M365 Security Assessment Case Study:

Overview:

We recently completed a Microsoft 365 Cloud Security Assessment for a regulated financial services organization with over USD 1.4 billion in total assets. The engagement focused on independently reviewing the customer's Microsoft 365 security configuration against industry-recognized frameworks, including the CIS Microsoft 365 Foundations Benchmark and ISO/IEC 27001:2022 control objectives, to provide clarity, confidence, and actionable insight into their overall cloud security posture.

This project highlights our ability to assess complex, regulated environments and deliver highly customized, clear, and practical outcomes without disrupting day-to-day business operations.

The Challenge:

The customer had already invested in Microsoft 365 security capabilities and completed initial configuration, but lacked independent validation of their environment. There was uncertainty around whether deployed controls were effectively configured, difficulty identifying gaps and prioritizing improvements in a regulated context, and a need for clear, actionable guidance rather than generic best-practice advice. Like many organizations, the customer had the technology in place but required assurance, transparency, and direction across both technical controls and supporting governance processes from an independent security expert.

What We Did:

We performed a structured Microsoft 365 Cloud Security Assessment focused on the areas most critical to financial services environments. The engagement included a detailed review of identity and access management configurations, evaluation of security and monitoring controls across Microsoft 365, and assessment of configuration alignment against industry-recognized best practices. We identified risks, gaps, and improvement opportunities and delivered a clear, prioritized set of remediation recommendations tailored to the customer's specific environment.

As part of our approach, we first conducted an independent assessment of the Microsoft 365 environment and assigned risk ratings based on Digital Edge, AI driven risk analysis methodology. For each identified risk, we provided a clear explanation of the associated AI driven risk scenario and the rationale behind the assigned severity, ensuring transparency into how each rating was determined.

The engagement emphasized practical findings and real-world remediation rather than theoretical risk. For every identified risk, we developed a step-by-step self-remediation guide that included clear implementation instructions, direct links to relevant Microsoft and standards-based

documentation, and screenshots showing exactly where to locate and enable the required controls within the Microsoft 365 environment.

Following the initial assessment, we worked closely with the customer's internal cybersecurity team to review compensating controls that existed outside of Microsoft 365. Through this collaboration, we re-evaluated the original risk ratings in the context of the organization's broader security architecture, including non-M365 technologies and governance controls. Based on this joint analysis, we refined our findings and produced an updated, board-ready report that reflected the customer's true residual risk after compensating controls were considered. The final output was used directly by the Bank's Board as input into its enterprise risk assessment process.

Why We Are Proud:

We are proud of this engagement because it demonstrates our ability to go beyond a point-in-time technical assessment and operate as a true partner in a highly regulated environment. By combining transparent risk rationale, collaboration with internal security teams, and validation of compensating controls outside the assessed platform, we provided the customer with clear visibility into their Microsoft 365 security posture and overall risk exposure. The result was not simply a set of findings, but a board-ready, defensible, and actionable foundation the organization can use to support ongoing security improvement and regulatory confidence.