

# Introducing Surveil

Advanced Insights and Analytics for Microsoft Services



# About Us

Founded in 2009, ITEXACT Limited is a global cloud services company, specialising in cloud-centric software and subscriptions, asset and identity management, and security and governance.

The Surveil platform sits at the heart of our offering, providing AI-powered intelligence to optimise cost, adoption, security, and customers' Microsoft investments.

**4m** users managed on Surveil through existing partners, across **200** EA-based clients and **15,000** CSP clients



# What Does Surveil Do In M365 & Azure?



## Optimise

- Cloud costs – remove waste, invest in value
- Adoption and ROI
- Productivity
- Joiners/leavers & resource leaks



## Secure

- Security feature usage and alerts
- Governance, compliance, and audits
- Secure identities & resources



## Control

- Smarter decision-making
- Laser accuracy on EA/CSP renewal planning (Supporting NCE)
- AI-powered intelligence presented on custom dashboards
- Ease of visibility

## Technical Details

80+ APIs connected

PowerBI embedded for analytics

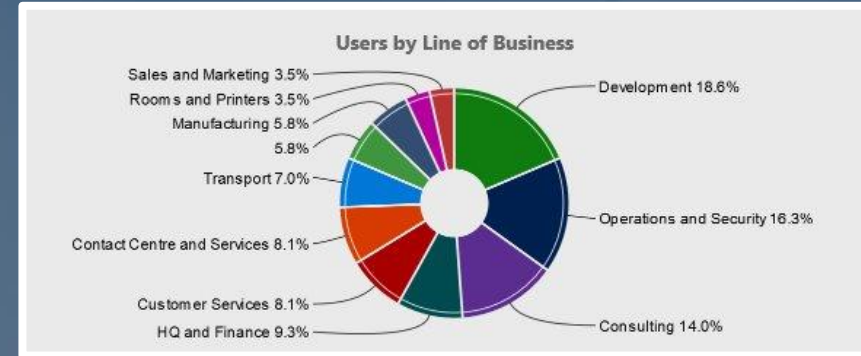
200+ PowerBI dashboards and counting

Azure and M365 on same platform

# Cost Optimisation



- Understand Cloud Spend with AI recommendations
- View, manage, and plan licensing costs
- Financial planning with Prediction
- FinOps based on Microsoft's 10-point checklist
- Align IT billing with Business Categories
- Empower people to control costs
- Optimise your Microsoft investments – including Dynamics 365
- Remove and reallocate licences as needed
- Handles licences for inactive and disabled accounts
- Link Resources to Business Context with AI Tagging



# App Usage and Adoption



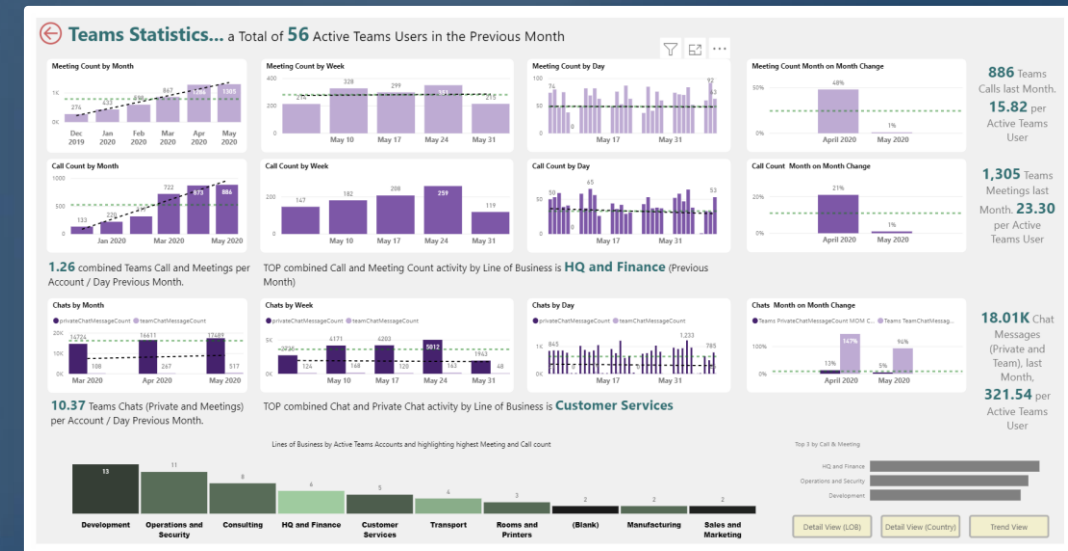
Drive adoption and understand productivity and collaboration levels in different areas of your business:

