



Service Definition Document

Microsoft 365
Assessments

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Solution Overview

As organisations embrace Modern Work and SaaS-based models, Microsoft 365 is a leading platform for productivity, collaboration, security, and compliance. But the key question remains: Are you getting the full value from your Microsoft 365 investment?

Many organisations lack the time or expertise to validate their Microsoft 365 environment, including configuration, licensing, and tenant setup. This can lead to security gaps, unnecessary costs, and underutilised features—impacting productivity and ROI.

We want to help you understand if your M365 environment—including configuration, licensing, and tenant health—fully aligns with your business needs and user requirements. This is why we developed our M365 Assessment Services, offering a set of tailored assessments based on what's right for your organisation.

Key Features

- Licensing analysis and optimisation to reduce cost and complexity
- Tenant configuration review for security, compliance, and performance
- Security posture assessment to identify and mitigate vulnerabilities
- Compliance and governance checks against Microsoft best practices
- Secure Score remediation recommendations for improved security posture
- Usage and adoption insights to maximise Microsoft 365 value
- AI and Copilot readiness evaluation for future enablement
- Detailed reporting with prioritised actions for quick improvements
- Identity and access configuration analysis for secure authentication
- Endpoint management and device compliance review for protection

Key Benefits

- Reduces licensing costs by eliminating unnecessary or unused software licenses
- Improves ROI on Microsoft 365 through optimised license allocation strategies
- Enhances compliance and security by ensuring correct licensing and governance
- Aligns licensing with business needs for maximum operational efficiency gains
- Increases feature adoption by enabling users to access relevant tools
- Simplifies license management through automated tracking and streamlined administrative processes
- Delivers a future-proof licensing strategy adaptable to evolving business requirements
- Provides a clear roadmap for optimisation, reducing complexity and uncertainty
- Offers greater visibility into usage and wastage for informed decision-making
- Improves budgeting accuracy through predictable insights and transparent cost forecasting

Aims and Objectives

This Microsoft 365 Assessment encompasses a complete review of your Microsoft 365 tenancy and licensing to understand where improvements can be made. It will cover:

- Current configuration and tenant health.
- Security posture and identity management (Zero Trust, MFA, Conditional Access).
- Licensing analysis and optimisation opportunities.
- Requirements moving forward, prioritised using MoSCoW ratings.
- Planning to deploy further Microsoft 365 technologies with recommendations.
- Identifying technologies that could be replaced by Microsoft 365 for cost savings.
- Documenting changes needed to close gaps and improve governance.
- Knowledge sharing for your IT team.

Scope and Duration

Scope

The scope of this service will encompass the following tasks:

- Collecting data from Microsoft 365 tenant and licensing reports through scripts and technical discovery workshops.
- Analysing data and providing a report with recommendations and remediation activities.
- Reviewing identity and access management, governance, and compliance settings.
- Knowledge transfer through discovery and requirements workshops with IT staff.
- Capturing and documenting specific requirements for use as a baseline moving forward.

Anything not specifically described as being in-scope can be deemed to be out-of-scope.

Duration

The typical duration for a Microsoft 365 Configuration Assessment would be 5 days but this can vary depending on specific requirements.

Deliverables

The key deliverables of this engagement is the production of a report with findings, requirements, and capture of recommendations.

Structure and Activities

Governance

Iomart will work with named individuals at your organisation to ensure we have the correct information and the required delegated admin privileges to facilitate a successful completion of the proposed work.

The essential security and governance details will be agreed in the initial workshops.

Resources

The following table describes the resources that will be required during this engagement.

