ConversationalGeek®

Conversational
Microsoft 365
Management

By J. Peter Bruzzese (8x Awarded Microsoft MVP)

3rd Edition
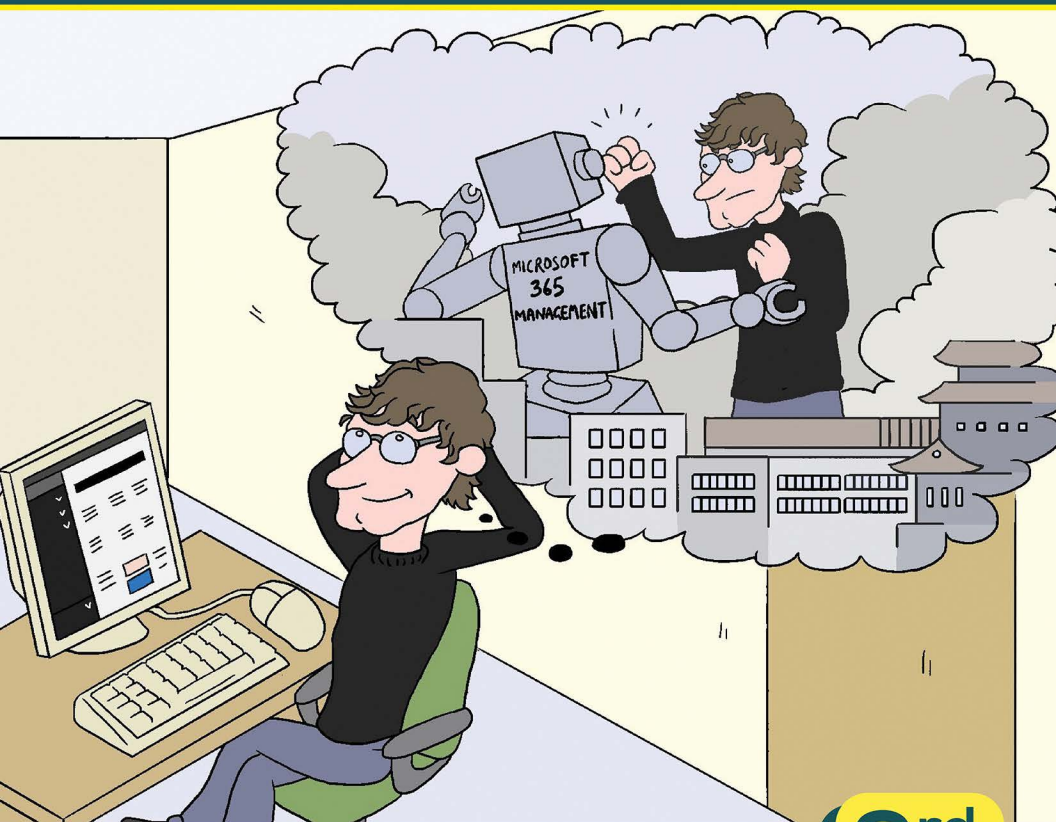
In this book, you will learn:

- Licensing and management challenges of Microsoft 365

- The gaps in native M365 administrative tools to handle license management, RBAC, compliance and more

- The value of a Microsoft 365 Management Platform to plug those gaps

Conversational Microsoft 365 Management
By J. Peter Bruzzese

© 2023 Conversational Geek

ConversationalGeek®

Conversational Microsoft 365 Management
Published by Conversational Geek® Inc.

www.conversationalgeek.com

Trademarks

Warning and Disclaimer

Additional Information

Publisher Acknowledgments

Note from the Author

Greetings!

Microsoft has always left the door open for an ecosystem to spring up around their solutions and enhance what they did out of the box. Microsoft 365 is no different in that it opens the door for new cloud-based solutions to take what is built-in and make it better, giving us more options.

One area where I can see this being valuable is in our management of Microsoft 365. There are solutions in the marketplace that help improve onboarding and offboarding, provide greater insight into the services being used, provide license management, automate things that you would typically have to do manually (or through a script that you have to take the time to figure out and build) and more.

