



Microsoft 365 Health Check

Purpose

This worksheet is designed to help IT professionals, system administrators, and business owners evaluate the security, administration, and overall health of their Microsoft 365 environment. Complete each section honestly and identify areas that require review or improvement.

Section 1: Security Assessment

Review each area and mark your current status.

Security Area	Yes	No	Unsure
MFA enabled for all users	☐	☐	☐
MFA enabled for administrators	☐	☐	☐
Password reset methods reviewed	☐	☐	☐
Security defaults or Conditional Access configured	☐	☐	☐
Microsoft Secure Score reviewed recently	☐	☐	☐

Notes

Section 2: Administrative Access Review

How many Global Administrators currently exist?

Do you know who has Global Administrator access?

When was admin access last reviewed?



Are former IT providers still present in the tenant?

- ☐ Yes
- ☐ No
- ☐ Unsure

Notes

Section 3: User & Account Management

Review the following:

- ☐ User accounts reviewed regularly
- ☐ Former employees removed correctly
- ☐ Shared accounts minimised
- ☐ Shared mailboxes used where appropriate
- ☐ Licensing assigned correctly
- ☐ Inactive accounts identified

Notes



Section 4: Licensing & Business Value

What Microsoft 365 licenses are currently being used?

Have licenses been reviewed within the last 12 months?

- ☐ Yes
- ☐ No
- ☐ Unsure

Are users making use of the features included in their licenses?

- ☐ Yes
- ☐ No
- ☐ Unsure

Notes

Section 5: Email Systems & Devices

Review the following:

- ☐ Printers can send email reliably
- ☐ SMTP configuration documented
- ☐ Shared mailbox sending permissions reviewed
- ☐ Mail flow tested recently
- ☐ Legacy authentication dependencies identified

Notes



Section 6: Action Plan

Highest-priority Microsoft 365 issue to address:

Security improvement I will implement first:

One action I will complete this month:

Target completion date:

Final Reflection

If I could improve only one area of my Microsoft 365 environment today, what would it be?
