



Gold  
Microsoft  
Partner



# CloudCompass

Helping companies manage continual Microsoft 365 product updates that impact e-discovery, compliance and information governance programs.

# ADVISORY SERVICES

## MISSION

To serve as trusted advisors to our clients, delivering solutions to complex business problems at the intersection of law and technology

## TEAM

- 45+ consultants across the US and EMEA
- Subject matter experts, product experts, technologists, lawyers, former regulators

## FOUR KEY PRACTICE AREAS



INFORMATION GOVERNANCE



CLOUD SERVICES



EDISCOVERY



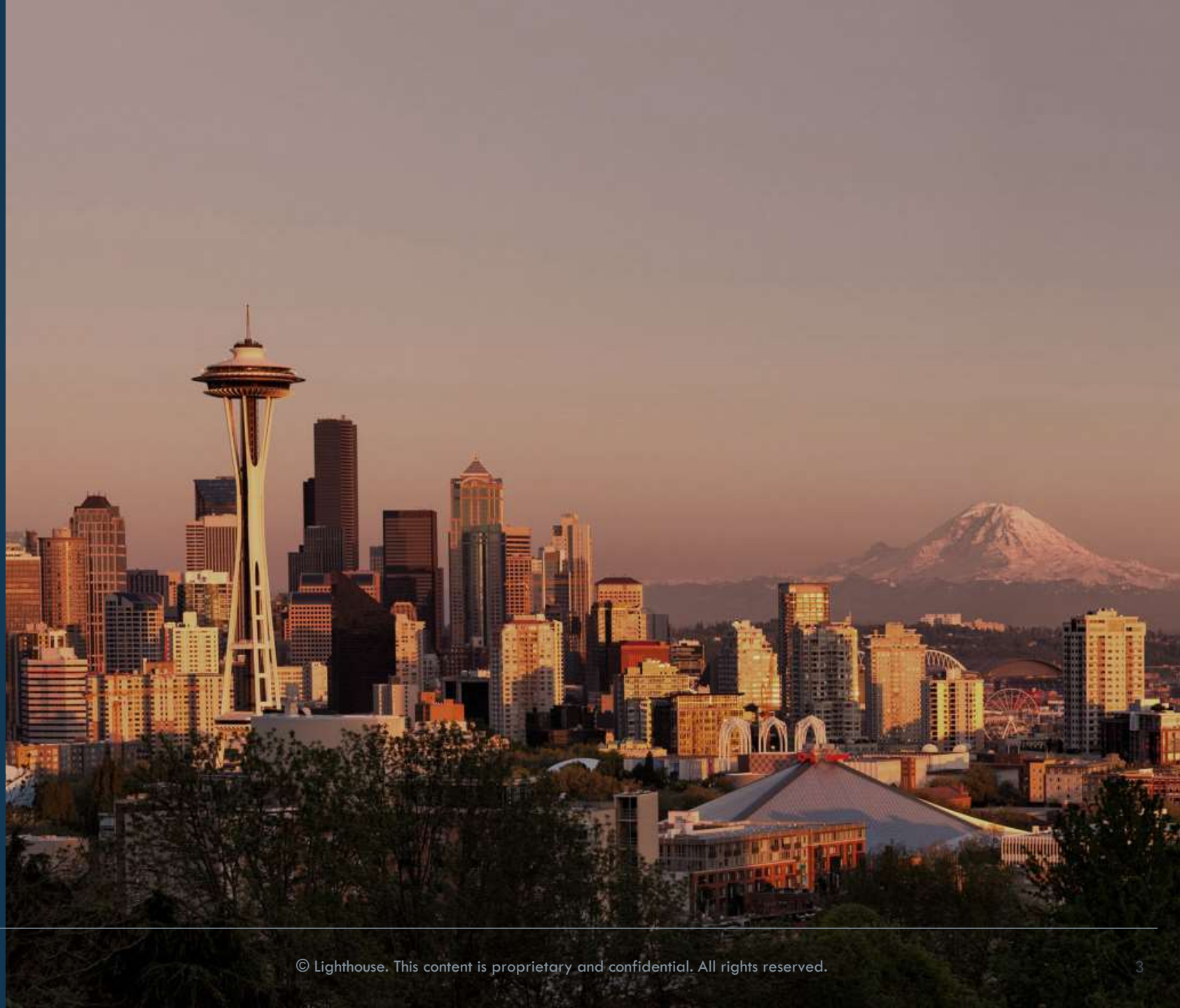
EXPERT SERVICES

# Lighthouse + Microsoft

## 25 YEARS OF LEGAL & COMPLIANCE

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- We are Microsoft's #1 Legal and Compliance Partner for M365 Advisory Services
