

# Why Every Organization Needs a Strategic Microsoft 365 Plan

Maximizing Microsoft 365

January 8th, 2026





## Goal

The breadth of Microsoft 365 solutions and rapid evolution of products creates confusion about what people own and how to best implement it.

Forrester research shows that organizations improved utilization of existing technology by up to 80% after developing a roadmap-based adoption plan and awareness campaign.

Using disparate, non-integrated tools adds complexity, risk, and cost – particularly with security solutions.

Microsoft Digital Defense Reports demonstrated organizations with end-to-end, integrated visibility saw a 60% reduction in breaches. Additionally, IT staff efficiency increased 22% and third-party vendor cost reduced 30-40% (Forrester)



## Goal

The New Year is the time to set plans - My goal for today is to give you a variety of insights into how we think about the process that allows technology to deliver meaningful outcomes for a business.

My hope is that you pull at least one thing from this webinar that motivates you to ask the question, "How can we do this in our business?"

If that happens, reach out: [Jason.Webster@eGroup-us.com](mailto:Jason.Webster@eGroup-us.com)

# Microsoft 365 Getting Stronger in 2026

Recent announcements of adjustments to existing licensing tiers have bolstered security and management capabilities at existing levels.

## Remote Support in ME3 & ME5

Intune Suite's Remote Support capability has been incorporated into ME3 and ME5. Another opportunity to consolidate remote support tooling, save costs, and support where you manage.



## Defender for Office 365 Plan 1 in OE3/ME3

Essential phishing and mail protection is now included in all the E3 level licensing. Allowing for enhanced protection, consolidated security, and reduction in costs.

## Intune Plan 2 included in OE3/ME3

Beyond remote support, this adds the enhanced capabilities for going beyond basic MDM into mobile app VPN, specialty device support, and firmware updates.

## Endpoint Privilege Management & Cloud PKI

Just-in-time elevation controls to reduce or eliminate permanent local admin rights are available in Microsoft 365 E5. You can now have native cloud PKI services for certificate management for authentication, Wi-Fi, and VPN access.

# Agenda



**What is Microsoft 365?**



**Building a Microsoft 365 Roadmap**



**Driving Adoption with Organizational Change Management**



**Security Without a Security Team**



**Optimizing Licensing Benefits**

# What is Microsoft 365?



<https://www.m365maps.com>



# Office 365

Core productivity, collaboration, and communication tools to allow work to get done.

# Enterprise Mobility + Security

In addition to advanced productivity solutions like Power Platform, we add in essential security and compliance capabilities to drive defense in depth and zero trust.

# Windows 11

Enterprise licensing for Windows to streamline device licensing, secure endpoints, and connect them to enterprise data.

# How the Microsoft 365 Platform is Organized Based on Benefits



## Core Microsoft 365

Delivers secure collaboration, devices management, and productivity tools to keep your team effective.

Microsoft 365 A3/G3/E3

## Enhanced Productivity

Low Code Solutions, Business Intelligence and Process Automation.

### Microsoft 365 Security Bundle

Comprehensive Defense across Endpoints, Identity, and Cloud.

### Microsoft 365 Compliance Bundle

Secure, Understand, and Streamline Data Compliance and Risk.

Microsoft 365 A5/G5/E5

## CoPilot

Generative AI and Agents grounded in your work data.

### Intune Suite (Changing in 2026)

Endpoint Security, Automation, and Modern Device Control.