The world of IT continues to become more complicated as IT teams try to do more with less. With a need to reduce costs, coping with staff shortages and hiring freezes, while managing more complicated cloud-based solutions, smart IT teams need to leverage solutions that will help them do more than survive, but thrive. This book will explore the value of Microsoft 365 management tools to assist in doing just that.

J. Peter Bruzzese

Getting Your Arms Around Managing Microsoft 365

The Covid-19 pandemic forced organizations to rely further on cloud-based communication and collaboration solutions like Microsoft 365. As a result, the number of active users has grown at a rapid pace. At the latest investor earnings release Amy Hood, executive vice president and chief financial officer of Microsoft said "This quarter Microsoft Cloud revenue was $25.7 billion, up 24% (up 31% in constant currency) year-over-year. We continue to see healthy demand across our commercial businesses including another quarter of solid bookings as we deliver compelling value for customers". And Satya Nadella, chairman and chief executive officer of Microsoft, in commenting on the future, said "In a world facing

increasing headwinds, digital technology is the ultimate tailwind. In this environment, we're focused on helping our customers do more with less, while investing in secular growth areas and managing our cost structure in a disciplined way."

Details regarding M365 are based around Microsoft's FY23 Q1 results.

goto.cg/MSFY23Q1

With such large volumes of users utilizing Microsoft's premier communications and collaborations platform (M365 and Teams), there comes the need for IT to manage this environment to meet the specific needs of each customer organization. As Microsoft did with their legacy on-premises solutions, they've also done with Microsoft 365; they've provided us with a variety of tools used to address daily and one-off administrative needs.

But, similarly, it's understood that Microsoft has so many customers with such varying needs, that it's impossible for their management capabilities to be comprehensive in nature. As you'll see, Microsoft has definitely put thought into what kinds of management are possible natively, but some more advanced functionality either requires customization, scripting, or 3rd party help.

In moving from an on-premises world to a cloud-based one, there are major gains, but also very clear control losses for IT. Enterprises need to look at the current state of their environment with the goal of getting things back under control and that can be accomplished with both built-in and bolt-on solutions. You just need to know what can be done out of the

box (or cloud, so to speak). Let's begin by looking at what comes right "out of the cloud".
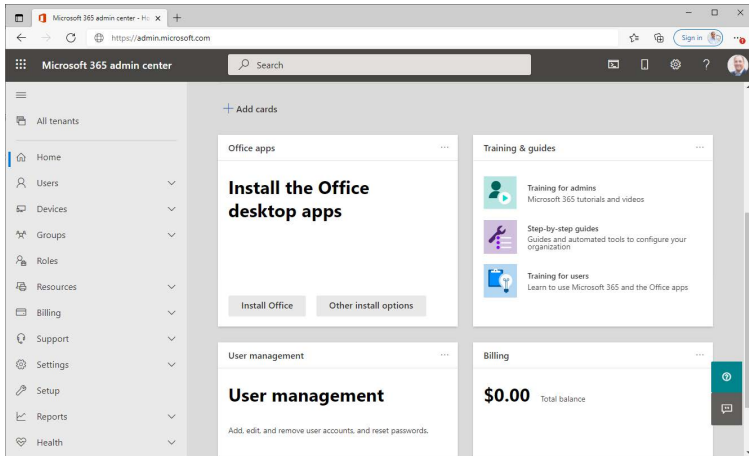
The Microsoft 365 Admin Center

Native Microsoft 365 Administration Tools

Microsoft provides a basic set of admin tools through administrative consoles that, where applicable, port back to their on-premises counterparts.

For example, when working with specific features of Microsoft 365, like Exchange Online, an admin will have the ability to work with a web-based portal solution like what they use on-premises.

More and more, however, Microsoft is working to create new dashboards that help to surface specific management tools so that admins can find them based on subject and manage them across different parts of the platform. Granted, it's not ideal to develop this way but they're starting from a disparate server scenario and trying to merge architectures together (Exchange, SharePoint) while building new solutions on top (Teams).

