



**Make Microsoft Simple**  
to Manage Permissions,  
Increase ROI and Improve  
Cyber Security

Thursday July 6<sup>th</sup>, 2023

11:00 – 11:45am EDT

# Introductions: **Julian Mills**



- **VP Product and Marketing**
- Digital strategy and business process development specialist
- *“Guiding the product, building the brand”*
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# Teams Meeting Etiquette

- This is a regular Teams meeting.
- Chat is open throughout the webinar.
- Feel free to ask questions or make comments through chat at any time.
- Please stay on mute. If you'd like to join the conversation, please ask on chat or raise your virtual hand, and wait for an invitation.
- Welcome, enjoy, and learn!

# Introductions: **Denesh Sohan**



- **VP of Engineering**
- Expert in SharePoint, .NET technologies, and client-side web development
- Certified Scrum Master
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# Introductions: **Logan Guest**



- **VP of Sales and Customer Success**
- 7+ years' experience in sales and delivery of Envision IT/EUM
- Microsoft 365 consulting and development solutions
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# Introductions: **Peter Carson**



- President, Envision IT and Extranet User Manager
- 12-time Office Apps and Services Microsoft MVP
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- President Toronto SharePoint User Group



# What We Will Cover

- Microsoft 365 challenges and underlying complexity
- The permissions management dilemma
- How extending M365 content and data to external users can unlock value
- How EUM brings simplicity to M365
- Real customer case studies

# The Power of Microsoft 365

300M+ Active Users Worldwide

466% ROI over a three-year period

**Yet...**

50% of users are unaware of the features available to them

43% of IT professionals struggle to configure M365 due to its complexity





# Identifying M365's underlying complexity

1

Extensive options can make it challenging to find and utilize the most relevant features

2

Apps and features may require training/user adoption efforts

3

Configuring Microsoft 365 to align with an organization's specific requirements is tedious and requires substantial IT experience

4

Microsoft 365 does not natively support large-scale external collaboration, resulting in onerous permissions management processes

5

Administration and governance for organizations with a large user base and collaboration requirements can be complicated and costly

# What Happens When it's Complex?

## Reduces ROI

- Underutilization or misuse of available tools leads to decreased productivity
- User adoption challenges
- Inefficient external collaboration with high turnover time

## Encourages Shadow IT

- Complex admin introduce delays and roadblocks
- The business may acquire duplicative apps
- Cumbersome setup may cause users to resort to using insecure workarounds

## Undermines Security

- Manual permissions management poses risk of human error
- Lack of granular control over who can access defined content
- Data leakage risks from insecure file-sharing methods (links and email)

We Make  
Microsoft  
Simple





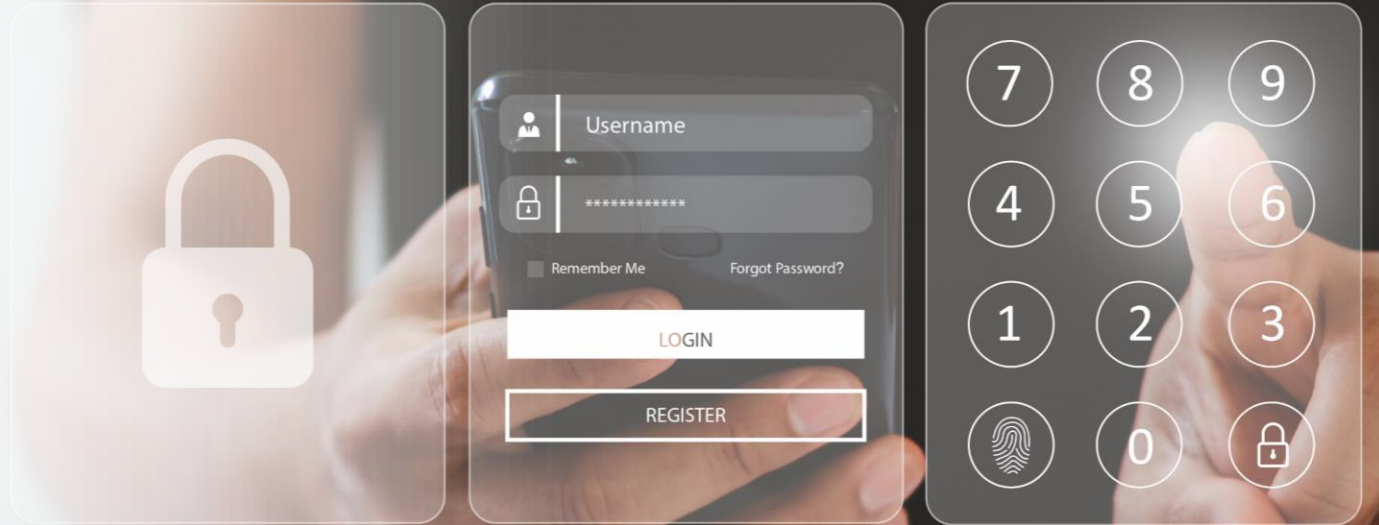
## **We make Microsoft simple for organizations to connect with their external stakeholders**