- View licensed application adoption across the M365 suite – not just the office apps
- View adoption and usage trends.
- Drill down to the specific features used, for each application.
- Make sizeable and achievable decisions – actionable insights
- Accurate metrics for your M365 change programs

Views on Product Consumption and Adoption of Key Office 365 Products

Product Adoption (Country) - Previous Month

TAG-Country	Users with assigned Office 365 Licenses (Y/N)	Total PrePlus Activations (All Time)	Email Receive Count per Active User (Per Day)	Email Send Count per Active User (Per Day)	Active Email User	OneDrive Storage per Active User	OneDrive Avg. Active File Count per Active User	OneDrive Avg. OneDrive User	SharePoint Page View Count per Active SharePoint Site	SharePoint Active File Count per Active SharePoint Site	SharePoint File Count per Active SharePoint Site	Teams Call Count per Active Teams User (Per Day)	Teams Meeting Count per Active Teams User (Per Day)	Teams Private Chat Message Count per Active Teams User (Per Day)	Skype Conferenc e per Active User (Per Day)	Skype Peer to Peer IM Count per Active User (Per Day)
United Kingdom	18	58	12	3	9	16	27	7,079	48	86	11,551	0.7	1.0	10	0.0	0.1
South Africa	70	150	110	5	57	12	17	5,881	0	0	0	0.7	0.8	9	0.0	0.0
Lithuania	25	5	7	6	4	1	10	3,198	0	0	0	0.1	0.2	3	0.0	0.0
India	4	6	7	2	2	0	2	32	0	0	0	0.5	0.9	11	0.0	0.0
France	1	1	19	13	1	0	2	20	0	0	0	0.8	1.7	9	0.0	0.0
Philippines	1	3	5	1	1	15	2	450	0	0	0	0.1	0.1	1	0.0	0.0
United States	3	2	17	8	1	8	8	8	0	0	0	0.3	1.7	2	0.0	0.0
<b>Total</b>	<b>129</b>	<b>238</b>	<b>81</b>	<b>4</b>	<b>80</b>	<b>11</b>	<b>17</b>	<b>5,354</b>	<b>48</b>	<b>86</b>	<b>11,553</b>	<b>0.6</b>	<b>0.8</b>	<b>8</b>	<b>0.0</b>	<b>0.1</b>



