



The Conference on Information and Records Management

Microsoft Purview & Information Governance - What's New in 2025

Jim Koziol

Epiq Global

Sr. Director, Information Governance

james.koziol@epiqglobal.com







Agenda

- Introduction
- What is Microsoft Purview?
- Purview Interface
- Purview Capabilities
- Key Features
- Use Cases
- Lessons Learned/Overcoming Obstacles
- Q&A





Your Presenter



Jim Koziol
Epiq Global
Sr. Director, Information Governance
james.koziol@epiqglobal.com

Jim Koziol is a Sr. Director in Epiq's Information Governance practice, where he consults on engagements relating to Information Governance, Records Management, Data Privacy, eDiscovery and data migrations. His experience spans client-facing consulting on Microsoft technologies and leadership roles in IT, mainly within global financial services organizations. He has also worked with major software solutions providers.

Jim began his career in Microsoft technology in the late 1990s, serving as an Exchange administrator, SharePoint administrator, and Teams administrator. He has been a Microsoft Certified Trainer (MCT) since 1999 and has passed over 30 Microsoft certification exams and holds numerous other industry certifications including CISSP, IGP, CIPP-US, CIPM, and FIP.

He earned his MBA from Penn State University and holds a BBA in Finance from Dowling College in Oakdale, NY.







Microsoft Purview is a comprehensive data governance solution designed to help organizations manage and govern their data across various sources.









