

## M365 Envisioning Workshop

### Motivation

Many organizations run Microsoft 365 alongside non-Microsoft tools, legacy systems, departmental applications, and industry-specific platforms. Over time, this can fragment collaboration, blur ownership, duplicate data, increase manual work, and create uncertainty around security and compliance.

An M365 Envisioning Workshop provides a structured starting point to assess the current landscape, clarify business needs, identify pain points, and define a pragmatic direction for collaboration, automation, AI, integrations, security, compliance, legal, regulatory, and GDPR-related topics.

### What we bring

PRODYNA brings senior Microsoft 365 consulting expertise across collaboration, governance, security, compliance, automation, AI, and enterprise integration. We help executives identify where Microsoft 365 creates business value, and what roadmap is required to move forward pragmatically.

- Enterprise experience with Microsoft 365, SharePoint, Teams, Power Platform, Copilot, governance, security, and compliance.
- Pragmatic assessment of Microsoft and non-Microsoft tool landscapes, integration needs, and platform constraints.
- Clear translation of business priorities into realistic opportunities, quick wins, and implementation paths.

The result is a clear management view of the current situation and a realistic path forward. Recommendations are tailored to your tenant, risk profile, operating model, and strategic priorities. Based on the assessment, PRODYNA can prepare a follow-up proposal for implementation support, governance setup, platform enablement, and admin or maker training aligned with the agreed priorities.

### What you need

For an effective M365 Envisioning Workshop, we need you to provide access to key stakeholders from business, IT, security, compliance, legal, and relevant departments such as finance, production, warehouse, HR, sales, or operations.

Existing insights into your application landscape, collaboration challenges, governance rules, security and compliance requirements, and strategic goals help focus the workshop on the highest-value opportunities.



### Benefits

- **Shared Vision:** Align business, IT, security, and stakeholders.
- **Pragmatic Prioritization:** Focus Microsoft 365 value opportunities.
- **Reduced Complexity:** Clarify Microsoft and non-Microsoft landscapes.
- **Compliance Awareness:** Consider security, legal, and GDPR early.
- **Actionable Roadmap:** Define quick wins and workstreams.



### Quick facts

- **Duration:** Full-day workshop plus preparation and follow-up.
- **Outcome:** Vision, priorities, roadmap, quick wins.
- **Follow-up:** Governance, automation, Copilot, adoption, integrations.



## What you get

The M365 Envisioning Workshop creates a shared understanding of the current digital workplace and a realistic view of how Microsoft 365 can support the organization's future ways of working. Rather than a detailed implementation concept, it delivers a high-level assessment, prioritized opportunity areas, initial governance considerations, quick wins, and a recommended path forward for collaboration, automation, AI, integrations, security, compliance, and adoption.

PRODYNA will guide you and your team through the development of a target Microsoft 365 vision using streamlined phases and a foundational example approach:

| PHASE                                                          | ACTIONS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Preparation</b><br>(0.5–1 day)                              | Collect initial information about the existing Microsoft 365 environment, non-Microsoft tools, collaboration platforms, business applications, CRM and ERP systems, integrations, security and compliance requirements, and known pain points. Define workshop participants, expectations, and focus areas.                                                                                                                                                                                                                                        |
| <b>Envisioning Workshop</b><br>(1 day)                         | A full-day envisioning session covering objective alignment, current-state analysis, a Microsoft 365 capability overview with selected demos, modern collaboration and information architecture, security, compliance and governance, automation and AI opportunities, use-case ideation and prioritization, and target vision definition.                                                                                                                                                                                                         |
| <b>Post-Processing &amp; Next-Step Planning</b><br>(0.5–1 day) | Document the workshop outcomes, including current state findings, prioritized opportunity areas, capability mapping, initial governance considerations, quick wins, and open questions.<br>Based on the documented results, define a pragmatic next-step plan with recommended workstreams such as deeper as-is analysis, architecture workshops, governance and security concepts, introductory sessions and training, migration planning, Microsoft 365 configuration, Power Platform or Copilot pilots, system integrations, or customizations. |

Note: The full-day workshop format is designed for customers with multiple stakeholders, complex environments, or compliance-sensitive scenarios. PRODYNA can shorten, extend, or tailor the agenda depending on your M365 maturity, available time, strategic priorities, and the desired depth of demos, discussions, and prioritization.

## Get started

To learn about pricing and how to get started, please contact [info@prodyna.com](mailto:info@prodyna.com).

## About PRODYNA

PRODYNA designs and operates AI-enabled business systems serving the needs of corporations and enterprises across the European continent. For more information, please visit [www.prodyna.com](http://www.prodyna.com).