



VisioClara

MICROSOFT CLOUD & AI PARTNER

THE 12-MONTH PLANNING WORKBOOK

Your 12-Month Microsoft Roadmap

An AI-ready planning workbook for
Canadian startups & SMBs

Vision-led. Trust-built. Clarity-driven.

Q1 FOUNDATIONS & SECURITY

Q2 PRODUCTIVITY & AI

Q3 DATA & AZURE

Q4 SCALE & OPTIMIZE

Licensing · Security · Copilot · Purview · Fabric & Power BI · Azure · FinOps

Microsoft, made simple.

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You don't need more Microsoft

YOU NEED THE RIGHT MICROSOFT — SEQUENCED

Most teams already own more Microsoft than they use. The win isn't buying more — it's sequencing what you have.

This workbook turns a year of Microsoft decisions into a single, ordered plan — from right-sizing licences and locking down security, to adopting Copilot with governance, modernizing your data, and building solid Azure foundations. Work through it in order: each quarter builds on the last, and each one delivers value on its own.

Q1

FOUNDATIONS
& SECURITY

Q2

PRODUCTIVITY
& AI

Q3

DATA
& AZURE

Q4

SCALE
& OPTIMIZE

How to use this workbook

It's built to be filled in. Start with the **"Where are you now?"** self-assessment to see which pillars are solid and which need work. Then shape your year with the **quarter-by-quarter** templates, and lock the big calls on the **"Decisions to make"** worklist. Write on it, tick the boxes, and bring it to your roadmap session. Figures shown as **[add stat]** are placeholders for your own verified numbers.

The one rule: govern before you scale

Security and governance come first for a reason. Copilot and analytics are only as trustworthy as the data and permissions beneath them — so we sequence the foundations before the fireworks.

Where are you now?

A QUICK MATURITY SELF-ASSESSMENT

For each pillar, tick the box that best describes you today — **None** (not started), **Basic** (partly in place), or **Solid** (working well). Be honest; this is the baseline your 12-month plan builds from.

PILLAR — WHERE ARE YOU TODAY?	NONE	BASIC	SOLID
Licensing & spend Right-sized Microsoft 365 plans — Business Premium, E3, E5 / E7 — matched to who needs what.	☐	☐	☐
Security baseline MFA, conditional access, Defender, Intune, and a reviewed Microsoft Secure Score.	☐	☐	☐
Productivity & Copilot Teams, Outlook, and file habits standardized; Microsoft 365 Copilot adopted with real value.	☐	☐	☐
Governance & privacy Purview sensitivity labels and DLP in place; PIPEDA and Quebec Law 25 obligations mapped.	☐	☐	☐
Data & analytics One source of truth — Microsoft Fabric & OneLake — with Power BI behind key decisions.	☐	☐	☐
Azure foundations A landing zone with identity, network, and data residency in Canada Central / Canada East.	☐	☐	☐
Cost & FinOps Visibility into cloud spend, with budgets, tagging, and guardrails on what can grow.	☐	☐	☐
Backup & resilience Backup, recovery, and a tested business-continuity plan you could actually rely on.	☐	☐	☐

Read your results

Mostly **None / Basic**? Start with Q1 foundations — don't skip ahead to AI. A mix of **Basic / Solid**? Use the quarters to close the specific gaps you ticked. The goal isn't every box "Solid" at once — it's the **right next move**, in the right order.

Your year, one quarter at a time

SET GOALS, PICK YOUR MOVES, DECIDE

Four quarters, four themes — tick the moves you'll make, name an owner, and write your decision in your own words.

Q1

QUARTER 1

Foundations & Security

Buy smarter · Secure the base

KEY MOVES — Months 1–3

- ☐ Right-size licensing — confirm who truly needs Business Premium vs E3 vs E5 / E7.
- ☐ Turn on the security baseline — MFA everywhere, conditional access, review Secure Score.
- ☐ Deploy Intune + Defender for managed, protected devices across the team.
- ☐ Clean up identity and sharing — before you layer productivity or AI on top.

OUR GOAL FOR THE QUARTER

OWNER

TARGET DATE

OUR DECISION / NOTES

Q2

QUARTER 2

Productivity & AI

Adopt Copilot · Govern first

KEY MOVES — Months 4–6

- ☐ Standardize Teams, Outlook, and file habits — stop emailing attachments around.
- ☐ Govern first — apply Purview labels and right-size access before switching Copilot on.
- ☐ Run a governed Copilot pilot, then expand by role and measure the hours saved.
- ☐ Map your PIPEDA and Quebec Law 25 obligations to concrete Purview controls.

