Slack, Zoom, and other modern tools for collaboration. The days of email-only communication methods are over.
- Significant eDiscovery and information governance implications**  
 The widespread adoption of modern tools has significant implications for eDiscovery and information governance, including the need to capture data from a wider selection of tools, deal with new data types, and account for links to files rather than attachments.
- Access to data in Teams for eDiscovery and internal investigations**  
 The need to access content in Teams and other tools for eDiscovery and internal investigations is a common occurrence, and some employees are already trying to suppress the true nature of their communications in Teams.
- Weaknesses in native eDiscovery capabilities in Microsoft 365**  
 Organizations using the native retention capabilities for Microsoft Teams will be unable to find all content in eDiscovery searches. Content searches are slow, previewing results in Advanced eDiscovery looks completely different to the native Teams interface, and importing content from third-party data sources outside Microsoft 365 is complex.
- Benefits of third-party solutions for eDiscovery and information governance**  
 Specialized third-party solutions for eDiscovery and information governance offer better capabilities than what is provided natively in Microsoft 365. Enhanced capabilities include capturing edits to messages without users having to be on legal hold forever, unified search across data from Microsoft Teams and other key applications, and a separate offsite data store that mitigates the risk of failures and human error in source applications.

*The widespread adoption of Teams and other modern tools has significant implications for eDiscovery and information governance.*

### ABOUT THIS WHITE PAPER

This white paper is sponsored by Onna. Information about Onna is provided at the end of the paper. Unless otherwise stated, the survey data referenced in this paper is extracted from the Osterman Research Microsoft Teams report that was published in May 2021.<sup>1</sup>

## New Tools for Modern Collaboration

Email has been the predominant channel of communication and collaboration in organizations for several decades, but organizations are increasingly turning to new tools to handle modern work processes. In this section, we look at growth in Microsoft Teams, Slack, and other tools in enterprise customers.

### ADOPTION OF MICROSOFT TEAMS

Microsoft Teams was launched in March 2017 and was used in 329,000 organizations within 18 months.<sup>2</sup> In July 2019, Microsoft released its first ever user count, at 13 million daily active users.<sup>3</sup> This grew to 20 million by November,<sup>4</sup> and once the pandemic hit, the number of daily active users skyrocketed. Growth went from 32 million in early March 2020 to 44 million one week later, 115 million by October,<sup>5</sup> 145 million in April 2021,<sup>6</sup> and although Microsoft changed its method of counting, to almost 250 million *monthly* active users in July 2021.<sup>7</sup>

In our research on the use of Teams in organizations, we have seen:

- Several use cases for adoption**  
 Supporting employees working from home was the most important reason for embracing Teams in 2020 (77% of organizations), followed by interacting with customers and clients (45%) and working with supply chain partners (37%).
- Intent for enterprise-wide use**  
 Four out of five organizations intend to enable Microsoft Teams for use enterprise-wide.
- Teams usage is at 80% or 90% of email users**  
 The number of people using Teams in an organization ranges between 80% and 90% of the number of people using email. While not all employees use email, the majority of those who use email also use (or are licensed for) Teams.

Teams is being used for much more than just chat conversations, however. The rate of people using video in calls doubled during the pandemic and video call usage increased ten times.<sup>8</sup>

### ADOPTION OF SLACK

Slack claimed 12 million daily active users of its work chat service in September 2019, with more than half representing paid seats, but has not provided an updated number since then.<sup>9</sup> The latest number from Slack is 12.5 million simultaneously connected users in late March 2020.<sup>10</sup> This is a different metric from daily active users because only a single action during any 24-hour period is required to be counted as a daily “active” user, while the bar for simultaneously connected users is much higher. Slack was acquired by Salesforce at the end of 2020—the acquisition was finalized in July 2021—adding to a wide suite of cloud apps offered by Salesforce and gaining access to its international direct and indirect sales channels, which will drive adoption beyond what Slack was able to accomplish as an independent entity.<sup>11</sup> In organizations that use Microsoft 365, it is not uncommon for the sales, marketing, and service organizations to use the Salesforce stack instead for tracking opportunities, managing customer relationships, optimizing service, and more. That stack now includes Slack.

