

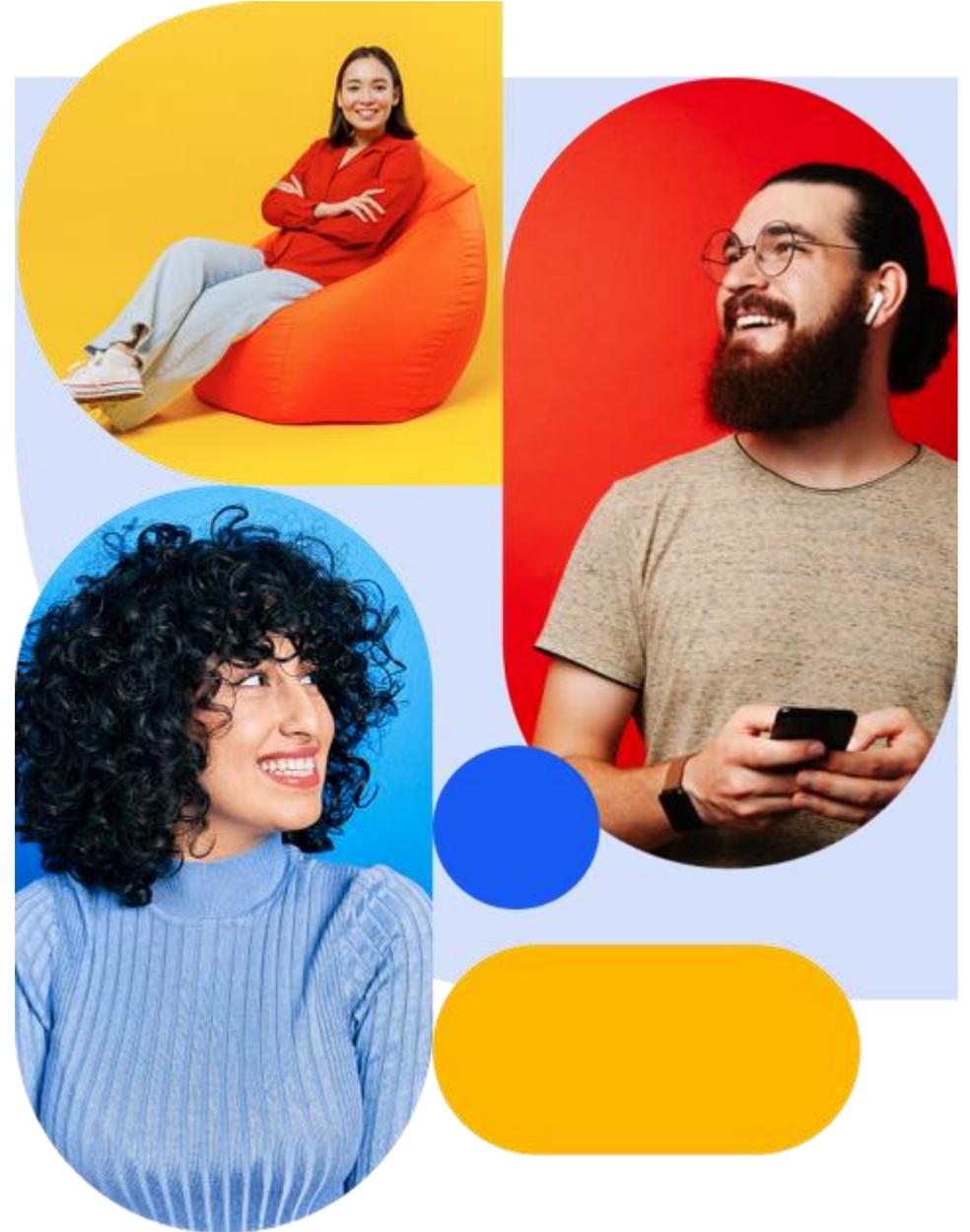
Offer

Data security maturity uplift

Protect, Govern and Secure your environment with Microsoft Purview



ENGAGE SQUARED 



<people> friendly technology

We are Engage Squared

Specialists in <people> friendly technology.

Our mission is to make work better.

We help organisations unlock the full potential of technology - so your people can do their best work, every day. From frontline teams to the executive suite, we work with large organisations to modernise the workplace, elevate culture, and drive lasting change.

Our expertise spans **advisory and adoption services, end-to-end solution delivery, and ongoing managed support** - tailored to help our clients thrive in a fast-changing digital world.

