BDO DIGITAL

Microsoft

Safeguard Organizational Data Advantage

WITH MICROSOFT PURVIEW

JUNE 13, 2024

BDO

Our Agenda Today

Focus on Mission

A Data Hydra

Platform unified visibility with Purview

Get Started: One Step at a Time

With You Today

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Focus on Mission

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Your Nonprofit isn't the "Typical Commercial Business"

Your nonprofit exists for something greater than money.

Achieving **THAT** outcome is what everything else is for.

Nurture and Drive Relationships

Organize and Communicate

Realize Outcomes Efficiently

Nurture and Drive Relationships

75%

of event and P2P donors will continue supporting into the future
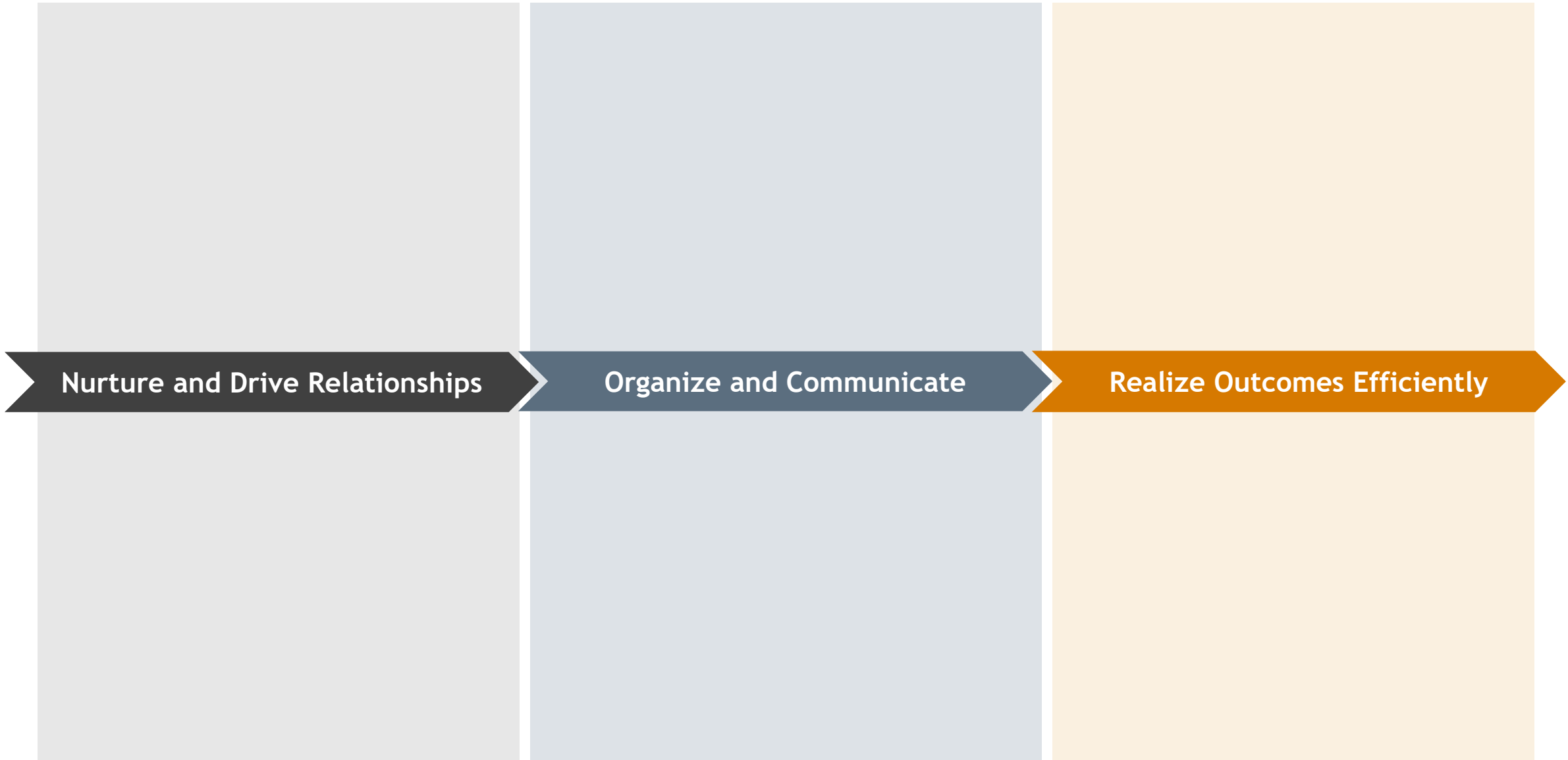

Organize and Communicate

42%

of nonprofit leaders list digital transformation among top three priorities for the next 12 months