*The adoption of Microsoft Teams, Slack, Zoom and other tools has increased significantly over the past 18 months.*

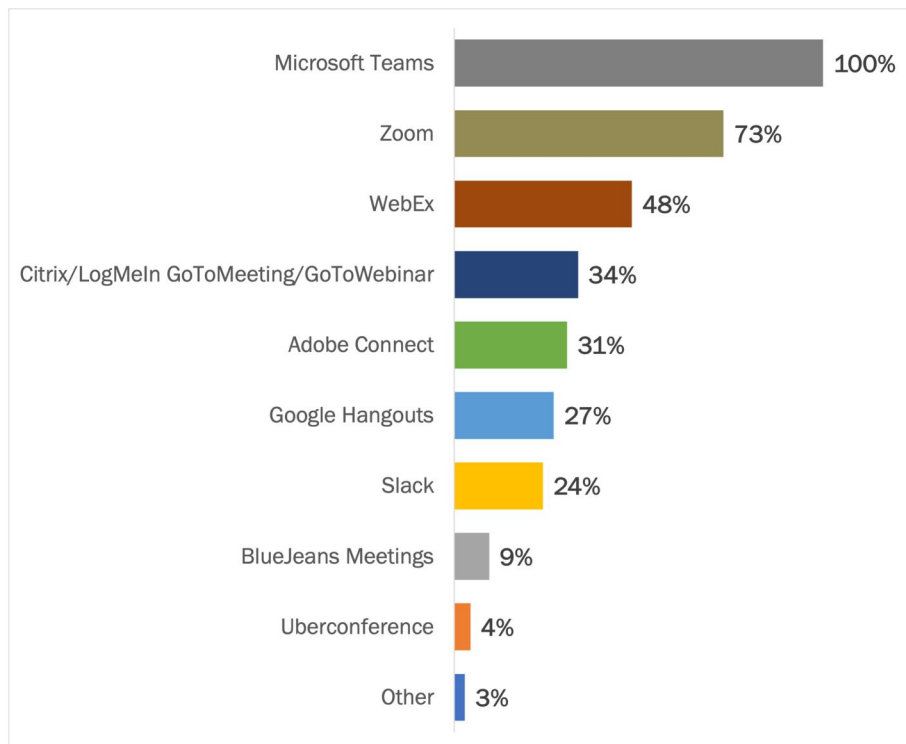
### ADOPTION OF ZOOM

Zoom is widely viewed as a convenient, reliable, and easy-to-use service that encompasses video chat, meetings, webinars, and phone capabilities. Prior to the pandemic, Zoom had become the most used video conferencing service<sup>12</sup> and, by late 2019, was being used by approximately 10 million people each day for online meetings.<sup>13</sup> Once the pandemic began, usage surged to 200 million daily meeting participants for remote working and learning in March 2020. Within a month, Zoom claimed 300 million daily meeting participants,<sup>14</sup> and by the end of 2020, 350 million people each day joined a Zoom meeting.<sup>15</sup> Among organizations with Microsoft 365 available, people frequently prefer Zoom for online meetings with external participants rather than expecting other people to use Teams.

### HEAVY RELIANCE ON MORE THAN JUST MICROSOFT 365

Organizations use multiple tools in parallel and combination, and many organizations rely heavily on more than just the Microsoft 365 stack. In our recent survey on the use of Microsoft Teams in organizations, all organizations made use of Teams and a variety of other tools as well, led by Zoom (73% of organizations) and WebEx (48%). At organizations with Microsoft 365 and Teams available, Zoom is often used in parallel for online meetings due to its simplicity, ease of use, and reliability. In the survey, four out of ten organizations used three or more of the additional tools listed in Figure 1.

**Figure 1**  
**Usage of Other Tools Similar to Microsoft Teams**  
 Percentage of respondents



Source: Osterman Research (2021)

*Almost all organizations use Microsoft Teams and other similar tools in parallel.*

## THE IMPLICATIONS FOR EDISCOVERY

The adoption of Microsoft Teams, Slack, Zoom and other new tools for collaboration has significant implications for eDiscovery and information governance, including:

- Data subject to eDiscovery created in multiple tools**  
Organizations are using a heterogenous collection of communication tools, which must all be captured and available for eDiscovery and similar tasks. The days of email only are long gone.
- Multiple data types in Teams increases the complexity of eDiscovery**  
Microsoft Teams offers a buffet of tools for communicating with others, including text-based conversations, emojis and reactions, online meetings with voice and video sharing, whiteboards, and more. Capturing and preserving more than just text-based conversations is becoming increasingly important.
- Processing links to files, not email attachments**  
Modern tools enable people to share links to files, rather than attachments. How do legal teams identify the content in the referenced file when the link is shared, and how do they account for content changes over time? The simple historical reconstruction of email attachments over time is not available with modern collaboration tools.
- Relying on eDiscovery capabilities built into each tool does not work**  
While some modern collaboration tools offer native built-in eDiscovery and information governance capabilities, not all do. Native tools for eDiscovery often lag behind the addition of new productivity features. Regardless, having to use multiple eDiscovery tools with varying capabilities and approaches exposes an organization to uncaptured data, systematic blind spots, and ultimately the charge of spoliation.
- Growing data volumes from Microsoft Teams**  
Data volumes are growing as employees adopt Microsoft Teams and the increased use of new video and audio features have an exponential impact on data volumes. More employees using Teams results in growing volumes of data that may be subject to eDiscovery and information governance requirements, increasing the complexity, cost, and time of eDiscovery processes.
- Unified search across multiple tools**  
The ability to search across conversations created in multiple tools is increasingly important because employees can divide surreptitious communications between tools and channels. Unified search across multiple tools helps to identify instances of new evasive communication techniques.