# Productivity



## Operational Improvements:

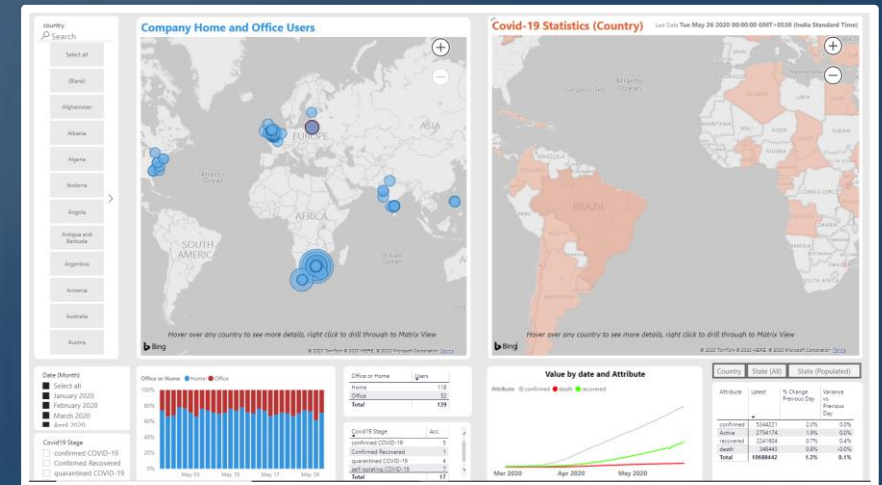
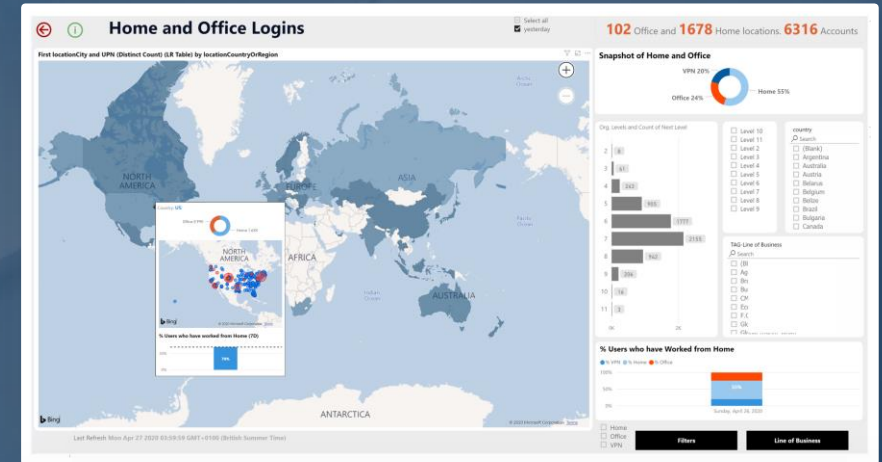
- Quick Access to all your Microsoft environments
- Operational Efficiencies - saves FTEs of time
- Metrics to measure and manage your programs
- Modern workplace dashboards

## Understand how changes affect your employees' productivity:

- How do employees adapt to changes e.g., in operating models and productivity methods/technologies.

## Use the information to:

- Spread the best trends across your organisation
- Help employees that need it most, to be productive
- Send targeted digital training offers with a click

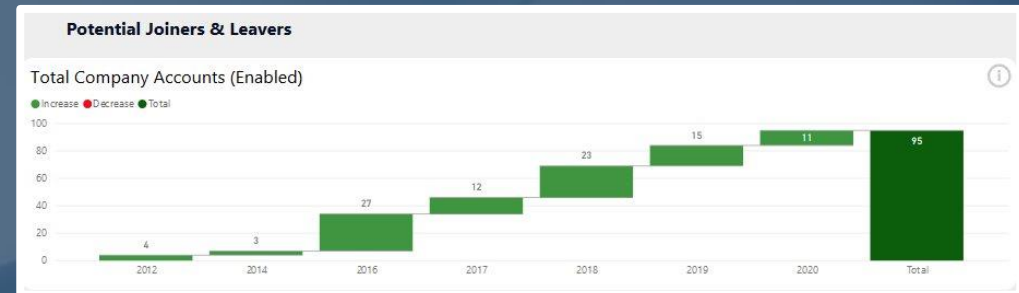






## Reduce Costs, Manage Security Risk:

- Know your (potential) joiners and leavers.
- Both IT and HR can initiate actions, independently in a timely manner, without having to wait.
  - Remove or reallocate licenses from inactive accounts.
  - Plug the risk of security leaks:
    - Remove unneeded access.
    - Restrict access for high-risk leavers.



