



Getting More from Microsoft 365

A Practical Guide for Business Owners and Teams



Microsoft 365: More Than Just Office in the Cloud

Most businesses already use Microsoft 365 (M365) for everyday tools like Outlook, Word, and Excel. But few truly tap into the full potential of their subscription.

Used properly, Microsoft 365 can improve collaboration, streamline processes, boost security, and even save hours of manual work each week.

At Somerbys IT, we work with businesses across Leicestershire, Derbyshire, and Nottinghamshire to help them get more from their investment in Microsoft 365, ensuring every licence pays for itself many times over.

This guide is designed to show you how.



"We regularly meet businesses who are only scratching the surface of what Microsoft 365 can do.

Most teams use it for email and Word, but few realise how much more value is sitting right there in their subscription - from automation and collaboration tools to powerful security features.

Our goal at Somerbys IT is to help businesses unlock that potential and make technology truly work for them."

Allan Page, MD Somerbys IT

What's Included in Microsoft 365 Business Subscriptions

Microsoft 365 Business comes in three main plans - Basic, Standard, and Premium - each offering different features depending on your needs and level of security.

Here's a quick breakdown of what's included, and how to get the most out of it.

Feature	What You Get	How to Use It Effectively	Real-Life Example
Outlook & Exchange Email	Business-class email with calendars, contacts, and 50GB mailboxes.	Use shared mailboxes (e.g. sales@company.com) instead of forwarding. Apply rules and retention policies to keep inboxes tidy.	A logistics firm uses a shared mailbox so multiple team members can reply to client requests without missing a beat.
OneDrive & SharePoint	1 TB cloud storage per user and shared team sites for files.	Replace network drives and email attachments with shared document libraries. Use version history to track edits.	An accountancy practice now co-authors spreadsheets live in SharePoint — no more “Final_V2_Really_Final.xlsx”.
Teams	Chat, video meetings, and collaborative workspaces.	Create Teams for departments or projects, with channels for different topics. Integrate Planner, Forms, or shared documents.	A design agency keeps every client project in a dedicated Teams channel — with visuals, chat, and approvals in one place.
Office Apps (Word, Excel, PowerPoint)	Always-up-to-date desktop, web, and mobile versions.	Use online co-authoring, templates, and autosave to avoid version chaos.	A marketing firm collaborates on proposals in real-time, saving multiple rounds of feedback.
Security & Device Management (Premium plan)	Advanced protection via Microsoft Defender, Intune, MFA and conditional access.	Enforce MFA for all users. Use Intune to manage laptops and phones, with encryption and remote wipe.	A financial advisor protects sensitive data with device policies and MFA, meeting compliance with FCA requirements.

How Businesses Can Get More from Microsoft 365

Even without upgrading your licence, there are many ways to make your subscription work harder for you:

1. Automate Routine Tasks

Use Power Automate to reduce manual admin.

For example:

- Automatically save email attachments to SharePoint.
- Alert managers when a document is approved.
- Remind staff when licences or certifications expire.
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💡 Example: A Leicester-based construction company uses Power Automate to send reminders for expiring health and safety certificates - saving hours of manual tracking.

2. Centralise Communication and Files

Replace multiple apps (Zoom, WhatsApp, Dropbox) with a unified system:

- Use Teams for calls, chat and meetings.
- Store and share files via SharePoint - accessible anywhere, securely.
- Sync documents to local devices with OneDrive for offline access.

💡 Example: A Derby-based firm eliminated five separate tools by adopting Teams and SharePoint, reducing software costs and simplifying IT management.

3. Boost Data Security

Cyber threats are on the rise, and Microsoft 365 can help protect your business - if configured correctly.

- Enable Multi-Factor Authentication (MFA) for all users.
- Use Conditional Access to block sign-ins from unapproved devices.
- Turn on Defender for Office 365 to detect phishing and malicious attachments.
- Apply Data Loss Prevention (DLP) to prevent sensitive information leaving the business.

💡 Example: A Nottingham accountancy practice prevented a near miss with a phishing email thanks to Microsoft Defender's automatic link scanning.

4. Empower Hybrid & Remote Working

Microsoft 365 was built for flexible work.

Encourage staff to:

- Use Teams meetings with live transcription for note-taking.
- Share project updates in Teams channels instead of lengthy emails.
- Access files securely from anywhere — no VPN needed.

💡 Example: A Leicester engineering firm uses Teams to connect office staff with site engineers through video calls and shared drawings, all synced via OneDrive.

5. Use Insights & Reporting

Within Microsoft 365 you can access:

- Usage analytics to track adoption.
- Security & compliance dashboards to monitor risks.
- Teams analytics to see collaboration trends.

💡 Tip: Schedule regular reviews to identify underused tools or gaps in training.



Upgrading and Add-Ons: Taking Microsoft 365 to the Next Level

If you're ready to go further, here are optional upgrades and add-ons worth exploring:

Upgrade	What It Adds	Who It's For
Microsoft 365 Business Premium	Includes Defender, Intune, and advanced security features.	Businesses handling sensitive or regulated data.
Teams Phone System	Turns Teams into your full business phone system with call queues, voicemail, and hold music.	Businesses wanting to replace desk phones or unify remote/hybrid calling.
Power BI	Data visualisation dashboards connected to Excel, SharePoint or SQL.	Managers wanting to see live insights and KPIs across the business.
Power Apps	Build custom apps without coding.	Companies automating field reports, inspections, or form submissions.
Microsoft Purview (Compliance Add-on)	Data retention, DLP, audit, and compliance management.	Firms in regulated industries (finance, legal, healthcare).
Third-Party Backup Solutions	Independent backups of emails, Teams, and SharePoint data.	Every business - for disaster recovery and compliance peace of mind.

Common Mistakes Businesses Make with Microsoft 365

Even with all this power, many businesses still:

- Treat M365 like “just email and Word.”
- Leave security defaults unchanged.
- Don’t train staff on Teams or SharePoint.
- Fail to back up cloud data.
- Mix personal and business data on unmanaged devices.

A few simple changes can protect your data, streamline collaboration, and improve productivity across your entire organisation.

How Somerbys IT Helps Businesses Maximise Microsoft 365

We help local businesses:

- Audit their existing Microsoft 365 setup.
- Optimise licences (often saving hundreds in unused features).
- Secure data with proper policies and MFA.
- Train staff to use Teams, SharePoint, and OneDrive effectively.
- Automate repetitive processes to save time and reduce errors.

Whether you’re an accountant, manufacturer, or professional services firm, our goal is the same - to make technology work harder for your business.



56 %

of small businesses in the UK are now using some form of cloud-based services, up from 35 % roughly five years ago.

Source: Microsoft

Next Steps

If you'd like to:

- Review your Microsoft 365 setup
- Explore automation and security options
- Or simply ensure you're getting full value from your subscription

👉 Book a Microsoft 365 Review with Somerbys IT

We'll identify the features you're missing, the security gaps to fix, and the time-saving tools you can start using immediately.

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