

The Total Economic Impact™ Of Microsoft Purview

Cost Savings And Business Benefits Enabled By Microsoft
Purview

A FORRESTER TOTAL ECONOMIC IMPACT STUDY
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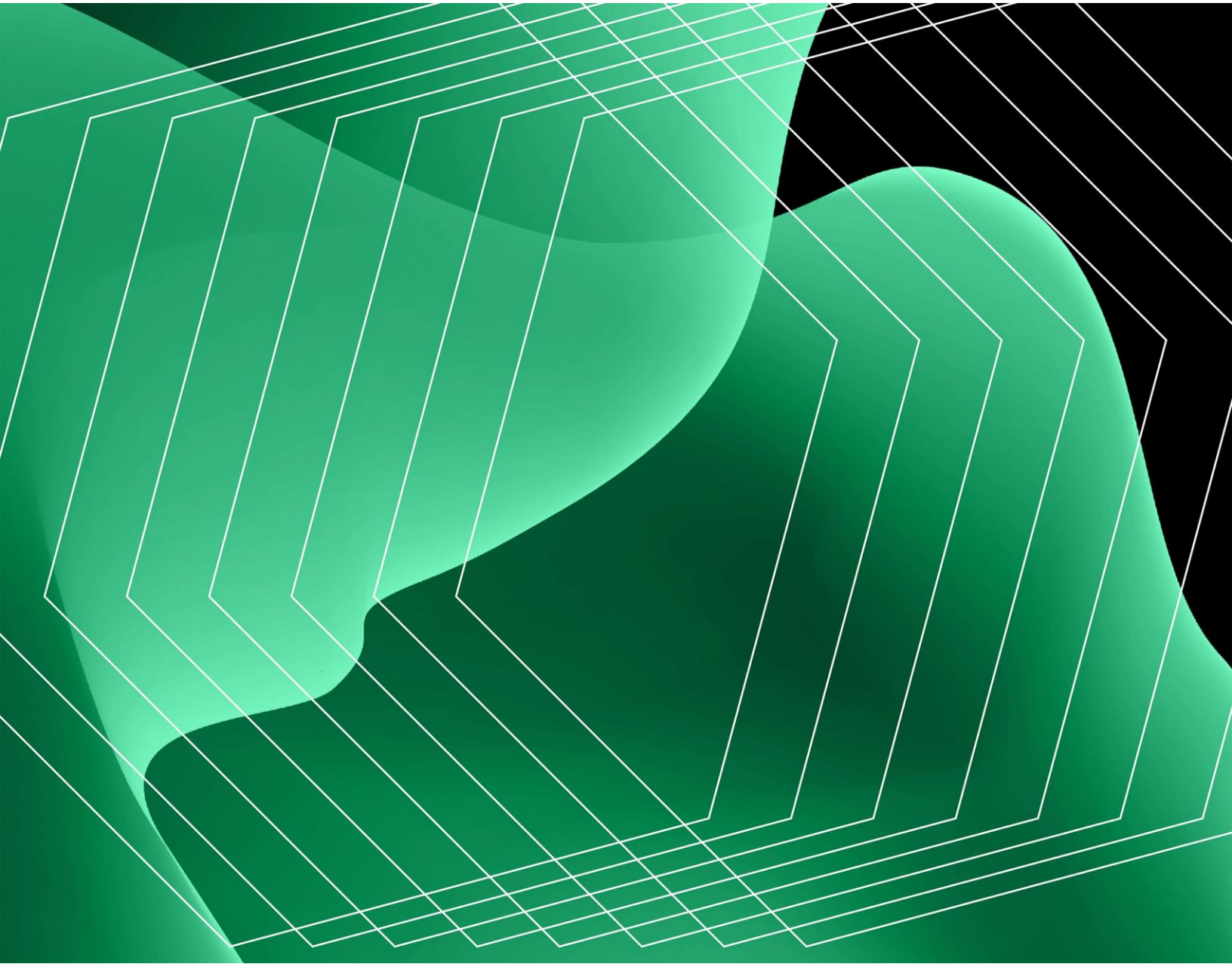


Table Of Contents

Executive Summary	3
The Microsoft Purview Customer Journey	9
Analysis Of Benefits	14
Analysis Of Costs	30
Financial Summary	34

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Executive Summary

Balancing users' access to sensitive data with robust information security and compliance is a significant challenge for organizations navigating the complexities of digital transformation. End users require timely access to the right data to drive innovation and operational efficiency while the organization must ensure proper security and governance for this data. A lack of effective data security and governance policies lead to inadvertent leaks resulting in costly data breaches, compliance fines, and reputational damage. Yet, many organizations lack the comprehensive data security platform to identify where their sensitive data lives and how it is used, making this balancing act extremely difficult.

[Microsoft Purview](#) is a unified platform combining data security, data management, and data governance tools that enable organizations to understand where their data lives and how it's used in order to safeguard it from external and internal threats of data exfiltration, ensure compliance across all clouds, applications, and devices, and enable the right users with the data they need to do their jobs in a flexible yet secure manner. Purview allows organizations to maintain data security while ensuring compliance with relevant regulations, all through the Purview single platform.

Microsoft commissioned Forrester Consulting to conduct a Total Economic Impact™ (TEI) study and examine the potential return on investment (ROI) enterprises may realize by deploying Purview. The purpose of this study is to provide readers with a framework to evaluate the potential financial impact of Purview on their organizations.¹



Return on investment (ROI)

355%



Net present value

\$2.3M

To better understand the benefits, costs, and risks associated with this investment, Forrester interviewed four representatives with experience using Purview. For the purposes of this study, Forrester aggregated the interviewees' experiences and

combined the results into a single composite organization that is a global organization with \$750 million in annual revenue, 2,000 information workers with access to Purview across the organization's Microsoft 365 deployment.