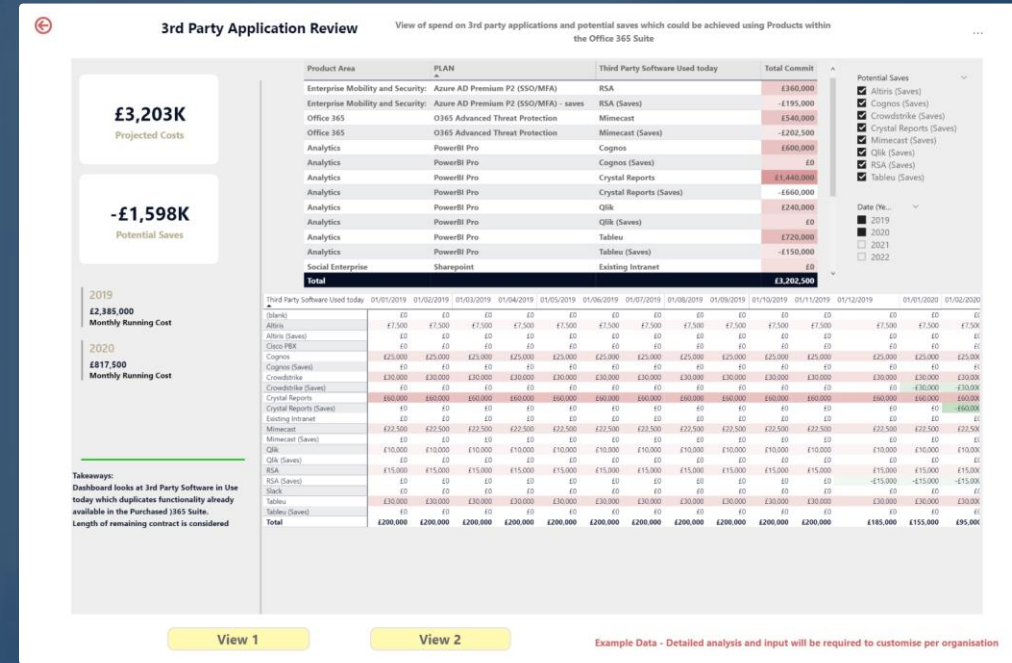
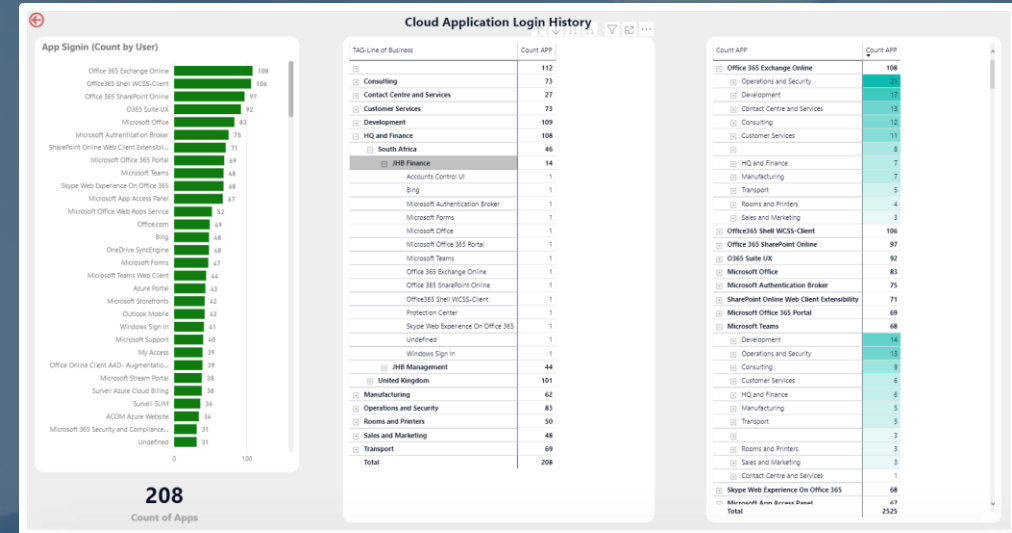
# Security Feature Usage



## Replace 3rd-Party Apps that have Duplicate Functionality

Plan out the replacement of third-party applications with functions that your Microsoft 365 subscription already has?

- Better understanding of Shadow IT
- See all the applications being accessed by your employees (MS linked applications in cloud).
- AI Recommendations for which applications to replace and potential savings estimated.





