**WADE**VANTAGE

MICROSOFT 365 SECURITY & COMPLIANCE, COVERED 365

**SAMPLE REPORT — ILLUSTRATIVE FINDINGS**

# M365 Security & Compliance Snapshot

Findings Report — Prepared for a fictional sample client to illustrate report format and depth

PREPARED FOR
**Meridian Family Law, PLLC***

ENVIRONMENT
**Microsoft 365 Business Premium**

USERS REVIEWED
**18**

REPORT DATE
**Sample / Illustrative**

## Executive Summary

This is a sample report built from fictional data to show the format, depth, and plain-language style of every Wade Vantage Snapshot deliverable. Your actual findings report will reflect your real tenant configuration.

**62**
/ 100

**Overall security posture: Moderate risk.** Three findings below are flagged high priority and should be addressed within 30 days. None are actively exploited at time of review, but several represent open doors that are easy for an attacker, or a departed employee, to walk through unnoticed.

## Findings by Category

Each finding is ranked by real-world risk, not just technical severity, so you know what to fix first.

| CATEGORY | RISK | FINDING |
|---|---|---|
| **Identity & Access**<br>Entra ID / MFA / Admin Roles | Critical | 4 of 18 user accounts do not have multi-factor authentication enforced, including one Global Administrator account. |
| **Identity & Access**<br>Conditional Access | High | No Conditional Access policy restricts sign-in by location or device compliance, any managed or unmanaged device can access mailbox and files from anywhere. |
| **Identity & Access**<br>Stale Accounts | High | 2 former employee accounts remain active with licenses assigned, last sign-in over 90 days ago. |
| **Email & Data Sharing**<br>SharePoint / OneDrive | Medium | 6 files and 1 folder are shared externally via "Anyone with the link," including one folder containing client billing records. |
| **Email & Data Sharing**<br>Exchange Online | Medium | Mailbox forwarding rules are enabled for 2 accounts, forwarding to external, non-company email addresses. |
| **Device & Endpoint**<br>Intune Enrollment | Medium | 7 of 18 devices connecting to company email are unmanaged, not enrolled in Intune, no compliance policy applied. |
| **License & Cost**<br>Utilization | Low | 3 Business Premium licenses assigned to accounts with no sign-in activity in the last 60 days, approximately $66/month in avoidable spend. |

## Prioritized Action Plan

This is the part clients tell us they actually use, a clear order of operations instead of a long list to sort through alone.

1. **Enforce MFA on all accounts, starting with admin roles.**
   Highest impact, lowest effort, closes the single biggest door first.
2. **Disable or remove the 2 stale former-employee accounts.**
   Removes standing access tied to no one currently accountable.
3. **Review and restrict the externally shared client billing folder.**
   Directly reduces exposure of sensitive client financial data.
4. **Stand up a baseline Conditional Access policy.**
   Requires compliant or managed devices for sign-in.
5. **Investigate the 2 external mail-forwarding rules.**
   Confirm they are legitimate, remove if not.
6. **Reassign or remove the 3 unused licenses.**
   Recovers avoidable monthly spend.

## This is what your Snapshot looks like.

Every engagement gets a report built like this one: plain language, ranked by real risk, with a clear action plan instead of a raw data dump. Flat fee, $750, findings back within about a week.

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**Meridian Family Law, PLLC is a fictional company used for illustration only. All findings, user counts, and figures in this sample are constructed examples and do not represent any real client, tenant, or engagement. Your Snapshot findings will reflect your organization's actual Microsoft 365 environment.*