*Using multiple eDiscovery tools with varying capabilities exposes an organization to uncaptured data, systematic blind spots, and ultimately the charge of spoliation.*

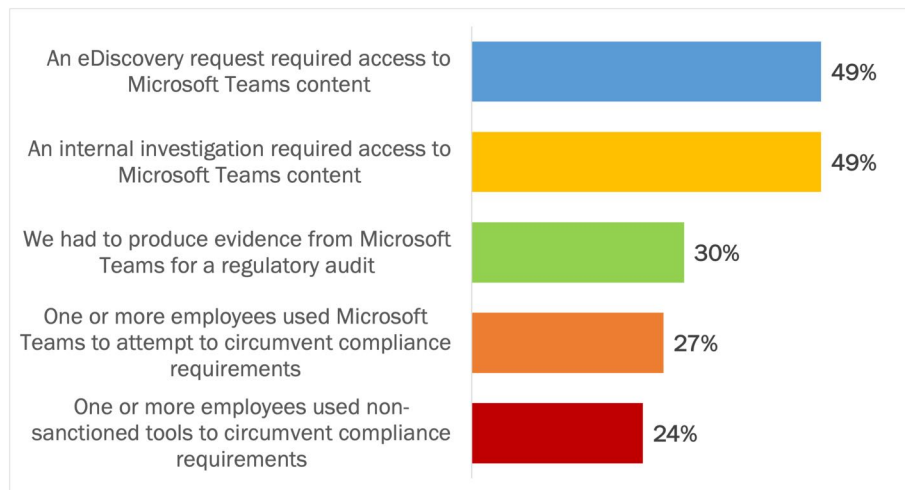
## eDiscovery and Internal Investigations

Communication and interaction data in Microsoft Teams and other modern tools is needed for eDiscovery and internal investigations. In this section, we look at what's happening in organizations today.

### INCIDENTS THAT REQUIRE ACCESS TO TEAMS DATA

Organizations are already experiencing incidents that require access to content created and stored in Microsoft Teams, including eDiscovery requests, internal investigations, and regulatory audits. Over the past year, 75% of organizations have experienced at least one type of incident, with just under 50% experiencing two or more of the incident types. See Figure 2.

**Figure 2**  
**Incidents Over the Past 12 Months**  
Percentage of respondents



Source: Osterman Research (2021)

Responding to an eDiscovery request and informing an internal investigation tie for first place. Although eDiscovery requests carry external legal weight and legal consequences, the frequency of both types of incidents will be different at most organizations. Being subjected to an eDiscovery request is something that should happen a lot less frequently—on the order of 10-50 times less frequently—than needing accurate, comprehensive, and current data to inform an internal investigation.

A quarter of organizations have been able to detect deliberate insider actions by employees to circumvent compliance requirements, or stated more broadly, to hide the true nature of their communications. A tool like Microsoft Teams offers multiple ways for employees to cover their tracks, such as creating a chain of benign messages dispersed across multiple channels, sending but then editing or deleting messages, using tools in Teams that are not captured by native eDiscovery capabilities, or using Teams in combination with other messaging channels. People have proven adept at finding creative ways to attempt to conceal their tracks when necessary.<sup>16</sup> While a quarter of respondents had the optics to detect such insider actions, it is likely that many other organizations have also experienced insider actions which have gone undetected.

**75% of organizations needed to access Teams data in the last 12 months for eDiscovery, internal investigations, and other requirements.**

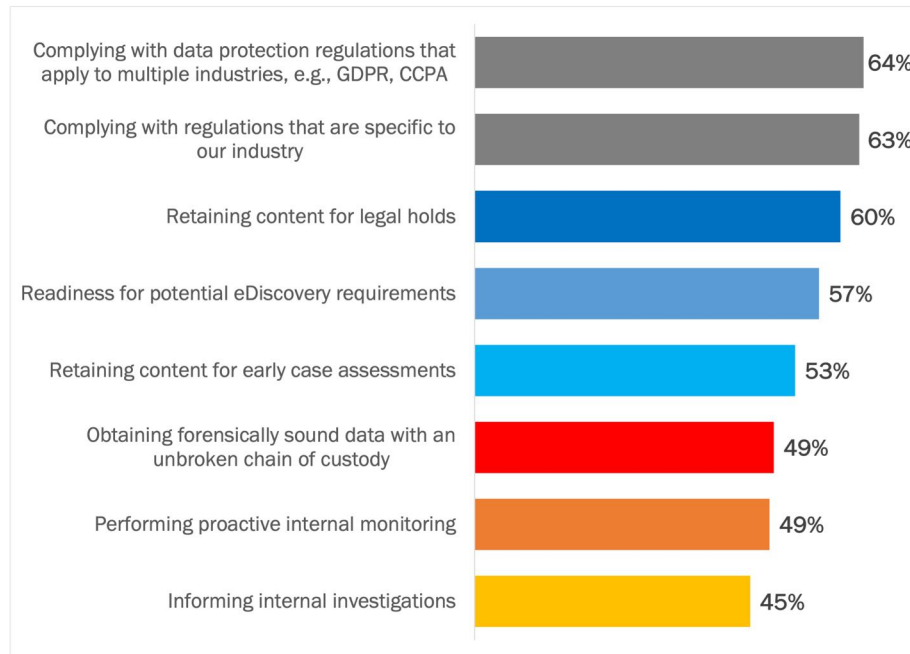
### THE IMPORTANCE OF LEGAL HOLDS AND EDISCOVERY

