

FACT SHEET

Microsoft Cloud Advisory Practice: Assessment & Strategy

Know where you stand before you move. A structured evaluation of your Microsoft 365 governance, Copilot readiness, and compliance posture—mapped to legal and regulatory risk.

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The Challenge

Enterprises are deploying Microsoft Copilot and expanding their Microsoft 365 footprint faster than their governance can keep up. Legal, compliance, and IT teams face a growing set of blind spots:

- Copilot surfacing sensitive or privileged content to unauthorized users
- Retention and legal hold policies that don't cover new data types like AI-generated summaries and Teams transcripts
- Overshared SharePoint and OneDrive content creating discovery and insider risk exposure
- No clear picture of data classification maturity or regulatory readiness

Without a structured assessment, organizations risk deploying AI on an ungoverned foundation.

What You Get

1. Governance Maturity Scorecard

Current-state evaluation across Purview modules: data classification, DLP, retention, insider risk, and eDiscovery—benchmarked against industry peers.

2. Copilot & AI Readiness Assessment

Identify data exposure risks, oversharing, and access control gaps that must be resolved before or during Copilot rollout.

3. Regulatory Risk Map

Alignment of your Microsoft 365 environment to applicable regulatory frameworks, with gap analysis and prioritized remediation.

4. License Optimization

Right sizing of license allocations across E3, E5 and E7 skus to reduce overspend and align each employee to the tier that delivers measurable value.

Why Choose Consilio?



Legal-first perspective

We translate governance gaps into business and regulatory risk—not just technical findings.



Microsoft ecosystem depth

Our advisory team includes former Microsoft engineers with hands-on Purview and Copilot expertise.



End-to-end continuity

Assessment findings connect directly to Consilio's implementation, managed services, and eDiscovery capabilities.



Proven at scale

Trusted by Fortune 500 legal departments across financial services, pharma, retail, and technology.

Who This is For

- **General Counsel & Legal Ops** teams navigating AI-era discovery and compliance obligations
- **CISOs & IT Security leaders** responsible for data protection across the Microsoft ecosystem
- **Chief Compliance Officers** managing regulatory exposure in financial services, healthcare, pharma, and energy
- **Records & Information Governance** teams modernizing retention and lifecycle management

Typical Engagement

Week
1-2

Discovery & Stakeholder Alignment

Interviews with legal, IT, compliance, and security stakeholders. Scope definition and data collection.

Week
3-4

Technical & Policy Review

Hands-on evaluation of Purview configuration, Copilot readiness, data classification, and retention posture.

Week
5

Analysis & Benchmarking

Findings scored against maturity model. Regulatory gap analysis. Peer benchmarking where applicable.

Week
6

Roadmap & Executive Briefing

Delivery of scorecard, risk map, and strategic roadmap. Executive presentation with prioritized recommendations.



Ready to assess your readiness?

Contact us to schedule a complimentary scoping call with our Microsoft Advisory team.

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Ready to Learn More?

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