

PACKAGE 1

M365 Governance Quick Assessment

Independent technology review of your Microsoft 365 tenant configuration, services and usage

Package 1 – Target Group & Scope

Target Group
Organizations using M365 that want an independent review of their tenant and are open to improvements.

Identity & Infrastructure

- Architecture & Entra ID
- Licensed M365 features
- Mobile devices & Intune
- Tenant settings & identity
- Data security & encryption

Services & Data

- License assignments
- Information architecture
- Exchange Online & mail flow
- Teams, SharePoint & OneDrive
- External sharing & B2B guests

Package 1 – Assessment Summary

3

Workshops

With M365 resp., Tenant admin, Legal, Security & Adoption

PDF

Report

Summary · Main results · Quick wins · Action items

2h

Debriefing

Walk through findings and agree on next steps

2

PACKAGE 2

M365 Governance Detailed Analysis

Comprehensive technical and functional review of your Microsoft 365 environment

Package 2 – Target Group & Scope

Everything from Quick Assessment — plus a deep-dive into

Copilot & Agents

Usage, inventory, lifecycle, governance

Advanced Security

DLP, retention policies, content governance (SAM)

Power Platform

Power Apps, Automate, BI · Archiving & backup

M365 Operation & technology adoption

Global admins, PIM, M365 change board, M365 technology adoption

Network

Service URLs, bandwidth, proxy bypass, DNS

Microsoft 365 Compliance Configuration

Technical review of eDiscovery roles, access controls and policy lifecycle

Package 2 – Assessment Summary

5

Workshops

M365 resp., Tenant admin, Legal, Security & Adoption

PDF

Detailed Report

Summary · Results · Quick wins · Roadmap · Actions

3h

Debriefing

Extended session to walk through the full report

3

PACKAGE 3

Copilot Readiness & Governance Check

For companies introducing or operating Copilot for Microsoft 365

Package 3 – Target Group & Scope

Companies introducing or operating Copilot — without yet having clarified governance & security.

Operational readiness for Microsoft 365 Copilot

- Workshop with Copilot, security and adoption representatives
- Technical blockers and Copilot-ready users
- Operational readiness for Microsoft 365 Copilot
- Evaluation of Microsoft 365 productivity tools and Copilot use cases
- Data security & governance check

Copilot Governance

- Review of current tenant configuration
- Copilot governance policies & recurring tasks
- Assessment of M365 Copilot technology and information-governance risks
- Technology user profiles, technical responsibilities and lifecycle processes

Deliverable: PDF report with action items + Debriefing session (1h)

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PACKAGE 4

AI Agent Readiness & Governance Check

For companies introducing or operating AI Agents

Package 4 – Target Group & Scope

Companies introducing or operating Agents — without yet having clarified governance & security.

Agent Readiness

- Workshop with Agent, security and adoption representatives
- Microsoft AI Agent use-case and technology alignment
- Technical foundation: Microsoft platform, data access and security prerequisites
- Operational readiness and user enablement for AI Agents
- Security and governance baseline

Agent Governance

- Review of current tenant configuration
- Agent governance policies & recurring tasks
- Assessment of technical, data-access and operational risks related to AI Agents
- Technology user profiles, technical responsibilities and lifecycle processes

Deliverable: PDF report with action items + Debriefing session (1h)

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PACKAGE 5

Copilot & Agent Governance

Combined governance engagement for both Copilot and Agents

Package 5 – Copilot Component

Companies introducing or operating Copilot — without yet having clarified governance & security.

Operational readiness for Microsoft 365 Copilot

- Workshop with Copilot, security and adoption representatives
- Technical blockers and Copilot-ready users
- Operational readiness for Microsoft 365 Copilot
- Evaluation of Microsoft 365 productivity tools and Copilot use cases
- Data security & governance check

Copilot Governance

- Review of current tenant configuration
- Copilot governance policies & recurring tasks
- Assessment of M365 Copilot technology and information-governance risks
- Technology user profiles, technical responsibilities and lifecycle processes

Deliverable: PDF report with action items + Debriefing session (1h)

Package 5 – Agent Component

Companies introducing or operating Agents — without yet having clarified governance & security.

Agent Readiness

- Workshop with Agent, security and adoption representatives
- Microsoft AI Agent use-case and technology alignment
- Technical foundation: Microsoft platform, data access and security prerequisites
- Operational readiness and user enablement for AI Agents
- Security and governance baseline

Agent Governance

- Review of current tenant configuration
- Agent governance policies & recurring tasks
- Assessment of technical, data-access and operational risks related to AI Agents
- Technology user profiles, technical responsibilities and lifecycle processes

Deliverable: PDF report with action items + Debriefing session (1h)

Package 5 – Copilot & Agent Governance Summary

Copilot Governance

- Tenant setup review
- Governance policies
- Recurring tasks
- Responsibilities

Agent Governance

- Tenant setup review
- Governance policies
- Recurring tasks
- Responsibilities

Roadmap & Actions

- Secure Copilot and Agent rollout plan
- Action items (PDF)
- Debriefing (3h)

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PACKAGE 6

Microsoft Roadmap & Message Center Checks

Ongoing monitoring for companies without or with low internal capacity

Package 6 – Target Group & Scope

Target: Companies without or low internal capacity to monitor the M365 roadmap & Message Center

M365 Technology Change Board

Design or review the operating model for an M365 technology change board

Planner Board

Track & assign M365 roadmap changes

Microsoft & AI Roadmap Monitoring

Governance, security & compliance features

M365 Message Centre Analysis

Categorize by technical impact, security risk, urgency and tenant relevance

Bi-weekly Review

2h session with M365, CAB, security & adoption

Advisory Support

Help on selected action items (max. 2 PDs/ month)

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PACKAGE 7

Trusted M365 & AI Technology Advisor

Your independent advisor for Microsoft 365, Copilot, AI Agents and technology governance.
Flexible support for technology decisions, tenant governance, security configuration and M365 & AI operations.



My Partners

Recommended partners for complementary technology consulting and implementation

My Partners

Partner	Contact	Primary Focus	Ideal Joint Plays
Atwork (Wien)	Martina Grom	M365 governance, security & compliance; Delegate365	Governance assessments · Copilot guardrails · Purview
GO365 (Wien)	Georg Weigl	M365 technology strategy, migration, rollout, user adoption and change enablement	M365 governance blueprint GO365 supports technical rollout and user adoption



Why This Model?

Use an independent Microsoft 365 & AI Advisor

Why This Model?

01

Truly Independent

No vendor agenda — only what's best for you

02

Deep Hands-On Experience

12+ years at scale in a regulated bank

03

Speaker & Thought Leader

M365 Conference, ESPC, Adriatics Tech Summit, Baltic Tech Summit

04

Modular & Scalable

Start small, expand to full governance

INDEPENDENT M365 & AI TECHNOLOGY ADVISORY

Dr. Manfred Koch



Microsoft 365 & AI Advisor

My Offerings

Manfred.Koch@M365AIAdvisor.com
Tel. +43 670 6532151
www.M365AIAdvisor.com