Prior to using Purview, these interviewees noted how their organizations lacked a unified solution that could balance data security and user access. Visibility and gaps existed among the organization's data, presenting data loss risks of all kinds leading to potentially costly breaches and/or compliance fines. Manual work was required from security and compliance as they struggled to identify data security risks and remain compliant with relevant data laws and regulations. With the investment in Purview, the interviewees' organizations unified data security and compliance management to a single platform, yielding benefits across the organization. End users benefit through improved ease of data discovery, access, and workflow automation, saving significantly on productivity. Security teams create machine learning informed flexible data loss prevention (DLP) policies that reduce the risk of data leakage, avoiding costs related to data breaches, compliance fines, and potential organizational reputational damage. Compliance teams benefit from simplification of previously manual data classification, compliance, and audit tasks. Some organizations realized additional cost savings from retiring legacy security solutions and related infrastructure by moving to Microsoft Purview.

KEY FINDINGS

Quantified benefits. Three-year, risk-adjusted present value (PV) quantified benefits for the composite organization include:

- **Reduced impact of data loss, security incidents, and compliance fines through a 30% improvement to data security.** By investing in Microsoft Purview, the composite organization gains improved visibility into potential external and insider threats, allowing for fine-tuned data security policies that reduce the likelihood of these threats becoming larger incidents. The Microsoft ecosystem provides additional protections such as the ability to leverage multi-factor authentication and single sign-on capabilities, further improving the security and accessibility of organizational data and reducing the likelihood of an incident. The composite organization saves over \$225,000 annually over three years from improved data security.

- **Improved efficiency for security personnel by 75%.** With all organization data classified on a single platform on Microsoft Purview, the composite organization's security personnel can perform investigations into potential security events more efficiently, allowing for the reallocation of headcount from investigations to higher-value teams tasks. Security and compliance investigation and remediation efficiency gains led to nearly \$230,000 in annual savings over three years.
- **End users reduce time spent on data discovery and access by 75% with Purview.** The composite organization realizes \$1.1 million in efficiency gains over three years for end users by enabling users with the data they need through dynamic, machine learning informed policies that allow users to readily access the data they need when they need it. Relevant data discoverable from a single search, allowing end users to work more efficiently. With Purview's automated data tagging and alerts, end users rarely need to spend time tagging data or interacting with compliance teams.
- **Automation and unifying to a single system improves efficiency for compliance teams, reducing manual effort by 60%.** With Purview, records managers regain control over organizational data and its governance. Purview allows these teams to automate formerly manual processes, customize alerts, and run real-time reporting. This frees up time to apply expertise to value-added activities such as improving analytics capabilities to serve end users faster, training additional compliance users, refining policies, and supporting the business where needed. These efficiencies result in nearly \$242,000 in savings over three years.
- **Unifying data security and compliance on Microsoft Purview eliminates costs related to legacy solutions.** The composite organization can completely sunset legacy records management and data security tools, saving on licensing, infrastructure, and management costs. Consolidating these capabilities on Microsoft Purview saves over \$493,000 over three years.

Unquantified benefits. Benefits that provide value for the composite organization but are not quantified for this study include:

- **Improved strategic decision-making.** With a simplified view into the organizational data landscape, teams can start to leverage analytics for a myriad of business initiatives ranging from developing personalization capabilities for

marketing, launching new products or entering new markets faster, improving efficiency for internal teams, and improving organizational security.

- **Improved organizational culture around data security.** With Microsoft Purview, end users can be trained to be good stewards of organizational data, while data security personnel can set parameters to prevent improper use and sharing while providing tools and resources to make data classification and discovery easier.
- **Modernized communication channels internally and for customers.** Purview's ability to easily integrate with other tools, especially in the Microsoft ecosystem, allow organizations to compliantly leverage channels like chat and SMS for customer communications because of the ability to monitor and archive conversations for compliance.

Costs. Three-year, risk-adjusted PV costs for the composite organization include:

- **Microsoft Purview annual subscription fees.** Purview is included with a Microsoft E5 license and carries a stand-alone per user fee for Microsoft E3 users (beyond the foundational Purview value included in E3).
- **Microsoft Purview implementation and ongoing management personnel effort.** Interviewed customers spoke about the level of effort that the Microsoft Purview implementation required, as well as effort to maintain the solution (from an IT perspective) once deployed.

The financial analysis that is based on the interviews found that a composite organization experiences benefits of \$3.0 million over three years versus costs of \$633,000, adding up to a net present value (NPV) of \$2.3 million and an ROI of 355%.

Avoided costs by reducing likelihood of data breaches by 30%

\$561,160

EXECUTIVE SUMMARY



ROI

355%



BENEFITS PV

\$3.0M



NPV

\$2.3M



PAYBACK

<6 months

Benefits (Three-Year)

Avoided data security incidents attributable to Microsoft Purview

\$561.2K

Avoided manual staff investigation effort

\$570.7K

End-user workflow efficiencies

\$1.1M

Avoided manual compliance tasks

\$241.7K

Legacy cost avoidance

\$498.1K

TEI FRAMEWORK AND METHODOLOGY

From the information provided in the interviews, Forrester constructed a Total Economic Impact™ framework for those organizations considering an investment in Purview.

The objective of the framework is to identify the cost, benefit, flexibility, and risk factors that affect the investment decision. Forrester took a multistep approach to evaluate the impact that Purview can have on an organization.

DISCLOSURES

Readers should be aware of the following:

This study is commissioned by Microsoft and delivered by Forrester Consulting. It is not meant to be used as a competitive analysis.

Forrester makes no assumptions as to the potential ROI that other organizations will receive. Forrester strongly advises that readers use their own estimates within the framework provided in the study to determine the appropriateness of an investment in Purview.

Microsoft reviewed and provided feedback to Forrester, but Forrester maintains editorial control over the study and its findings and does not accept changes to the study that contradict Forrester's findings or obscure the meaning of the study.

Microsoft provided the customer names for the interviews but did not participate in the interviews.

1. Due Diligence

Interviewed Microsoft stakeholders and Forrester analysts to gather data relative to Purview.

2. Interviews

Interviewed five representatives at organizations using Purview to obtain data about costs, benefits, and risks.

3. Composite Organization

Designed a composite organization based on characteristics of the interviewees' organizations.

4. Financial Model Framework

Constructed a financial model representative of the interviews using the TEI methodology and risk-adjusted the financial model based on issues and concerns of the interviewees.

