SAMPLE REPORT. Kestrelbrook Health is a fictional company. Every name, number and finding in this document is illustrative and shows the format and depth of a real Operations Diagnostic.

OPERATIONS DIAGNOSTIC REPORT

Kestrelbrook Health

$82,476 a year in Microsoft 365 licenses Kestrelbrook pays for and does not use. 23 former employees who can still sign in. 11 standing Global Administrators. All three are fixable in 60 days, with a person approving every change.

Prepared for	Dana Whitfield, Chief Information Officer
Prepared by	UpRyzze
Engagement	October 26 to November 6, 2026 (two weeks), read-only
Readout	November 10, 2026
Organization	Specialty pharmacy and infusion. 940 staff. 6 sites: Columbus HQ, Dayton Infusion Center, Cincinnati Pharmacy, Louisville Clinic, Indianapolis Pharmacy, and remote staff.

Executive summary

LICENSE SPEND NOT USED
$82,476
a year. $66,348 recoverable without any change in how people work.

ACCOUNTS THAT SHOULD BE CLOSED
70
23 former staff and 47 stale accounts with no owner. 2 former staff signed in after their last day.

STAFF AND AGENT TIME RECOVERABLE
$188,904
a year, as capacity: service desk, onboarding and contact center.

What we found. Kestrelbrook spends $671,640 a year on Microsoft 365 licenses and add-ons. 12.3% of that buys nothing: seats never assigned, licenses held by people who left, and add-ons nobody opens. Identity hygiene has drifted the same way. Offboarding takes a median of 4 business days to disable an account, and 23 accounts were never disabled at all. Admin rights are broad and permanent, although Kestrelbrook already owns the tools to fix that through its E5 licenses.

What it costs. $82,476 a year in direct license spend. About 4,010 analyst and agent hours and 250 staff days a year go to work a system can answer or prepare, worth $188,904. A breach is the larger exposure: IBM's 2024 Cost of a Data Breach study puts the healthcare average at $9.77 million.

What we recommend. Act this week on the two post-termination sign-ins and the 23 former staff accounts. Then UpRyzze Pulse™ on the Operations tier, with Spend and licenses and People lifecycle as the

two included modules. The recoverable license findings alone equal 110% of the $60,000 annual platform fee.

> **ALREADY RAISED WITH KESTRELBROOK**
>
> On day 4 of the engagement we called Dana Whitfield about two former employees with successful sign-ins after their last day. Both are listed in Appendix A. We changed nothing. A Diagnostic is read-only.

How we did the work

Source	Access	Period
Microsoft Entra ID and Microsoft 365 admin data (users, licenses, sign-ins, roles, guests, MFA registration, Conditional Access)	Read-only app registration, removed at the end of the engagement	Current state, sign-ins for 180 days
HR roster export: active staff, start dates, termination dates	File provided by HR	As of October 26, 2026
Service desk ticket export	File provided by IT	90 days
Phone system queue reports and a 400 call recording sample	Files provided by Patient Services. Patient data redacted before analysis	90 days
Interviews: CIO, service desk lead, HR onboarding lead, Patient Services manager	45 minutes each	Week 1

Assumptions behind the dollar figures

Item	Value used	Basis
Microsoft 365 E5	$57.00 per user per month	US list price, annual commitment
Microsoft 365 E3	$36.00 per user per month	US list price, annual commitment
Power BI Pro / Visio Plan 2 / Project Plan 3	$14 / $15 / $30 per user per month	US list price
Service desk analyst, loaded	$36 per hour	$68,000 loaded, 1,880 productive hours
Contact center agent, loaded	$30 per hour	Patient Services pay bands plus 30%
Average staff member, loaded	$240 per day	$30 per hour, 8 hours
License agreement anniversary	March 31, 2027	Kestrelbrook's agreement. Seat counts drop at renewal, not mid-term

Kestrelbrook's contracted prices replace list prices in the build. If the contracted discount is 15%, every license figure in this report falls by 15%.

Findings

1. Microsoft 365 and Entra license waste

Kestrelbrook owns 740 E5 and 330 E3 seats, plus three add-ons. Annual spend at list: $671,640.

