

A hand holding a pen over a document with financial charts overlaid. The charts include a candlestick chart and a line graph. The background is a blurred office setting. There are blue and orange geometric shapes in the corners of the slide.

6 Steps

to get the most out of your
Microsoft 365 investment



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Realising the true value of Microsoft 365

Microsoft 365 has long been the office cornerstone. Products like Word, PowerPoint and Teams are central to operations, and so much so that the idea of maximising ROI can go over stakeholders' heads. Many Microsoft buyers overestimate the package they need, assuming comprehensive coverage is better. This leads to business leaders subscribing to large Microsoft 365 bundles, thinking they will be more cost-effective in the long-run – but end up paying for more than they need. The truth is, Microsoft is metamorphic by nature, constantly updating and refining its suite of tools. With frequent releases and commercial models, most 365 subscriptions become underutilised.

Getting the most from your Microsoft 365 investment is a challenge, in that it requires full visibility into how new licences are deployed and used across an organisation, as well as knowledge of optimisation tactics. Whilst this is relatively straightforward for small businesses, it becomes more complex in large organisations with thousands of licences. IT teams sometimes lack the capacity to manage their Microsoft environment effectively – but without this, leaders will fail to recognise opportunities in their stack, or “trim the fat” of products that aren't delivering.

Forrester has shown that, when successfully adopted and optimised, business leaders can attain an ROI of [190% in 3 years](#) through 365.

Microsoft 365 ROI is best achieved – and certainly accelerated – with the support of an experienced Microsoft partner. However, there are key actions that business leaders can take independently to optimise their investment. We suggest six steps to get started.

1. Understanding Microsoft 365
2. Knowing the value of a Microsoft Partner
3. Maximising Microsoft 365 features
4. Choosing the right Microsoft Partner
5. Future-proofing your business
6. Getting the right implementation and support



1. Understanding Microsoft 365

MICROSOFT IS MORE THAN A COLLECTION OF OFFICE APPS – IT'S AN ECOSYSTEM.

The power of Microsoft 365 lies in the interplay of products and how they work together to support every stage of a workflow.

Apps like SharePoint and OneDrive form the large repositories that content can sit in, whilst Word, Excel, and PowerPoint are where the content is created. Microsoft Teams is a hub for sharing and discussing documents in real-time. Planner and Outlook help to manage team schedules, Power BI turns data across workflows into insights, Power Apps allows you to build custom apps to streamline tasks, and Copilot now allows you to automate tasks and enhance productivity across the platform.

Microsoft 365 is all about the flow of information. From creating data, to storing it, sharing it, accelerating it, and managing it – the apps form a real, digital ecosystem. Disrupting one part of this system – for example the central data repository – can create inefficiencies and impact productivity across connected workflows.

Common Microsoft 365 challenges

AMONG E5 LICENCES, AS MANY AS 38% CAN BE DOWNSIZED TO AN E1 LICENCE.

On average, 44% of Microsoft 365 licences are underused – a problem often caused by large batch purchasing. Batch buying within Microsoft makes sense, as the tech giant offers discounts and bulk offers – but it also leads to a huge amount of waste. Among E5 licences (the top tier) as many as 38% could be downsized to an E1 licence. Overspend is often a result of misalignment between employee profiles (what an organisation needs) and the actual licence package (what an organisation has).

There is a complexity around choosing the licensing plans. Options are plenty, and business leaders tend to opt for higher tier licences like tier 5 as a precaution, only to find out they're paying for products they don't use. The Microsoft 365 admin centre offers insight into how products are used across an organisation, but without a strategy to monitor and adjust licences, companies risk paying for unused tools. Power BI might be a better solution – when combined with the admin centre, customers can track their usage data more effectively.

2. Knowing the value of a Microsoft Partner

A MICROSOFT PARTNER CAN DRASTICALLY IMPROVE YOUR MICROSOFT 365 OPTIMISATION PROCESS.

An obvious benefit is that a partner can offer expert and technical advice, but beyond that a partner has strong ties to Microsoft – which can help illuminate new commercial products, updates, and features. This direct relationship with Microsoft creates opportunities to adapt quickly to changes, ensuring organisations remain competitive and cost-efficient.

By working with a Microsoft Partner, organisations can ensure their teams are equipped with the right products, ensure that any security gaps are closed, and see that AI solutions can be strategically integrated into workflows. The result? Improved productivity, better quality of work, and maximised ROI from your Microsoft environment.

Key benefits of working with a Microsoft Partner:

- **Employee empowerment** - Receive better tailored training programs and match the specific need of your teams. Alongside a partner, employees are empowered to get more from tools like Copilot or Power BI.
- **Robust security** - Work with a partner certified to ISO 27001 and Cyber Essentials Plus. These certifications ensure they can quickly identify security gaps and implement industry-leading solutions to protect your sensitive data. Don't compromise on security - choose a partner equipped to safeguard your business.
- **Direct access to Microsoft support** - Escalate serious issues to Microsoft engineers and find quick resolution for the most challenging problems.
- **AI integration** - Partners have deep knowledge of tools like Copilot and their capacity to automate workflows and provide an uptick in productivity. 70% of Copilot users report being more productive, whilst 68% report a higher quality of work using AI within the Microsoft ecosystem.