Realize Outcomes Efficiently

94%

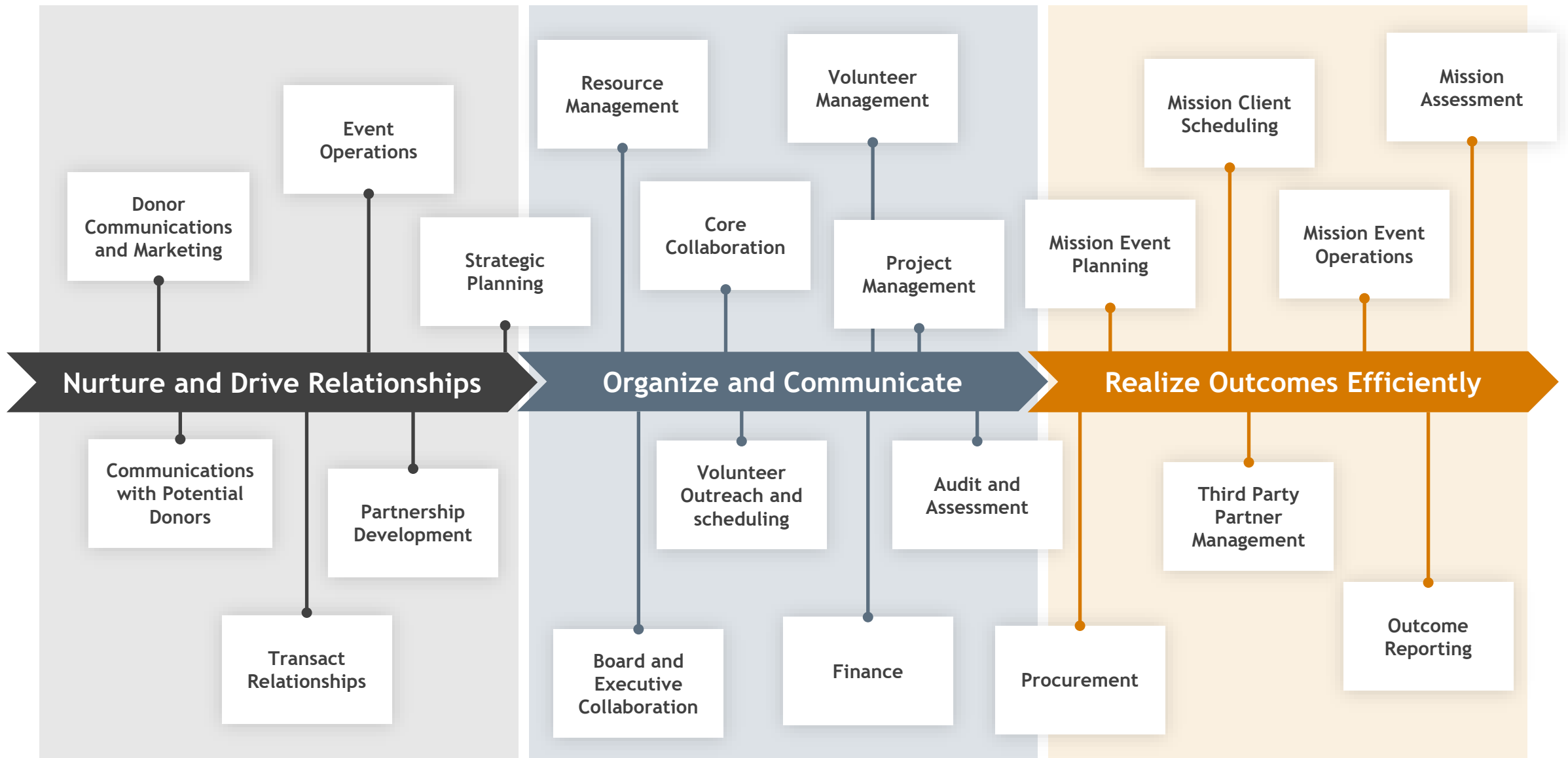of nonprofit leaders did not feel they were using data effectively