5. Case Study

Employed four fundamental elements of TEI in modeling the investment impact: benefits, costs, flexibility, and risks. Given the increasing sophistication of ROI analyses related to IT investments, Forrester's TEI methodology provides a complete picture of the total economic impact of purchase decisions. Please see [Appendix A](#) for additional information on the TEI methodology.

The Microsoft Purview Customer Journey

Drivers leading to the Purview investment

Interviews		
Role	Industry	Region
Head of global insurance and risk	Technology	Global
Records and information management team lead	Government	Australia
Lead enterprise architect Chief technology officer (CTO)	Government	UK
Chief compliance officer (CCO)	Financial services	US
Global risk and compliance director	Food processing	Latin America

KEY CHALLENGES

The interviewees noted how their organizations struggled with common challenges, including:

- **A lack of visibility into the organization's data estate made threat and sensitive data identification nearly impossible.** Interviewees noted that before the adoption of Microsoft Purview, data security efforts were complicated by a lack of visibility into the location of sensitive information, as well as how its end users accessed and used the data. This made detection of security incidents, especially from insider threats, very difficult.
- **Regulatory scrutiny risked the organizations compliance fines.** Without unified controls for compliance across the organization, interviewees noted challenges ensuring consistent adherence to regulatory requirements.
- **A lack of consistent, agreed-upon tools, best practices, and policies for data security and compliance across the organization.** Interviewees described a “wild west” situation with business units and individual teams using

their own tools, processes, and rules for data security best practices and compliance management. Inconsistent practices lead to significant challenges with visibility for security and compliance teams. Data security blind spots and avenues for data leakage were prevalent. The head of global insurance and risk in the technology industry described, “You have many different business units, all using different approaches to data governance.” Organizations often arrived in this position over time with growth and new acquisitions not always fitting smoothly into the current environment. The head of global insurance and risk in the technology industry also said: “We had immense growth in different departments and areas. Quite frankly, there wasn’t a great centralized source of data governance measures and solutions to meet those needs so teams were doing their best but there was no consistency.”

- **A fragmented landscape of data security tools.** Before the Microsoft Purview investments, organizations often worked with a disparate set of security solutions that lacked interoperability and integrations, obscuring visibility into security risks while driving excess cost and IT complexity.
- **A lack of consistent, agreed-upon best practices and policies for data security and compliance.** Interviewees described a “Wild West” situation with business units and individual teams using their own rules for data security best practices, tagging, classification, and storage. Inconsistent practices lead to significant challenges with visibility for security and records management teams, and for discovery and access for end users. Data security blind spots and avenues for data leakage were prevalent. The head of global insurance and risk in the technology industry described: “You have many different business units, all using different approaches to data governance. ... There was no consistency.”
- **Manual security and compliance processes posed challenges.** Teams spent significant time managing the manual tasks required to remain compliant with data security regulations and protect the business from breaches or data leakage. This left very little time to address the needs of end users and the goals of the larger organization to better leverage organizational data. The records and information management team lead in government said: “These teams are stuck in tradition, and they are providing low value services. They often get disregarded by their organization and more often than not end up dealing with hard copy stuff

instead of having any sort of way forward to modernize and get involved with the high-value information and records management initiatives.”

INVESTMENT OBJECTIVES

The interviewees’ organizations ultimately selected Microsoft Purview for the following reasons:

- **Microsoft Purview provides the tools to understand where sensitive information lives, how it’s used, and how to guard against data loss.** The global risk and compliance director from the food-processing organization explained to Forrester that the single largest reason they adopted Microsoft Purview was its ability to drive visibility into where sensitive information resides. The interviewee explained: “[With the newfound visibility] Purview helps us determine our DLP rules. Now we get alerts to any possible threats to data loss for our privileged information.”
- **Flexible, machine learning-informed DLP rules for end users.** Microsoft Purview capabilities such as Adaptive Protection help organizations balance flexibility for users and DLP rules based on user risk levels.
- **Automation of security and compliance in a meaningful and secure manner.** The CCO in financial services explained: “It’s one thing to be able to detect an issue after you know it has happened, but it’s a whole another thing to be able to put things in place to prevent those issues from happening to begin with. We were able to plug a lot of those holes once we went to Purview.”
- **Compliance becomes business enablers rather than blockers.** The records and information management team lead in government said: “Fundamentally, we still have the legislative requirement to do governance work, that’s not going anywhere. But it doesn’t need to be a barrier. Microsoft Purview allows us to continue to meet those legislative requirements but also be an enabler for the business. Our data is now more accessible and usable for our business users.”
- **Microsoft’s experience and leadership with enterprise technology implementation.** The head of global insurance and risk in the technology industry said, “[Microsoft] Purview did a really good job of understanding the

organization, understanding our use cases and pain points, and being able to customize their approach to address some of our specific needs.”

- **Purview’s capabilities and the Microsoft ecosystem.** The records and information management team lead in government noted that Purview has successfully consolidated their organization’s data security and government tools on one interoperable Microsoft platform while offering a level of stability that didn’t exist before. They continued: “There are no problems. It all works and there is a ton of functionality. We’re still investigating how to utilize all of the functionality we can in Purview, my team and I talk about it all the time.”

“We had immense growth in different departments and areas. Quite frankly, there wasn’t a great centralized source of data [protection] measures and solutions to meet those needs so teams were doing their best but there was no consistency.”

HEAD OF GLOBAL INSURANCE AND RISK, TECHNOLOGY

“Before implementing Microsoft Purview, we didn’t have any idea how our sensitive information was used. We didn’t understand how it moved, or even what we needed to protect. Microsoft Purview helped us determine our DLP rules.”

GLOBAL RISK AND COMPLIANCE DIRECTOR, FOOD PROCESSING

COMPOSITE ORGANIZATION

Based on the interviews, Forrester constructed a TEI framework, a composite company, and an ROI analysis that illustrates the areas financially affected. The composite organization is representative of the five interviewees, and it is used to present the aggregate financial analysis in the next section. The composite organization has the following characteristics:

Description of composite. The composite organization is a \$750 million, 2,000-employee company with access to Microsoft Purview across their M365 deployment (a 3:1 E3 to E5 ratio).

