



Microsoft 365 Optimisation Advisory Service

Contracting body

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CGI

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Service Definition Overview

Using our extensive real-world experience, CGI help clients achieve well-architected, maintained, and optimised environments to fully leverage the benefits of the full Microsoft 365 suite including Microsoft Copilot services.

CGI's Microsoft 365 Optimisation Advisory service assesses your environment, providing a comprehensive understanding of your current usage, providing recommendations of how to maximise value realisation.

Why CGI?

CGI delivers an end-to-end portfolio of capabilities, from high-end IT and business consulting to systems integration to IT and business process outsourcing services. Our services are supported by our unique differentiators:

We are a trusted partner for UK Government and regulated industries, providing expertise in Microsoft 365 optimisation to ensure government organisations can achieve well-architected, compliant, and cost-effective estates. We combine deep knowledge of Zero Trust security models, NCSC guidance, and IL-level requirements with mature deployment frameworks, governance accelerators, and adoption playbooks to reduce implementation risk and accelerate time to value. CGI's client-proximity operating model guarantees locally accountable delivery supported by a global network of Microsoft specialists, while our advisory services include Copilot readiness and AI governance to future-proof collaboration and productivity. This holistic approach—spanning People, Process, and Technology—enables government bodies to maximise return on investment, strengthen security posture, and unlock the full potential of their Microsoft 365 suite.

1. Service Definition Overview

In today's rapidly changing world, organisations must be able to adapt quickly to ongoing challenges.

Specifically, Microsoft 365 (M365) has become an essential collaboration tool for enabling agile operating models, with its ability to be accessed from anywhere at any time, on any device.

However, many organisations are yet to review their configuration for security best practices, or to fully leverage the benefits of the wider M365 suite, including the latest innovations in Microsoft A.I. technologies.

The challenge that many organisations now face is learning how to navigate all elements of the M365 suite efficiently and effectively, but without compromising governance and security.

At CGI, we use our extensive expertise to help clients understand their specific challenges and goals, providing tailored guidance to ensure successful outcomes, maximising return on investment in the M365 suite.

CGI helps organisations plan and implement improved M365 solutions leveraging and integrating all services where required. The approach uses the required People – Process – Technology (PPT) structure and is aligned with M365 best practices and Zero Trust principles.

People

- Assess current roles, skills, capabilities, and responsibilities associated with M365 management.
- Map responsibilities to DDAT job families (e.g., IT Operations Engineer, Technical Architect, Cyber Security Engineer).
- Provide a recommendations plan for organisational readiness, training, and potential resourcing uplift.

Process

- CGI will review current M365 environment and usage. This includes meeting with key stakeholders to understand all aspects of your M365 subscription, and future cloud requirements (roadmap).
- Identify any challenges your organisation faces, and the business drivers that need to be incorporated.
- Discuss any constraints your organisation may have, for example security and compliance gaps.
- Evaluate current license consumption and service usage.
- Assess policies and processes in relation to security, compliance, and governance and align with requirements.
- Evaluate alignment with Zero-Trust architecture and NCSC guidance.
- Workflow optimisation through identifying inefficiencies in onboarding/offboarding and change management.

Technology

CGI will review the organisation's M365 landscape, including:

- Audit Logging.
- Multi-Factor Authentication.
- Entra ID Identity Protection and Privileged Identity Management (PIM).
- M365 Threat Protection (Microsoft Defender integration).
- Purview data security including Information Protection, Data Loss Prevention and insider Risk Management.
- M365 Copilot technical pre-requisites.

Deliverables

CGI will provide a set of structured outputs, tailored to scope:

- Current M365 adoption and usage.
- M365 license consumption and cost saving recommendations.
- M365 security posture assessment (aligned to NCSC + Zero Trust). Aligned to recommended Good/Better/Best security adoption.
- M365 future roadmap.

- M365 Copilot technical readiness recommendations.
- Identity governance and Conditional Access improvement recommendations.
- Executive Summary for leadership with quantified benefits (e.g., uplift in license usage, security and compliance score).

Change Control

Any modification to scope, deliverables or timelines will be managed through CGI's formal change-control process in alignment with G-Cloud regulations.

2. Data Backup and Restore

This service is not applicable for the consultancy service as CGI does not host or operate buyer systems. CGI assesses buyer backup and restore posture where relevant (e.g., for data backup) and report any gaps.

3. Service Continuity

Consultancy delivery only.