- We are Microsoft's primary eDiscovery partner (giving us unique insight into Microsoft data)
- We hold key advisory positions: Microsoft's Partner Advisory Council, Compliance and Privacy partner programs
- We work closely with engineering team to address issues with features impacting legal and compliance





# Timing and Frequency of SaaS Updates



Released 2003  
**Windows Server 2003**



Released 2012  
**Windows Server 2012**

● = Legal & Compliance Review



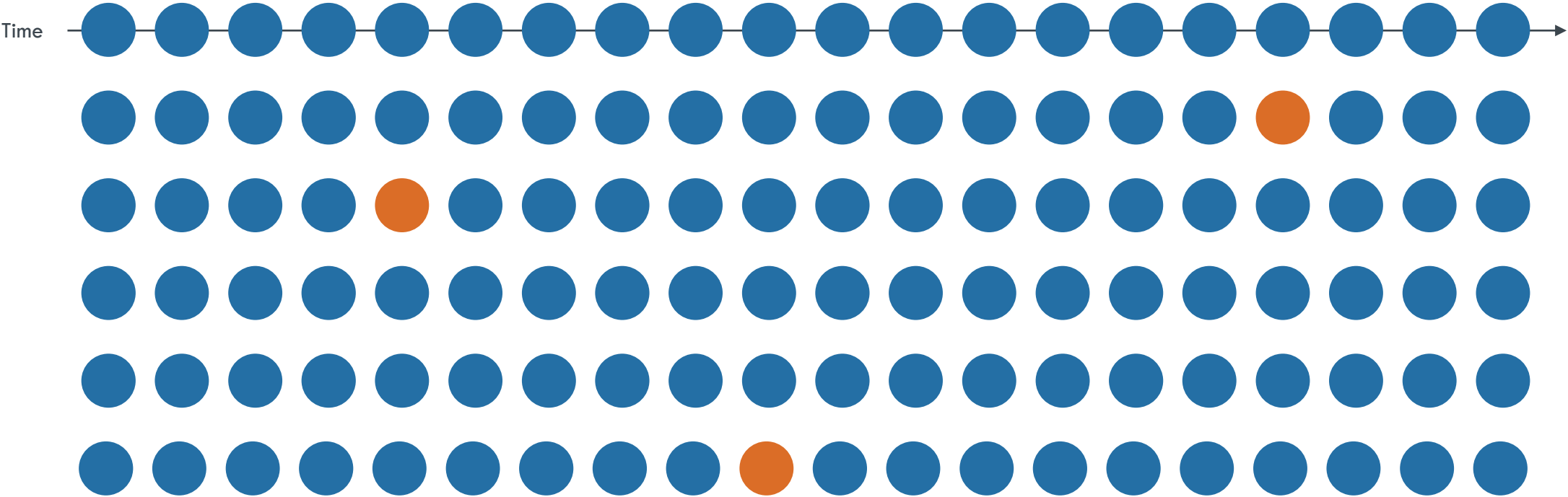
**The CADENCE of change with SaaS poses change management challenges**

THE MARKET CHALLENGE

# Finding the Needle in the Haystack



- = Legal & Compliance Review
- = Impacts to Legal & Compliance



Only 5% of updates materially impact legal and compliance but review is required for every update.

