



CONFIRM. NYC

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

March 4, 2025



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.

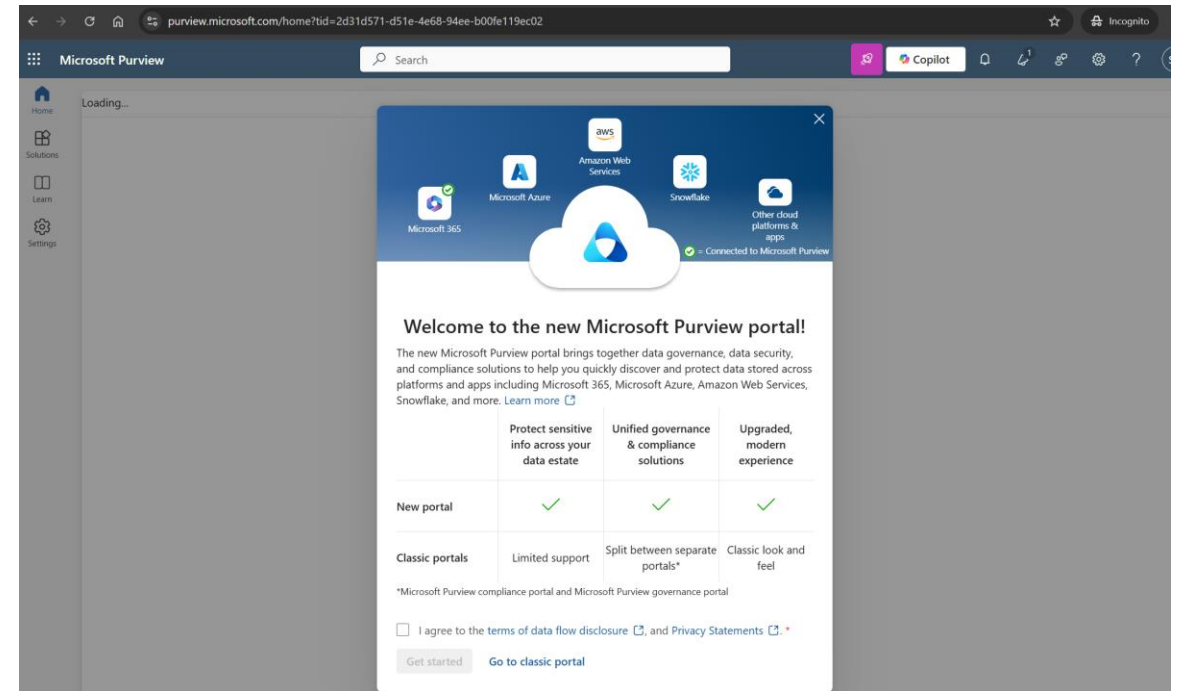
Jim began his career in Microsoft technology in the late 1990s, serving as an Exchange administrator, SharePoint administrator, and Teams administrator. He has been a Microsoft Certified Trainer (MCT) since 1999 and has passed over 30 Microsoft certification exams and holds numerous other industry certifications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