Two compliance issues rank as the most important drivers for information governance of Teams data, but organizations see the importance of a cluster of legal hold, eDiscovery, and internal investigation capabilities which follow the externally imposed compliance issues. See Figure 3.

Figure 3

#### Information Governance Drivers for Microsoft Teams

Percentage of respondents indicating “Very important” or “Extremely important”



Source: Osterman Research (2021)

In looking at the answers to this question:

- There is a similar pattern of response for many organizations**  
 49% of organizations said that five or more of the eight reasons were very or extremely important. For 26% of respondents, all eight reasons were very or extremely important.
- Organizations in some industries gave higher ratings to the drivers**  
 Organizations in life sciences gave the highest ratings for legal holds (83%), eDiscovery (83%), and early case assessment (67%), all of which are higher than the cross-industry averages in Figure 3. Organizations in financial services and insurance gave the second and third highest ratings; for example, 73% of financial services organizations rated eDiscovery as very or extremely important, and 77% of insurance organizations did the same for legal holds.
- There is a disconnect on internal investigations**  
 Informing an internal investigation is ranked as the least important driver for information governance in Teams yet is the first-equal actual incident type. There is a disconnect between how important it is in theory and practice.
- Don't forget the use of other tools, too**  
 While Microsoft Teams is an important tool being used by organizations, the drivers above apply more broadly to whatever tools are being used.

*Retaining content for legal holds and being ready for eDiscovery requirements are two key drivers for information governance of Teams data.*

## Weaknesses in Native eDiscovery Capabilities for Microsoft Teams

Microsoft offers bundled eDiscovery capabilities for Microsoft Teams in its higher-priced plans. In this section, we evaluate the weaknesses of these capabilities.

### NATIVE EDISCOVERY TOOLS REQUIRE THE HIGHER-PRICED PLANS

The higher-priced Office 365 and Microsoft 365 plans are required to gain access to native eDiscovery capabilities. The Microsoft 365 plans for enterprise (and equivalent plans for government customers) bundle the Office 365 collaboration, productivity, security, and compliance capabilities with advanced mobility, security, and directory capabilities. Microsoft offers two versions of eDiscovery depending on which plan is licensed:

- Core eDiscovery in E3 plans for Office 365 and Microsoft 365**  
 People holding eDiscovery and compliance rights can search for content across Office 365 applications. Core eDiscovery, including capabilities for legal hold and content export, enables searches to be organized into cases and assigned to case owners and members for limiting access to sensitive information. Retention policies can be created to retain chat and message content in Microsoft Teams.
- Advanced eDiscovery in E5 plans for Office 365 and Microsoft 365**  
 The E5 plans in both Office 365 and Microsoft 365 provide access to Advanced eDiscovery, an enhanced eDiscovery offering based on technology acquired from Equivio. The current version of Advanced eDiscovery includes analytics on search results, tagging using artificial intelligence, conversation threading, and the ability to import content from other modern tools into Office 365 for inclusion in eDiscovery cases.

Although the Core eDiscovery product provides the foundational capabilities for eDiscovery, its capabilities are insufficient for organizations working across modern collaboration tools because it does not support third-party applications. Customers must upgrade to the E5 plans to gain access to Advanced eDiscovery to import content from third-party applications. The E5 plans are roughly 75% more expensive than the base E3 plans, representing a significant uplift in cost.

### NATIVE EDISCOVERY TOOLS EXCLUDE TEAMS CONTENT

When an eDiscovery search in Microsoft 365 is executed for content in Microsoft Teams, certain content is excluded from the search results even if full native retention capabilities in Microsoft 365 are being used. The inability to find responsive content should be of high concern to organizations conducting eDiscovery searches, facing legal proceedings, and carrying out internal investigations. Teams content that is invisible to Microsoft's native eDiscovery search capabilities includes:<sup>17</sup>

- Edits to messages in Teams chats and channels, unless users are on legal hold**  
 Users can state unauthorized information in the first version of a message and then edit it to say something else after the recipient has read and acted on the initial version. Unless all users are perpetually on legal hold, such edits are invisible in eDiscovery searches.