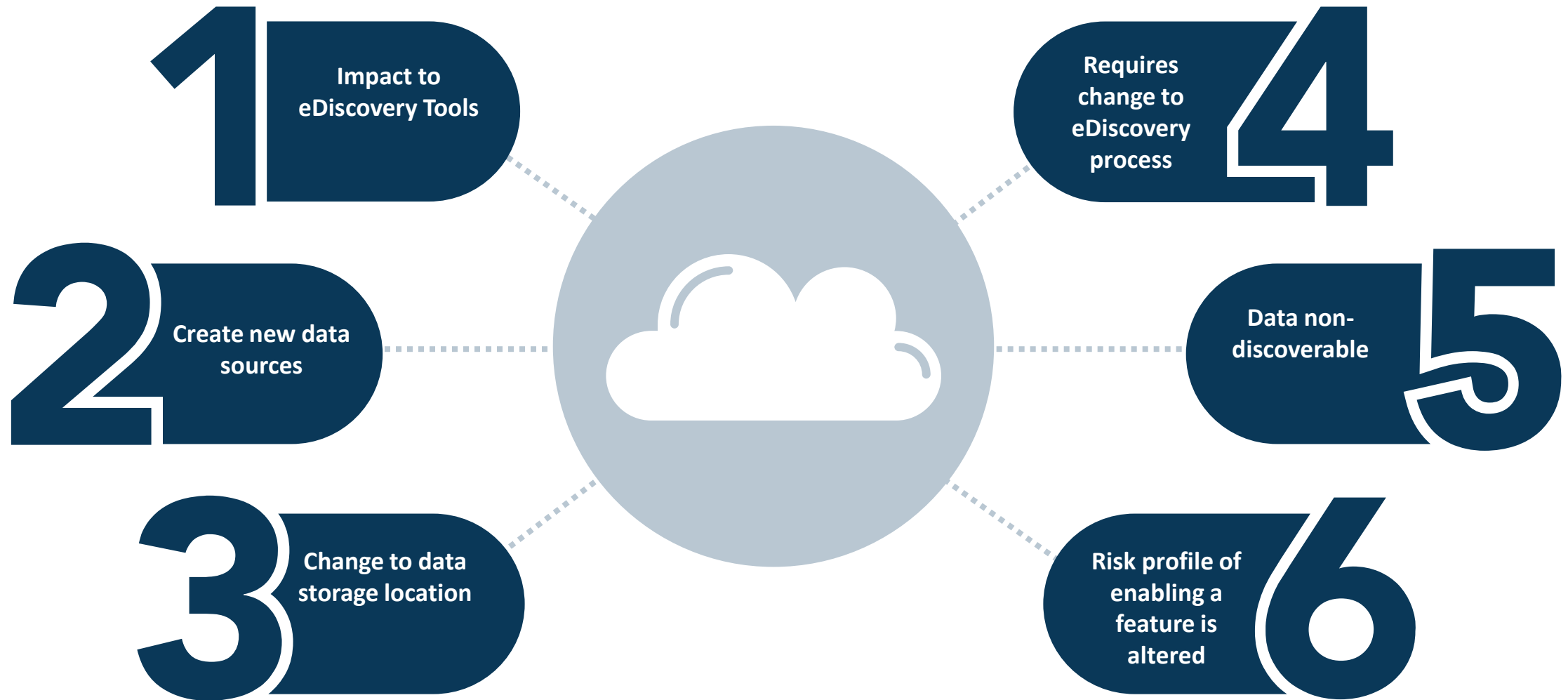
## THE MARKET CHALLENGE

# Most governance programs are not designed to support full range of needs

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## Programmatic identification of updates that matter



## THE SOLUTION

# Scaled expert driven analysis + custom assessment and support

## LIGHTHOUSE CloudCompass

For Microsoft 365

### A SUBSCRIPTION TO PEACE OF MIND

- With CloudCompass you'll know which M365 software updates may impact legal and compliance workflows, and what to do about them.
- Analysis and testing powered by Lighthouse's M365 product experts and legal and compliance SMEs backed by a rigorous methodology to produce reliable results.
- Custom assessment of your M365 configuration to identify overall health and identify areas of potential risk.
- Access to customizable consulting support hours.