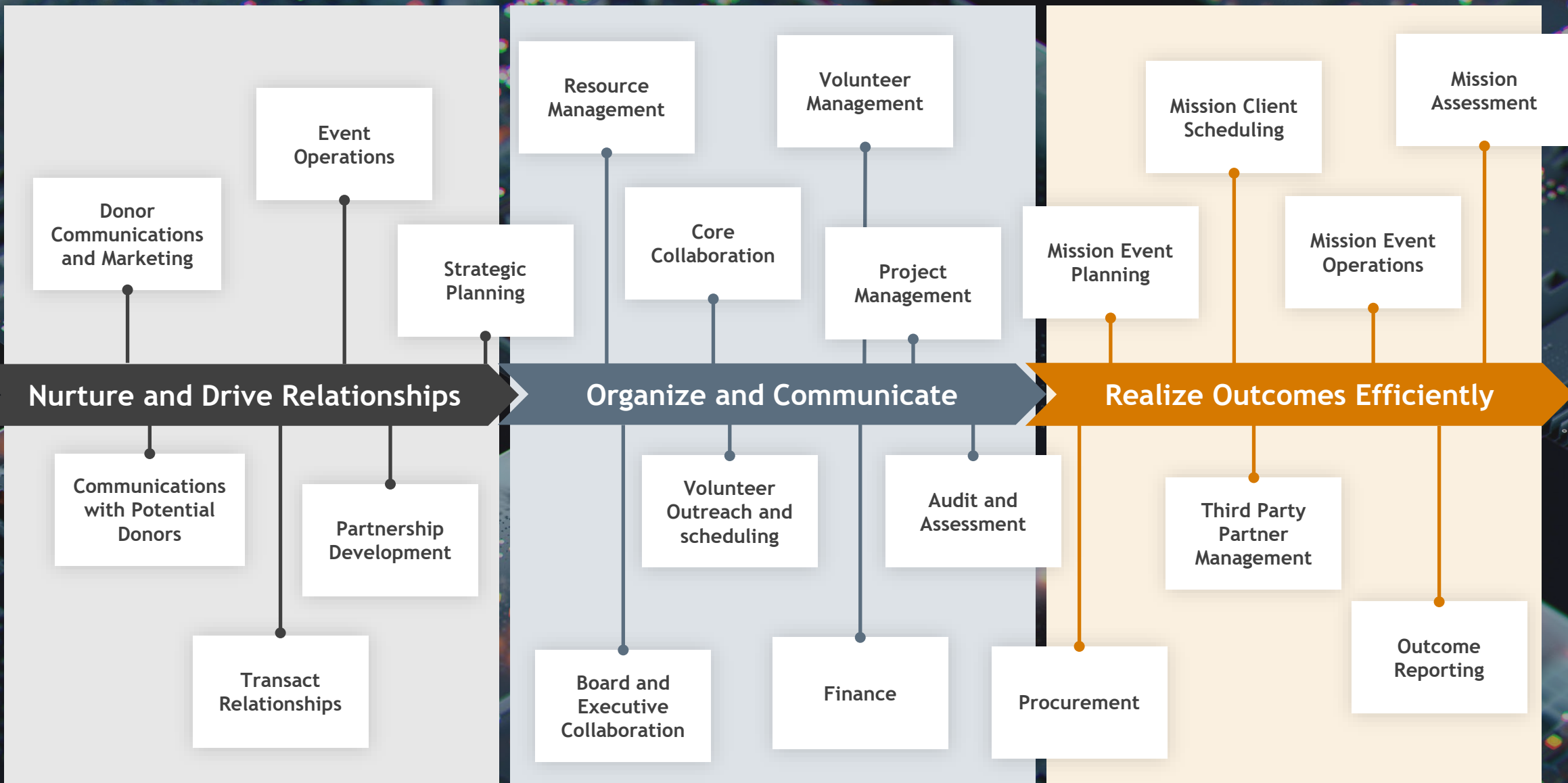**Nurture and Drive Relationships** > **Organize and Communicate** > **Realize Outcomes Efficiently**

Nurture and Drive Relationships

- Donor Communications and Marketing
- Event Operations
- Strategic Planning
- Communications with Potential Donors
- Partnership Development
- Transact Relationships

Organize and Communicate

- Resource Management
- Volunteer Management
- Core Collaboration
- Project Management
- Volunteer Outreach and scheduling
- Audit and Assessment
- Board and Executive Collaboration
- Finance

Realize Outcomes Efficiently

- Mission Client Scheduling
- Mission Assessment
- Mission Event Planning
- Mission Event Operations
- Third Party Partner Management
- Outcome Reporting
- Procurement

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A Data Hydra

SAFEGUARD ORGANIZATIONAL DATA ADVANTAGE WITH MICROSOFT PURVIEW

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Resource Management

Volunteer Management

Mission Client Scheduling

Mission Assessment

Event Operations

Donor Communications and Marketing

ssion Event perations

Each of these activities creates a "data exhaust"

Nurture and D

Efficiently

Communications with Potential Donors

Transact Relationships

Board and Executive Collaboration

Finance

Procurement

Outcome Reporting

Introduce a Data Lifecycle

Lifecycle should satisfy **unique requirements** for unique assets.

Lifecycle should span unique data types and discover them **automatically**.

Lifecycle should identify risk and **block information loss** under the most difficult conditions.

Lifecycle should **allow change** to unique data while **providing resilient restoration** to protected points in time.

Lifecycle should **empower authoritative review** before required data disposal.

Lifecycle protections must be resilient, enforcing compliance and **eliminating or reducing legal exposure** and regulatory risk.

SAFEGUARD ORGANIZATIONAL DATA ADVANTAGE WITH MICROSOFT PURVIEW

Maintain Data Protection

You need to affirmatively protect the data you have been entrusted with.

Verify Explicitly
Always authenticate and authorize based on all available data points

Use Least Privilege Access
Limit user access with Just-In-Time and Just-Enough-Access (JIT/JEA), risk-based adaptive policies, and data protection

Assume Breach
Minimize blast radius and segment access. Verify end-to-end encryption and use analytics to get visibility, drive threat detection, and improve defenses

Data Classification
So, you can know your data

Information Protection
So, you can protect your data

Data Loss Prevention
So, you can prevent data loss

Data Lifecycle Management
So, you can delete what you don't need

Protecting Data Used to be Very Complex

Security leaders historically have stitched together often disparate fabrics of siloed solutions attempting to gain coverage for data.

Your nonprofit may struggle with numerous overlapping commitments, increased licensing costs, and a web of connectors and management approaches.