A perfect example of this is the effort to pool together Security and Compliance for the entire platform into one dashboard.

From within these consoles (the Security and/or Compliance console) you can establish settings for multiple built-in solutions. For example, a retention policy that applies to email, SharePoint sites, OneDrive accounts, Teams and more.

In addition, you can establish a remote PowerShell connection to Microsoft 365 and perform most (but not all) tasks through the command-line as you would through the GUI.

> Although PowerShell is a great tool for command-based administration, some IT admins would prefer to avoid the heavy lifting involved with scripting and such and prefer a more automated approach.

Some smaller organizations might look at what Microsoft 365 offers and say it's "good enough" for their needs. Others might want greater transparency and visibility into reporting, license administration, role-based access control (RBAC) features, and more.

It's not a slight against Microsoft (or any other SaaS vendor for that matter) to say the native, built-in administrative consoles and features might not fully satisfy the management requirements of an organization – especially a large shop. But you can't let that deter you from pursuing the valuable communication and collaboration services platform provided

through Microsoft 365. Microsoft has always left gaps for third parties to fill in – and Microsoft 365 is no exception.

The Microsoft 365 Management Battlefield

There are aspects to Microsoft 365 management that are both time consuming and prone to error. Let's consider a few:

- **Provisioning** users is a clear example. First, you need to determine if you have enough licenses (and the right ones for the users), which isn't entirely an intuitive task. The Microsoft 365 Admin Center console will have you searching for the Licenses page (under Billing – Licenses). You can assign licenses from here or you can go back to the Active Users page (under Users) and begin the process of manually provisioning each user. Scripting the onboarding process for bulk user provisioning can be done through a remote PowerShell connection with a lot of research and trial and error.

- **Deprovisioning** is an even bigger issue, especially due to the security threat posed should a terminated user not be deprovisioned properly. Admins typically have a list of deprovisioning steps in mind provided by Microsoft that includes saving the contents of a former employee's mailbox (either through an export to .PST or by converting the mailbox to "inactive"), forwarding their email, wiping and blocking their mobile device, blocking access to their mailbox and data, moving their OneDrive content, removing the license, and deleting the account. And to accomplish all of this, you're moving from one Admin Center to another (e.g., from the M365 Admin Center to Exchange to SharePoint).

- The onboard/offboard process taps into the **license management** side of Microsoft 365, which is yet another cause for angst. When first getting started with Microsoft 365, many IT admins will scan its different license plans, see the features connected with each plan (E1 / E3 / E5), and make quick decisions on the number of licenses they need based on the end-user count and perceived use of services. Done! *But is it really?* Every plan has a base of services that, in a buffet license arrangement, may feel right for a swath of your end users. You may think "I'll level up or down" depending on your needs. But the challenge is first finding out what you really need *before* you can right size. Unfortunately, Microsoft 365 isn't incredibly transparent in this regard.

I often see environments where the licensing is either oversized (perhaps you've bought more applications than your users need) or underutilized (due to a lack of adoption).

- **Security** governance and management is another key aspect to Microsoft 365. Microsoft now provides its Secure Score report (through the Security admin center that takes you to Microsoft 365 Defender settings) which will tell you, from a very high-level point of view, where you need to bolster security (hint: a large part of your score is based on multi-factor authentication (MFA) for all users). From the Secure Score dashboard, you can quickly select remediation options, and you're taken to the Azure dashboard (yet another interface) for policy enablement.

- **PowerShell** is used to manage policies and feature options and to provide visibility into Microsoft 365 **(bit.ly/2RPe7J0)**. Granted, in some cases, this is simply the more efficient way to do something (just like with on-prem environments). Legacy admins don't mind getting their hands dirty to perform a little scripting. There are other situations that actually *require* PowerShell, because it's the *only* way to accomplish the task. For example, PowerShell is sometimes the only way to obtain information that isn't available anywhere in the M365 Admin Center. One example is the Deleted Item Retention Time. By default, it's 14 days, but you can adjust it up it to 30 days through a remote PowerShell connection and the *Set-Mailbox -RetainDeletedItemsFor* command. PowerShell is also necessary for reporting on anything that spans the suite of products by collating and combining that information.