*Unless all users are perpetually on legal hold, edits to messages in Teams chat and channels are invisible in eDiscovery searches.*



- **Reactions such as likes and hearts**

Newer non-textual methods of signaling agreement (and hence proving complicity) are excluded from recreated chat and channel conversations, therefore enabling only partial reconstruction of the thread and context of a conversation. eDiscovery conducted using Microsoft 365 will exclude potentially responsive content by design.

- **The content of linked files and documents**

Links to files and documents shared in a Teams chat or channel conversation are discoverable, but not the content of the file or document. Figuring out what the linked file or document stated requires manual work to iterate through the version history of the linked file—assuming versioning history is available and even whether the linked file or document itself has not been deleted. This is a costly and time-consuming manual process to find potentially responsive content.

Teams generates a wide variety of content types, and the native retention capabilities for Microsoft Teams preserves much of it for eDiscovery and content search. Not everything is captured which creates gaps in what is collected for eDiscovery purposes, and in addition, the ignored content types provide space for employees to communicate inappropriately or with malicious intent.

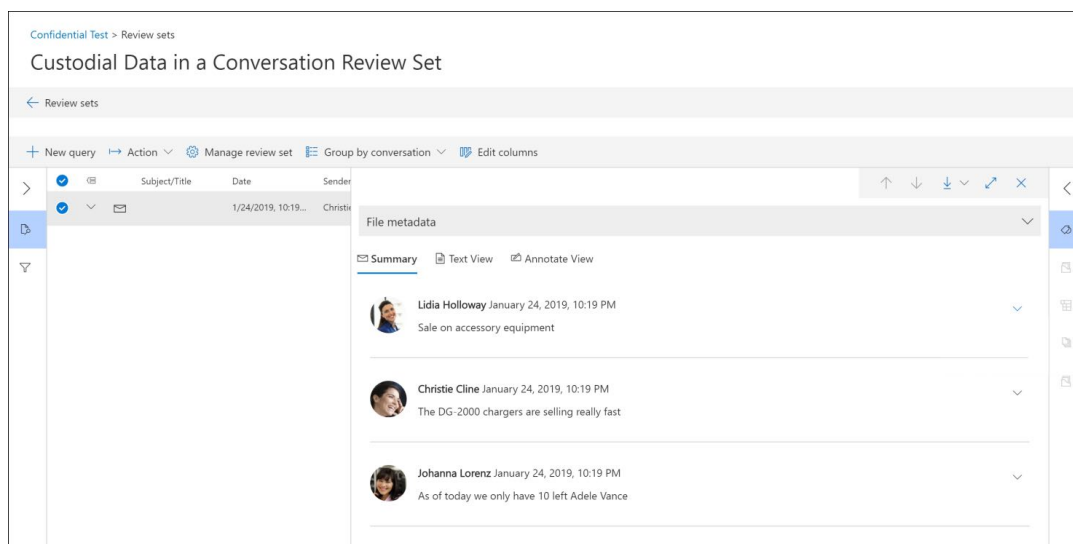
### NATIVE EDISCOVERY SEARCHES DO NOT RECREATE A NATIVE PRESENTATION

Core eDiscovery in the E3 plans shows search results as single messages with no concept of replies and a reply hierarchy in a conversation. Advanced eDiscovery in the E5 plans includes “conversation threading,” a capability for capturing the conversational structure in a Teams chat or channel conversation. Threaded conversations reconstructing the back-and-forth of a conversation are presented using a flat structure, rather than the native nested reply hierarchy used in Microsoft Teams. The interface used to display the threaded conversations also looks completely different to the native Teams interface. See Figure 4.

**Conversations are not presented using the native nested reply hierarchy of Teams nor the native Teams interface.**

Figure 4

Threaded Conversations in Advanced eDiscovery Do Not Look Like Teams



Source: Microsoft (2021)<sup>18</sup>

### NATIVE SEARCH IS SLOW

Microsoft 365 re-indexes all identified data locations for a custodian in Microsoft 365 each time an eDiscovery search is executed. Content re-indexing adds time to each search process, delaying the ability to identify potentially responsive content. In addition, search results cannot be pre-processed using Microsoft's native eDiscovery offerings and must be exported first to a third-party eDiscovery review tool—adding more time and further delaying the process.