MULTIPLE POINT SOLUTIONS

SIEM Security Information & Event Management

Discovery uniquely solved for each silo

Quarantine for email

DLP for cloud

DLP for email

Retention for email

DLP for files

Retention for files

EMAIL   CLOUD
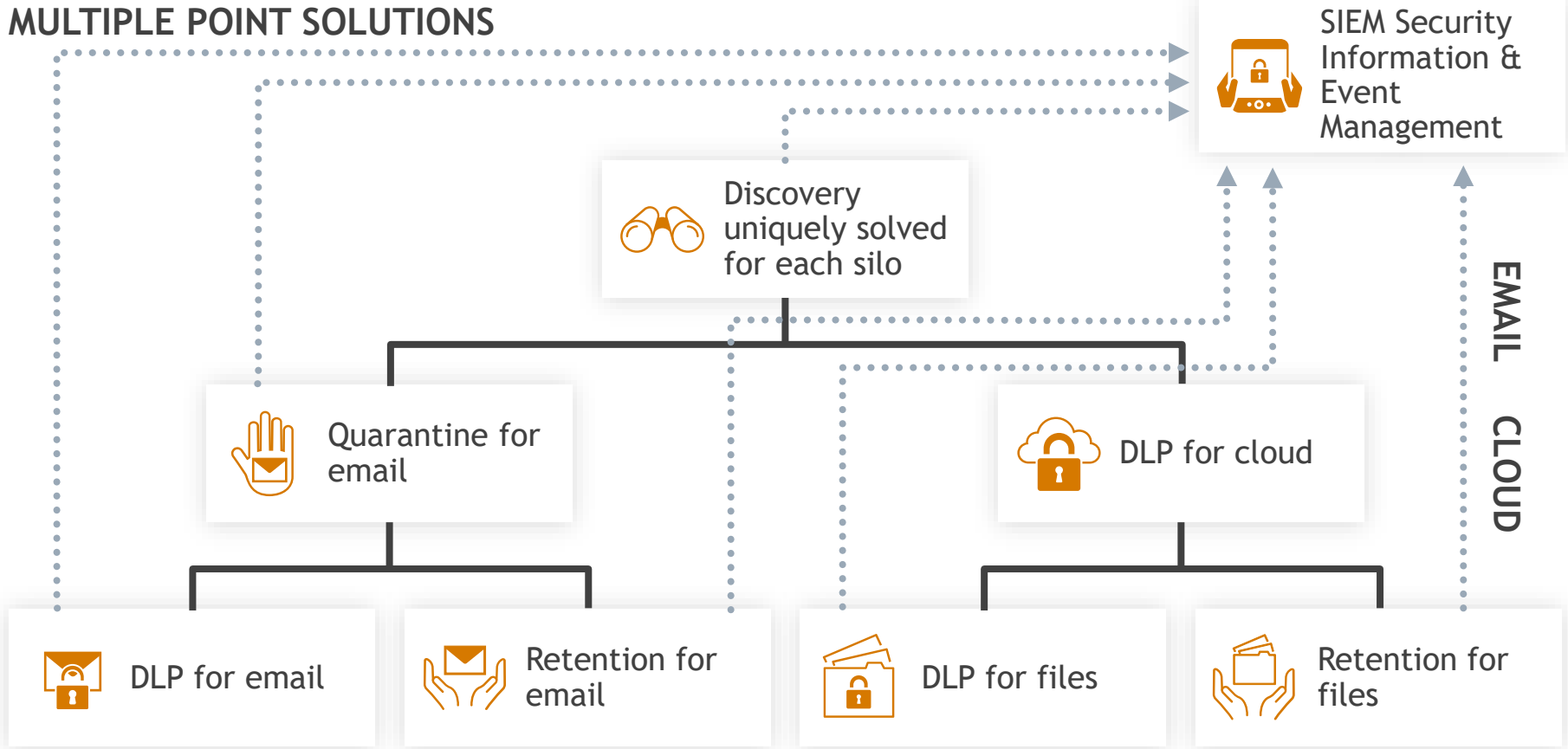
Platform Unified Visibility with Purview

Microsoft Purview

Microsoft Purview empowers data security with a comprehensive set of unified solutions controlling **governance**, **AI and machine learning driven discovery**, **data classification**, **controls**, **telemetry**, **security information** and **events** across the digital estate.

Purview overcomes:

▶ The fragmentation of data across solutions

▶ Lack of visibility and gaps associated with security silos

▶ Alignment of function solving the blur typically associated with with multiple IT/Security management roles

Data Classification

Data Lifecycle

Internal Risk

Cloud App Security

UNIFIED DATA SECURITY PLATFORM

DLP & Rights Management

Case Management

Audit

Link Your Program Investments to Your Mission Goals

Donors

▶ Meet regulations in specific markets

▶ Enable fundraising through donor trust commitments

▶ Maintain long term relationships and protect your brand

Cost Avoidance

▶ Reduce the risk of breach-based liability

▶ Reduce potential cost of incident response

▶ Streamline security tools and costs

- ✔ Streamline into managing one platform's features and permissions

- ✔ Keep visibility to the data pipeline

- ✔ Efficient training and operations

- ✔ Full audit logging for compliance and security features

- ✔ Comprehensive data management features,

- ✔ Include investments in privacy risk management supporting features

Purview Now and in the Future

Microsoft Purview helps you stay on top of the ever-changing data governance, risk and compliance landscape.

Purview Portal benefits from world class enterprise customers feedback and trillions of terabytes of signal telemetry to drive an industry leading roadmap in cybersecurity.

▶ **185** in development

▶ **26** rolling out

Purview embodies a robust Feature Updates cycle with regular monthly updates across the platform.