## FEATURE UPDATE #1

SharePoint sites can now be moved using PowerShell or “Swap Site” button in the administration center.

**Impact:** If a SharePoint site under legal hold is moved or swapped, the site (and its data) will be removed from the scope of the hold policy. A new legal hold policy must be created to ensure the site remains on hold.

**Risk:** Unless a new legal hold policy is created against the moved site, there is a real risk that data will be altered or deleted, resulting in a potential failure to preserve data.

### WITH CLOUDCOMPASS:

**Outcome:** Legal is informed of the feature update, impact and Lighthouse’s recommendation to mitigate risk. Legal quickly implements a process to verify the legal hold status of a site prior to it being moved or swapped so it can re-apply the legal hold policy against the new location.

## FEATURE UPDATE #2

Within AeD, one can now retain, preserve and collect the precise version of a document sent via reference link (aka “modern attachment”).

**Impact:** Previously, the retention, preservation and collection of “modern attachments” was limited because there was no way to associate the message with the referenced document (which is “live”). Collection was limited to the most recent version of the document, not necessarily the one that was transmitted with the message.

**Risk:** This feature mitigates prior e-discovery risk associated with versioning by enabling the retention, preservation and collection of messages + attachments (including the precise version transmitted).

### WITH CLOUDCOMPASS:

**Outcome:** Legal is informed of the feature update, impact and Lighthouse’s recommendation to mitigate risk. Legal – through its M365 Governance Team – enables this feature and updates its SOPs to account for use cases involving the need to preserve and collect “modern attachments”. For regulated companies required to retain communication (and attachments), this removes a major hurdle for native retention/archiving.

# Solution Overview

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CloudCompass helps teams' manage, mature and maintain Microsoft-centric eDiscovery, compliance, and information governance programs, despite on-going and voluminous platform updates.



## Annual Health Check

Review and validation of your legal and compliance workflows by legal and technology experts.



## R2 Report™

Provides a risk assessment , or opportunity to expand feature adoption, and recommended actions for every M365 release on the roadmap.



## Expert Consulting Hours

Supplement your internal team with a block of 35 hours to use throughout the year

## Common ways organizations utilize their CloudCompass subscription

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1. **Program Maturation & Upskilling** – Use your CloudCompass subscription to guide internal team learning and growth based on real-world information related to the capabilities and functionality of Advanced eDiscovery.
2. **Proof of Due Diligence** – A CloudCompass subscription demonstrates reasonable effort to maintain compliant processes and workflows in the case of regulatory scrutiny, audit, or ediscovery failure related to deficiency for software related causes.
3. **Maintenance & Quality Control** – Use your CloudCompass subscription to drive regular maintenance cadence / review of key workflow and automation – prevents “set it and forget it” mentality related to workflows within Microsoft 365 with ediscovery impact.
4. **Access to Experts** – The additional hours that come as part of CloudCompass subscription provide companies the ability to access as-needed, customized support related to M365 that is flexible, and purpose can be determined as need arises.

## EVALUATE

# Annual HealthCheck

Customized assessment of your organization's legal and compliance workflows to ensure alignment to best practices and identify opportunities for improvement.



### Work with You

- Review your current utilization of M365 tools
- Internal stakeholder questionnaire
- Key use cases



### Assess Workflows

- Preservation
- Collection
- Search
- Review
- Export



### Make Recommendations

- Identify and resolve issues in current operating model
- Validate current processes align to leading edge standards

Ongoing review and report on every new M365 software update to identify those which may have legal or compliance impacts and what actions should be considered.