### Windows 365

1 to 1 Secure Cloud Desktops in a Desktops as a Service (DaaS) Model

### Entra ID Suite (Changing in 2026)

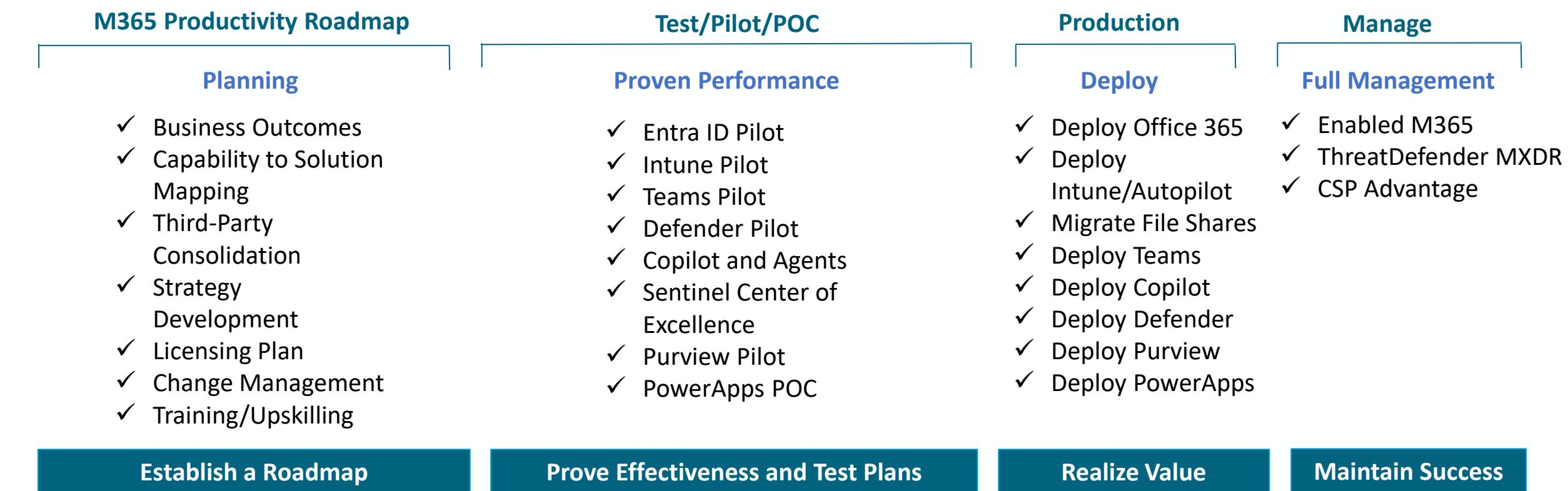
Identity governance across platforms.

Value Add Extras

# M365 AI, Productivity, Security, and Compliance Roadmap



The Microsoft 365 AI, Productivity, Security, and Compliance Roadmap aims to [enable users to be secure and effective with Microsoft 365 productivity tools](#). This is achieved through the construction of an analysis of current solutions, developing an adoption plan, and a budget to create a roadmap to the desired outcomes.



## OUTCOMES

- Education + Alignment
- Capability GAP Analysis
- Actionable Implementation Plan
- Timeline
- Third-Party Cost Consolidation
- Microsoft Licensing Plan
- Total Cost of Ownership (TCO)

## SECTIONS COVERED

- Productivity Solutions
- AI Solutions
- Endpoint Management
- Voice Solutions
- Identity & Access Management
- Threat Protection
- Cloud Security
- Information Governance & Compliance
- Risk Management

# How is a Microsoft 365 Workshop Conducted?



8 Hours

**Strategy Workshop** – Align the roadmap participants around business goals and desired outcomes while developing a shared understanding of ...

- Current solutions – Review the engagement workbook to complete understanding of current posture
- Microsoft Productivity – What solutions address the business goals defined?
- Artificial Intelligence – How are you approaching the implementation and integration of AI?
- Microsoft Zero-Trust – How does Microsoft security address cloud and on-prem security needs?
- Microsoft Compliance – How does Microsoft address compliance needs?

6 Hours

**Solution Deep Dives** – Breakout sessions designed provide education on a set of solutions and uncover the details needed to develop the actionable plan.

1 Week

**Roadmap Development** – Development of the plan, budgets, consolidation, and actionable next steps.

2 Hours

**Presentation of Findings** – Joint review of the plan, timeline , actions, and budgets to make decisions.

# Sections in the GAP Analysis



# GAP Analysis - Areas of Planning

- Productivity Solutions
- Unified Endpoint Management
- Voice Solutions
- Identity & Access Management
- Threat Protection
- Cloud Security
- Information Governance & Compliance
- Risk Management

## Unified Endpoint Management

Requirement	Current Solution	Microsoft Solution	License Cost	License Term	Action
✓ Mobility Management	Ivanti	Intune			Intune
✓ Desktop/Laptop Management	Ivanti	Intune			Intune
✓ Endpoint Encryption	Bitlocker	Bitlocker	N/A		Intune Managed
✓ Endpoint VPN	Always On VPN	Always On VPN	N/A		
✓ Desktop Virtualization	Workspaces	Azure Virtual Desktop			No Action
✓ Remote Support	LogMeIn	Intune Suite			LogMeIn
✓ Image Management	Ivanti	Autopilot + Intune			Autopilot