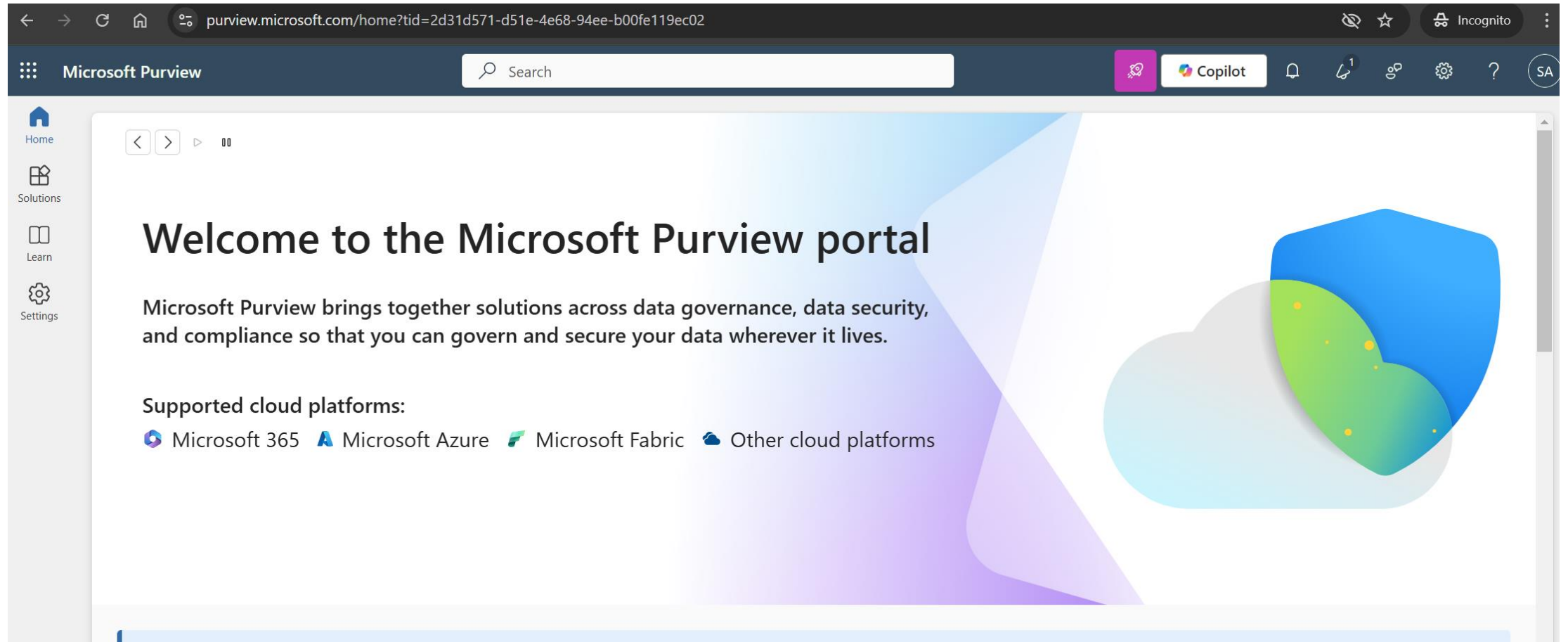


What is Microsoft Purview?

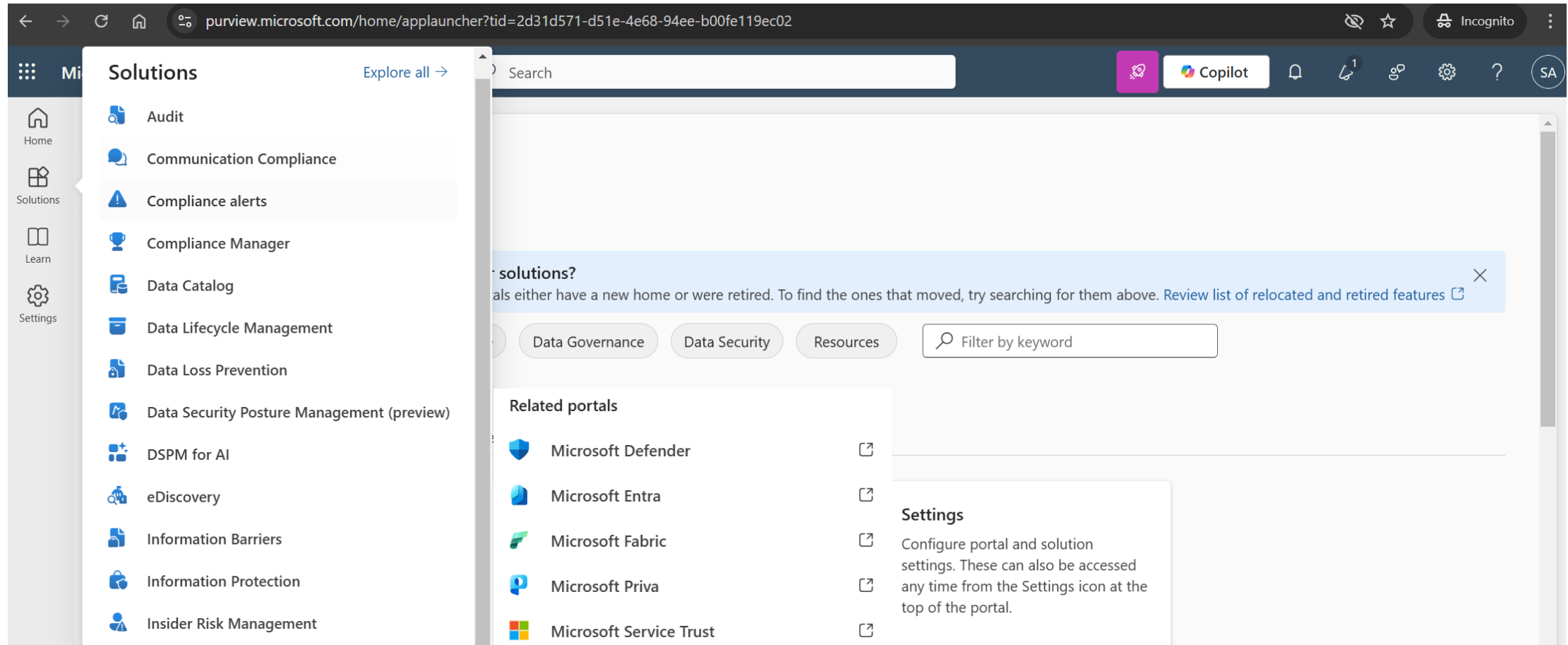
Microsoft Purview is a comprehensive data governance solution designed to help organizations manage and govern their data across various sources.