Cybersecurity Leader Awards:

▶ (2) Gartner Magic Quadrant

▶ (9) Forrester Wave

▶ (2) Engenuity Mitre ATT&CK

▶ … #1 in Cyber market share

Gartner.
A Leader in two Gartner® Magic Quadrant™ reports.

FORRESTER®
A Leader in nine Forrester Wave™ categories.

≡IDC
A leader and #1-ranked market share in two IDC reports.

MITRE | ATT&CK®
A leader in two Engenuity ATT&CK® Evaluations.

Get Intentional to Safeguard Your Mission Data

Assess Data Estate

Proactive Data Management

Control Data Exposure

Operate and Improve

Build the Habit of Continuous Assessment
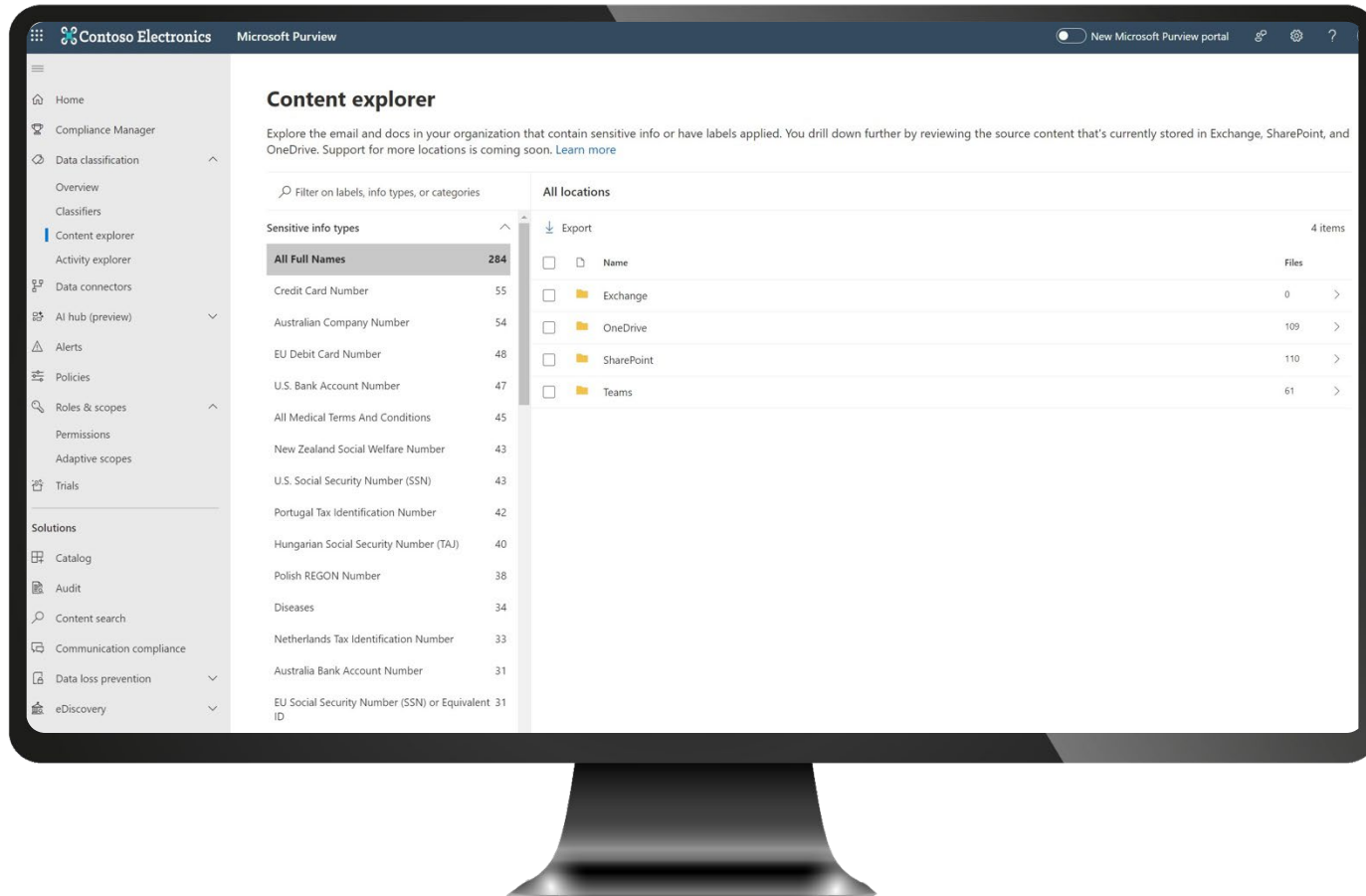
Assess Data Estate

▶ Establish a baseline of what sensitive info you hold

▶ Talk to your business - what are they concerned about

▶ Set a definition of success – how do you know what good is?