 Solution Deployed  Solution Partially Deployed  No Solution In Place

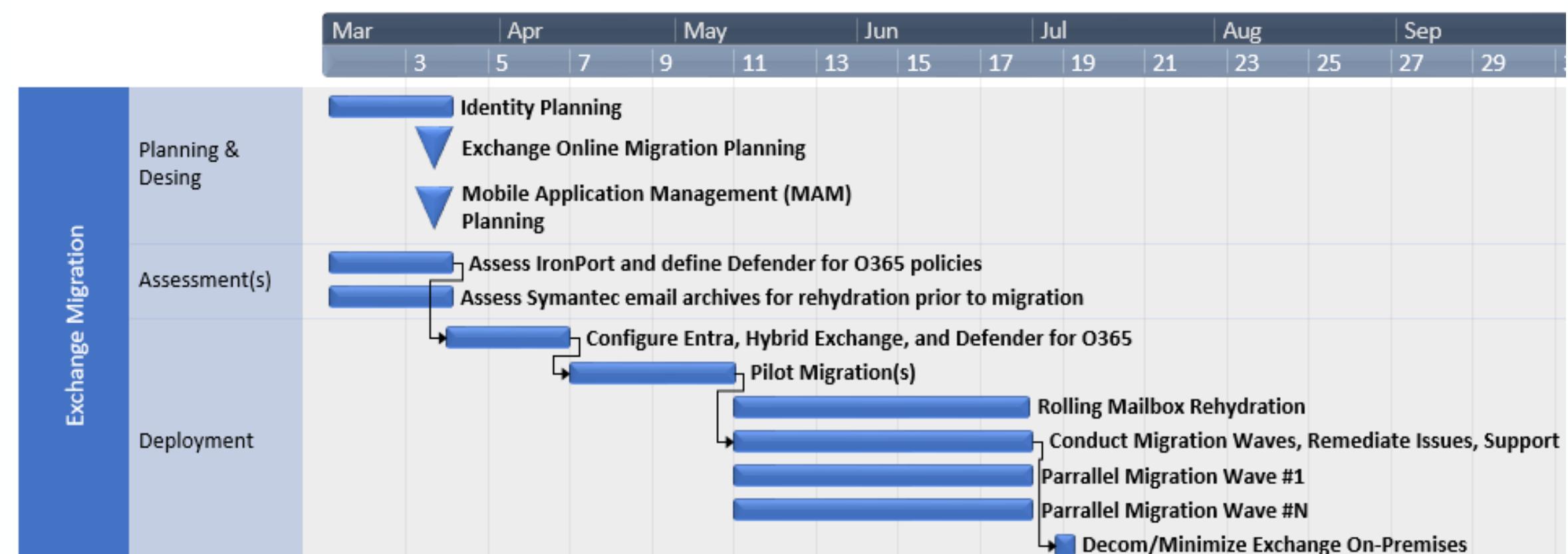
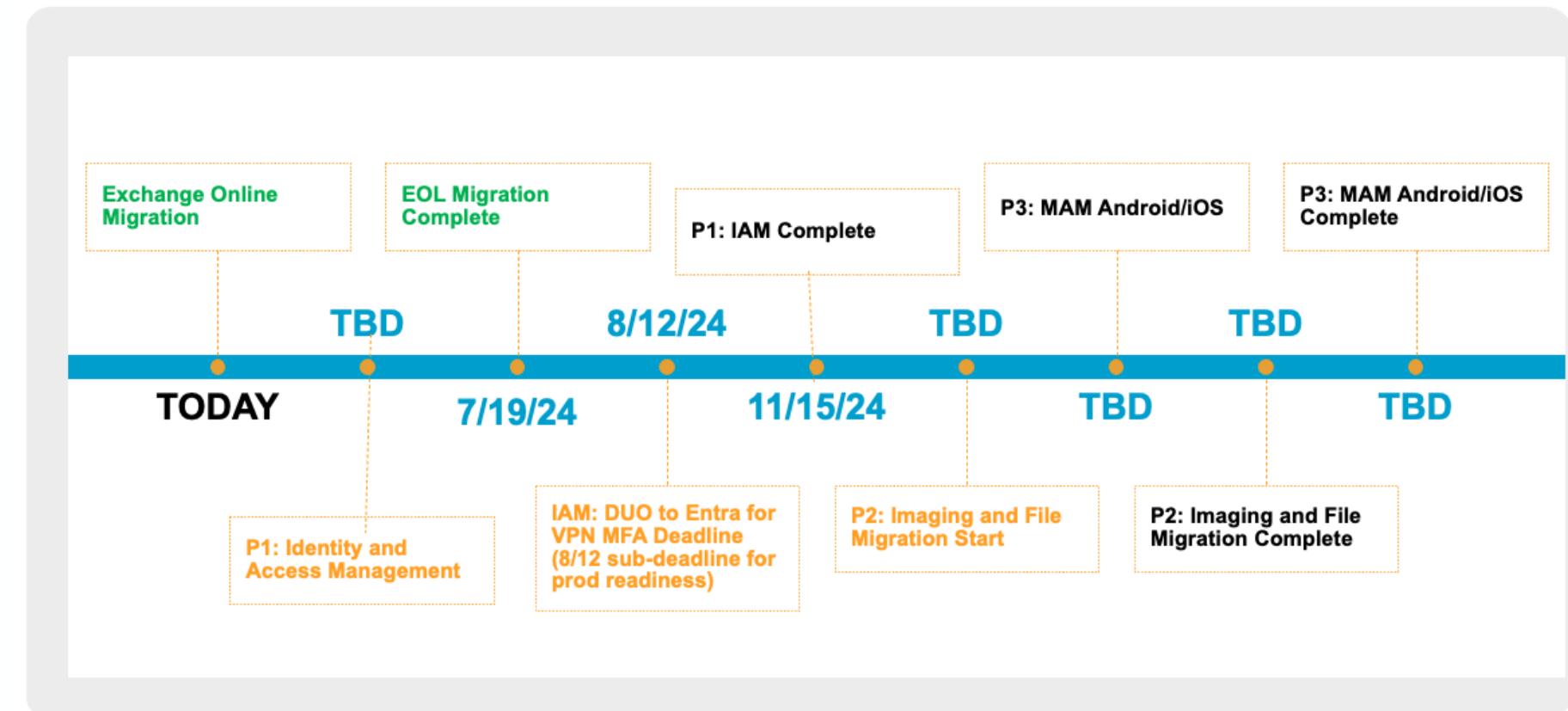
**Goal** – Document current solutions, overlapping costs, and desired actions at a high-level for planning sessions.