Deployment characteristics. The composite organization migrated from a homegrown solution that consisted of a combination of SharePoint and a collection of plugins. The composite takes advantage of multiple Purview capabilities including audit, adaptive protection, communication compliance, data loss prevention (DLP), e-discovery, information protection, insider risk management, and records management.

KEY ASSUMPTIONS

\$750 million revenue

2,000 knowledge worker employees

Microsoft 365-deployed organization

Analysis Of Benefits

Quantified benefit data as applied to the composite

Total Benefits						
Ref.	Benefit	Year 1	Year 2	Year 3	Total	Present Value
Atr	Avoided data security incidents attributable to Microsoft Purview	\$225,651	\$225,651	\$225,651	\$676,952	\$561,160
Btr	Avoided manual staff investigation effort	\$229,500	\$229,500	\$229,500	\$688,500	\$570,733
Ctr	End-user workflow efficiencies	\$454,896	\$454,896	\$454,896	\$1,364,688	\$1,131,259
Dtr	Avoided manual security and compliance tasks	\$97,200	\$97,200	\$97,200	\$291,600	\$241,722
Etr	Legacy cost avoidance	\$136,425	\$204,638	\$272,850	\$613,913	\$498,141
	Total benefits (risk-adjusted)	\$1,143,672	\$1,211,884	\$1,280,097	\$3,635,652	\$3,003,015

AVOIDED DATA SECURITY INCIDENTS ATTRIBUTABLE TO MICROSOFT PURVIEW

Evidence and data. Interviewees spoke to the challenge of ensuring data security and managing risk in their legacy environments. Inconsistent visibility into sensitive data and how it's accessed presented threats to data leakage from external and internal actors alike, both intentionally and unintentionally. By migrating to Microsoft Purview, organizations' security and compliance teams were able to define their DLP rules and manage risk based on a thorough understanding of their sensitive data and how it's used across all clouds, applications, users, and devices, reducing the likelihood of security breaches and data leakage. The reduction in likelihood of security breaches (and the impact of breaches when they occur) may save organizations from compliance fines, reputational damage, and negative business impact resulting from data loss.

- The global risk and compliance director at the food-processing organization explained how their organization went from nearly no visibility into their sensitive information to a robust understanding of where the data exists, who uses it, and

how it's used. The interviewee noted that the organization used this newfound understanding of its data estate to define new DLP rules, avoiding potential data loss risks and insider threats (using Purview insider risk management) that were undetectable before implementing Microsoft Purview. The interviewee also noted that their organization has also avoided fines related to personally identifiable information (PII) compliance.

- Prior to Purview, legacy architecture created bad habits for end users' data practices, while security and compliance teams lacked the visibility to detect these threats. Users would create risky work-arounds when they were unable to access data that they needed and tended to create copies rather than sharing links and following other best practices. These practices, along with inconsistent application of controls and poor visibility, created risks of data leakage and represented a potential vector of attack. The head of global insurance and risk in the technology industry explained: "How do we reduce a lot of risk for data breaches, data loss, and compliance violations? Regulators look at us very closely, and we are highly scrutinized, so we have a lot of interest in being able to protect ourselves from costly fines and reputational damage. Purview is a tool that we use to make sure we have the right practices in place going forward".
- Interviewees said that their organizations liked the balance between data access and organizational control that Purview enabled. The CTO of a government agency said, "Purview lets the users use and control their data but provides the organization an ability to manage compliance."
- The CCO in financial services described the types of attacks they now know about and prevent with Purview: "It's amazing to me the sheer number of login attempts that we get from foreign countries on a daily basis that fail because of two-factor authentication. If anyone in our company complains about that extra step, I just show them one of the logs for their account, and that's it — they understand why."
- The lead enterprise architect at a government agency described how they are improving security posture with Purview: "The main focus has been around getting some coherence around the records management side. In principle, that in itself reduces the risk of inadvertent data leaks or the removal of key information."

Modeling and assumptions. For the composite organization, Forrester makes the following assumptions:

- The likelihood of the composite organization experiencing a data breach is 70% annually.²
- The mean cumulative cost of data breaches for the composite organization is \$3,349,000 annually.
- The percentage of these breaches originating from the types of external and internal threats that Microsoft Purview protects against is 71.3%.
- Of these threats, on average, 50% are addressable by Microsoft Purview.
- With Microsoft Purview, organizations are able to apply fine-tuned DLP policies based on greater visibility into their data landscape, reducing the likelihood of a data breach by 30%.

Risks. The impact of this benefit may vary due to:

- The sensitivity of the data and impact if it is affected by a breach.
- The types of threats an organization faces and an organization's pre-Purview data security landscape.

Results. To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year, risk-adjusted total PV of \$561,000.

Avoided Data Security Incidents Attributable To Microsoft Purview: Calculation Table

Ref.	Metric	Source	Year 1	Year 2	Year 3
A1	Likelihood of experiencing one or more breaches per year	Forrester Research	70%	70%	70%
A2	Mean cumulative cost of breaches	Forrester Research	\$3,349,000	\$3,349,000	\$3,349,000
A3	Percentage of breaches originating from external and internal threats	Forrester Research	71.3%	71.3%	71.3%
A4	Percentage of threats addressable with Microsoft Purview	Interviews	50%	50%	50%
A5	Annual risk exposure addressable with Microsoft Purview	$A1 \times A2 \times A3 \times A4$	\$835,743	\$835,743	\$835,743
A6	Percentage of threats addressable with Microsoft Purview	Interviews	30%	30%	30%
At	Avoided data security incidents attributable to Microsoft Purview	$A5 \times A6$	\$250,723	\$250,723	\$250,723
	Risk adjustment	↓ 10%			
Atr	Avoided data security incidents attributable to Microsoft Purview (risk-adjusted)		\$225,651	\$225,651	\$225,651
Three-year total: \$676,952		Three-year present value: \$561,160			

“With Microsoft Purview, we identify any insider risks to data leaks or exfiltration almost immediately.”