▶ Do periodically as a habit

Proactive Data Management to Prune Risk from ROT
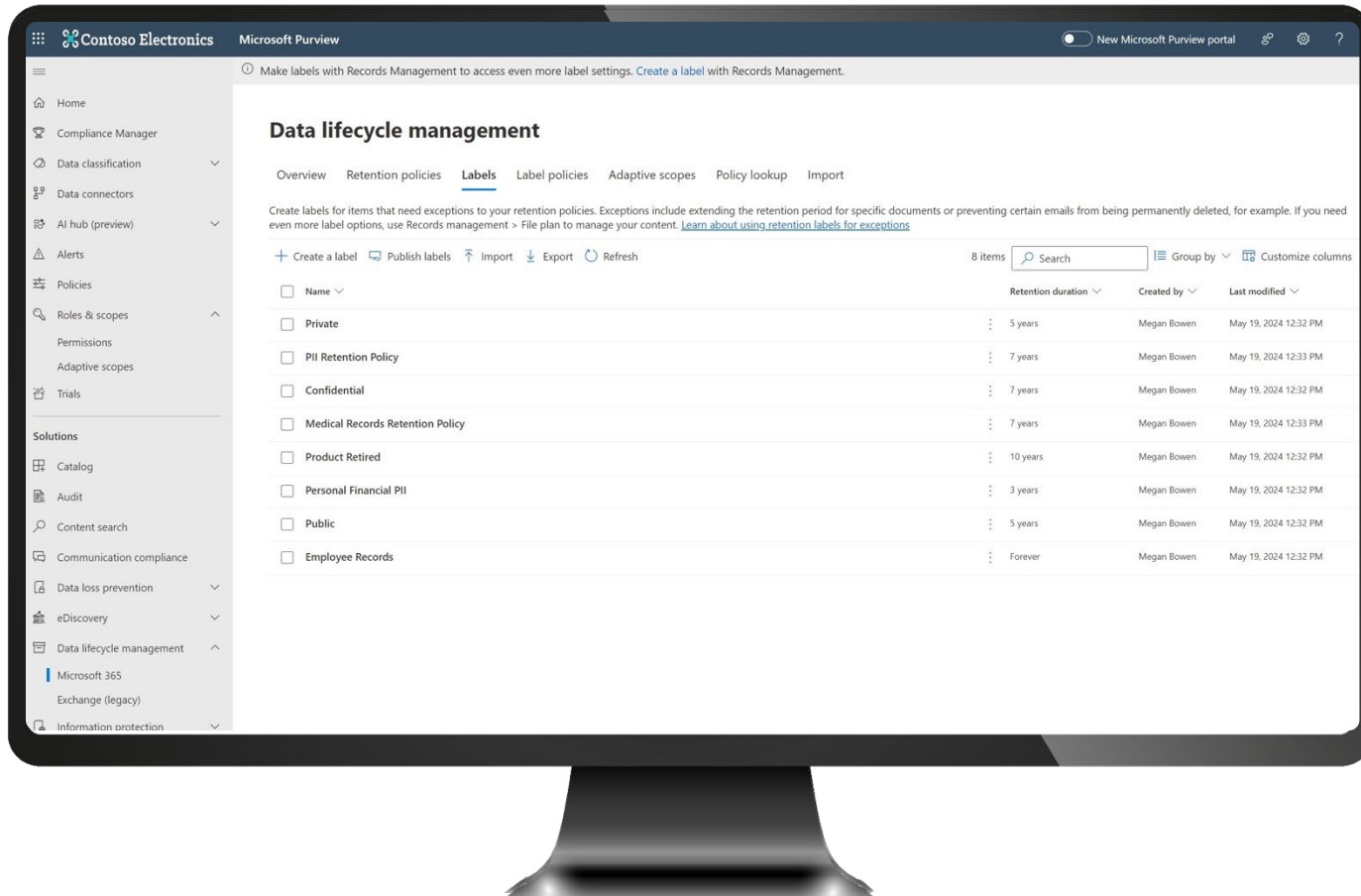
Proactive Data Management