70% OF COPILOT USERS ARE MORE PRODUCTIVE, WHILST 68% REPORT HIGHER QUALITY WORK.

3. Maximising Microsoft 365 features

MOST MICROSOFT CUSTOMERS BARELY SCRATCH THE SURFACE OF ITS FEATURES.

Microsoft 365 is a productivity powerhouse, with over [one million](#) business customers in the US alone. A margin of that customer base use Microsoft Security, with over [860,000](#) customers opting for Microsoft to shoulder their security risk. The number of Microsoft Security customers is growing, however, with more businesses choosing to consolidate their security stack and implement advanced security features. Companies using Microsoft 365's conditional access policies and multi-factor authentication can block [99.9%](#) of identity-based attacks.

OF THE ACCOUNTS THAT ARE HACKED, 99.9% DON'T USE MICROSOFT'S MULTI-FACTOR AUTHENTICATION FEATURES.

Collaboration optimised

Many businesses overlook how to optimise Microsoft 365's collaboration tools like Teams and SharePoint. In Teams, Microsoft Planner can combine team conversations and task management in one place. With this plug-in, you can set progress and assign responsibilities efficiently, reducing the time spent switching between project management tools (like Trello, Monday.com, Asana, etc.). Microsoft Teams can do more than share documents and host meetings. Its live chat feature can be used for customer support. With its integration

across Microsoft 365, collaboration tools like Teams or SharePoint connect to a range of tools like OneNote and Power BI, giving a three-dimensional quality to work collaboration.

EMPLOYEES WASTE 4 HOURS A WEEK TOGGLING BETWEEN SEPARATE APPLICATIONS, MAKING MICROSOFT APP INTEGRATION A PRODUCTIVITY ENABLER.

By integrating data across applications like Teams and SharePoint, business leaders can employ analytics tools more successfully, to improve overall business outcomes. With the ability to visualise KPIs and identify areas for improvement, businesses can gain oversight over their employees and achieve measurable ROI.

Progressive's Microsoft Azure and SharePoint migration

CASE STUDY 1

PROGRESSIVE, A LEADING ROOFING AND CLADDING CONTRACTOR IN EXETER, EMPLOYS OVER 50 STAFF AND HAS WORKED WITH CONSTRUCTION COMPANIES, PROPERTY GROUPS, AND ARCHITECTS SINCE 1988.

Facing costly on-premises server maintenance and security risks, they sought a solution to improve productivity and security for their remote workforce.

Nexus recommended migrating to a serverless cloud environment using Microsoft Azure and SharePoint, improving collaboration and eliminating VPN reliance. To enhance cyber security, Progressive upgraded to Microsoft 365 Business Premium, incorporating Intune and Defender for device management and advanced protection. The migration reduced infrastructure costs, improved team efficiency, and strengthened security.

“OUR TEAM ARE MUCH HAPPIER BECAUSE THEY CAN GET ON WITH DOING WHAT THEY DO BEST, KNOWING THAT THE TECHNOLOGY AROUND THEM IS THERE TO HELP AND NOT SLOW THEM DOWN.”

– ANDY SMITH, DIRECTOR

Transforming housing IT with Microsoft solutions

CASE STUDY 2

CORNERSTONE HOUSING, EXETER'S LARGEST INDEPENDENT HOUSING ASSOCIATION, HAS PROVIDED AFFORDABLE HOMES FOR OVER 90 YEARS, MANAGING 1,400 PROPERTIES ACROSS DEVON.

To modernise their IT infrastructure, they partnered with Nexus, transitioning to a full managed services model.

Key upgrades included cloud migration and deploying Microsoft Intune for improved device management. Outdated networking systems were replaced, and Nexus introduced advanced managed services such as 24/7 security monitoring, phishing training, and comprehensive backup solutions. Cornerstone also adopted email signature management and worked towards Cyber Essentials Plus certification. These Microsoft enhancements improved workflow efficiency, security, and operational resilience.



“NEXUS HAS FUNDAMENTALLY IMPROVED HOW WE MANAGE IT SYSTEMS, MAKING US MORE AGILE AND SECURE WHILE POSITIONING US FOR FUTURE GROWTH.”

– JAMIE SIMMS, IT MANAGER



4. Choosing the right Microsoft Partner

SELECTING THE RIGHT MICROSOFT PARTNER IS A PIVOTAL STEP IN MAXIMISING YOUR MICROSOFT 365 INVESTMENT.

But how do you choose the right fit?

Start by evaluating their certifications and expertise. A reputable partner should hold Microsoft accreditations, such as one of the [Solutions Partner](#) designations, which demonstrate technical proficiency in delivering Microsoft solutions. Beyond certifications, consider their track record – how long have they been working with Microsoft tools, and do they have experience with companies in your industry or of similar scale?