We specialise in:

- **Building intelligent modern workplaces** that improve collaboration, connection, and employee experience;
- **Creating and modernising intelligent agents, apps and workflows** to automating processes and unlock productivity;
- **Securing data and systems** with enterprise-grade compliance and governance frameworks;
- **Designing seamless digital and customer experiences** to enhance your customer, supplier and partner journeys.

With a team of strategists, technologists, designers, and change leaders, we bring a human-centred approach to every engagement - balancing innovation with practicality to create impact that lasts.

We take partnerships seriously, and we're proud to have been named **Microsoft's Partner of the Year** five times – as a global winner for Employee Experience, global winner for Frontline Worker solutions, and Australian and Japanese partner of the year winner.



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Microsoft Inner Circle

Microsoft AI Business Solutions

5x Microsoft Partner of the Year

Global Modern Workplace for Frontline Workers – Winner 2025, Finalist 2021

Microsoft Japan Partner of the Year Copilot & Agent – Winner 2025

Global Employee Experience – Winner 2022

Australian Partner of the Year – Winner 2021



Data & AI
Digital & App Innovation
Modern Work
Security



Advanced Specialisations:

Modern Work

- Adoption and Change Management
- Calling for Microsoft Teams
- Copilot
- Custom Solutions for Microsoft Teams
- Meetings and Meeting Rooms for Microsoft Teams
- Teamwork Deployment

Data Security

Business Applications

- Intelligent Automation
- Low Code Application Development

Exclusive Partner Programs

- Copilot and Agents Jumpstart
- Employee Engagement Jumpstart
- Frontline Worker Partner Advisory Council



Proud winners of:



Tech Partner News / CRN Impact Awards

2025 – Workforce Empowerment Leadership Award
2019 – Working Together



Digital Workplace Awards

2024 – Best Digital Transformation
2023 – Most Impactful Digital Transformation
Peter MacCallum Cancer Centre's Intranet



Step Two Digital Workplace Awards

2023 – Silver – Cerebral Palsy Alliance's Intranet
2021 – Silver – Origin Energy's Intranet



Victorian Premier's Design Awards

2022 – Service Design – Best in Category
Victorian Department of Premier and Cabinet's
Automated Briefing and Correspondence System



Intelligent tech, designed to make work better

Our mission is to make work better.

We help organisations unlock the full potential of technology – so your people can do their best work, every day.

Advisory and adoption • Solution delivery • Managed services



Data security

Protect sensitive information with enterprise-grade compliance governance and risk management solutions for Microsoft environments.



Intelligent apps and agents

Automate processes and unlock productivity with low-code apps, AI agents, and Microsoft Power Platform solutions.



Intelligent modern workplace

Empower collaboration and culture with integrated tools like Teams, Viva and SharePoint for hybrid work.



Custom apps & solution engineering

Engineering next-generation applications and reimagining legacy systems to unlock scalability, resilience, and business impact.

Microsoft
Partner

2025 Partner of the Year Winner
Modern Workplace for Frontline Workers – Global
Copilot & Agent – Japan
2022 Partner of the Year Winner
Employee Experience Award
2021 Partner of the Year Winner
Australia



Viva Engage
Adoption
Specialist



Microsoft Teams
Collaboration
Specialist



Microsoft 365
Copilot
Launch Partner



Sitecore
XM Cloud
Specialist

Our service streams

Employee Experience



- Intranets
- Digital workplace strategy
- Mobile frontline workers
- Enterprise social
- Viva suite

Information Management



- Information security
- Document management
- Records management
- Compliance
- Migrations

Business Applications



- AI Apps - Copilot Studio, Azure Open AI
- Forms, workflows and process automation
- Business tool integration
- Mobile apps
- Legacy app modernisation
- Centre of excellence
- CRM

Digital



- Customer experience
- Web UX / UI
- Consumer apps
- Headless CMS
- Sitecore cloud migrations

Change and Transformation



- Adoption
- Change management
- People science
- Communications
- Training & coaching
- Employee engagement

Cloud strategy, governance and security

Managed support, demand management and centres of excellence

Creative design, UX and HCD, launch and adoption

Engagement overview

At Engage Squared, we help organisations build confidence in their data by uplifting their security posture through modern, intelligent, and people-centered solutions.

We combine deep expertise in Microsoft Purview and across Microsoft 365 with a practical understanding of how people work, enabling organisations to discover, classify, and protect information across their digital estate. Our approach goes beyond compliance, it's about empowering teams to use data safely and confidently while reducing risk and complexity.