An exceptional user experience lets businesses connect and collaborate with external stakeholders and maintain Microsoft security.

IT is involved at the beginning, ensuring a seamless integration, while the business can focus on what really matters – getting the job done.

# The Inherent Challenges of Permissions Management

- Complex permissions structure
- Lack of centralized management
- IT as a gatekeeper
- Managing permissions for external users while maintaining security and compliance is complex
- Dynamic and changing user access requirements



# Decoupling Permissions Management and Membership Management

- Empowered business users
  - Business users can manage external stakeholder access independently, enabling agile management
- Delegated administrative tasks
  - IT departments can concentrate on critical responsibilities such as security and infrastructure management
- Faster turnaround time
  - Business users promptly adjust access without waiting for IT intervention,
- Business-driven flexibility
  - Business users adapt user access/membership based on dynamic changing needs
- Ensures secure collaboration
  - IT retaining control over permissions, reducing security risks



# Why Extend your Microsoft 365 Externally



## Cost Management

- Optimal use of existing licensing
- Minimize need for additional applications



## Rapid Adoption for Business Users

- Familiar interface and user experience for millions of business users



## Best in Class Security Mitigates Dark IT

- Microsoft 365 and Azure ensure information security internally and externally

# 3 Key Principles for Simplified External Collaboration within M365

- User-centric design
  - Prioritize the needs and experiences of end-users
  - Provide intuitive interfaces, streamlined workflows, and user-friendly processes to minimize complexity and enhance user adoption
- Automation and integration
  - Streamlining and automating processes can reduce manual efforts and eliminate redundant tasks
  - i.e. provisioning user accounts and managing permissions
  - Integration with other business systems helps eliminate data silos
- Avoid a one-size-fits all approach
  - Customize the Microsoft 365 platform to align with your specific business requirements and processes
  - Mitigates misuse of available tools and ineffective collaboration by creating a familiar and concise environment

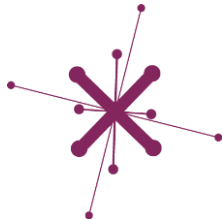




# Making Microsoft Simple

- Microsoft Teams ≠ Teams in Microsoft
  - Microsoft Teams = fantastic application for messaging, meeting and collaborating
  - Teams in Microsoft = the overall collaboration capabilities available within the Microsoft 365 suite
- Deploying and managing Teams in Microsoft effectively is key to sustaining strong user experience and security

# Making Microsoft **Simple**

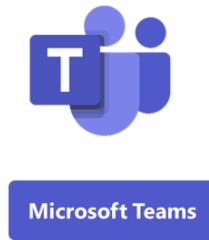


Work in *EUM Portal* for a simplified user experience to run

Boards, Committees and Projects, with support for many other collaborative scenarios



Work in SharePoint Online in *SharePoint Team Sites* to collaborate with Files



Work in *Microsoft Teams* to chat, meet and work with files

# Leveraging EUM for Simplification



- Intuitive and simple interface shields external users from M365's complexity
- Secure, low-friction permission management that doesn't require IT involvement, reducing administrative burden
- Integration with established processes
  - Leverages Azure AD and Microsoft 365
  - Easily integrates into third party systems, CRMs, SAP, etc.
- Improved cybersecurity and compliance

# Demo

# Data Room

- How to provision and use data rooms
- Denesh shows the provisioning piece
- Peter shows how we use it

# Case Study: Mold Masters



## The Client:

- Mold Masters specializes in design and manufacturing of solutions for plastic injection molding, utilized in various industries
- Needed a centralized, client-facing collaboration and document sharing platform for projects

