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# INDUSTRY JUMP-START Microsoft 365 for financial institutions

*Jump-start your initiatives with solutions born in industry and forged by strategy*

Pre-engagement

## Microsoft 365 overview

- What are your goals and objectives in considering Microsoft 365?
- How many users/mailboxes will be migrated?
- What is your time frame?

Phase 1

## Microsoft 365 planning with FI INSIGHTS

Our FI INSIGHTS guide you through the Microsoft 365 planning and implementation process based on the experience of others in your industry.

- Understand your data protection requirements when migrating data to cloud service providers
- Adopt recommended controls beyond Microsoft's defaults to ensure proper risk and vendor management
- Update your audit review process and information security policies to include Microsoft 365
- Verify you are ready for the common risks most often encountered by FIs after deployment

Phase 2

## Microsoft 365 FI due diligence

- Office 365 data classification and adoption process
- Office 365 data segmentation review
- Recoverability plan review and adoption

Phase 3

## Microsoft 365 FI vendor management

- Review FI roles and responsibilities
- Adopt additional controls for Microsoft 365 security
- Update information security policies for Microsoft 365 integration

Phase 4

## Microsoft 365 FI deployment methodology

- Configure Office 365 secure tenant
- Apply necessary service packs and configure in hybrid mode
- Configure security controls per adopted FI information security policy
- Transfer mail flow and migrate mailboxes
- Identify archives and PST files for import into Microsoft 365
- Deploy FI Connect intranet solution
- Configure mailbox backup according to adopted vendor management policy

Phase 5

## Microsoft 365 post-deployment audit

- Technical peer review of deployment
- Risk scorecard of environment-to-policy comparison
- Review mitigating controls for known Office 365 risks targeting FIs

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