By aligning technology, governance, and culture, we deliver a tangible data security uplift using a maturity level 1-3 offering or individual workloads which flows to strengthens trust, improves visibility, and supports secure collaboration in the era of AI.

Our goal is simple: to deliver a measurable data security uplift that reduces exposure, improves visibility, and empowers teams to work confidently with data, wherever it lives.

Benefits

- Through a combination of Microsoft Purview workloads such as Information Protection, Data Loss Prevention, Insider Risk Management, Data Lifecycle Management, Data Posture Management, eDiscovery we enable organisations to move beyond compliance, toward a state of proactive data resilience and trust.
- As part of each maturity level implementation, we believe that a strong adoption program is required from communication, bite size training and adoption plan.
- Increased confidence in security: Ensure that your environment's access and security are robust as you leverage AI tools like Copilot.

Data Security Maturity uplift

Phase 1: Discover

During the **Discovery Phase** we:

- Discuss your primary goals, current data posture, how data is used in the business
- Explore what in Microsoft Purview has been enabled so far
- Present you with a refresher on Microsoft Purview E5 capabilities

Phase 2: Assess

During the **Assessment Phase** we:

- Leverage native reporting in Microsoft Purview to provide reports on Data Security posture.
- Run Data Security Posture Management reports to see status of unprotected data

Phase 3: Review

During the **Review Phase** we:

- Facilitate a playback to review the detailed findings and recommendations.
- Develop and deliver an actionable plan in the form of a roadmap to move you towards the highest maturity level

Remediation

Implementation

- Work with key stakeholders to define and implement agreed remediation activities
- Requirements for change activities and permission
- E2 change team will work closely with the key employees to help with build communication and adoption

Maturity journey

Maturity level one

Foundation

Discover, classify and govern data

- Run Analytics in DSPM and Identify sensitive locations, identify where sensitive data are kept, used, archive
- Identify use cases e.g., collaboration between internal teams, internal and external. Sensitive data is shared via links, emails or SharePoint sites
- Build or review your Label Taxonomy. Example Public, General, Confidential, Highly Confidential, Sub-labels etc.
- Test, Pilot and Generally Deploy data classification (sensitivity label) across the organization
- Design data governance using Data Lifecycle Management + Records Management
- Review recommendation on Data Security Posture Management

Maturity level two

Protect high-risk paths

Apply policies, automate controls and reduce risk

- Build Custom Sensitive Info Types.
- Identify sensitive data, locations and use cases handling sensitive data. Build Data Loss Prevention Program
- Identify sensitive data, locations and use cases handling sensitive data. Build Insider Risk & Communication Compliance Program
- Enable Advanced features like Auto-Labeling client or service side.
- Run Data Risk Assessment report on SharePoint Libraries/OneDrive and review any recommendations, increase security posture from protected data and retention policies enablement
- Review recommendation on Data Security Posture Management

Maturity level three

Operationalisation

Embed Purview into ongoing security and AI readiness

- Build alert and incidents management playbook leveraging Activity explorer, Defender XDR, Audit, eDiscovery. Potential use of PAYG Security Copilot and Data Security Investigation
- Investigate and protect cold data using On-Demand classification across SharePoint, OneDrive and devices
- Implement advanced Classifiers Exact Data Match, Document Fingerprint Sensitive info types
- Enabling native policies specifically for Copilot/AI in DSPM
- Education in eDiscovery for advanced search and investigation, Escalation cases from Insider Risk, risky AI Prompts
- Operationalise Microsoft Purview, incident management, regular checks and fine tune alerts and policies, reports
- Review recommendation on Data Security Posture Management

Change management & training

Each maturity level includes change management, adoption, communications and training to help people understand, adopt and use the capabilities effectively.

Offer maturity – level one

We work with you to establish the control-plane foundations for data security by identifying sensitive data, introducing a core label taxonomy, rolling out baseline classification, and setting governance rules for retention and records.

Key activities:

- Build change management, adoption, communication and training
- Run analytics in DSPM to get insights into risky activities and recommendations.
- Identify sensitive locations and understand where sensitive data is kept, used and archived.
- Identify the business use cases where sensitive information is used.
- Build or review the sensitivity label taxonomy. Examples: Public, General, Confidential, Highly Confidential, Sub-labels etc.
- Test, pilot and generally deploy sensitivity labels across the organisation
- Design data governance using Data Lifecycle Management and Records Management.
- Review recommendations in Data Security Posture Management.

Outcomes from level one

A strong foundation for data security, with sensitive data identified, core labels and classification in place, and governance controls established to support safer, more consistent information handling.