# Building a Timeline in a Phased Approach



## Timelines and Phases

- Develop the overall sequencing of events. With drill down plans for specific phases.
- Develop the objectives, outcomes, durations, and budgets for each distinct phase.
- Address pre-requisites, unknowns, and added costs that need to be included.
- Clearly define the success criteria and outcome of the phase.



# Building a Timeline in a Phased Approach



## Licensing & Financial Analysis

- Understand what you will spend in licensing.
- Budget for the costs of implementation.
- Understand what and when can be consolidated to reduce overlapping costs.
- Understand incentives available for moving to M365.
- Drive success with M365.

License	Purpose	Quantity
Microsoft 365 E3	Knowledge Worker Enterprise	2,275
Microsoft Teams Enterprise	Teams for M365 E3 Licenses	2,275
Microsoft 365 F3	Clinical Staff Frontline Worker	4,225
Entra Id Plan 2	Privileged Accounts for Admins	TBD
Defender for Office 365	Defender for Office 365 for all users	6,500

While the initial goal can be covered by Microsoft 365 E3 licensing and some add-ons, key capabilities such as Teams DLP, Defender for Endpoint, Endpoint DLP, and automation is available in the Microsoft 365 E5 suite. Based on future goals and simplified procurement, [eGroup Enabling Technologies is recommending E5 and F5 licensing](#).