▶ Identify redundant, outdated, trivial data for removal

▶ Make it easy to protect the business – label for retention, label for removal

▶ Auto-recognize and label data at scale for review

▶ Keep what regulations say you must

Reduce Risk by Controlling Data Exposure with DLP
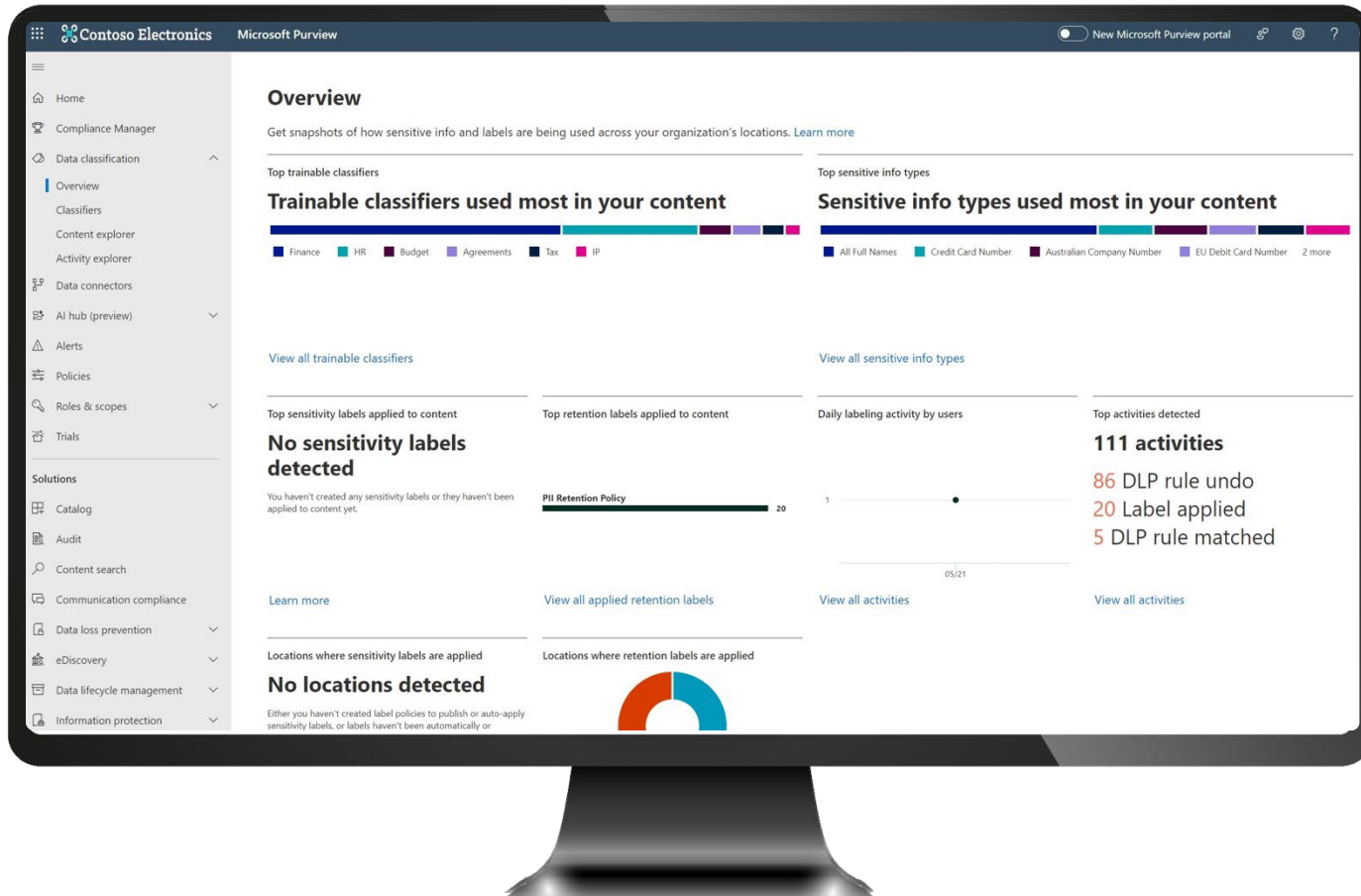
Control Data Exposure

▶ Control easily identifiable data using sensitivity types

▶ Powerful AI backed Trainable Classifiers can help with difficult/variable formats

▶ Build a matrix that reflects specific protection needs

▶ Enforce with a powerful platform

Operate and Improve Over Time Internally or With Managed Services

Operate and Improve

▶ Use a platform strategy to enrich good risk response decisions with insider risk management and/or Sentinel

▶ Consider a managed service provider to raise maturity quickly

▶ Refresh discovery and policies regularly

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Get Started: One Step

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Assess Your Data Estate to Start Reducing Your Risk

DATA RISK ENGAGEMENT

Discovery Session
Detailed assessment of your strategic objectives, influences, and priorities for risk management and regulatory compliance

Data Assessment
Use Microsoft Purview to discover and rapidly assess sensitive data in the Microsoft 365 and related environments. Optionally evaluate insider risk and risky communications.

Analysis
Build a list of recommendations and actionable next steps that will help mitigate identified security and compliance risks in your production environment.