CGI offers resource substitution and rescheduling to maintain delivery continuity.

4. Onboarding and Offboarding

4.1. Onboarding

- Kick-off meeting, scope validation, and project planning.
- Agreement of stakeholder groups and responsibilities.
- Access enablement (documentation, read-only portal access where authorised).

4.2. Offboarding

- Closure meeting and agreed next steps.
- Revocation of CGI access credentials.

5. Service Constraints

- Read-only environment access may be required for analysis.
- Buyer SME and Stakeholders availability is required for workshops.
- Remediation or implementation support is optional and may require separate commissioning.
- No 24x7 operations or live service management is provided within this consultancy.
- In-scope work must relate to buyer-owned Microsoft 365 estates only.

6. Service Levels

- Standard query response within 2 working days.
- Draft assessment report delivered within 10 working days of discovery completion.
- Final deliverables provided within 5 working days of receiving feedback.
- Services provided during UK business hours unless otherwise agreed.

7. After Sales Support

CGI can provide early-life post-optimisation support as part of the optimisation plan or take on complete support of your M365 environment. If this is of interest, we will advise on how best we can support you in this regard during this engagement as part of our wider Digital Workplace offering.

8. Technical Requirements

The buyer will ideally provide:

- Named SMEs for M365 assistance.
- Access to relevant Microsoft 365 admin portals (read-only unless otherwise approved):
 - Microsoft M365 Admin portal and wider services
 - Entra ID
 - Entra ID Audit and Sign-in logs (or equivalent)
 - Microsoft Purview
 - Microsoft Defender (optional)
- Architectural diagrams, licensing details, policies, RBAC models and logging configuration.

9. Outage and Maintenance Management

Not applicable – consultancy service.

Any scanning or assessment tooling will be scheduled with the buyer to avoid operational disruption.

10. Hosting Options and Locations

Not applicable.

Delivery is UK based unless otherwise agreed.

11. Security

CGI uses our Management Foundation including our Integrated Management System (IMS) for information assurance. These IMS processes are independently certified to BS/EN/ISO 9001.

CGI is committed to retaining our current range of UK-based certifications and will extend these to meet client expectations as required. The CGI Management Foundation design allows incorporation of best practice from across all our Public Sector and Commercial engagements.

Our accreditations include:

- ISO9001 and ISO20000
- ISO/IEC 27001:2013 Audit and Certification SSAE 16/ISAE 3402 Attestation
- ISO/IEC 22301:2012
- E.U. Data Protection Directive - (95/46/EC).

Other:

- CGI staff hold BPSS as a minimum; SC-cleared resources available.
- All access is least-privilege, time-bound and approved by the buyer.
- No buyer data is retained beyond agreed periods.

12. Service Pricing and Terms and Conditions

12.1. Pricing

Please refer to the G-Cloud 15 portal for the rates available.

12.2. Terms and Conditions

Please refer to the associated Terms and Conditions Document relevant for this Service including termination by the Buyer or Supplier.

13. Sustainability and Social Value

CGI embeds social value into all public sector engagements, aligned with UK Government's Social Value Model and CCS requirements. Including:

Sustainability:

- Carbon reduction: remote-by-default delivery; travel minimisation; device-life extension analytics; alignment to CGI's Carbon Reduction Plan (PPN 06/21 template).

Social value:

- We embed apprenticeships/skills development in delivery chains.
- SME inclusion: Aim to engage a minimum of one SME partner per project where proportionate.
- Prompt-payment compliance aligned to G-Cloud 15 expectations.
- CGI will complete GC15 Social Value declarations (Sections A–D) and report outcomes at call-off level.

14. Further information

For more information about this or any of our G-Cloud services, please contact us:

Phone: +44 0845 070 7765. Ask to speak to the G-Cloud team.

Email: uk.gen.ccsframeworks@cgi.com, including the following information:

1. The name of this service.
2. The name of your organisation.
3. Your name and contact details.
4. A brief description of your business situation.
5. Your preferred timescales for starting the work.

We will prepare a quotation for you. Once the quotation is agreed upon, we will issue you the necessary documentation (as required by the G-Cloud Framework) and ask you to provide us with a purchase order.

Once we have received your purchase order, the services will be configured to the requirements agreed with invoices issued to you for the services procured. On a monthly basis, we will also complete the mandated management information reports to Government Procurement.

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The information in this proposal is submitted on 30 Jan 2026 - Issue 1.0 on behalf of CGI by the following authorised representative:

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