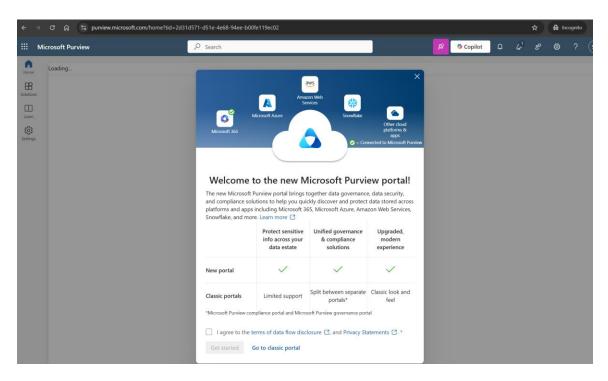






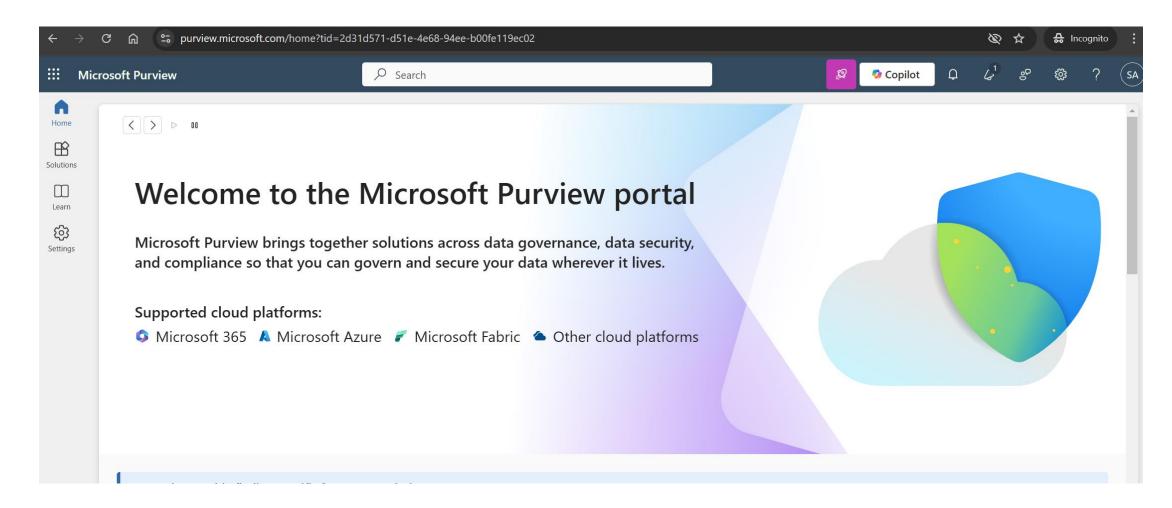






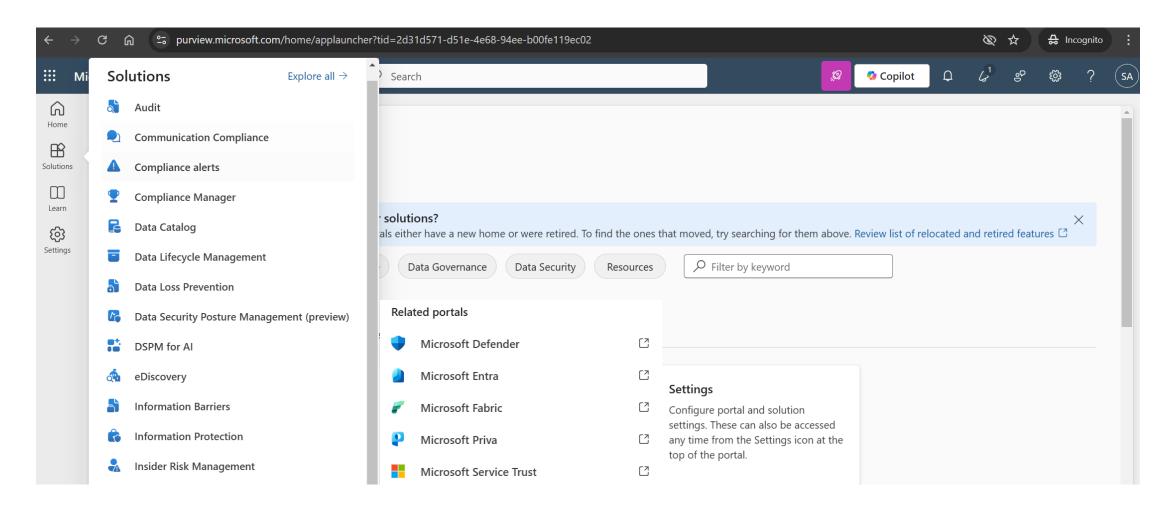
















Data Map and Data Catalog

Maximise the business value of data for your consumers by creating a unified map to automate and manage metadata from hybrid sources. This helps you manage and govern your on-premises, multi-cloud, and software-as-a-service (SaaS) data. Additional consumption costs apply.

Privacy Management

Generate actionable insights on enterprise personal data to help you spot issues and reduce risks, and to respond to data subject requests for GDPR. Additional consumption costs apply.

Data Loss Prevention

Automatically protect sensitive information from risky and unauthorised access across apps, services, endpoints, and onpremises files.

Microsoft

Purview

Solutions

Audit (Premium)

Record user and admin activity from you organisation so you can search the audit log and investigate a comprehensive list of activities across all locations and services.

Communication Compliance

Identify regulatory compliance and conduct violations such as sensitive or confidential information, harassing or threatening language, and sharing of adult content.

Compliance Manager

Reduce risk by translating complex regulatory requirements into specific improvement actions that help you raise your score and track process (ISO, NIST, GDPR, TISAX, etc.).

Information Protection

Discover, identify, classify, and protect sensitive data that is business critical, then manage and protect it across your environment.

eDiscovery (Premium)

Discover and manage your data in-place with end-to-end workflows for internal or legal investigations.

Data Lifecycle Management

Classify and govern data at scale to meet your legal, business, privacy, and regulatory content obligations.

Records Management

Use intelligent classification to automate and simplify the retention schedule for regulatory and business-critical records in your organisation.

Insider Risk Management

Detect, investigate, and take actions on critical risks in your organisation, including data theft, data leaks, and security policy violations.





Microsoft Purview Capabilities







Microsoft Purview Capabilities

- Capabilities are based on your subscription
 - https://m365maps.com/
 - E3
 - o E5
- Moving towards a consumption model





Key Features (for RM & IG)

- Records Retention
- Records Management
- Litigation Hold
- eDiscovery
- Data Classification





Key Features (Security)

- Data Loss Prevention (DLP)
- Insider Risk Management (IRM)
- Microsoft Defender for Cloud Apps (MDCA)





Key Features (Al Readiness)

- All of the Above...
- + Data Security Posture Management (DPSM) for AI





Use Cases

- Application Consolidation
- Migrating from On-Prem to Cloud
- Licensing Upgrades & Consumption
- Defensible Deletion
- Mergers & Acquisitions
- Al Readiness