### COMPLEX PROCESSES FOR IMPORTING THIRD-PARTY CONTENT

Organizations licensed for Advanced eDiscovery can import third-party content into an Advanced eDiscovery case. Importing third-party content has a range of complexities which increases time and cost, for example:

- Content must be pre-organized before uploading**  
 Third party content must be pre-organized before it is uploaded to Advanced eDiscovery, using a defined naming structure and hierarchy. Advanced eDiscovery cannot infer linkages to existing Microsoft 365 user accounts, meaning that an administrator must curate the content before uploading.
- A separate data storage subscription is required for Azure**  
 Third-party content must be uploaded into a storage account in Microsoft Azure, not a storage destination in Microsoft 365. This must be pre-configured and licensed before using.
- No option for repeated processing of new content**  
 After Advanced eDiscovery has processed content uploaded to Azure, any further third-party data can only be processed following a new upload to another Azure storage location. Adding new content to the initial upload destination is not offered.

Connectors can also be established for automatically importing non-Microsoft content into Microsoft 365. This content is processed using the archiving capabilities in Microsoft 365, with content that can be linked to an individual being converted into an Exchange email format and stored in the Exchange mailbox for the relevant individual. Microsoft offers several native data connectors to link with Bloomberg, Facebook, and LinkedIn (and a few other services), but most modern collaboration and social tools are excluded from Microsoft's native list. Organizations must therefore work with vendors of third-party connectors and set up the licensing and connectors required for importing third-party content into Microsoft 365. The resulting multi-step process adds cost, complexity, and risk—e.g., failed import processing—to the eDiscovery workflow, and can mean problems with forensic authenticity and chain of custody for data.

### USABILITY PREFERENCES OF MICROSOFT 365 CONFLICT WITH EDISCOVERY AND INFORMATION GOVERNANCE REQUIREMENTS

It is not uncommon for users of a product to seek capabilities that optimize productive usage while conflicting with eDiscovery and information governance requirements. Recent history shows that the productivity argument more frequently wins the battle. In most cases, desired productivity features reduce friction and streamline adoption for users, although in a minority of cases, people will use such capabilities to intentionally cover wrongdoing. Examples include:

*Importing third-party data into Microsoft 365 for eDiscovery is complex and costly.*

- **Moving a channel between Teams**  
Result is that a Teams workspace always shows only current and relevant projects. Projects (in a channel) can be started on one team and easily moved to another.
- **Deleting private chat threads**  
Old and unnecessary conversations—from the user’s perspective—can be removed from the private chat window.
- **Moving conversations to different channels**  
A channel in Teams always shows only current and relevant conversations. Users do not have to worry about starting a conversation in the perfect channel initially, because it can always be moved later.

The challenge for eDiscovery and information governance is about the destruction of potentially responsive evidence. For example, moving a conversation to another channel or another Teams workspace risks loss of the wider context when analyzing conversations for eDiscovery or an internal investigation. Organizations need to meet the productivity demands as well as the eDiscovery and information governance requirements, which often requires specialized tools alongside the collaboration infrastructure.

#### **NATIVE EDISCOVERY IS COMPLEX, ESPECIALLY FOR NON-IT USERS**

The Microsoft 365 Compliance Center provides access to the compliance tools and data in Microsoft 365, including Core eDiscovery and Advanced eDiscovery depending on licensing levels. The Center is complex to use for people who are not technically savvy. Areas of concern with the usability of the Compliance Center include:

- **Lack of granularity in selecting Teams channels**  
eDiscovery searches lack the granularity needed by many companies. For example, an eDiscovery search collects conversations from all Teams channels and cannot be scoped to only collect from specific channels in which a custodian is active. This increases the volume of data produced for a search which must then be culled by a human investigator—increasing the time and cost of the eDiscovery workflow for a case.
- **Search limits increase the complexity of the eDiscovery workflow**  
Both Core and Advanced eDiscovery have limitations that increase the complexity of the eDiscovery workflow in a case. For example, only the latest 100 items from a mailbox can be previewed in Microsoft 365 for any given search—the search must be executed and the results exported to a third-party eDiscovery tool for a complete analysis by an investigator which increases time and cost. Additionally, only suffix-based wildcard searches are supported; mid-string and prefix wildcard searches are not supported, therefore increasing the number of different search words that must be explicitly included.
- **Access to eDiscovery requires IT to assign the right roles**  
The Center relies on a list of roles and role groups from Azure Active Directory (Azure AD) and the Compliance Center for assigning permissions to the different tools available through the Center. These need to be given out by the IT department, which can be a slow internal process.

*Meeting both productivity demands and eDiscovery requirements often requires specialized tools.*

# The Case for Using Third-Party Solutions for eDiscovery and Information Governance

Specialized third-party solutions for eDiscovery and information governance commonly offer better capabilities than what is provided natively in Microsoft 365. In this section, we look at the case for using third-party solutions.

## SINGLE PLATFORM FOR ALL DATA SOURCES

Third-party solutions offer a single eDiscovery and information governance platform for collecting, searching, and processing responsive and potentially responsive content from across multiple tools, including Microsoft Teams. The specialized nature of these tools enables them to capture data types from Teams for eDiscovery that are ignored by Microsoft's native capabilities.