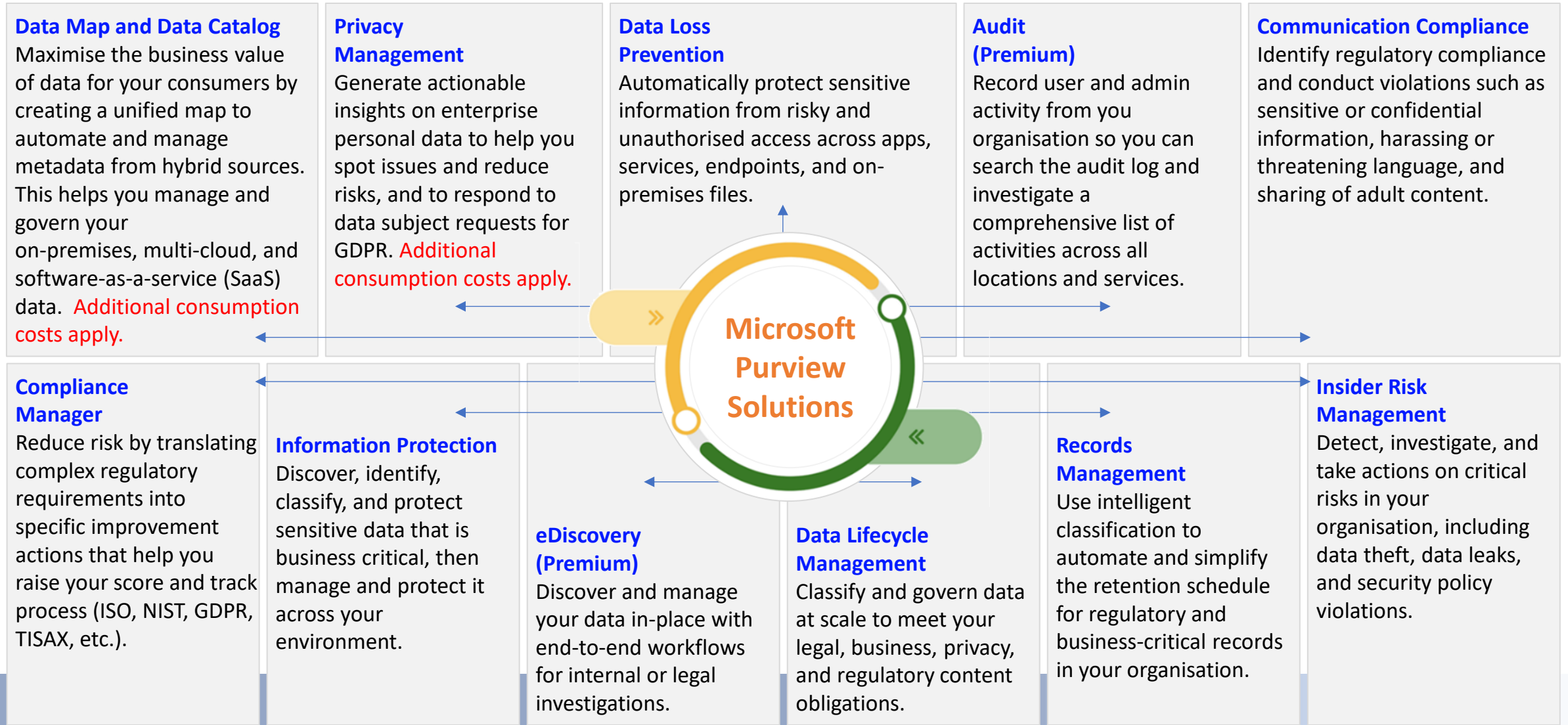
What is Microsoft Purview?