# Governance & Compliance Audits



- **Governance Reporting, Overviews, Audits:** get the basics right
- **Business Alerting Engine:** better and more focused response
- More effective Incident Response
- M365 Security Overviews and Compliance
- Enhanced Security with M365 Combined
- Governance Reporting
- Infrastructure Architecture and Governance

## Governance Reporting

- Bring business context to regulatory compliance.
  - Understand the *costs* and *resources* involved.
- Includes reports for PCI, ISO27001, CIS, NIST 800-171 & 800-53, etc.
- Tagging Engine filters by business categories, know which:
  - Business-critical services to invest in
  - Areas to optimise or ignore (e.g., temporary test environments)

# Securing Identities



## Identity and Resource Management:

- Secured Identity and Access Management
- Clean up existing AD and Azure Tags - without write access
- Know your Joiners/Leavers and manage resource leaks
- Full Business understanding of your Resources
- Modern Workplaces Dashboards – Home/Office Insights

## Identity Health Automation

Automate your AD optimization and clean up.

- For better AD health and ***better business context***.
  - Filtering and sorting that makes business sense.
    - E.g., by business owners, business unit, function, department, cost centre, region, etc.
  - Review, clean up, improve and update via our AI tagging engine.
- Better license allocation, based on functionality required.

**Identity Health Overview...** Views of an organisation broken down via geography, roles, company structure, departments, managers - to give a high level view of identity and associated cost distribution

System Tag Category, Tag Value	TenantName
AS	AS

Custom Tag Overview	Overview of Custom Tags and AD Parameters
Active Directory Health - Identity Summary by Company, Country, Department, Job Title	Active Directory view (AD defined fields), from an account and cost perspective.
Custom Tag to Active Directory Mapping	Custom Tag view (mapped to AD fields), from an account and cost perspective.
Active Directory Health - Identity Summary by Country (AD) & Line of Business (tag) (Accounts & Cost view)	Table views from Tag LOB and Tag Country with details down to account levels.
Active Directory Health - Identity Summary by Company Name (AD) & Manager (AD) (Accounts & Cost view)	Table view from AD Company Name and Manager, with details down to account levels.
User Account Details - Detailed view of Active Directory Accounts	Table view - lines per user with all useful user level details.

License Group Assignments	View of licenses assigned by groups and conflicts between group and direct assigned licenses
O365 Groups	Summary of O365 Groups
User Detailed View	Overview of all metrics related to an individual account

Account Aging profile	View of user account creation to inactivity windows to allow an understanding of activity windows
Management Hierarchy	View of management Hierarchy based on the Active Directory Manager field

**Tenants and Domains** Domain and Tenant Summary

# Decision-Making



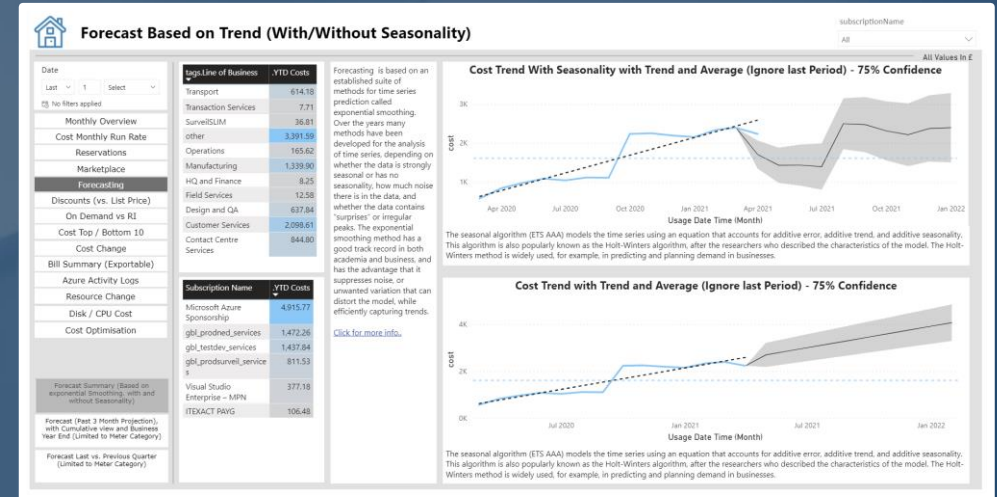
Our AI Engine combines your key business metrics and environment with deep data analytics, before framing it in a recognisable business context.