We could go on, but the point is clear that organizations of all sizes will appreciate the services of Microsoft 365, but not necessarily the management tools provided along with those services.

The Battlefield Isn't Just in the Cloud

In addition to the challenges that come with trying to address the previously mentioned aspect of Microsoft 365 management, IT organizations themselves are facing a continual battle of their own that impacts their ability to properly manage platforms like Microsoft 365. These include:

- **A Call to Reduce Costs** – The economics of last few years have resulted in a tightening of budgets, with IT organizations left trying to help grow the business with less spend to begin with.

- **A Shortage of Staff** – Many organizations are shy a few needed people within IT. In some organizations, budget cuts, hiring freezes, layoffs, and furloughs – while not commonplace – are a regular occurance today, making it even more difficult for IT to address every Microsoft 365 management need. And in those organizations that continue to thrive, IT hiring isn't easy these days, with plenty of open headcount but not enough IT practitioners with adequate experience, skill, and expertise.

- **More Complicated Environments** – The last few years have accelerated the digital transformation, causing orgzanizations to rely on many of the applications within Microsoft 365 as their "digital workspace", only multiplying the workload on the already strained IT organization.

- **An Expectation to Thrive** – Despite the decline in resources dedicated to IT, the organization still expects that IT will thrive, causing the organization to be more

productive and effective through it's investment in Microsoft 365, resulting in organizational growth.

The outcome of these challenges placed on IT is that to meet the need, IT will need to find ways to "do more with less" – a strategy that includes the use of third-party solutions designed to simplify, automate, and streamline the work of managing Microsoft 365.

Microsoft 365 Management Platforms

As we've discussed Microsoft 365 uses a bevy of different SaaS applications and management consoles that are Frankenstein'd together. This fragmented set of Microsoft 365 features and administrative options are an opportunity to reinvent the management side and help admins through consolidation of management features.

There are six major functional management categories: *administration, role-based access control, policy management, license management, workflow automation,* and *reporting*. The major players in this space will hit some or all of these categories (and perhaps a few additional ones where they feel the native SaaS platform needs a boost, like security and compliance).

According to Gartner, "Nearly all successful attacks on cloud services are the result of customer misconfiguration, mismanagement, and mistakes".

Compliance regulations, like GDPR, PCI, and HIPAA, make for another argument in favor of a management solution to assist with improved monitoring, reporting, and analytics.

The market direction, according to Gartner, is for management platforms to focus on "tactical IT administrative challenges in the native SaaS administrative consoles." Here are some places I see a bolt-on management platform being of value to organizations large and small that are feeling the pain of managing Microsoft 365.

Eliminating Reporting Silos

In the native Microsoft 365 Admin Center, there are a variety of different dashboards and management tools to access reporting, service information, and so on, adding to the complexity in trying to administer what are essentially massive server solutions stitched together with their individual consoles. Keep in mind, if Microsoft was starting all of this from scratch, they would have designed that unified console from the beginning, but that's not how Microsoft 365 was built. It started as on-premises endpoint and server solutions that are now cloud-based, hosted solutions, so the single pane of glass simply doesn't exist. Here is an area where an SMP solution can provide assistance: offering up a single dashboard with the ability to perform administration and reporting, and to handle permissions and such, that can make it easier to manage Microsoft 365 as well as provide the visibility into the use of the solution.

Workflow Process Automation

You can use the various Admin Center UIs to accomplish the basic administrative tasks. And you can resort to PowerShell (command-line) to accomplish deeper bulk administrative functions. However, the amount of time wasted and the degree of error or missed steps make the native consoles less than ideal.