OUR GOAL FOR THE QUARTER

OWNER

TARGET DATE

OUR DECISION / NOTES

Q3

QUARTER 3

Data & Azure

One source of truth · Azure

KEY MOVES — Months 7–9

- ☐ Consolidate scattered data into OneLake and model it in Microsoft Fabric.
- ☐ Build the Power BI dashboards behind your handful of business-critical decisions.
- ☐ Stand up an Azure landing zone — identity, network, and Canadian data residency.
- ☐ Apply Defender for Cloud and a security baseline to your Azure estate.

OUR GOAL FOR THE QUARTER

OWNER _____

TARGET DATE _____

OUR DECISION / NOTES**Q4**

QUARTER 4

Scale & Optimize

FinOps · Resilience

KEY MOVES — Months 10–12

- ☐ Put cost guardrails in place — budgets, alerts, and tagging (FinOps).
- ☐ Right-size and retire unused resources and licences you're no longer using.
- ☐ Confirm backup, recovery, and a business-continuity plan you've actually tested.
- ☐ Review the year, capture the wins, and plan next year's roadmap.

OUR GOAL FOR THE QUARTER

OWNER _____

TARGET DATE _____

OUR DECISION / NOTES

Decisions to make

THE CALLS THAT SHAPE YOUR YEAR

These are the seven decisions that most shape a Canadian SMB's Microsoft year. Write the call, name an owner, and set a target date. Unsure on any of them? That's exactly what a roadmap session is for.

1 Licensing mix

Which Microsoft 365 plan does each group of people actually need?

Options to weigh: Business Premium for most · E3 where you need more control · E5 / E7 for advanced security & compliance.

OUR DECISION

OWNER _____ TARGET DATE _____

2 Security baseline

Which controls are non-negotiable before anything else goes live?

Options to weigh: MFA for everyone · conditional access · Intune device management · Defender · Secure Score target.

OUR DECISION

OWNER _____ TARGET DATE _____

3 Copilot rollout

Who pilots Microsoft 365 Copilot first, and what does "ready" look like?

Options to weigh: Govern first (labels + access) · pick a pilot group · define success · expand by role.

OUR DECISION

OWNER _____ TARGET DATE _____

4 Data platform

How do you get to one source of truth for the decisions that matter?

Options to weigh: Microsoft Fabric + OneLake · Power BI dashboards · retire spreadsheet sprawl · agree definitions.

OUR DECISION

OWNER _____ TARGET DATE _____

5 Azure landing zone

How is your Azure foundation designed — and where does data live?

Options to weigh: Region: Canada Central / Canada East · identity & network design · Defender for Cloud baseline.

OUR DECISION

OWNER _____ TARGET DATE _____

6 Backup plan

What's protected, how often, and how is recovery proven?

Options to weigh: Microsoft 365 + Azure backup scope · retention · recovery targets · a test you actually run.

OUR DECISION

OWNER _____ TARGET DATE _____

7 Cost guardrails

How do you keep cloud spend predictable as you scale (FinOps)?

Options to weigh: Budgets & alerts · resource tagging · a named cost owner · monthly review cadence.

OUR DECISION

OWNER _____ TARGET DATE _____

Bring this to your session

You don't need every answer today. Fill in what you know, flag what you don't, and we'll turn your notes into a sequenced, costed 12-month plan — Canadian data residency and governance built in from day one.

Book your roadmap session

TURN THIS WORKBOOK INTO A PLAN

VisioClara helps Canadian startups and SMBs make better Microsoft decisions — across licensing, security, productivity, AI, and Azure. Bring your filled-in workbook and we'll sequence it into a clear, right-sized plan for the year ahead. Vision-led on where you're headed, trust-built in how we govern your data, and clarity-driven in every recommendation.

✓ A sequenced 12-month plan

Your quarters, ordered and right-sized — not a shopping list.

✓ A licensing recommendation

The Business Premium / E3 / E5 / E7 mix that actually fits your team.

✓ A security & governance baseline

The non-negotiables, mapped to PIPEDA and Quebec Law 25.

✓ A Copilot & data path

Govern-first Copilot and one source of truth with Fabric + Power BI.

✓ An Azure & residency view

Landing-zone foundations with data residency in Canada.

✓ A cost & resilience check

FinOps guardrails and a backup plan you can rely on.

Book a free 30-minute roadmap session

We'll walk your workbook together and map it to a sequenced 12-month plan — licensing, security, Copilot, data, Azure, and cost — with governance and Canadian residency built in from day one.

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