## Make better decisions through:

- Recommendations
- Trigger Events
- Various analytics

## Financial Planning with Prediction

- Predict future costs
  - See trends in costs for the past year.
  - View forecasts for spend.
- View and manage exceptions and outliers, by any business category.
- Cognitive Predictive Forecasts – Seasonal, quarterly, based on increases, etc.



Operational Summary				3 Year view of license commitments, paid and pending amounts plus any additional reservations during the fixed commitment which could influence year on year pricing.	Summary View
Year 1	July 2018	£55,239	£0	£0	...
	Period From - To	Y1 Commit Cost	Y1 Reservation Cost	Y1 Paid	£55,239
	June 2019			£0	Y1 Total Cost
				Y1 Remaining Cost	
Year 2	July 2019	£55,239	£5,732	£3,000	
	Period From - To	Y2 Committed Cost	Y2 Reservation Costs	Y2 Paid	£60,971
	June 2020			£2,732	Y2 Total Cost
				Y2 Remaining Cost	
Year 3	July 2020	£55,239	£975	£100	
	Period From - To	Y3 Commit Cost	Y3 Reservation Costs	Y3 Paid	£56,214
	June 2021			£875	Y3 Total Cost
				Y3 Remaining Cost	

# Renewal Planning



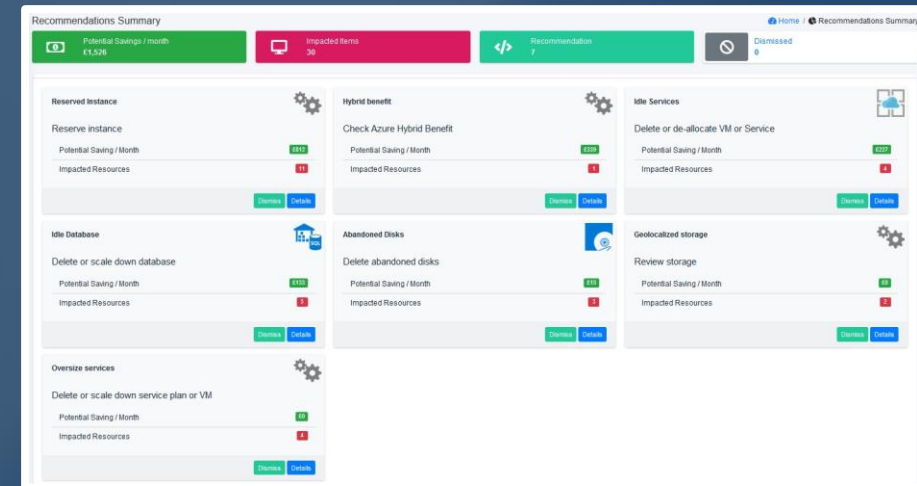
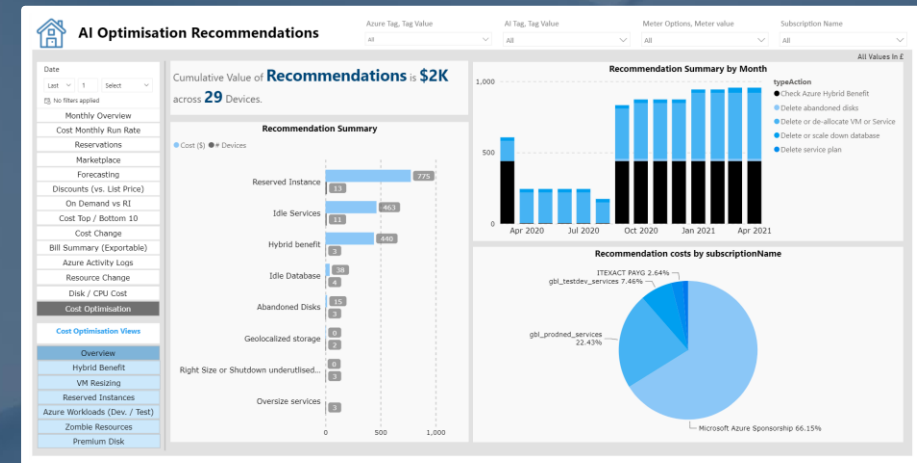
See your EA costs however you want, in ways relevant to you.