Automation is one of those areas third-party solutions tend to focus on. Why should every admin in every organization have to research, build, test, and deploy PowerShell scripts for the

basic process automation of their environment? Having access to one-click, GUI-based options makes much more sense and helps eliminate the user error that comes from poor execution of home-grown scripting solutions.

Another area of concern is policy management and proper service configurations. While it's easy to get Microsoft 365 up and running with the basic settings, the deeper configuration and management sides to it require a great deal of effort for admins to research, test, and deploy (rinse/repeat). Having an easier means of deploying services with best practices in mind through default policy controls would prevent misconfigured accounts.

Role-Based Access Control (RBAC)

The concept of least privilege is an important security principle that requires that RBAC be implemented properly. Microsoft 365 does offer a variety of admin roles, but they paint with a very wide brush (**goto.cg/3IxCDdT**).

If you scan the different admin roles, there is a *global administrator* (which can do pretty much anything... including handle services like Exchange, SharePoint, Teams and so on). On the lower end there are *global readers* (which have read-only access to admin centers). There is a *helpdesk admin* for password resets, support ticket management, and service health. There are also *service admins* (like for Exchange, SharePoint and Teams). And then there are category focused roles for collaboration, devices, identity, read-only, security and compliance and a few additional ones. The problem, however, is that even though the roles might narrow control, these are *global* credentials. Perhaps in small shops that kind of approach works, but in global environments where you have different teams and tiers, a granular approach that allows the management of specific groups, departments, geos, etc. is needed.

License Management

There are plenty of times organizations eliminate a position or fire an employee and do *not* reduce the number of Microsoft 365 licenses. This mismanagement of licenses can become very costly if not addressed.

Additionally, there are situations where licenses are underutilized. For example, what if you have an E3 plan for all your users but find, through reporting, that several hundred do not have Office desktop applications installed on-premises because they're still using a legacy version of Office on their system?

Situations such as this create *oversized licenses* issues that should be addressed. An E1 license (which would be the correctly-sized license) would save the company money and might better suit your needs. Alternatively, you might want to review software deployment to get everyone onto Office desktop applications, or turn on the archive features to ensure you're getting every last bit of that license.

Right-sizing licensing ports to opportunity costs and the "opportunity" can go either way. There are two ways to address this issue of oversized licenses: you can either attempt to drive adoption or downsize to the proper license. Using the native tools, it's very difficult to pinpoint your users' exact consumption levels. This means you're most likely wasting license fees within your tenant. Having optics on the adoption and consumption of your licensing and usage can ensure your money is better spent by right-sizing software spend. SMPs

providing granular visibility into license usage can assist in the identification portion of these kinds of scenarios, as well as the downsizing of licensing.

Personally, I've bought into the M365 communication and collaboration, 21st century modern workplace story. I believe the key to it is not necessarily right-sizing by altering the license, but through increased adoption. Help your users embrace the tools you've given them.

Security & Compliance

Compliance is a term applied to a variety of different aspects of a business but in this context, we need to lean towards security concerns within your M365 environment. What happened, when did it happen, and what is the response generated – those are the key concerns that need to be addressed. That requires monitoring, alerting and automated resolution because with the excessive issues coming at IT each day it's impossible to rely on manual response times to immediate threats.

Microsoft has some built-in monitor/alert/remediation functionality and additional ones you can purchase to extend your options. But here is where third party compliance mitigation can really be a life saver.

The Big Takeaways

Microsoft has done an incredible job of building a 21st century communication, collaboration and cooperation solution for the modern workplace. Microsoft 365 is being utilized by millions and is evolving in many ways, visually to the end-user as well as behind the scenes for the administrators. One of the key challenges to moving on-premises solutions to the cloud, tying them together, and adding new solutions to the mix is the lack of a clear set of administrative tools.

Legacy dashboards that display as reporting silos and do not provide a single pane of glass may not be super confusing for seasoned on-prem admins but with next-gen admins or non-IT admins being thrust into administrative roles it can be challenging. We see Microsoft working to create new dashboards that combine stories across solutions (for security and compliance needs, as an example).