License	Purpose	Quantity
Microsoft 365 E5 (no Teams)	Knowledge Worker Enterprise	2,275
Microsoft Teams Enterprise	Teams for M365 E3 Licenses	2,275
Microsoft 365 F5	Clinical Staff Frontline Worker	4,225

## Microsoft Licensing

Quantity	Objective	MSRP/LIST Cost	Monthly Cost	Total Annual Cost
...	...	...	...	...
...	...	...	...	...
Total Licensing Costs		...	...	...

## Cost Consolidation Opportunities

Quantity	Objective	MSRP/LIST Cost	Monthly Cost	Total Annual Cost
...	...	...	...	...
...	...	...	...	...
...	...	...	...	...
...	...	...	...	...
Total Cost Consolidation		...	...	...

# Organizational Change Management

Your most valuable tactic to driving understanding, adoption, and productivity with your end users.



## Communication

Crafting and intentional plan for how you communicate new or changes in technology platforms reduces the friction in adopting those platforms. You get happy end users who are well equipped and need less support.

## Drive Awareness

Whether it be security, compliance, or productivity solutions, ensuring your users understand that "why" increases the desired outcome. Let's face it, users know how to use their email, but not all of them know how to use it securely and within the compliance regulations of the business.

## Gain Feedback

Feedback loops are critical to improving communications and collaboration with your end users. Integrating feedback into communications allows for greater alignment between those doing the work and those supplying the resources to get it done.

# Security Requires Comprehensive Solutions

Comprehensive solutions and the people that go along with them are expensive. Leveraging a leading platform and partnering with certified experts offers a simpler path to cost efficient security.

With ThreatDefender, you gain access to the people, processes, and technology to secure your critical data.

## People

Security is a 24x7 business. You need both breadth and depth across essential skillsets to manage your defense. Being able to have around the clock access to the right expertise based on the threat presented without staffing, turnover, and ongoing skill development is essential.

## Process

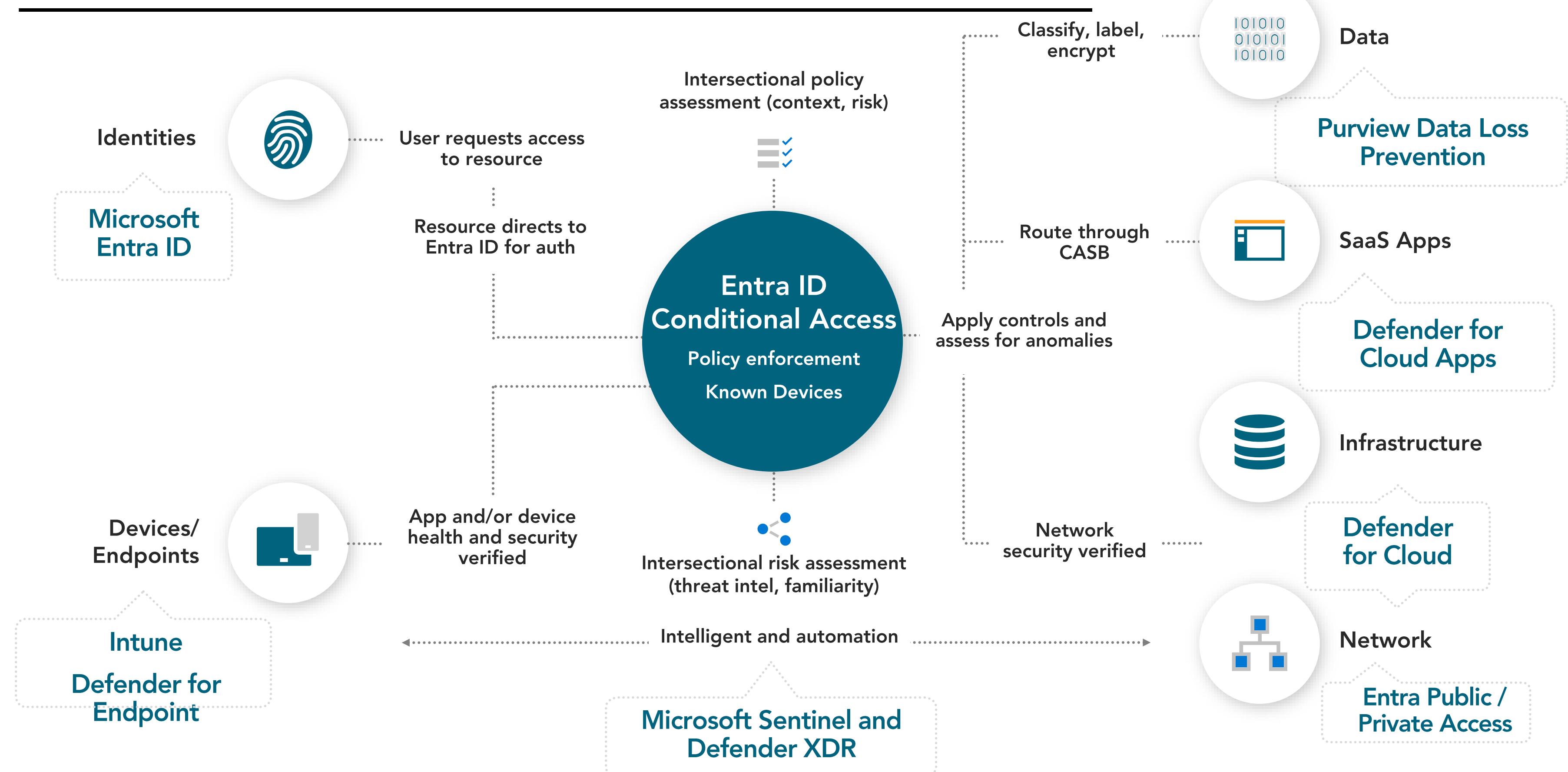
For today's threats, speed saves. Microsoft Defender and eGroup Enabling Technologies ThreatDefender are built for rapid and automated responses to contain active threats, investigate, and remediate.

