

Microsoft 365 Optimisation Assessment

Assisting [Client Name] in recognising licensing efficiency opportunities and advancing digital transformation

Scene Setting

- Today's agenda is set based on requested topics and the provided outline. We'll cover these broadly since it's our first meeting. Feel free to ask questions, and I will too, to understand your organization, Microsoft usage, goals, and digital transformation plans. This usually leads to follow-up actions to better align with your expectations.

Agenda

- Opportunities to enhance your licence efficiency
- Opportunities to enhance your operational efficiency
- Boosting your Microsoft Security Score
- Microsoft 365 Copilot opportunities and adoption

Opportunities to enhance your licence efficiency

- Outline strategies for optimising Microsoft 365 license utilisation and identifying cost-saving opportunities. By addressing excess licenses and various types of "zombie" accounts and products, the aim is to streamline your organization's Microsoft 365 licensing, thereby reducing unnecessary expenditure.

[Client Name]

Your Licence Position



SKU Name	Purchased	Consumed	Available	Suspended	SKU % Assigned
Dynamics 365 Operations - Device	140	140	0	0	100%
Microsoft 365 E3	206	200	6	0	97%
Dynamics 365 for Supply Chain Management	31	25	6	0	81%
Power BI Premium P1	1	1	0	0	100%
Dynamics 365 Operations Sandbox Tier 2	3	3	0	0	100%
Microsoft 365 F3	462	458	4	0	99%
Dynamics 365 Finance	20	10	10	0	50%
Dynamics 365 Operations – Activity	62	60	2	0	97%
Power Apps per user plan	83	82	1	0	99%
Microsoft 365 E5	25	23	2	0	92%
Dynamics 365 for Supply Chain Management	16	8	8	0	50%
Teams Rooms Pro	8	8	0	0	100%
Teams Phone Standard	38	38	0	0	100%
Visio P2	9	8	1	0	89%
Project P3	4	3	1	0	75%
Dynamics 365 Team Members	9	4	5	0	44%
Power BI Pro	6	6	0	0	100%
Power Automate per user plan	1	1	0	0	100%
Teams Phone Resource Account	90	89	1	0	0%

Licence Optimisation: **Excess licences**

Identify and eliminate surplus licenses that are not actively being used by any employees.

- Conduct a comprehensive audit of all allocated licenses.
- Determine the necessity of each license.
- Reclaim and reassign or deactivate unnecessary licenses.
- **£2,950.64 per month (£35,407.68 per year) saving.**

Licence Optimisation:

Disabled accounts with licenses

Identify disabled accounts that still have active licenses attached.

- Run a report to list all disabled accounts.
- Check for licenses assigned to these accounts.
- Reclaim licenses from these accounts for reassignment or deactivation.
- **£6.40 per month (£76.80 per year) saving**

Licence Optimisation:

Active user with a product that was never used

Identify active users who have been assigned products they have never used.

- Review usage logs for all assigned products.
- Reclaim licenses for products that have never been used by these active users.
- **£7,731.02 per month (£92,772.24 per year) saving.**

Licence Optimisation:

Active user with a product with inactive usage

Identify products assigned to active users that show inactive usage over a specified period.

- Track product usage activity to determine inactivity.
- Reclaim and reassign or deactivate licenses for these products.
- **£124.82 per month (£1,497.84 per year) saving.**

Licence Optimisation:

Active account with licenses never logged in

Identify products assigned to active users that show the user hasn't logged in over a specified period.

- Track product usage activity to determine inactivity.
- Reclaim and reassign or deactivate licenses for these products.
- **£195.53 per month (£2,346.36 per year) saving.**

Licence Optimisation:

Inactive accounts with licenses

Pinpoint accounts that have been inactive for an extended period but still hold licenses.

- Analyse account activity logs to identify inactivity.
- Reclaim licenses from these inactive accounts.
- **£670.10 per month (£8,041.20 per year) saving.**

Licence Optimisation:

Recategorize licenses

Identify products assigned to active users that have identified an opportunity to reclassify the licence.

- Review usage logs for all assigned products.
- Recategorize licenses for products that are more suitable (E-class to F-class)
- **£44.82 per month (£537.84 per year) saving.**

Licence Optimisation: Efficiency Summary

[Microsoft Modern Workplace
Subscription Optimisation Assessment -
\[Client Name\].xlsx](#)

Type	Category	Monthly Saving	Annual Saving
Excess	Excess licenses	£2,950.64	£35,407.68
Zombie	Disabled accounts with licenses	£6.40	£76.80
Zombie	Inactive accounts with licenses	£670.10	£8,041.20
Zombie	Enabled accounts that have never logged-in with licenses	£195.53	£2,346.36
Zombie	Active user with a product that was never used	£7,731.02	£92,772.24
Zombie	Active user with a product with inactive usage	£124.82	£1,497.84
Recategorize	Recategorize licenses	£44.82	£537.84
Total		£11,723.33	£140,691.96

Operational Optimisation: **Efficiency Summary**

[Microsoft Modern Workplace
Subscription Optimisation Assessment -
\[Client Name\].xlsx](#)

Category	Count
Disabled accounts without Licenses	22
Inactive guest accounts without licenses	63
Guest account that have never logged in without licenses	11
Inactive account without licenses	72
Account that has never logged in without licenses	112
Total	280

Boosting Your Microsoft Security Score

- Boosting your Microsoft Secure Score is essential for enhancing your organization's security posture. To achieve this, it is critical to follow a comprehensive approach that addresses various facets of your security infrastructure.

[Example Client] Secure Score

- We are pleased to present your organization's current Microsoft Secure Score, which measures your security posture and highlights areas for improvement. By consistently monitoring and improving your Secure Score, you enhance your defenses against potential threats.

Metric	Score
Average Secure Score (101-1,000)	51.9%
Current Secure Score (%)	49.7.3%
Current Secure Score (Points)	678
Secure Score Improvement (Points)	675
Recommended Improvements	169

Secure Score Improvement

Improving a Microsoft Secure Score involves focusing on four main areas: **Apps, Identities, Data, and Devices**.

- For Apps, ensure applications follow the latest security protocols and update them regularly.
- For Identities, implement multi-factor authentication and strict access controls.
- To protect Data, use strong encryption, regular backups, and data loss prevention policies.
- For securing Devices, deploy endpoint protection, keep software up-to-date, and enforce device compliance policies.

Impact	Apps	Identity	Data	Device	Total
High	10	7	4	0	21
Moderate	180	12	0	462	642
Low	6	6	0	0	12
Totals	196	25	4	462	675



[Microsoft Modern Workplace Secure Score Enhancements - \[Client Name\].xlsx](#)

CoPilot for Microsoft 365 opportunities and adoption

- Adopting Copilot for Microsoft 365 offers organisations the chance to boost productivity and simplify workflows.
- This AI assistant helps by providing real-time support, automating tasks, and promoting team collaboration. It can generate insights, give data-driven recommendations, and allows employees to concentrate on strategic activities instead of administrative tasks.

Copilot for Microsoft 365 Candidate Users

[Copilot for Microsoft Candidate Users - \[Client Name\].xlsx](#)



User Location	Candidate Users
United Kingdom	28
United States	9
Australia	5
China	2
France	2
Germany	1
Spain	1
Sweden	1
India	0
Italy	0
Malaysia	0
Netherlands	0
Total	49

Microsoft 365 Optimisation Assessment

Thank you for your time and attention.