Roadmap
Provide a set of long-term recommendations in a roadmap with key initiatives and tactical next steps to reduce risk with new and existing capabilities.
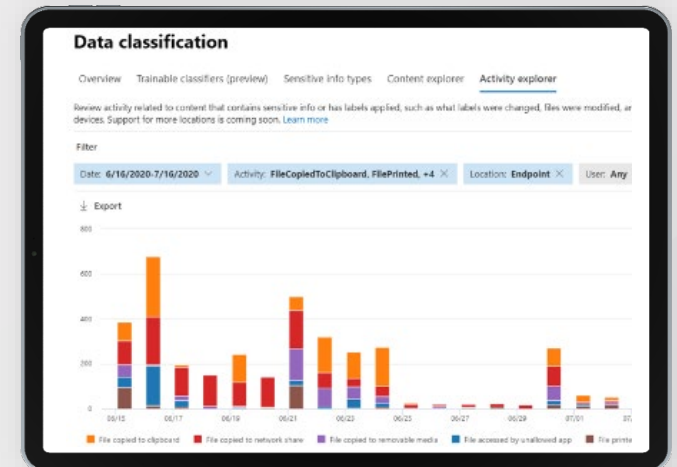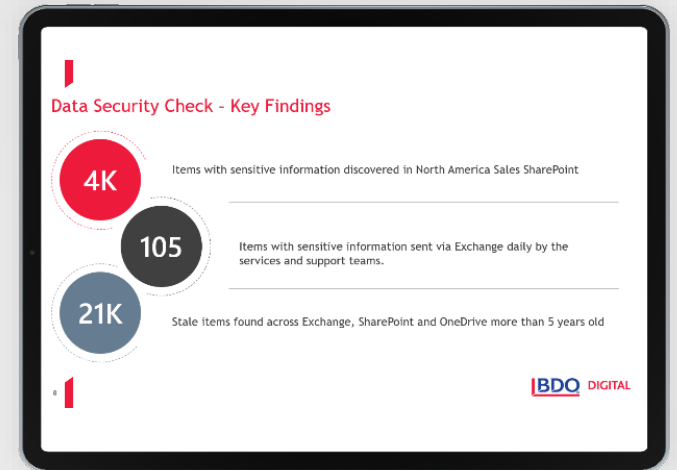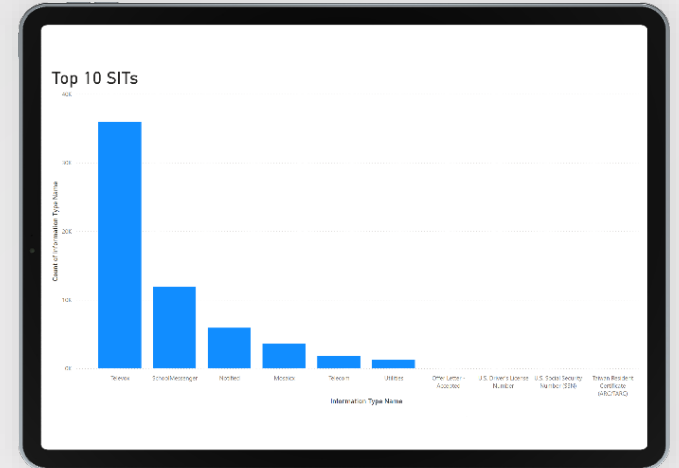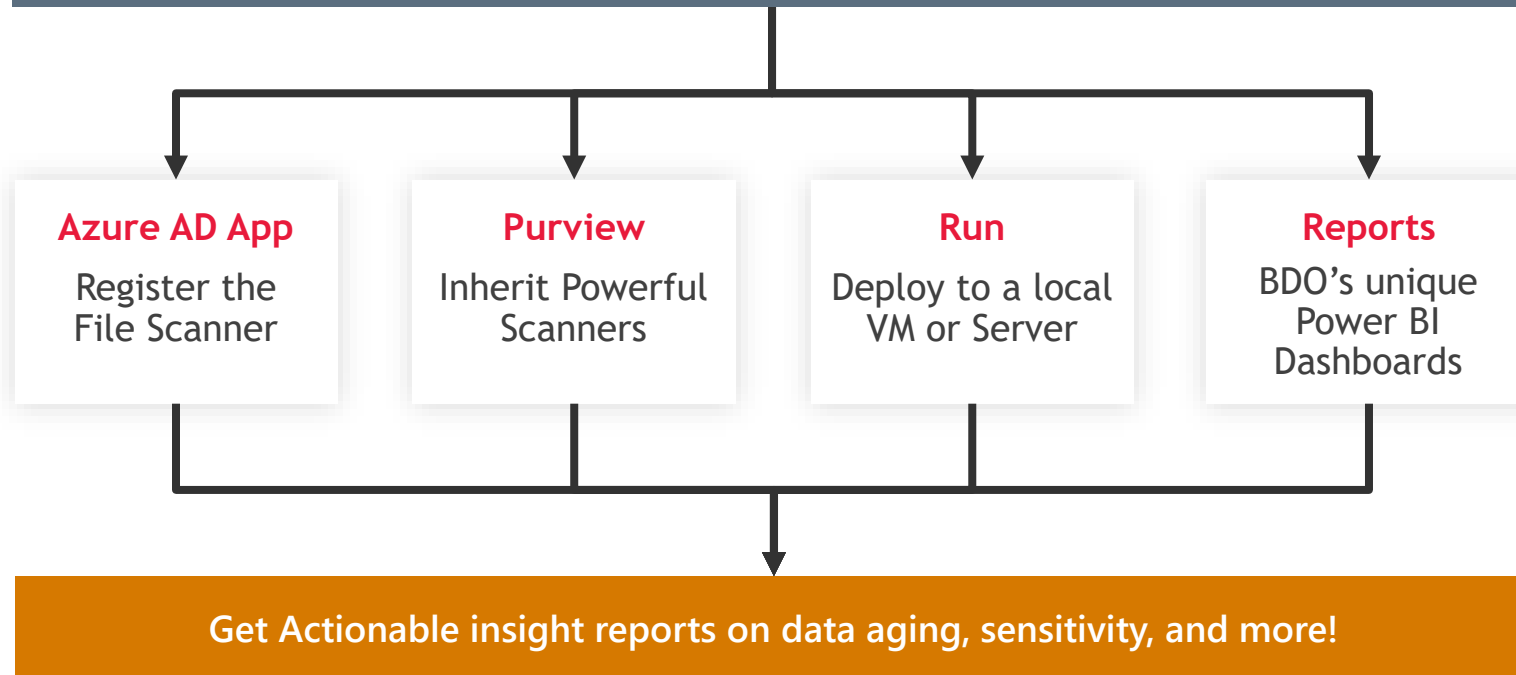
Extend Purview to your Dark Data to Start Reducing Your Risk

FILE SHARE ASSESSMENT

Planning: Get identities established, plan key file shares, target critical risks.

Azure AD App	**Purview**	**Run**	**Reports**
Register the File Scanner	Inherit Powerful Scanners	Deploy to a local VM or Server	BDO's unique Power BI Dashboards

Get Actionable insight reports on data aging, sensitivity, and more!

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Questions?

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