### Risk Rating

We analyze every change based on how it may impact legal and compliance workflows assigning an overall risk rating for each



### Impact Assessment

We include specifics on the potential impact of each update and considerations based on deployment and configuration details



### Recommended Actions

We provide detailed recommendations with specific steps to take to ensure legal programs can stay compliant



## Expert Consulting Hours

Continuous, personalized improvement through access to our team of industry leading experts who provide custom support in the areas you need it most.



### With your hours you get:

- On-demand hours to use when you need them most
- M365 Product Experts
- ediscovery and information governance SMEs
- Fully flexible use

### Examples of how customers use this time:

- Validate that preservation and collection workflows for Teams data are consistent with industry standards
- 1/2 day deep dive on feature updates related to modern attachments and to discuss impact on current workflows + needed modifications
- Conduct use case testing for preservation and collection of OneDrive and SharePoint data

**Every membership includes 35 hours of consulting support each year.**

“ Having access to reliable information about product updates and their impact to e-discovery is a critical aspect of managing risk associated with M365 changes. CloudCompass helps us focus our efforts on the changes that matter so we can respond quickly and effectively.

”

- Customer in the Financial Services industry

# 164% ROI: Estimated annual cost savings of \$156K with a CloudCompass subscription as compared to an in-sourced governance model (not including risk avoidance)

	FTE*	COST**	HOURS*	ADDITIONAL BENEFITS
M365 Change Discovery	0.27	\$38.5K	393	
Impact Analysis of Changes	0.18	\$25.7K	262	Health Check \$15K
Use Case Testing for eDiscovery	0.36	\$51.4K	524	+
Use Case Testing for Compliance	0.36	\$51.4K	524	Consulting Hours \$12.5K
Use Case Testing for Information Governance	0.18	\$25.7K	262	
Analysis and Recommendations	0.36	\$51.4K	524	
Documentation	0.04	\$6.43K	58	
	<b>\$250.5K</b> Avg. Internal Cost		<b>2,547</b> Avg. Hours	<b>\$95K</b> CloudCompass

# 164% ROI: Estimated monthly cost savings of \$13K with a CloudCompass subscription as compared to an in-sourced governance model (not including risk avoidance)

	FTE*	COST**	HOURS*	ADDITIONAL BENEFITS
M365 Change Discovery	0.27	\$3,212	30	
Impact Analysis of Changes	0.18	\$2,142	20	Health Check \$15K
Use Case Testing for eDiscovery	0.36	\$4,283	40	+
Use Case Testing for Compliance	0.36	\$4,283	40	Consulting Hours \$12.5K
Use Case Testing for Information Governance	0.18	\$2,142	20	
Analysis and Recommendations	0.36	\$4,283	40	
Documentation	0.04	\$535	5	
	<b>\$21K</b> Avg. Internal Cost		<b>195</b> Avg. Hours	<b>\$8K</b> CloudCompass

# LIGHTHOUSE CloudCompass

For Microsoft 365



**Annual Health Check:** Expert led evaluation of the “health” of your legal and compliance workflows every year.



**R2 Report:** Timely reporting identifying software updates to M365 that may have an impact on compliance and providing recommendations on how to mitigate, or new opportunities to expand feature adoption within your compliance and ediscovery frameworks.



**35 Consulting Hours:** Access to our expert consultants for fully customized support based on your individual needs.

# Why Lighthouse?



## Proactive Strategy

Our specialized teams keep a pulse on the technology landscape to identify and understand the potential compliance, legal, and regulatory impacts. With this knowledge, we develop pre-emptive solutions to evolve your organization's compliance, information governance, and eDiscovery programs.

## Proven Expertise

With more than 25 years of compliance, eDiscovery, and information governance experience, we provide best practices and strategies to ensure your programs surpass stringent compliance and legal requirements—all while reducing costs and mitigating risks.

## Elite Partnership

Lighthouse is a premier Microsoft partner in data discovery, spanning compliance, eDiscovery, and information governance. Our partnership is built on trust and a 20+ year collaboration that has resulted in exclusive access to product insights and roadmaps.





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Call for more information: 206.223.9690  
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Learn more: <https://lighthouseglobal.com/>