

DAYONE+ DEAL

A secure Microsoft 365 stand-up for a newly independent US advisory firm.

A small US risk advisory team separating from its parent firm's Microsoft 365 tenant as the parent exited the US market: identity, email, data and devices handled as one plan.

CORPORATE CARVE-OUT AND MANAGED SERVICES STAND-UP / RISK ADVISORY / UNITED STATES

AT A GLANCE

100%

Users, devices and data carved out under a phased, amicable separation plan

~4 mo

From introduction to independent tenant, endpoints and managed services live

Day 1

Entra ID, MFA, Conditional Access, Intune, BitLocker and Defender baselines in place

A small US risk advisory team separating from its parent firm's Microsoft 365 tenant as the parent exited the US market: identity, email, data and devices handled as one plan.

THE CHALLENGE

A small risk advisory team was separating from its parent firm's Microsoft 365 tenant as the parent exited the US market. Users, devices, mailboxes, SharePoint deal data and licences all had to be carved out in a controlled, amicable way, and the new entity needed to land on a secure, managed footing from day one.

OUR APPROACH

- 01 One integrated plan across identity, email, data and devices, not five side-conversations.
- 02 Phased separation to keep the parent-firm relationship amicable through cutover.
- 03 Security baseline was part of the stand-up scope, not a follow-on project.
- 04 Managed services on-ramp aligned to go-live so the founder never operated unsupported.

WHAT WE DELIVERED

- Independent Microsoft 365 tenant with Entra ID, MFA and Conditional Access.
- Intune, BitLocker and Microsoft Defender baseline across all endpoints.
- Legacy mailboxes, SharePoint deal data and devices handed back to the parent under a controlled plan.
- Managed services live from day one under a single accountable partner.

“A lean team, a serious separation. Identity, email, data and devices were handled as one plan, not five side-conversations.”

FOUNDER, NEWLY INDEPENDENT US RISK ADVISORY FIRM

WHAT WE TOOK FROM IT

- 01 A lean team does not mean small risk. The separation surface area is the same.
- 02 An amicable hand-back is a design choice. It has to be planned, not hoped for.
- 03 Landing on a managed service on day one prevents the founder from becoming the help desk.

ABOUT NUMATA

Numata is a business technology services and solutions provider for small and mid-sized enterprises. We align technology to business outcomes across IT strategy, cyber, data, operations, modern work and AI, delivered through NumataOne™, our strategy enablement framework.

Speak to the team: numata.co/contact