Additional "battlefield" issues revolve around provisioning and deprovisioning of users. Since some of the core solutions for M365 were silo'd and users were provisioned per service it's been a challenge to ensure you can spin up a user with multiple services upon entry into an organization and deprovision those same services smoothly upon exit.

License management and license right-sizing is yet another factor to ponder either from a cost perspective or an adoption perspective. And then there are the nitty gritty administrative aspects that require admins use the command-line PowerShell remote connection options to configure, which is an added complexity with added room for user error.

The end result is need for a bolt-on M365 management platform that assists in M365 administration by providing the missing gaps of the story. A single pane of glass dashboard to fill those gaps.

Vendor Sponsor: CoreView's CoreSuite
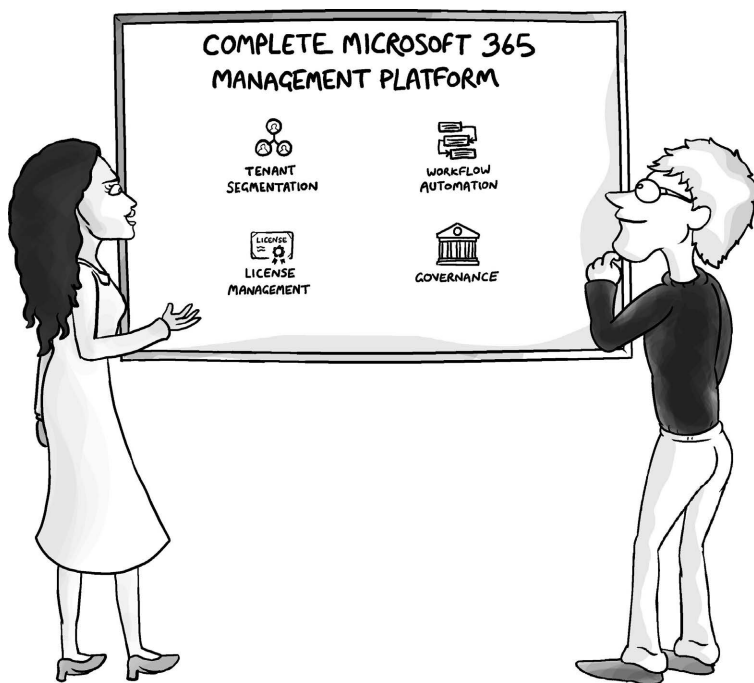
CoreView is a leading Microsoft 365 Management Platform provider that gives IT teams the ability to manage M365 with more efficiency and control while also mitigating risk through improved security. . CoreView provides organizations with a management platform solution focused on tackling the shortcomings in Microsoft 365's native management.

Their primary offering is called *CoreSuite*. CoreSuite is a suite of CoreView tools that puts all your M365 administration in one unified space..

Let's dive in!

Overview

The CoreView dashboard takes the gaps discussed in the previous section revolving around issues with license over/under commit, RBAC, and such, and offers mitigation through license lifecycle management, virtual tenants, and other features.
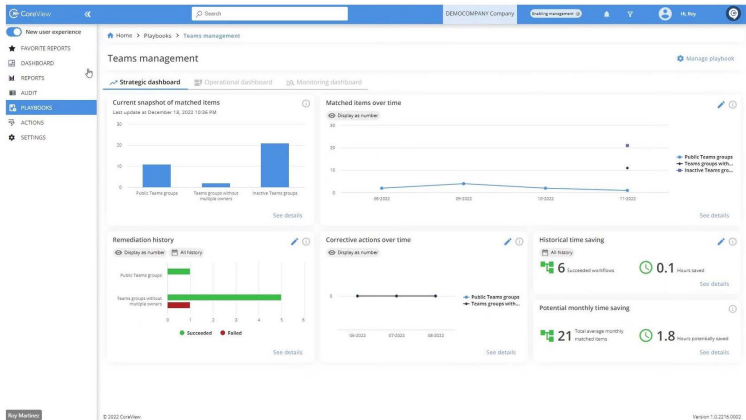
Microsoft 365 has an endless number of license and service configurations thanks to set plans and a la carte combinations. It can become convoluted and expensive, especially with larger, distributed organizations and/or government entities. With CoreView, you can spot unused, unassigned or underused licenses, and enjoy an average savings of 30% on license costs.