Characteristics of this approach generally include:

- Capture of more data types**  
 Regular and repeated ingestion of data from key applications enables time-based comparisons to be made for identifying edits, deletions, and other modifications, e.g., edits to messages in channels in Teams without requiring all users having to be on legal hold perpetually, emojis and reactions, etc.
- Separate copy of key application data**  
 A separate copy of all key application data is captured and stored in a centralized platform that is different from any of the applications which were used to create the data originally. This approach creates a secure digital memory with tight restrictions on access for the purposes of eDiscovery, internal investigations, and other information governance tasks.
- Unified search**  
 The ability to search across all key application data for eDiscovery, early case assessment, internal investigations, and other compliance related searches (e.g., to respond to data subject access requests under GDPR).
- Unified information governance**  
 A unified policy engine for classifying, protecting, and setting retention timeframes on all key application data. Under this approach, the originating system becomes an additional element of metadata for determining classification and retention timeframes, not a limiting factor of capability.
- Optimizes source applications for productivity**  
 Data in source key applications can be deleted and manipulated to optimize presentation and use for productivity, communication, and collaboration—because another copy has already been captured and stored in the third-party centralized repository for eDiscovery and information governance tasks. For example, in source key applications, conversations can be moved between channels, disposed of using native retention capabilities, deleted, and otherwise manipulated to support the current needs of people and projects.

*Specialized third-party solutions for eDiscovery and information governance commonly offer better capabilities than what is provided natively in Microsoft 365.*

- Separate data store**  
 A comprehensive approach to preventing edits, unauthorized deletions, and other interference in the authenticity of captured data, by using a data store that is separate to the source key applications. Microsoft relies on retention policies to prevent edits and deletions, but it is not without risk, e.g., an IT administrator at KPMG made a mistake when changing a retention policy and permanently deleted the Teams chat histories for 145,000 users.<sup>19</sup>
- Consistent capabilities for eDiscovery and information governance**  
 Centralizing all key application data in a single system offers consistent capabilities for eDiscovery and information governance, rather than a disjointed and uneven distribution of capabilities that vary with source applications and future vendor roadmaps. Organizations can change the mix and type of source applications—switching from Dropbox to Box, for example, or Google Workplace to Microsoft 365—without having to worry about degrading the firm’s eDiscovery and information governance posture. Third-party solutions offer consistent capabilities across all key applications, even when key applications are no longer used.
- Enduring data management when legacy systems are retired**  
 Changes in the composition of key applications are fluidly handled with a third-party platform for eDiscovery and information governance because after data has been ingested from the source application, legacy systems can be decommissioned without affecting access to historical data. This is of elevated importance in the era of cloud services whenever the provision of functional service is intricately tied to how data is managed. In the absence of a third-party platform for eDiscovery and information governance, organizations must pay to keep legacy cloud services in operation to retain access to historical data for eDiscovery, internal investigations, and other legal processes.

### OFFSITE DATA STORE MITIGATES RISK OF FAILURES IN SOURCE APPLICATIONS

Using a third-party solution for eDiscovery and information governance mitigates the risk of failure and non-availability of source applications, along with the impacts of human error in configuration and administration. This means, for example:

