Microsoft 365 Optimization Checklist

Microsoft 365 is a powerful platform, but many organizations only scratch the surface of its capabilities. This checklist will help you tighten security, cut costs, and boost productivity across your team.

1. Security & Compliance
☐ Enable Multi-Factor Authentication (MFA) across all user accounts.
☐ Review and apply Conditional Access policies.
☐ Configure Microsoft Defender for Office 365 for advanced threat protection.
☐ Set up Data Loss Prevention (DLP) rules to protect sensitive data.
☐ Regularly review audit logs and compliance reports in the Microsoft Purview portal.

2. Licensing & Cost Management
☐ Audit current licenses to ensure alignment with actual usage.
☐ Remove unused or duplicate licenses.
☐ Match roles to the correct license tiers (e.g., Business Premium vs. E3/E5).
☐ Explore add-on services (e.g., Defender, Intune) only if they align with business goals.

3. Collaboration & Productivity
☐ Train staff to use Teams as the hub for communication and project collaboration.
☐ Standardize Teams and SharePoint site creation to avoid duplication and sprawl.
☐ Implement OneDrive for Business with automatic desktop backup.
☐ Use Planner or Tasks for project and task management.
☐ Leverage Viva Insights for employee productivity and wellbeing.

4. Cloud Storage & Data Management
☐ Migrate files to SharePoint and OneDrive with clear folder structures.
☐ Set retention and archival policies to manage storage efficiently.
☐ Enable versioning to protect against accidental deletion or overwrites.
☐ Regularly back up Microsoft 365 data (email, Teams, OneDrive, SharePoint).

5. Device & Endpoint Management
☐ Configure Intune for mobile device and application management.
☐ Enforce device compliance policies (encryption, antivirus, patching).
☐ Apply Windows Autopilot for streamlined device provisioning.
☐ Enable automatic updates for Office apps and Windows.

6. User Training & Adoption
☐ Provide ongoing training for Teams, SharePoint, and OneDrive best practices.
☐ Develop role-based guides for using Microsoft 365 effectively.
☐ Promote keyboard shortcuts and time-saving features in Outlook and Excel.
☐ Run quarterly refresh sessions to encourage adoption of new features.