## Technology

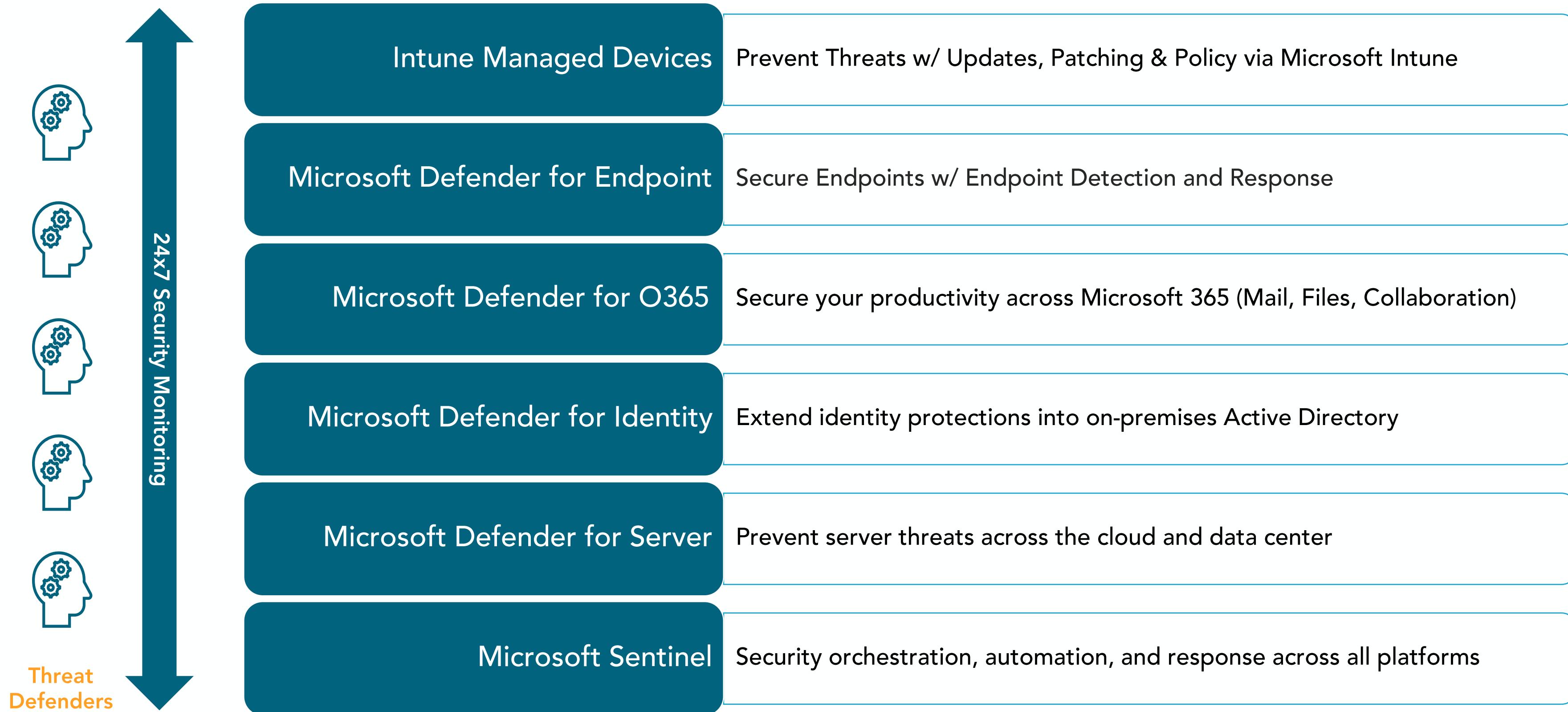
Microsoft Defender and Sentinel are Gartner recognized, industry leaders, in Managed Detection and Response. Providing you with a platform that you own and we help you manage.