- Visibility of sensitive data locations and risk areas
- Agreed sensitivity label taxonomy and baseline classification rollout
- Foundational retention and records governance established



14-18 Weeks

Offer maturity – level two

In level two we work with you to advance your data security posture by implementing custom classification, data loss prevention, and insider risk management capabilities to protect sensitive information across your digital estate.

Key activities:

- Build change management, adoption, communication and training
- Build custom sensitive info types
- Identify sensitive data, locations and use cases handling sensitive data.
- Build data loss prevention program
- Build insider risk & communication compliance program
- Enable advanced features like Auto-Labeling client or service side.
- Run Data Risk Assessment report on SharePoint libraries/OneDrive and review any recommendations, increase security posture from protected data and retention policies enablement
- Review recommendations on Data Security Posture Management

Outcomes from level two

You have stronger protection for sensitive information through custom classification, data loss prevention, insider risk capabilities and advanced labelling, supported by clearer visibility into where data sits and how it is being used across Microsoft 365.

- Build custom sensitive info types to ensure we're capturing the data through reports and auto-labelling
- Implement a DLP Program, securing sensitive data and sites
- Implement Insider Risk management program, capturing data leaks, and monitoring departing users
- Apply Service Side labelling and client-side labelling. Being able to apply data classification at rest and in transit



18-22 weeks

Offer maturity – level three

A sustained and more operationalised data security capability, with advanced classification, incident management, investigation processes and AI-specific governance controls in place to help manage data risk at scale.

Key activities:

- Build alert and incidents management playbook leveraging Activity explorer, Defender XDR, Audit, eDiscovery. Potential use of PAYG Security Copilot and Data Security Investigation
- Investigate and protect cold data using On-Demand classification across SharePoint, OneDrive and devices
- Implement advanced Classifiers Exact Data Match, Document Fingerprint Sensitive info types
- Enabling native policies specifically for Copilot/AI in DSPM
- Education in eDiscovery for advanced search and investigation, escalation cases from Insider Risk, risky AI Prompts
- Operationalise Microsoft Purview, incident management, regular checks and fine tune alerts and policies, reports
- Review recommendation on Data Security Posture Management

Outcomes from level three

You have stronger protection for sensitive information through custom classification, data loss prevention, insider risk capabilities and advanced labelling, supported by clearer visibility into where data sits and how it is being used across Microsoft 365.

- Microsoft Purview embedded as an ongoing operational capability
- Repeatable incident management and investigation processes established
- Advanced classification and protection controls in place for high-risk data
- Better monitoring and response across SharePoint, OneDrive and devices
- Governance controls introduced for Copilot and AI-related data risks
- Security teams equipped to review, tune and improve policies over time



8-12 weeks

We can also help customers with Microsoft 365 E3

Capability / Feature Category	Included in E3?	Included in E5?	What you <i>miss</i> if you stay on E3 (versus E5)
Manual sensitivity labels / basic information protection / no advanced classifiers	✓ Yes (basic) but no advanced classifiers	✓ Yes (advanced)	On E3 you lack automatic classification, container-level default labels, and machine learning-based label application. No fingerprint-based SIT, Exact Data Match, Trainable classifiers
Retention labels / policies (basic)	✓ Yes (basic)	✓ Yes (advanced)	On E3 you don't get advanced retention like event-triggered or ML-based retention or richer lifecycle controls.
Data Loss Prevention (DLP) – core workloads (Exchange, SharePoint, OneDrive)	✓ Yes (core)	✓ Yes (extended: endpoints, Teams, third-party apps)	On E3 you miss endpoint DLP, DLP in Teams/third-party cloud apps and more advanced scenarios.
eDiscovery & Audit – Standard vs Premium	✓ Basic eDiscovery & standard audit	✓ Advanced eDiscovery/Premium audit & longer retention	On E3 you have more limited search/hold/export, shorter audit retention, and fewer forensic features.
Insider Risk Management & Communication Compliance	✗ Not included	✓ Included	On E3 you cannot leverage built-in Insider Risk Management or Communication Compliance features (detecting risky behaviour, monitoring internal communications) out-of-the-box.
DSPM (policies & monitoring for AI interactions)	? Limited / Not fully supported	✓ Fully supported	On E3 you are missing the full DSPM for AI, specifically enabling one-click policies, capture prompts/responses, monitor/AI interaction at granular level, unable to turn on IRM and DLP analytics for objectives
DSPM (new unified)	✗ Not fully supported	✓ Fully supported	

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