Finding	Seats	Annual cost	Recover by
E5 seats bought and never assigned	38	$25,992	True down at the March 31 renewal
E3 seats bought and never assigned	22	$9,504	True down at the March 31 renewal
E5 held by former staff (16) and stale accounts (6)	22	$15,048	Reclaim now, reuse for new starts
E3 held by former staff (7) and stale accounts (5)	12	$5,184	Reclaim now, reuse for new starts
Power BI Pro not opened in 90 days (keep 3 spare)	30	$5,040	Reclaim now
Visio Plan 2 not opened in 90 days	15	$2,700	Reclaim now
Project Plan 3 not opened in 90 days	8	$2,880	Reclaim now
Recoverable without any change in how people work	**147**	**$66,348**	**9.9% of license spend**
E5 users in roles Kestrelbrook's own policy places on E3 (couriers, warehouse, front desk), no E5 only workload used in 90 days	64	$16,128	Security decision, then step down at renewal
Total license spend identified	**211**	**$82,476**	**12.3% of license spend**

Kestrelbrook hired 52 people in the last 90 days. The 34 reclaimed E5 and E3 licenses cover about two months of hiring without buying a seat. The 64 seat step down is a security decision: E5 carries Defender and Purview features those users would lose. We recommend Kestrelbrook's security lead makes that call, not the license count.

2. Stale and orphaned accounts

Entra holds 1,104 enabled member accounts. HR lists 940 active staff.

Accounts	Count	Status
Matched to an active employee	940	Expected
Contractors with a named Kestrelbrook sponsor	36	Expected. 9 sponsors have left; reassign
Service, room and shared mailbox accounts	58	14 shared mailboxes allow direct sign-in. Block it

Former employees, still enabled	23	ACT NOW Oldest left 14 months ago. All licensed. 2 signed in after their last day
Stale, no owner, no sign-in for 90 days or more	47	REVIEW Old test accounts and past vendors. 11 licensed
Enabled member accounts	**1,104**	**70 should be closed**

Offboarding is the root cause. For the 49 departures in the last 90 days, the median time from last day to disabled sign-in was 4 business days. 6 took longer than 10. Each one is a working sign-in held by someone who no longer works at Kestrelbrook.

3. Guest accounts

Guest finding	Count	Recommendation
Guest accounts in the tenant	412	Set an owner and a 180 day review on every guest
No sign-in in 180 days	268	Remove after the owning team confirms
Invited and never accepted	61	Remove
Can reach SharePoint sites labeled as holding patient data	37	ACT NOW Review each against a signed BAA or vendor agreement
From personal email domains	9	Remove, or move to a sponsored vendor account

Kestrelbrook's E5 licenses include Entra ID P2, so access reviews for guests need no purchase.

4. MFA and admin gaps

Finding	Count	Risk
Enabled member accounts with no MFA method registered	86	HIGH Includes 1 account with a privileged role and 4 former staff
Accounts excluded from the MFA policy (a 2023 scanner exclusion group)	52	HIGH 17 are people, not devices
Users whose only MFA method is a text message	212	MEDIUM Move to the authenticator app
Standing Global Administrators	11	HIGH Microsoft recommends fewer than 5. Privileged Identity Management is licensed and unused
Global Administrators without a phishing resistant method	3	HIGH
Global Administrator accounts also used for daily email	2	HIGH Separate admin and daily accounts

5. Service desk

3,460 tickets in 90 days, about 1.2 per employee per month. 6 analysts. Average handle time 25 minutes.

MEDIAN FIRST REPLY
2h 40m
business hours. Target: under 30 minutes

RESOLVED WITHIN TARGET
71%
Target: 90%

PASSWORD AND SIGN-IN
22%
761 tickets in 90 days. Most need no analyst

AI intake answers a quarter of requests before a ticket is filed **$51,900 a year**

At the reference company, the AI assistant answers 25% to 30% of requests before a ticket exists. At 25% of Kestrelbrook's 13,840 yearly tickets, that is 3,460 tickets and 1,442 analyst hours a year, at $36 an hour. That is capacity, not headcount: it is the time the desk needs to reach a 30 minute first reply.

6. Onboarding: time to productive

52 people started in the last 90 days, about 208 a year.

Measure	Kestrelbrook today	Target
Median business days from start date until every role app works	3.4	1.0
New starts who filed an access ticket in their first week	16 of 52 (31%)	Under 5%
New starts with no laptop on day one	4 of 52	0

Ready on day one **$59,904 a year**

2.4 days saved per new start, at half productivity in those days, is 1.2 days at $240. Across 208 starts a year: $59,904. The fix is a prepared plan per role: accounts, groups, licenses, apps, equipment and the day one session, prepared by the platform when HR confirms the hire and applied by IT.

7. Contact center deflection

Patient Services takes about 1,150 inbound calls per weekday, 287,500 a year. Average handle time is 6.5 minutes. Today no call is analyzed for its reason. Our 400 call sample, with patient data redacted:

Call reason	Share	Calls a year	Change	Calls avoided
Refill status or ship date	31%	89,125	Refill status in the phone menu, 15% self-serve	13,369
Prior authorization status	18%	51,750	Status texts at each step, 20% fewer calls	10,350
Copay or benefits question	15%	43,125	Not addressed in year one	0
Calls avoided a year				**23,719**

Fewer status calls **$77,100 a year**

23,719 calls at 6.5 minutes is 2,570 agent hours, about 49 hours a week, at $30 an hour. Both changes are Kestrelbrook decisions in its own phone system. UpRyzze Pulse™ measures each one before and after, so the leadership team sees what it bought.

