iomer | Herald

HERALD · EVALUATION GUIDE · NOVEMBER 2026

Evaluating Herald: a guide for communications, authors, IT and privacy

Herald is a newsletter studio for SharePoint. It's a solution accelerator: the foundation is already built, and iomer builds your organization's version as a single deployment package and installs it in your tenant. Use this guide to run a fair evaluation, prepare for a walkthrough, and build a business case on your own numbers.

1 · WHAT TO CHECK

A checklist for each person evaluating Herald

Bring these to the walkthrough. Each item is something you can see for yourself, with series and audiences like yours.

Internal communications

- ☐ Set up a series with its audience, template and Teams channels. Did it need any code?
- ☐ Choose an office and a department as the audience. Does Herald show how many people, and where they are?
- ☐ Open an issue's results. What do reached, read and confirmed mean, and can you see anyone's name?
- ☐ Change the newsletter brand's colours. Does Herald say when text would be hard to read?

Authors and approvers

- ☐ Start an issue from a template and add a news post from the SharePoint tab. What does the checklist flag before you can send?
- ☐ Preview it as an email, a PDF and a Teams card. Does each look right?
- ☐ Ask readers to confirm a section, then send yourself a test. Where does the confirm link take you?
- ☐ As an approver, ask for changes with a comment. What does the author see?

IT and Microsoft 365

- ☐ What exactly does iomer install, and where does it run?
- ☐ Which permissions does the package request, and are they delegated or application?
- ☐ Where is the data stored, and is anything held outside your tenant?
- ☐ Which account do the flows run as, what does it need on the shared mailbox, and how is sending stopped?
- ☐ How do changes and Microsoft 365 updates reach you, and how is it removed?

Privacy, records and legal

- ☐ What does Herald record when someone reads an issue, and who can see it?
- ☐ What is the smallest group results may show, and how long are reading records kept?
- ☐ Who can export the confirmation register, and what does it contain?
- ☐ When an issue is limited to its audience, who else can still open it?

What your records, privacy and accessibility staff will ask

MARKET	WHERE SHAREPOINT CONTENT IS STORED	POINTS TO RAISE WITH YOUR OWN ADVISERS
Canada	Microsoft's Product Terms commit to in-country storage of SharePoint Online content for tenants provisioned in Canada.	Federal and provincial privacy law applies to staff data. Quebec's Law 25 requires a privacy impact assessment for new systems that handle personal information. Accessibility laws such as Ontario's AODA and the Accessible Canada Act may apply to internal systems.
United States	In-country commitment for tenants provisioned in the United States.	Some state privacy laws, such as California's, cover employee data. Under the ADA, accessible internal systems can be part of a reasonable accommodation.
United Kingdom	In-country commitment for tenants provisioned in the UK.	The UK GDPR gives staff a right of access to their data. The Equality Act 2010 requires reasonable adjustments for disabled staff.

A summary to start a conversation, not legal advice. Check your own tenant's data location before relying on it. Flow run history lives in your Power Platform environment, which has its own region.

QUESTION	WHERE HERALD ANSWERS IT
Who can open a draft?	Drafts, issues in review and scheduled issues are only for Herald's roles; approvers and auditors can read them. Readers can't open them once the permission design is applied.
What does Herald record about readers?	When someone opens an issue's page: the sections they read, links followed, channel, whether on a phone, and confirmations, in their name. Each reader sees only their own; owners, administrators and auditors can read all of them. Reading inside an email isn't recorded.
What do results show?	Totals only, by location, department and channel. Groups smaller than the size you set (5 people unless changed, 3 to 50) are merged before results are saved. The confirmation register is the one export with names.
How long is reading data kept?	Reading records for 90 days unless changed (30 to 730), deleted by the clean-up flow once results exist. Confirmations, results, sent issues and the audit log are kept; your Microsoft 365 retention policies still apply.
Who changed what?	The audit log records every change made in Herald, with who, what, before and after, and exports to CSV.
Can working lists turn up in search or Copilot?	Sent issues and the archive are found like any content people can open. The working lists, reading records included, are hidden, so search doesn't index them.
Are the newsletters accessible?	Image descriptions, keyboard and screen reader support, and the newsletter brand checked to 4.5:1 contrast. iomer's automated tests run axe-core for WCAG 2.2 AA on every screen and dialog.