Lessons Learned

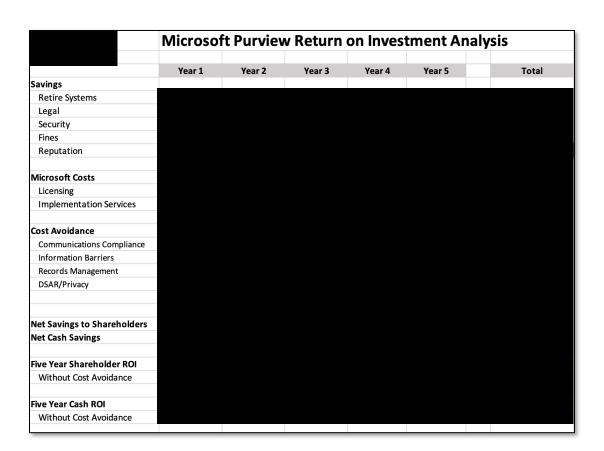
- Understand your current licensing
 - Know your renewal date
 - Funding may be available from Microsoft for implementation and/or consumption
- Align stakeholders
- Have plans for People + Process + Technology
 - Expect the unexpected
- Confirm your end goal(s)





Lessons Learned

- Know your environment
 - Take advantage of what you are licensed for
 - Know and react to what is coming
 - Identify opportunities to remove redundant tools and processes







Lessons Learned

Resources

- Microsoft
 - learn.microsoft.com
 - adoption.microsoft.com
 - https://www.microsoft.com/en-us/microsoft-365/roadmap
- Microsoft Partners
- LinkedIn/YouTube/X
- GitHub
- ARMA



The Conference on Information and Records Management



8:45 - 9:00 AM	2025 CONFIRM.NYC Opening Remarks, David Prather, Chapter President		
9:00 - 9:45 AM	Keynote: Constantine Karbaliotis, nNovation LLP The New Ecosystem: The Intersection of AI, Privacy, and RIM		
Room Assignments	Union Square	Murray Hill	Gramercy
Track	Governance, Risk, Compliance Green Track	Technology Blue Track	Professional Development Gold Track
Session 1 10:15 - 11:15 AM	Jim Koziol Epiq Purview & IG - what's new in 2025	Mary Sherwin, Consultant David Smythe, Epiq Digital Information Governance – Implementing Tools	Kristi Robison Paintrock Consulting Emerging Trends & Technologies in GRC
11:15 -11:45 AM	BREAK 1		
Track	Governance, Risk, Compliance Green Track	Technology Blue Track	Professional Development Gold Track
Session 2 11:45 - 12:45 PM	Ron Hedges, Attorney David Smythe, Epiq Generative Al: Case and Issues Update	Sandra Serkes Valora Technologies AutoClassifying the 3 R's: ROT, Records & Retention	Jennifer Watters-Farley Jen Best Avoid the Bored Room: Practical Strategies for Engaging Records and IG Training
12:45 - 2:00 PM BREAK 2			
Track	Governance, Risk, Compliance Green Track	Technology Blue Track	Professional Development Gold Track
Session 3 2:00 - 3:00 PM	Jo Ann Davaris, Booking Holdings Mary Sherwin, Consultant Fireside Chat: Privacy, Ethics & Al	Matt McLelland Ankura 4 Case Studies: Data Cleanup Through Asset Prioritization	Kristi Robison Paintrock Consulting How to Grow Your Role
3:00 - 3:30 PM BREAK 3			
Track	Governance, Risk, Compliance Green Track	Technology Blue Track	Professional Development Gold Track
Session 4 3:30 - 4:30 PM	Therese Craparo Reed Smith Practical Implementation of Al Governance	Richard Davis The Seismic Implications of the EU Al Laws on Records Management and Compliance	Jennifer Watters-Farley Lauren Barnes The Art of the Chat: Leveraging Casual Conversations for Professional Growth
4:30 - 4:45 PM	2025 CONFIRM.NYC Closing Remarks		
5:00 PM	RECEPTION: 230 Fifth Rooftop Bar		







Jim Koziol Epiq Global Sr. Director, Information Governance james.koziol@epiqglobal.com