Customer reviews and case studies are invaluable. Partners who can share specific, measurable outcomes from their work demonstrate their ability to deliver value. Look for case studies that align with your own specific business challenges, whether that's in bolstering your Microsoft 365 security, or reducing licensing costs.

Five starting questions for your Microsoft Partner:

1. How do you tailor your recommendations to fit our specific industry or organisational needs?
2. Can you provide examples of businesses like ours that have seen measurable ROI improvements?
3. How will you help us keep up with Microsoft's frequent updates and licensing changes?
4. What training and support will you provide for our teams?
5. How do you ensure data security and compliance with industry standards?

5. Future-proofing your business

BUSINESS LANDSCAPES CHANGE ALL THE TIME.

The systems that underpin operations and facilitate the flow of work must be able to adapt. As your organisation diversifies or pivots to capture greater market share, your Microsoft 365 environment should evolve in tandem. The regular audits and adjustments provided by a Microsoft Partner ensures that your 365 infrastructure remains aligned with business objectives – maintaining peak performance as the goal posts shift.

MICROSOFT COPILOT HAS DRIVEN UP TO 353% ROI FOR SMBS

Microsoft is constantly innovating to address these evolving needs. With the introduction of tools like AI-powered Copilot, organisations can streamline processes, automate repetitive tasks, and enhance decision-making with actionable insights. Copilot integrates seamlessly across the Microsoft 365 suite, empowering teams to work smarter. Already, Microsoft Copilot has driven up to [353% ROI](#) for SMBs.

Beyond AI and Copilot, cyber security threats grow more sophisticated and dangerous. Conditional access policies, multi-factor authentication, and AI-driven threat detection tools are working their way into the mainstream, for safeguarding sensitive data and maintaining compliance.

REGULARLY OPTIMISING MICROSOFT 365 KEEPS ORGANISATIONS AGILE, SECURE, AND PREPARED FOR THE CHALLENGES OF TOMORROW.

Solutions such as Microsoft Intune and Microsoft Defender, available through Microsoft 365 Business Premium and the E3 and E5 plans, enable businesses to centralise device management and provide advanced protection against cyber threats. And advancements of Microsoft Azure and SharePoint reduce reliance on outdated infrastructure like VPNs. Regularly optimising Microsoft 365 keeps organisations agile, secure, and prepared for the challenges of tomorrow.

6. Getting the right implementation and support

With Nexus as your IT partner, we ensure that your transition to Microsoft 365 is smooth, and that your systems continue to perform at their best long after migration. With over two decades of experience, Nexus serves thousands of fully managed users across public, commercial, and non-profit sectors. Our clients, including high-profile organisations trust us to optimise their IT environments for maximum value. Our **ISO 27001** and **Cyber Essentials Plus certifications** demonstrate our commitment to security and compliance, ensuring your Microsoft 365 environment remains secure while delivering outstanding results.

As a recognised Microsoft Solutions Partner with the Modern Work designation, Nexus has the expertise and resources to help you unlock the full potential of your Microsoft 365 licences, from seamless integration to ongoing user training and support. Our proactive 24/7 monitoring and expert service desk ensure you get the most from your investment while avoiding disruptions.

HOW ARE WE DOING?

96% First Response

Service request first response within target

98% Resolved

Service requests resolved within target

99% Satisfaction

% of service users clicking very happy on ticket surveys



“WITH NEXUS’S SUPPORT, WE’RE MORE CONFIDENT IN OUR ABILITY TO NAVIGATE FUTURE CHALLENGES AND CAPITALISE ON EMERGING OPPORTUNITIES.”

– CLAIRE LOVETT, MANAGING PARTNER AT AMICUS LAW.



Turn your potential into performance

YOUR BUSINESS DESERVES MORE THAN TOOLS.

At Nexus, we specialise in transforming your Microsoft 365 investment into a strategic asset, with bespoke solutions and guidance, backed by over 25 years' experience in the Microsoft landscape.

By partnering with Nexus, you gain access to:

- **Expertise that delivers results**, with a specialised understanding of Microsoft 365, we ensure your implementation aligns perfectly with your business goals.
- **Engaged support**, with a team that adapts to your unique business goals, offering solutions that empower your employees.
- **Ongoing value**, with a long-term vision to ensure that every aspect of your Microsoft investment is continually optimised.

[SCHEDULE A BESPOKE MICROSOFT 365 CONSULTATION.](#) →



Additional resources

[Microsoft 365 Copilot drove up to 353% ROI for small and medium businesses](#)

[Microsoft 365 licence optimisation](#)

[The projected total economic impact of Microsoft 365 Copilot for SMB](#)

[Protect your business with a 45-minute free health check](#)

[Drive value with Microsoft 365 user enablement tools](#)

[Cloud migration success story with progressive roofing and cladding](#)

[Microsoft 365 for business security best practices](#)

[Why your business needs an infrastructure refresh in 2024](#)

[Get started with Microsoft Defender for Office 365](#)

[Is Copilot right for my business?](#)



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