> Herald supports your records, privacy and accessibility programs; it doesn't make an organization compliant on its own. Microsoft's certifications, such as ISO/IEC 27001 and SOC 2, describe Microsoft 365, not iomer.

Questions to answer as a team

You don’t need every answer for a first conversation. They tell us both how Herald fits, who should be involved, and how big the job is.

	QUESTION, AND WHAT THE ANSWER TELLS US	YOUR ANSWER
1	**Which newsletters do you send today, and how?** All-staff, leader, department and frontline newsletters, from Outlook, a newsletter tool or the intranet. It shows how many series you have.	
2	**Who builds each issue, and how long does it take?** Copying stories in from the intranet is the work Herald takes away. Authors can be limited to their own series.	
3	**Who should each newsletter reach?** Entra groups, offices, departments and named people become each series’ audience.	
4	**How reliable is your department and office data in Entra ID?** Audiences by office or department, results by location and reminders depend on it.	
5	**Do any newsletters need approval before they go?** A series can name an approver, such as the CEO for a CEO briefing.	
6	**Are there messages people must confirm they’ve read?** A safety notice, a policy change or a leader’s talking points. Any section can ask readers to confirm.	
7	**Which channels matter for each audience?** Email, the intranet, Teams and a PDF for notice boards. Each issue can go out all four ways.	
8	**Do your frontline staff have mailboxes?** People without one read on the intranet or in Teams.	
9	**Which shared mailbox should newsletters come from, and which account will run the flows?** The service account needs Send As on the mailbox.	
10	**Who should see results, and how small a group may they show?** Agree the smallest group results may show, and how long reading records are kept, with your privacy staff.	
11	**Which distribution lists do you send to today?** Members of mail-only lists can’t be given access to an issue page secured to its audience.	
12	**Who will run the newsletters day to day, and do you use another iomer accelerator?** Herald needs an owner. Chronicle’s stories can go into an issue like any SharePoint news post.	

4 · BUSINESS-CASE WORKSHEET

Measure today, then again 90 days after launch

Use your own numbers. iomer doesn't supply industry benchmarks for these, because they vary too much between organizations to be useful.

MEASURE	HOW TO MEASURE IT	TODAY	90 DAYS AFTER LAUNCH
Newsletters sent a month, across all series	From the sending mailboxes or your newsletter tool		
Hours to build one issue	Ask the people who build them, for a typical issue		
Versions made of the same issue	Count for one recent issue: email, intranet page, Teams post, print		
Share of an all-staff issue's audience it reached	Today, what your current tool reports and how it measures it; then, Herald's reached		
Notices people had to confirm last quarter, and how it was recorded	Ask safety, HR and the policy owners		
Staff without a mailbox who should get the newsletters	From Entra ID or your HR system		
Staff who say they get the information they need	The item in your own engagement survey, if it has one		

Time spent building newsletters, per year = hours per issue × issues a month × 12.
Reach = people who opened the issue ÷ people it was sent to.

Axios HQ and Gallup (2022) found that employees who strongly agree they get enough information to do their job well were 2.9 times more likely to be engaged at work. Axios HQ sells internal communications software. It shows a link between information and engagement, not that a tool on its own raises engagement.

5 · NEXT STEPS

From first call to proposal

1
Discovery call
How your newsletters go out today and what matters most.

2
Walkthrough
Thirty minutes with Herald, set up with series and audiences like yours.

3
Scoping workshop
Your series, templates, audiences, approvers, Entra ID data and privacy settings. It produces a work estimate.

4
Proposal
A written proposal with the work estimate and timeline.

Pricing is scoped with you first, then a work estimate and proposal. Book a walkthrough at **www.iomer.com/accelerators/herald/contact.html**, call **780.424.3122** or email **contactus@iomer.com**.