GLOBAL RISK AND COMPLIANCE DIRECTOR, FOOD PROCESSING

AVOIDED MANUAL STAFF INVESTIGATION EFFORT

Evidence and data. On Microsoft Purview, security personnel tasked with data loss prevention gained visibility into sensitive information, how it's used, and who's using it, reducing the need for aimless investigation effort for known security incidents, data leaks, or bad actors. The improvement to security posture realized by interviewees' organizations as quantified as part of Benefit A reduced the burden on security investigations to begin with, saving additional security personnel capacity.

- The global risk and compliance director at the food-processing organization noted how their fairly restrictive DLP rules for most users automatically create alerts for their security personnel to review, avoiding manual investigation efforts. The organization also uses Microsoft Purview e-discovery to support the security team with fraud investigations.
- Prior to Purview, interviewees described an environment consisting of multiple systems where business units would operate independently. This fragmented environment made data discovery and collaboration challenging for end users, but it made investigating security or compliance threats even more challenging for security personnel. The records and information management team lead in government said: "We didn't have any particular stake in the other systems. They all had their system administrators and other pieces of technology in place. Now, with Purview, the gloves are off. We have a great relationship with all the other system administrators and systems because we are actually at the table when they have conversations and make decisions."
- The CCO in financial services said: "Information security is my number one concern, so we need to be able to track user activity to see if someone is, for example, deleting or downloading a large number of files. With Purview, we get alerts for those types of activities, so my team and I are notified and can investigate them further."
- The head of global insurance and risk in the technology industry said: "We are seeing much more structure, particularly for the [security and] management of data assets, and much better governance. Directionally, we are able to free up [IT

and security] headcount to do other work or to roll off and help with other projects.”

- The CTO in government described how Purview is helping to close security gaps across the business and educate end users about the risks of cyber threats. The CCO from the financial services company said: “Purview gave us the ability to audit logs from all of our devices, so we review those to find out if there are any particular vulnerabilities or trends that we are noticing. For example, we may see someone’s login being used in multiple different countries, so we issue a warning about paying close attention to MFA approvals to prevent granting an outsider access.”

Modeling and assumptions. For the composite organization, Forrester makes the following assumptions:

- The composite organization dedicates six FTEs to security incident investigation and compliance tasks.
- With Microsoft Purview, the effort to conduct compliance and security investigations is reduced by 75%.
- The average fully burdened annual salary for an investigator is \$120,000.

Risks. The impact of this benefit may vary due to:

- The size and responsibilities of the current team responsible for security incidents and compliance investigations.
- The speed at which Purview is deployed and the specific capabilities that are implemented.

Results. To account for these risks, Forrester adjusted this benefit downward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$571,000.

“Microsoft Purview has allowed us to create a culture of information security at the company. All of our associates know how to manage the information they use daily correctly.”

GLOBAL RISK AND COMPLIANCE DIRECTOR, FOOD PROCESSING

Avoided Manual Staff Investigation Effort					
Ref.	Metric	Source	Year 1	Year 2	Year 3
B1	FTEs assigned to security incident investigation and remediation tasks	Composite	6	6	6
B2	Reduction in effort on Microsoft Purview	Interviews	75%	75%	75%
B3	FTE reduction	B1*B2	4.5	4.5	4.5
B4	Average fully burdened annual salary for an investigator FTE	Assumption	\$120,000	\$120,000	\$120,000
B5	Productivity recapture	TEI methodology	50%	50%	50%
Bt	Avoided manual staff investigation effort	B3*B4*B5	\$270,000	\$270,000	\$270,000
	Risk adjustment	↓ 15%			
Btr	Avoided manual staff investigation effort (risk-adjusted)		\$229,500	\$229,500	\$229,500
Three-year total: \$688,500			Three-year present value: \$570,733		

END-USER WORKFLOW EFFICIENCIES

Evidence and data. Through automated data classification, flexible, dynamic DLP policies, and improved data discovery capabilities (through e-discovery), end users can quickly and easily search for and access the data that they need, freeing up time and reducing instances of rework. Adaptive Protection on Microsoft Purview allows organizations such as the food-processing organization to maximize productivity for its uses while maintaining security based on user risk levels informed by machine learning.

- Prior to Purview, interviewees had limited visibility into where organizational data was stored, leading to inefficiencies for end users searching for this information. The records and information management team lead in government described, “Prior to Purview, if the CEO came to me and asked, ‘How did we do this work on a particular project?’ I would go off and find one or two emails that show a tiny piece of the puzzle. Nowadays, if my team and I have done our jobs properly, I can say, “Here’s the SharePoint site that manages that project,’ and it’s all contextualized and hyperlinked and all the data is in there.”
- End users were also asked to accurately tag, classify and store data, which was challenging and required training. The CTO of a government agency said: “We would often ask end users to know the right thing to do, to read all the trainings and then apply them in the right context. We wanted to reduce the burden on users by leveraging as much automation as we could.”
- With Purview, end users have access to automation to accurately tag and classify the data that they use and have a centralized location to find and share the data that they need. The records and information management team lead in government said: “There was a lot of bang for buck with Purview. We eliminated a standalone records system overnight, and with the new automation, users could comply with our legislative requirement to keep and produce records simply by virtue of putting their information in the places that they were already doing it anyway.”
- With Purview’s dashboard, interviewees could more easily monitor data usage and access and saw improvements in culture and collaboration. The head of global insurance and risk in the technology industry said: “We are seeing more collaboration across the team. Using the centralized platform we can see more

members in drafting, sharing access, and sharing information. Users are finding data that they previously didn't know existed or didn't know they could use."

Modeling and assumptions. For the composite organization, Forrester makes the following assumptions:

- There are 2,000 end users, each spends 12 hours per year on data search, discovery, access, and records management, and 9 hours per year on recreating undiscovered or deleted content.
- End users reduce time spent on data discovery, access and management by 75% with Microsoft Purview.
- End users reduce time spent on recreating content by 90% with Microsoft Purview.
- The average, fully burdened average hourly rate for end users is \$35.10.
- Fifty percent of the time savings is recaptured for productive work.

Risks. The impact of this benefit can vary due to:

- End-user time spent on data discovery, classification, access, and content recreating in the prior state.
- The relative uplift a Microsoft Purview deployment provides on an organization's data classification capabilities.

