

FACT SHEET

Microsoft Cloud Advisory Practice: Change Management & Optimization

Make it stick and make it better. Ongoing advisory, managed monitoring, and continuous optimization of your Microsoft 365 governance—so compliance keeps pace with your business.

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The Challenge

Implementation is not the finish line. Microsoft's roadmap evolves quarterly, user behavior drifts, and new regulatory requirements surface continuously. Without active management, governance configurations degrade and risk exposure grows.

- eDiscovery export workflows that break as data volumes grow and source types multiply
- Copilot interactions generating sensitive content with no monitoring or audit trail
- Policies that made sense at launch but no longer reflect current regulatory requirements
- No dedicated resource to track Microsoft roadmap changes and adapt configurations

Governance is not a project—it's an operating discipline that requires sustained attention.

What You Get

1. eDiscovery Workflow Optimization

Streamline legal hold, collection, and export processes within Purview—reducing cycle time and ensuring defensible, repeatable workflows that connect to Consilio's review platform.

2. Copilot Usage Monitoring & Risk Oversight

Ongoing monitoring of Copilot interactions for sensitive data exposure, privilege leakage, and policy violations—with alerting and executive reporting.

3. Policy Tuning & Regulatory Alignment

Quarterly reviews of DLP, retention, insider risk, and classification policies to align with evolving regulations and Microsoft feature updates.

4. Managed Advisory & Roadmap Guidance

Dedicated advisory support to track Microsoft's product roadmap, recommend configuration changes, and deliver training and audit-readiness reporting.

Why Choose Consilio?



eDiscovery DNA

Unlike pure IT consultancies, we optimize Purview workflows with litigation outcomes in mind—defensibility, proportionality, and cost control.



Managed services at scale

Consilio's operational backbone supports ongoing monitoring, alerting, and reporting across your Microsoft environment.



Microsoft roadmap fluency

Our team tracks feature releases and deprecations so your governance posture adapts before changes impact operations.



Cross-platform continuity

Optimization work feeds directly into Consilio's Aurora AI, document review, and investigation services.

Who This is For

- **Legal departments** with active litigation that need optimized eDiscovery processes inside Microsoft 365
- **Compliance & risk teams** managing ongoing regulatory obligations across multiple jurisdictions
- **IT leaders** who have deployed Purview and Copilot but lack bandwidth to maintain and optimize configurations
- **Organizations seeking recurring value** through a managed advisory model rather than one-time project engagements

Engagement Model

Month
1

Baseline & Quick Wins

Current-state review of deployed configurations. Identify immediate optimization opportunities and resolve critical policy gaps.

Month
2-3

Optimize & Tune

Refine DLP rules, retention policies, and eDiscovery workflows. Reduce alert noise. Establish monitoring baselines and reporting cadence.

Quarterly

Review & Adapt

Policy alignment to Microsoft roadmap updates and regulatory changes. Executive reporting on risk posture, compliance metrics, and recommendations.

Ongoing

Managed Advisory

Dedicated advisory hours for ad-hoc guidance, incident support, training, and audit preparation. Retainer or subscription model.



Ready to optimize what you've built?

Contact us to discuss a managed advisory engagement with our Microsoft Advisory team.

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Ready to Learn More?

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