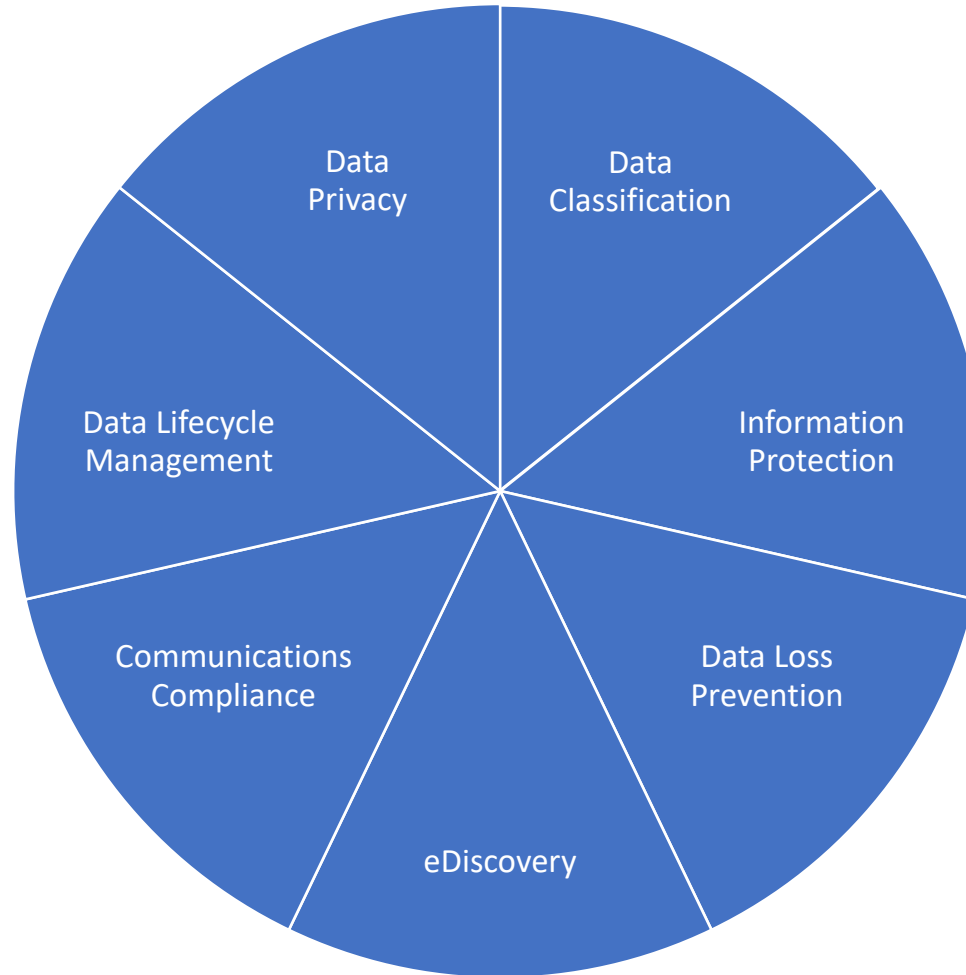
What is Microsoft Purview?



What is Microsoft Purview?



Microsoft Purview Capabilities



Microsoft Purview Capabilities

- Capabilities are based on your subscription
 - <https://m365maps.com/>
 - E3
 - 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 (AI 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
- AI 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

	Microsoft Purview Return on Investment Analysis						
	Year 1	Year 2	Year 3	Year 4	Year 5		Total
Savings							
Retire Systems							
Legal							
Security							
Fines							
Reputation							
Microsoft Costs							
Licensing							
Implementation Services							
Cost Avoidance							
Communications Compliance							
Information Barriers							
Records Management							
DSAR/Privacy							
Net Savings to Shareholders							
Net Cash Savings							
Five Year Shareholder ROI							
Without Cost Avoidance							
Five Year Cash ROI							
Without Cost Avoidance							

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

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 AI: 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 & AI	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 AI Governance	Richard Davis The Seismic Implications of the EU AI 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		



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