Value summary

Area	Type	Annual value
Licenses recoverable now and at renewal	Cash	$66,348
E5 to E3 step down, after the security decision	Cash	$16,128
Service desk: AI intake	Capacity, 1,442 hours	$51,900
Onboarding: ready on day one	Capacity, 250 staff days	$59,904
Contact center: status calls avoided	Capacity, 2,570 hours	$77,100
Total identified		**$271,380**

Cash findings are $82,476. Capacity findings are $188,904 and free time for higher value work; they reduce cost only if Kestrelbrook chooses to hire less.

90 day plan

When	What happens	Who approves
This week No platform needed	Investigate the 2 post-termination sign-ins. Disable the 23 former staff accounts. Remove the 17 people from the MFA exclusion group.	Dana Whitfield, Security lead
Days 1 to 30 Build and Spend and licenses	Connect Entra, Microsoft 365 and the HR roster. Reclaim 34 licenses and 53 add-on seats, prepared in batches for approval. List the 47 stale accounts with a proposed owner for each. Start MFA registration for the 86 accounts.	IT lead approves each batch
Days 31 to 60 People lifecycle	Role plans for the 12 most hired roles. Offboarding plan prepared on HR's last day notice and applied at the cutoff. Guest review: 268 stale guests and 37 with patient data reach, each confirmed by its owning team. Global Administrators from 11 to 4, the rest eligible through Privileged Identity Management.	HR confirms the hire or departure. IT applies the plan
Days 61 to 90 Service desk and reporting	AI intake on Get help. AI drafted replies for analysts. Status page. Leadership report every Monday. Refill status phone menu proposal with its before and after measure. March 31 renewal plan: 60 seat true down and the step down decision.	Service desk lead, Patient Services manager, CFO for the renewal

What day 90 looks like

Measure	Today	Day 90 target
Former staff accounts enabled	23	0
Last day to sign-in disabled	4 business days	Same day, at the cutoff
Licenses held by people who left or idle accounts	34	0
Standing Global Administrators	11	4
Accounts with no MFA method	86	Under 10
Median days to productive for a new start	3.4	1.0
Median first reply on the service desk	2h 40m	Under 30 minutes

Which tier fits, and why

Operations. Kestrelbrook has 940 staff, inside the Operations range of 500 to 1,000. Foundation is built for 200 to 500 staff. Command is built for 1,000 to 2,000; Kestrelbrook moves to it if an acquisition takes headcount past 1,000.

Item	Amount
Operations platform, annual ($5,000 a month)	$60,000

One-time build	$15,000
Operations Diagnostic, already paid, credited to the build	($3,500)
Build balance due	$11,500
Year one	**$71,500**
Year two onward	$60,000

- **Included modules:** Spend and licenses, and People lifecycle. They carry the cash findings and the access risk.
- **Added at day 61:** Service desk with AI triage, priced in the proposal. Contact center analytics follows when Patient Services is ready for the phone menu change.
- **The math:** cash findings of $82,476 a year against a $60,000 platform fee. The capacity findings are on top.
- **Hosting:** inside Kestrelbrook's own Azure, the default for regulated customers. Data stays in Kestrelbrook's tenant. A BAA is signed before any patient data module goes live.
- **Billing:** annual or quarterly in advance. Build fee 50% at signing, 50% at go live.

> **HOW THE WORK RUNS**
> UpRyzze Pulse™ finds the problem and prepares the change. A person at Kestrelbrook approves every change outside the platform. Nothing changes on its own, and a click never does more than it shows. Every approval is in the audit log.

Appendix A: post-termination sign-ins

Account	Last day (HR)	Sign-in after last day	Detail
Former Revenue Cycle specialist	August 14, 2026	August 19 and 22, 2026	Outlook mobile, personal phone, Columbus area IP. Mailbox access only
Former Sales territory manager	September 30, 2026	October 3, 2026	Browser, SharePoint. Opened 4 files in the Sales team site

Names are withheld from this sample. In a real report this appendix lists the accounts by name and is shared only with the CIO and the security lead.

Appendix B: what the Diagnostic did not cover

- Applications outside Microsoft 365 and the HR roster. Pharmacy Dispensing, Billing and Claims and the other line of business systems are connected in the build.
- Endpoint and device posture. Intune data is read in the build.
- Cloud spend outside Microsoft 365.

SAMPLE. UpRyzze Pulse™ Operations Diagnostic for Kestrelbrook Health, a fictional company. Every name, number and finding is illustrative. List prices are US Microsoft list prices used for illustration; confirm against the customer's agreement.