Results. To account for these risks, Forrester adjusted this benefit downward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$1.1 million.

End-User Workflow Efficiencies					
Ref.	Metric	Source	Year 1	Year 2	Year 3
C1	End users	Composite	2,000	2,000	2,000
C2	Hours spent annually on data search/discovery, access, and records management	Composite	12	12	12
C3	Reduction on Microsoft Purview	Interviews	75%	75%	75%
C4	Hours saved annually on data discovery and access (per end user)	C2*C3	9	9	9
C5	Hours spent annually on content rework	Composite	6	6	6
C6	Reduction on Microsoft Purview	Interviews	90%	90%	90%
C7	Hours saved annually on content rework (per end user)	C5*C6	5.4	5.4	5.4
C8	Blended, average, fully burdened hourly rate for an end user (rounded)	Composite	\$35.10	\$35.10	\$35.10
C9	Productivity recapture	TEI methodology	50%	50%	50%
Ct	End-user workflow efficiencies	C1*(C4+C7)*C8*C9	\$505,440	\$505,440	\$505,440
	Risk adjustment	↓ 10%			
Ctr	End-user workflow efficiencies (risk-adjusted)		\$454,896	\$454,896	\$454,896
Three-year total: \$1,364,688			Three-year present value: \$1,131,259		

AVOIDED MANUAL SECURITY AND COMPLIANCE TASKS

Evidence and data. Interviewees described how their compliance teams were able to operate out of a single platform and leverage Purview's tools to automate processes, fine-tune DLP rules and alerts, and monitor compliance (using Compliance Manager, eDiscovery, and Audit). These data-tagging and -cleaning efforts result in more structured and searchable data that can be leveraged for analytics and other internal programs.

- With Purview Information Protection, many manual tasks related to identifying and tagging information were automated. The head of global insurance and risk in the technology industry said, "We were able to scale down the resources that were dedicated to tasks like cataloging and managing data assets, including

metadata, and reallocate them to focus on higher-value tasks.” They cited up to a 70% reduction in resources required to manage data cataloging efforts and a 50% reduction in resources required to manage and ensure regulatory compliance (with Compliance Manager) on Purview.

- Prior to Microsoft Purview, compliance teams played a very niche role and were viewed as necessary but not value-adding. Teams were tasked with ensuring that records were compliant with regulations, leaving little time or resources to focus on improving user access and discoverability. Legacy architecture also played a role, as the interviewees’ organizations all used separate systems for records management and storage prior to unifying on Purview. The records and information management team lead in government said: “[With Records Management on Purview], our records and information management team has gone from being stuck in the corner of our organization where no one really knows what they did, to now, where we get invited to all sorts of strategic planning meetings and are leveraging the internal help desk system so end users can request services. The team has upskilled massively and really transformed. The change in culture is remarkable.”
- Purview gave compliance teams the tools and capabilities they need to successfully do their jobs and reduced the reliance on end users to tag and classify data. The lead enterprise architect at a government agency said, “One big benefit of Purview is that it puts control of records management back in the hands of records managers, rather than relying on end users.”
- By implementing Purview Compliance Manager, eDiscovery, and Communication Compliance, the global risk and compliance director at the food-processing organization noted that his team saves significant amounts of time maintaining compliance with regulations in the regions where it operates, as well as during compliance audits through e-discovery.
- The records and information management team lead in government was very excited about their team’s new purpose: “We’re just super busy with lots of great, meaningful work that is of high value to the organization. As someone from a traditional records background, that is a really wild statement to make.”

Modeling and assumptions. For the composite organization, Forrester makes the following assumptions:

- Prior to Purview, the composite organization dedicated four FTEs to compliance activities and information tagging.
- These activities require 60% less labor with Purview.
- The average fully burdened annual salary for compliance FTEs is \$90,000.
- A productivity recapture rate of 50% is applied to the composite, as not all saved time will be redirected to higher-value work.

Risks. The impact of this benefit can vary due to:

- The specific capabilities and features of Purview that are leveraged and deployed.
- The scope of current compliance and information-tagging activities.

Results. To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$242,000.

Avoided Manual Security And Compliance Tasks					
Ref	Metric	Source	Year 1	Year 2	Year 3
D1	FTEs required for data tagging and compliance activities	Composite	4	4	4
D2	Reduction in manual effort with Microsoft Purview	Interviews	60%	60%	60%
D3	FTE reduction	D1*D2	2.4	2.4	2.4
D4	Average annual FTE salary	Composite	\$90,000	\$90,000	\$90,000
D5	Productivity recapture	TEI methodology	50%	50%	50%
Dt	Avoided manual security and compliance tasks	D3*D4*D5	\$108,000	\$108,000	\$108,000
	Risk adjustment	↓ 10%			
Dtr	Avoided manual security and compliance tasks		\$97,200	\$97,200	\$97,200
Three-year total: \$291,600			Three-year present value: \$241,722		

LEGACY COST AVOIDANCE

Evidence and data. Interviewees' organizations were able to reduce costs through a combination of removing on-premises infrastructure and its associated management, as well as avoiding costs for legacy data security and compliance tools that were now redundant given the breadth of Microsoft Purview's functionality.

- Prior to Purview, interviewees' organizations leveraged a combination of third-party tools, homegrown solutions, and SharePoint sites. Records management teams were stuck managing an aging system, while end users experienced challenges and issues with data discovery and access. Organizations sought a way out, a means to unlock valuable data for users and the business, and a path to simplify their internal environments. The lead enterprise architect at a government agency said: "We don't have the legacy system anymore. Therefore, we don't have to pay for the legacy system anymore, we don't have to host the legacy system anymore, and users can no longer find workarounds to the rules that we put in place. Purview has put records management back in the hands of records managers — where it should be."
- The same lead enterprise architect described their legacy environment and how things have changed with Purview: "We had four separate systems, so all the hardware plus several terabytes worth of data in storage and everything took a bit longer to do. With Purview, we don't need third-party solutions. We have been able to get rid of legacy [systems], and we've saved a lot of money not running them."