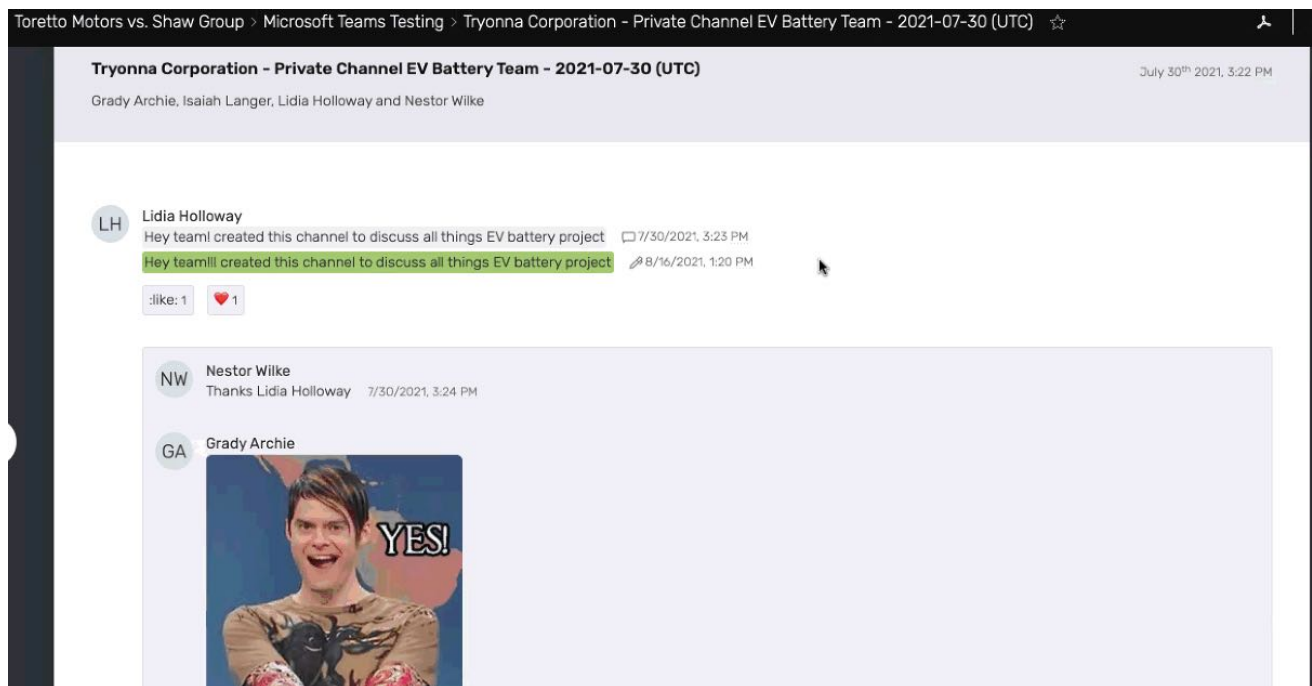
- Mitigates the risk of failure**  
 Coding conflicts, power outages, cyberattacks, and other causes of system failure and non-availability in source applications does not impact the availability of eDiscovery capabilities and previously captured data. eDiscovery case managers and teams can continue with searching, tagging, and reviewing content.
- Mitigates the risk of human error**  
 Human error in configuring and operating source applications does not impact the historical data stored in the third-party solution. For instance, the misconfiguration of the Teams retention policy by an IT administrator at KPMG—as mentioned previously—would not have also deleted the historical data stored in the third-party system.

*Centralizing all key application data in a single system offers consistent capabilities for eDiscovery and information governance.*

### TEAMS-LIKE INTERFACE FOR EDISCOVERY SEARCHES

Third-party solutions can present eDiscovery search results in an interface that looks almost exactly like Microsoft Teams, simplifying user adoption and recreating the original nuance that existed when the conversation was held. This includes conversational hierarchy using nested replies, the display of Teams reactions, the highlighting of edits and deletions of Teams messages alongside the original version, and time-based processing of linked files and documents. See Figure 5.

Figure 5  
eDiscovery Search Results Recreated to Look Like the Teams Interface



Source: Onna (2021)

### SOLVES INFORMATION GOVERNANCE CONCERNS WITH MICROSOFT

A recent survey of organizations highlighted several significant concerns about information governance in Microsoft 365.<sup>20</sup> These disconnects include:

- Business managers are unaware of information governance implications**  
 While 59% of senior IT managers claim to understand all the long-term implications of using Microsoft 365 for data management, only half as many senior business managers have the same understanding. Senior business managers are less aware of the business risks and concerns of using Microsoft 365 for data management. In comparison with senior IT managers, many fewer senior business managers have signed off on a complete business analysis.
- Business and IT managers are unsure how to retrieve data from Microsoft 365**  
 Less than half of senior IT management have a detailed exit plan for getting all data back from Microsoft 365, and only one in five senior business managers have the same. If, as many organizations assert, data is the lifeblood of their organization and the source of competitive advantage, this represents a significant risk, major oversight, and alarming area of weakness.

- Most organizations believe Microsoft has not figured out long-term data management in Microsoft 365**  
 Most organizations express high levels of concern with Microsoft's plan for long-term data management. Concerns include how Microsoft will manage both Microsoft 365 data and third-party data over the long term (77% of organizations are concerned), how Microsoft will manage customer data over the long term (75% concerned), and the complementary use of third-party data platforms alongside Microsoft 365 (71% concerned). See Figure 6.

Figure 6  
Long-Term Data Management Concerns with Microsoft



Source: Osterman Research (2021)

Using third-party solutions for long-term data management alongside Microsoft 365 offers a better approach for organizations because data is held separately from Microsoft and Microsoft 365. This gives organizations a greater say in the long-term information governance of their data and offers a solid exit strategy under their control.

## Conclusion

The era of using modern tools for collaboration calls for organizations to critically assess how they meet their eDiscovery and information governance requirements across multiple tools. While some modern platforms offer native capabilities for eDiscovery and information governance, these are usually lacking in comparison to third-party solutions. The latter offer enhanced capabilities for data capture, search, and production, elevated assurance for long-term data management, and flexibility so that organizations are not held ransom by platform vendors.

**Third-party solutions give organizations a greater say in the long-term information governance of their data and offer a solid exit strategy under their control.**



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