

1. Prior to introduction to M365, did any assessment of data and retention practices take place? If, yes, please expand? How does an early assessment of data storage impact your chosen process and scope of work?
2. What approaches were considered for introducing M365 IG retention?
3. Working out of an M365 environment, what approach was recommended and why?
4. If IG retention was introduced, at what stage did you introduce it? For example, was it introduced once people were migrated to M365, on migration day 1, or at a later date?
5. How was M365 IG retention introduced and by whom? What team(s) owned the transformation?
6. How has M365 IG retention changed over time?
7. What training or coaching was rolled out to support teams?
8. What effect does daily use of M365 IG retention have on typical users, management, leadership?
9. Did you have any external support in introducing M365 IG retention? If so, who and at what cost?
10. If you introduced M365 retention, did you introduce it for shared data only or shared data, plus Exchange & OneDrive?
11. If any key lessons or takeaways were captured in introducing M365 retention – can you share them?
12. Can any plans be shared to show what areas were impacted in delivering M365 retention?
13. What challenges was the organisation faced in selecting an approach for M365 retention?
14. What are the most effective communication strategies for involving end users with the transformation? How was comms prepared and delivered? Can you share examples?
15. What are the key advantages and disadvantages of introducing your approach?
16. How effective has your chosen approach been?
17. How can your chosen approach to M365 retention be improved?
18. How does M365 IG retention influence data management for shared data and emails?