We mentioned the stress with having multiple admin consoles in M365 instead of a single source of truth but CoreView provides that single pane, replacing multiple admin center interfaces.

Additionally, you can set up license pools for better management, tracking, chargebacks, etc. The license pools allow you to delegate to different business units through virtual tenants (aka tenant segmentation). This proactive license management helps you to better control the assignment of licenses (and who is paying for those licenses). In addition, it provides license usage reporting on the use of those accounts broken down by group. The goal is to optimize the licenses you have.

Using Microsoft Graph APIs, another key part of the CoreView options is the Teams dashboard that can help you see user activity, call quality and other telephony elements, inactive users and more. This kind of data can assist with the adoption side to management. And it's important to mention that the reporting is actionable immediately from within the report. You can run actions from within the report or string those actions together into automated workflows.

Automation

It's great to be able to see information and reports but it's even better to be able to fix problems or change things from the report itself. Workflow automation, another important aspect of CoreSuite, helps optimize execution of common, repetitive tasks while removing human error with automated tasks like user provisioning and de-provisioning. Combine that with auditing, so you know who is doing what, when, where and why.

Pre-Built Playbooks

It's easy to tell folks to establish compliance standards with KPI metrics that lead to automated response. It's not quite that easy to make that happen, especially with the standard M365 tools. CoreSuite has pre-built playbooks with out of the box and/or custom designed compliance standards. Standard KPIs with metrics tied to remediation and automation pulls it all

together to provide much more control over your environment, whether it be security-based control, or performance-based or adoption-based, it's all about control.

Through the playbooks feature you can build out playbooks to adhere to specific compliance scenarios and view it all through a single dashboard. Continuance compliance monitoring and remediation. This will also help to cut down on escalations, which means fewer help desk tickets. That follows the same thinking we mentioned earlier from Satya Nadella in helping customers "do more with less".

Playbooks let you implement governance policies automatically, so those often-forgotten tasks get done. For example, how often in Teams do we have abandoned, headless teams? The original owner is gone. Manually searching and resolving these types of situations can be a time waster. Instead, use a playbook to find them, and tie the action to finding a new owner for them. That's just one of many examples of how playbooks can help resolve issues whether it be Teams management, governance issues, cyber security concerns and more.

Custom Actions is a feature that allows you to use your existing PowerShell commands and scripts within the CoreSuite solution as either a one-off or part of a workflow. There are some fun things you can do here with regard to your PowerShell scripts to make them available to non-experts within the organization (aka democratized PowerShell). You can turn those scripts into buttons and assign to admins for ease of use.

Delegated Administration

CoreSuite allows you to break up your Microsoft 365 tenant into smaller sub-tenants or virtual tenants (v-tenants). The granular, easy-to-use aspects of role-based access control options are valuable; they help fill the gaps of Microsoft 365 administration by giving admins specific permissions to perform only those tasks they're assigned and only over those users they're assigned. So, you're able to have local admins, or assign admins to departments, and limit who the admin manages, and what management functions they can perform. Wait… that sounds like… you've got it… real RBAC. This is in stark contrast to the global permission allowances given to IT admins because it's a bit of a nightmare to try and box them in using the built-in roles provided.

Allowing autonomy based by geographic location and/or departments not only helps with segmenting users for management, but also adds another security control angle. Each agency has independent silo'd jurisdiction which allows you to enforce the security boundaries you map out for your organization while also providing autonomy to those boundaries through the permission sets and augmentation of RBAC.