Modeling and assumptions. For the composite organization, Forrester makes the following assumptions:

- Prior to implementing Purview, the composite organization spent \$120,000 per year on licensing fees for legacy data security and compliance solutions (DLP, insider threat detection, compliance). It paid \$36,000 per year in infrastructure and hosting for legacy systems and required 1.5 FTEs to manage the legacy systems.
- With Purview, the composite organization can phase out the legacy system over time, realizing incremental savings each year.

Risks. The impact of this benefit may vary due to:

- The architecture and specific legacy systems in place prior to deploying Purview.
- The speed at which Purview can replace the capabilities of the legacy systems.

Results. To account for these risks, Forrester adjusted this benefit downward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$498,000.

“Purview has become a better tool for us to do our job. We do more, but it’s also made the old stuff we do way easier, and in loads of instances made some of it moot.”

RECORDS AND INFORMATION MANAGEMENT TEAM LEAD, GOVERNMENT

Legacy Cost Avoidance					
Ref.	Metric	Source	Year 1	Year 2	Year 3
E1	License fees for legacy data protection solutions/plugins	Composite	\$120,000	\$120,000	\$120,000
E2	Infrastructure/hosting requirements for legacy solutions	Composite	\$36,000	\$36,000	\$36,000
E3	Solution management requirement (FTEs)	Composite	1.5	1.5	1.5
E4	Average fully burdened annual salary for a solution management FTE	Composite	\$110,000	\$110,000	\$110,000
E5	Average FTE maintenance expense	E3*E4	\$165,000	\$165,000	\$165,000
E6	Avoidable expenditure (annually)	Interviews	50%	75%	100%
Et	Legacy cost avoidance	(E1+E2+E5)*E6	\$160,500	\$240,750	\$321,000
	Risk adjustment	↓ 15%			
Etr	Legacy cost avoidance (risk-adjusted)		\$136,425	\$204,638	\$272,850
Three-year total: \$613,913			Three-year present value: \$498,141		

UNQUANTIFIED BENEFITS

Interviewees mentioned the following additional benefits that their organizations experienced but were not able to quantify:

- Improved strategic decision-making.** Data is considered to be many organizations' most valuable — if often underutilized — resource. By modernizing data governance and access, organizations enable users to access and leverage new data and analyze it in new ways, including for business analytics and customer services tracking. The head of global insurance and risk in the technology industry said: "Better understanding of where our [data exists] helps drive insights. Once we've created that data catalog, our users can get that snapshot view of data all across the organization. They can leverage data from different business units to perform analysis and uncover insights. For example, our sales engineers can leverage data from our brick-and-mortar retail operations for e-commerce research and use customer data to serve up better products, better experiences — to basically get a deeper understanding of their customers."
- Improved organizational culture around data security.** Interviewees described how easy it was to train their users on the basics of data classification with Purview and found that users were much more engaged with the resource management team in general. The CCO in financial services said: "From a user perspective, the technology is really easy to train [on] and use. The Purview tools have one interface, regardless of what module you are using, and the functionality is similar across all applications. It allows us to do more with less." The global risk and compliance directory from the food-processing organization noted that the adoption of Purview has created an "information security culture" in their organization. They also explained that Communication Compliance is used to protect end users from inappropriate business conduct in internal communications, fostering a positive business environment at the organization.
- Modernized communication channels internally and for customers.** Purview integrates well with many different partners, and interviewees appreciated how, through those integrations, they were able to adopt capabilities such as SMS communication with customers. The CCO in financial services explained: "We are now able to utilize business-related text messages between our agents and

our customers because we can now funnel those in through Purview and monitor and archive them. Prior to Purview, we were not permitted to text with customers, and it was a big pain.”

FLEXIBILITY

The value of flexibility is unique to each customer. There are multiple scenarios in which a customer might implement Purview and later realize additional uses and business opportunities, including:

- **Unlocking organizational data that leads to new business opportunities.** The head of global insurance and risk in the technology industry said, “Purview helps us be more forward-looking about potential areas of opportunity by allowing us to consolidate and combine different datasets to find different patterns and insights.”
- **Supporting cloud transition.** The same interviewee said: “As you think about moving data to a cloud-based solution, Microsoft is very effective in that space. Their expertise and experience with scalability, flexibility, and agility and their experience with how to provide cloud services and how to support that transition are extremely valuable.”
- **Improving security through leveraging the Microsoft ecosystem.** By deploying Purview, organizations are able to easily take advantage of the other tools and capabilities that are included with their Microsoft Enterprise license. Interviewees described leveraging single sign-on and multifactor authentication through their Microsoft ecosystem to further boost their security posture.

Flexibility would also be quantified when evaluated as part of a specific project (described in more detail in [Appendix A](#)).

Analysis Of Costs

Quantified cost data as applied to the composite

Total Costs							
Ref.	Cost	Initial	Year 1	Year 2	Year 3	Total	Present Value
Ftr	Microsoft Purview annual subscription fee	\$0	\$237,600	\$237,600	\$237,600	\$712,800	\$590,876
Gtr	Microsoft Purview implementation and ongoing personnel effort	\$34,500	\$13,800	\$13,800	\$13,800	\$75,900	\$68,819
Total costs (risk-adjusted)		\$34,500	\$251,400	\$251,400	\$251,400	\$788,700	\$659,695

MICROSOFT PURVIEW ANNUAL SUBSCRIPTION FEE

Evidence and data. Interviewed customers had a mix of Microsoft E3 and E5 licenses across their user bases. Purview is included with the Microsoft E5 license, while baseline Purview functionality is included with E3.

- Some organizations were able to justify the investment simply through sunseting their legacy records management system and applying some of those savings to Purview. The records and information management team lead in government explained: “With Purview, we get a bunch more functionality than our legacy standalone system. The money that we save from our legacy tool covers the upgrade to E5 license for us.”
- Interviewees shared their experiences with planning and deployment, giving Microsoft good marks on both. The head of global insurance and risk in the technology industry said: “They have a good industry understanding and a really good understanding of large tech organizations and large complex organizations. It definitely seems like they have done a lot of implementations for other large organizations, so they know the complexity and understand the global aspects of certain departments or teams.”