Phase	Resource Type	Description	Qty	Provider
All	Staff	Technical Architect	1	Iomart
	Permissions	Access to M365 admin portal and Azure Active Directory	N/A	Customer

Ongoing Support

Following the completion of the Microsoft 365 Assessment, Iomart would be able to provide professional services to carry out the recommended improvements to the configuration. This would be scoped based on the individual requirements and costed based on the rates in the SFIA rate card

Data Protection & GDPR

Atech, part of the Iomart Group, is committed to conducting its business in accordance with all applicable Data Protection laws and regulations and in line with the highest standards of ethical conduct. Our Data Protection policy sets forth the expected behaviours of Iomart Employees and Third Parties in relation to the collection, use, retention, transfer, disclosure and destruction of any Personal Data belonging to an Iomart Contact (i.e. the Data Subject). Iomart, as a Data Controller, is responsible for ensuring compliance with the Data Protection requirements outlined in our Data Protection policy (available on request).

Iomart's leadership is fully committed to ensuring continued and effective implementation of this policy and expects all Iomart Employees and Third Parties to share in this commitment.

Iomart uses the Personal Data of its Contacts for the following broad purposes:

- The general running and business administration of Iomart Entities.
- To provide services to Iomart customers.
- The ongoing administration and management of customer services.
- The use of a contact's information should always be considered from their perspective and whether the use will be within their expectations or if they are likely to object.

Each Iomart Entity will Process Personal Data in accordance with all applicable laws and applicable contractual obligations. More specifically, Iomart will not Process Personal Data unless at least one of the following requirements are met:

- The Data Subject has given Consent to the Processing of their Personal Data for one or more specific purposes.
- Processing is necessary for the performance of a contract to which the Data Subject is party or to take steps at the request of the Data Subject prior to entering a contract.
- Processing is necessary for compliance with a legal obligation to which the Data Controller is subject.
- Processing is necessary to protect the vital interests of the Data Subject or of another natural person.
- Processing is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the Data Controller.
- Processing is necessary for the purposes of the legitimate interests pursued by the Data Controller or by a Third Party.

Why Partner with Atech?

Credentials and Capability

Atech is the one of the UK's most accredited providers of secure hybrid cloud managed services, delivering deep expertise across Microsoft technologies, data protection, and cybersecurity. We hold Microsoft designations for **Modern Work, Security, Infrastructure (Azure)** and are recognised as an **Azure Expert MSP** – a status achieved by only 60 partners globally and 15 in the UK.

As part of the Microsoft AI Cloud Partner Program, we have validated technical capabilities across the full cloud lifecycle. Our inclusion in the **Azure Expert MSP Program** reflects proven excellence in people, processes, and tools, ensuring sustainable, repeatable, and scalable managed services. This means you can rely on a partner that consistently delivers best practice and operational efficiency.

Partnering with us gives you access to over **200 Microsoft cloud specialists**, including **two Microsoft MVPs**, ensuring unparalleled technical depth and experience.

Microsoft Endorsements and Specialisations

We hold multiple Microsoft Solutions Partner designations, including:

- Digital & App Innovation (Azure)
- Data & AI (Azure)
- Business Applications



Figure 1: Microsoft Accreditations

In addition, we have achieved advanced specialisations in areas such as:

- Cloud Security
- Identity and Access Management
- Threat Protection
- Infra & Database Migration
- Azure Virtual Desktop
- Enterprise Application Migration to Azure



Figure 2: Microsoft Designations

These credentials validate our ability to deliver complex, secure, and innovative solutions aligned to Microsoft best practices.

Security and Compliance

Security is at the heart of our services. Atech is **ISO 27001 certified**, **Cyber Essentials Plus accredited**, and a member of the **Microsoft Intelligent Security Association (MISA)** – an invitation-only program granting access to Microsoft’s top security experts. We also hold **CREST accreditation** and participate in the **Microsoft MSSP Program**, one of only 12 partners in the UK, giving our customers direct benefits such as access to product teams and funded workshops.

Further reinforcing our security leadership:

- **Microsoft Gold Partner Status** alongside **Azure Expert MSP**
- **Microsoft MSSP Program** (1 of only 12 UK partners)
- **Microsoft Fastrack Ready Partner** (1 of only 300 globally)
- **Microsoft XDR status**

These credentials provide you with assurance that security is embedded throughout design, migration, and ongoing management. Combined with our advanced specialisations and industry recognition, they demonstrate our ability to deliver secure, compliant, and future-ready solutions.

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