Security

With millions of users, Microsoft has a tremendous amount of threat intel that can be of benefit to them, and to your organization. CoreSuite provides forensic analysis and auditing with long-term, full-year storage of activity logs. Data can be mined and surfaced back in compliance reports that can be analyzed by department, business unit, country and so on. This will help you see where breaches are occurring. You're able to create custom, real-time alerts to allow for faster response times for your IT staff (which is great for inappropriate file access or sharing and false log-in attempts).

File auditing and data analysis can really help an organization to see user behavior throughout their Microsoft 365 environment. CoreSuite has 200+ customizable reports to assist you with monitoring usage and end-user activity to ensure you're fully compliant with company/governmental policies.

> CoreView calls their audit logs "human readable", which is rare, as you know if you're ever seen some of the log data IT folks have to parse through. Very human unreadable most of the time.

There is a health check service that provides a full report back on license utilization, vulnerabilities, security and compliance risks, and usage activities. The results are organized into four categories: license management, security and compliance, change management and adoption, and an action plan.

For example, the assessment might report that you are not using MFA within your environment (or perhaps it hasn't been enabled for all users to take advantage of). Through CoreSuite, you can easily set and enforce MFA policies. The same is true

of password policies. You can also monitor and enforce appropriate password policies for your organization.

That's not to imply that CoreView's CoreSuite is an intrusion detection system. Rather, it provides insight into dangerous user behavior and misconfiguration of your M365 portal.

In Conclusion

CoreView's CoreSuite is an enterprise-grade Microsoft 365 Management Platform with a heavy focus on improved administration, RBAC, policy management, license insights, workflow automation, reporting and more. Through its centralized approach to managing Microsoft 365, it provides organizations with an ability to simplify the work of increasing the overall adoption of Microsoft 365, improving end-user productivity, centralizing IT's control, and enhancing the organization's security and compliance stance – all while lowering the overall cost of owning Microsoft 365.
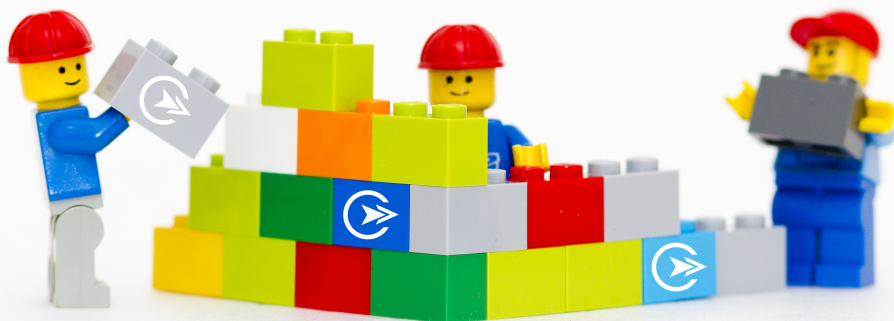
Quickly become conversational about Microsoft 365 Management in any setting

With Microsoft 365 reaching global dominance, enterprise organizations need help to manage, secure and optimize their Microsoft 365 tenants. Disparate admin centers, cumbersome workflow process automation, simplistic RBAC, license bloat, and other management issues are causing some to be frustrated by Microsoft 365. In this book, we will discuss the challenges of managing Microsoft 365 and look at the value of a Microsoft 365 Management Platform to assist with these frustrations.
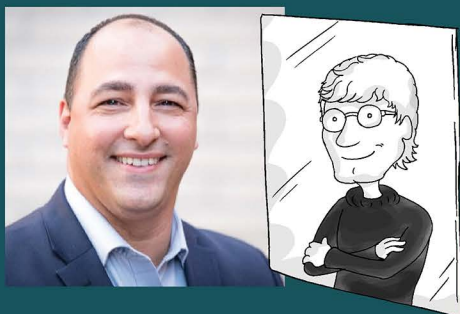
About J. Peter Bruzzese

J. Peter, co-founder of ClipTraining, is an 8-time Microsoft MVP (Exchange/Microsoft 365) awardee. He is an internationally published tech author, journalist, speaker, as well as a global cyber security advisor.

ConversationalGeek®

For more content on topics geeks love, visit

conversationalgeek.com