The screenshot displays the 'Engineering Extranet' interface. At the top, there's a header with the Mold Masters logo and the user name 'Peter Carson'. Below the header, a navigation bar shows 'Sales Orders' with a dropdown arrow. The main content area is titled 'Order Number: 1234567'. On the left, there's a sidebar with order details: Order Number (1234567), TSE (gdhillon@envisionit.com), Customer Approval (Begin Approval button), Customer Name (Sprint Demo), Reference Number (13192-01), Mold Number (6501340011), PO Number (2124-13 Job 13192-01), ECR (6343238), and ECR Notes (Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.). On the right, there's a file list table with columns for Filename, Line Item, Drawing Description, File Type, Modified, and Size. The table contains four rows of files, each with a checkbox and a download icon.

Filename	Line Item	Drawing Description	File Type	Modified	Size
1234567EGA11 E0-10.PDF	10	System General Assembly	PDF	11/1/2021 3:57:39 PM	192196
1234567ENP11 B0-10.PDF	10	Name Plate	PDF	11/1/2021 3:57:38 PM	192196
1234567ESPL0-10.PDF	10	System Parts List	PDF	11/1/2021 3:57:39 PM	192196
PDF 01.pdf		Customer Document	PDF	11/1/2021 9:14:39 PM	192196

## The Solution

- EUM Portal and Documents provides simple and secure collaboration experience
- Engineering drawings to be reviewed are surfaced from SharePoint Online
- Automated drawing package preparation
- Approval workflows for a low-friction user experience
  - Internal engineering approval required first
  - Customer notification and approval
  - Reminder notifications
  - Approval completion updates SAP order status
- Ability for customer to upload annotations or additional documents, enabling seamless version control and ease of use

# Case Study: **Seamless External Training**



## **The Client:**

- Keystone Technologies is a lighting manufacturer that sells their products through distributors and wholesalers

## **The Problem**

- Required a frictionless and user-friendly way to provide product training to external salespeople through an online LMS
- LMS admins did not have IT permissions to provision accounts
- Engaging IT for each new learner was an inefficient process with high turnover time and a confusing end-user experience

## **The Solution**

- EUM out-of-the-box streamlined learner onboarding and management, providing seamless access to Keystone's training assets in LMS365 (a SharePoint Online based LMS)
- EUM Admin enabled LMS admins to manage LMS permissions, without higher IT privileges or altering business processes
- Familiar user interface and environment, without the complexity

# Case Study: Simplifying Collaboration and Education in the Healthcare Sector



## The Client:

- Central East Clinical Information System (CECIS) is partnership between a collection of hospitals and clinics and provides a wide range of support to healthcare providers

## The Problem

- CECIS needed to provide training to users at each hospital/clinic in the network; each learner could be any staff member within one of the hospitals and each would have a known organizational email domain
- Used SharePoint Online out-of-the-box, which did not support self-service registration and continuous external onboarding

## The Solution:

- EUM Portal made registration and access simple for 20,000 external users through automation and an intuitive UI
- Custom approval workflows streamlined access by granting it to users with white-labeled email domains
- Self-registration reduced administrative burden, making Microsoft usage simpler for CECIS staff
- EUM empowered CECIS to extend their M365 systems externally and automate collaboration and training processes securely, increasing ROI, efficiency, and user adoption
- Implementation of EUM reduced security risks and shadow IT



# Questions to Consider

1. How easy or difficult is it to:
  - a) collaborate within your organization?
  - b) work with your organization as an external stakeholder?
2. How many tools do you use daily that overlap features within Microsoft 365?
3. How would you classify the information you share externally?  
Ex. PII, PHI, PCI, etc.
4. How would you rate the security of your external sharing?

# Next Steps

Interested in learning how we can help you simplify your Microsoft 365?

[Schedule Connect with Logan](#)



## We Make Microsoft Simple



 Julian Mills | Published June 20, 2023

Microsoft 365 (M365) is many things. It's one of the fastest growing productivity solutions in the world, with over 300 million commercial monthly active users. It's a driver of value, with businesses using it experiencing a 466% return on investment over a three-year period. It's familiar to millions of business professionals who use Excel, Word, and increasingly Teams to complete their daily tasks.

One thing it's not, however, is simple.



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## Your Thoughts & Questions?

- [Learn More](#)