# Zero Trust Architecture



# Building A Plan for Comprehensive Security



# Three Core Advantages of ThreatDefender



No Vendor Lock-In

**You own your licensing – EA/MCA/CSP**

**You own your data – It lives in your Microsoft tenant**

**We provide Managed Detection & Response (MXDR)**

Updates and Patching are Included

**24x7 Managed Detection & Response via ThreatDefender**

**Endpoint managed updates via Intune**

**Endpoint managed patching via Intune**

Co-Management is an Option

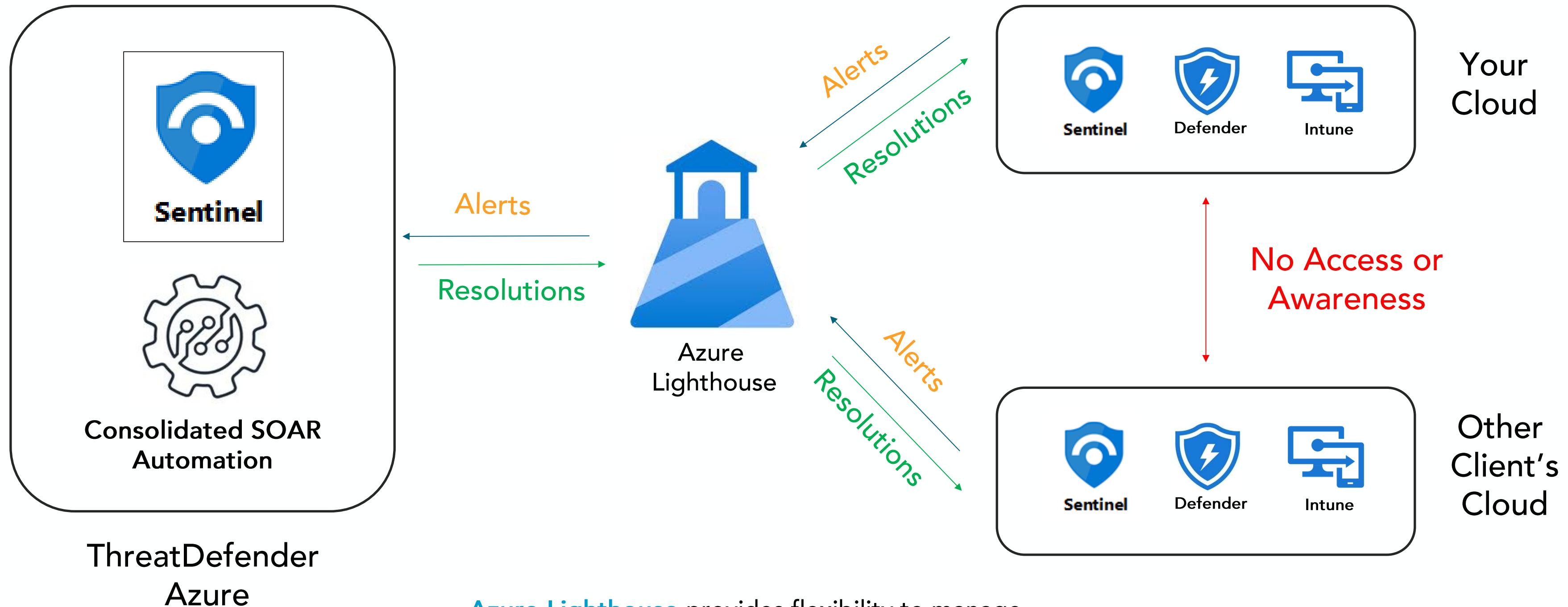
**eGroup Enabling Technologies installs Microsoft Solutions**