- Easily manage your MS budget and re-bill, be it internally or externally.
- View licence cost by:
  - Country, region, cost centre
  - Business Unit, department, LOB
  - Operational environment (e.g., Dev vs Prod)
  - Individual user
  - Any other custom view.
- EA renewal planning – remove waste, invest in value
- Supports EA, CSP, PAYG, MCA, etc.
- AI Recommendations engine help to secure 18-37% savings
- Financial Transparency via Automated AI Tagging Engine
- Multi-tenant views (Merger & Acquisition)
- Remove SaaS Fragmentation via single pane-of-glass view

# AI-Powered Intelligence



- Quickly see which areas are contributing to costs
- Take action accordingly from the same screen, with a few clicks
- Picklist of optimisation benefits – you decide how much to review, one step at a time



# Ease of Visibility



Relevant dashboards for leadership teams to focus on key areas:

- Growth Insights.
- Top Costs by Line of Business
- Top Areas of Risk Level and Impact
- Critical Areas of Resource Consumption and Spend.

## C-Level Dashboards

- Take out the technical detail:
  - Product adoption and consumption
  - EA and license financial summaries
  - Reservation True-up details every day, so no surprises at the end of the year

**C-Level Dashboard..**  
High level overview of an organisations Office 365 Environment, looking at product adoption and consumption, finances and key metrics on organisational accounts.

The dashboard includes the following sections:

- Consumption Summary:** Active Directory accounts and Office 365 distribution by Line of Business, focusing on recent product usage and uptake of technologies (productivity and collaboration) within the environment.
- Consumption / Adoption - Detailed Business View:** Views of both consumption and adoption, summarised by Line of Business and Country.
- Adoption Summary:** Views of both consumption and adoption of key technologies, summarised by Line of Business and Country. Top 10 view is summarised view focusing on top Line of Business / Country.
- Heatmaps of Device and App Use:** Includes **Device Summary** and **Mobile Summary**.
- Regional Distribution:** View of an organisations global identity footprint based on Active Directory and customised tags. Including AD accounts and account aging metrics.
- Joiners & Leavers Overview:** Focus on the organisations Active Directory account information looking and account growth over time and account aging.
- Financial Summary:** View of the Office 365 Licensing spend focusing on the major license categories, allocation of licenses and aging of assigned licenses.
- EA Details (Operational Summary):** View of the Enterprise Agreement (EA) and year and year costs plus future options.
- EA Renewal:** View of the Enterprise Agreement (EA) and year and year costs plus future options.
- 3rd Party Application Overview:** Customised view of 3rd party applications and potential saves which could be achieved leveraging Office 365 Products. Data is an example and would need to be customised per environment.

**Operational Summary** 3 Year view of license commitments, paid and pending amounts plus any additional reservations during the fixed commitment which could influence year on year pricing.

Year	Period From - To	Y1 Commit Cost	Y1 Reservation Cost	Y1 Paid	Y1 Total Cost
<b>Year 1</b>	July 2018 - June 2019	<b>£55,239</b>	<b>£0</b>	<b>£0</b>	<b>£55,239</b>
<b>Year 2</b>	July 2019 - June 2020	<b>£55,239</b>	<b>£5,732</b>	<b>£3,000</b>	<b>£60,971</b>
<b>Year 3</b>	July 2020 - June 2021	<b>£55,239</b>	<b>£975</b>	<b>£100</b>	<b>£56,214</b>

Y1 Remaining Cost, Y2 Remaining Cost, Y3 Remaining Cost

Buttons: Summary View, Year 1 Detail, Year 2 Detail, Year 3 Detail



# Thank you!

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Find out more: [www.surveil.co](http://www.surveil.co)