**ThreatDefender as a 24x7 extension to your team**

**or... ThreatDefender as your team**



# ThreatDefender – How Do We Do It Securely?



Azure Lighthouse provides flexibility to manage multiple customers without having to sign in to different tenants. **Your data stays with you.**

Microsoft Verified  
Managed XDR Solution

# What Is the CSP License?

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- The Microsoft CSP license refers to the Cloud Solution Provider (CSP) program, which is a licensing and sales model that allows Microsoft partners to sell Microsoft cloud licenses (M365, Dynamics, Azure, Copilot, etc.).
- Basic benefits of the CSP license include, but are not limited to:
  - Flexibility to scale up as needed or down as dictated by business seasonality (monthly license option).
  - Pricing and bundling services.
  - Opportunities to build long-term strategic relationships with license reseller.
  - 24/7 reactive support



*For far too long customers have felt that they need a PHD to decipher Microsoft licensing. Well, not anymore. We make it easy!*

# Benefits of CSP through eGroup



Benefit	Description	Client Impact
<b>Expert Guidance</b>	Licensing Optimization Sessions, Architecture Modernization Reviews	Avoid shelfware, save money on misaligned SKUs, right-size licensing proactively
<b>Strategic Support</b>	24/7 U.S.-based Support + Microsoft escalation	Resolve issues faster, reduce downtime, ensure SLA alignment
<b>Operational ROI</b>	Secure Score, Compliance Reviews, Cost Optimization Tool	Reduce security risks and compliance exposure, identify cost savings regularly
<b>Innovation Enablement</b>	AI Strategy Sessions, CxO Roadmaps, BCDR Planning	Position for growth and resilience, not just utility licensing
<b>Flexibility &amp; Transparency</b>	Self-service storefront, flexible billing, monthly/annual/multi-year commit options	Greater control over spend, no long-term lock-in

# CSP Advantage Program - Overview

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## CSP Advantage Program Overview

- Strategic Partnership vs CSP Transactor
- Offer benefits that promote growth
- Built based on feedback from our CSP Customers
- All benefits are at **no additional cost** to you

We know Licensing and Azure Subscriptions are a huge investment. Let us help you maximize that investment both for now and in the future.

## Partnering with eGroup

- Access to Experts
- CSAT = 98%+ YoY
- NPS = 70

# CSP Advantage Program - Benefits

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- 24 x 7 M365 Licensing and Azure Support
- Flexible Billing Options
  - Consolidated Billing
- Access to M365 Licensing and Azure Experts
- Self-Service Storefront
- Partner with Microsoft Services Experts (eGroup)
- New Capability and Feature Updates
- Participation in Customer Roundtable Forums
- Access to Azure Cost Optimization Tool

## Partnering with eGroup

- Competitive Pricing
- Support Included
- Azure Cost Optimization tool included at no cost
- Access to Experts
- CSAT = 98%+ YoY
- NPS = 70



# Ready. Set. Managed.

So how do we make this happen and begin enabling productivity while securing your business and taking AIM at real threats.

Thank You – Next Steps...

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## Acquire

Let's build a plan that gets you're the right solution and is designed to fit your business based on your number of users, endpoints, and infrastructure.

**Action:** Microsoft 365 Roadmap

## Implement

Execute the roadmap and unlock productivity while walking closer to a zero-trust architecture month over month.

**Action:** Optimize Licenses & Implement the Plan

## Manage

Count on eGroup Enabling Technologies' ThreatDefenders to patch and protect while continuously monitoring, reacting, and remediating threats.

**Action:** Onboard ThreatDefender