Modeling and assumptions. For the composite organization, Forrester makes the following assumptions:

- The composite organization has a mix of Microsoft E3 and E5 licenses. Five hundred users have E5 licenses and can leverage Purview for no additional cost, while 1,500 users carry an additional per-user per-month cost.
- Purview (as part of E5 Compliance) costs \$12 per user per month for Microsoft E3 users.

Risks. This cost may vary due to:

- The mix of licenses in place prior to adopting Purview.
- The need for professional services or other third parties for planning and deployment.

Results. To account for these risks, Forrester adjusted this cost upward by 5%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$564,000.

Microsoft Purview Annual Subscription Fee						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
F1	Microsoft Purview (E5 Compliance) subscription cost per E3 user (monthly)	Microsoft	\$0	\$12	\$12	\$12
F2	Totals users (on E3)	Composite	0	1,500	1,500	1,500
Ft	Microsoft Purview annual subscription fee	$(F1*12)*F2$	\$0	\$216,000	\$216,000	\$216,000
	Risk adjustment	↑ 5%				
Ftr	Microsoft Purview annual subscription fee (risk-adjusted)		\$0	\$226,800	\$226,800	\$226,800
Three-year total: \$680,400			Three-year present value: \$564,018			

MICROSOFT PURVIEW IMPLEMENTATION AND ONGOING PERSONNEL EFFORT

Evidence and data. Interviewees spoke to the level of effort that the Microsoft Purview implementation required. Interviewees noted a minor to moderate implementation period, including the effort to retire previous solutions.

Modeling and assumptions. For the composite organization, Forrester makes the following assumptions:

- Four IT professionals manage the three-month deployment period, spending 25% of their working hours on implementation activities.
- Once deployed, one part-time IT professional manages Purview from an IT standpoint.

Risks. This cost may vary due to:

- The complexity of an organization's Purview deployment based on prior state and organizational specifics.
- The need for professional services or other third parties for planning, deployment, and management activities.

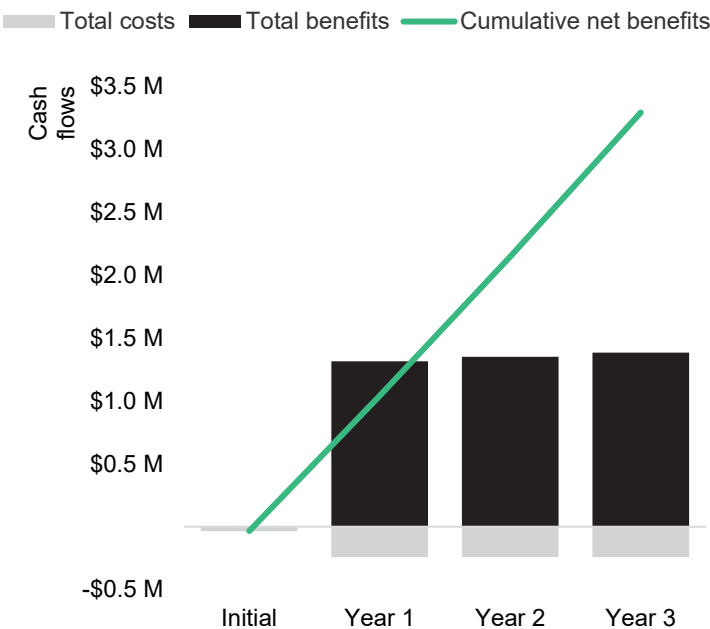
Results. To account for these risks, Forrester adjusted this cost upward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$69,000.

Microsoft Purview Implementation And Ongoing Personnel Effort						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
G1	FTEs tasked with Microsoft Purview implementation or ongoing management	Composite	4	1	1	1
G2	Working time spent on implementation activities	Assumption	25%	0%	0%	0%
G3	Working time spend on post-implementation management activities	Assumption	0%	10%	10%	10%
G4	Implementation duration (months)	Interviews	3	0	0	0
G5	Average fully burdened annual salary for an implementation or ongoing management FTE	Composite	\$120,000	\$120,000	\$120,000	\$120,000
Gt	Microsoft Purview implementation and ongoing personnel effort	$(G1 \cdot G2) \cdot ((G4/12) \cdot G5) + (G1 \cdot G3 \cdot G5)$	\$30,000	\$12,000	\$12,000	\$12,000
	Risk adjustment	↑ 15%				
Gtr	Microsoft Purview implementation and ongoing personnel effort (risk-adjusted)		\$34,500	\$13,800	\$13,800	\$13,800
Three-year total: \$75,900			Three-year present value: \$68,819			

Financial Summary

Consolidated Three-Year Risk-Adjusted Metrics

Cash Flow Chart (Risk-Adjusted)



The financial results calculated in the Benefits and Costs sections can be used to determine the ROI, NPV, and payback period for the composite organization's investment. Forrester assumes a yearly discount rate of 10% for this analysis.

These risk-adjusted ROI, NPV, and payback period values are determined by applying risk-adjustment factors to the unadjusted results in each Benefit and Cost section.

Cash Flow Analysis (Risk-Adjusted)						
	Initial	Year 1	Year 2	Year 3	Total	Present Value
Total costs	(\$34,500)	(\$251,400)	(\$251,400)	(\$251,400)	(\$788,700)	(\$659,695)
Total benefits	\$0	\$1,143,672	\$1,211,884	\$1,280,097	\$3,635,652	\$3,003,015
Net benefits	(\$34,500)	\$892,272	\$960,484	\$1,028,697	\$2,846,952	\$2,343,320
ROI						355%
Payback						<6 months

APPENDIX A: TOTAL ECONOMIC IMPACT

Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists vendors in communicating the value proposition of their products and services to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of IT initiatives to both senior management and other key business stakeholders.

Total Economic Impact Approach

Benefits represent the value delivered to the business by the product. The TEI methodology places equal weight on the measure of benefits and the measure of costs, allowing for a full examination of the effect of the technology on the entire organization.

Costs consider all expenses necessary to deliver the proposed value, or benefits, of the product. The cost category within TEI captures incremental costs over the existing environment for ongoing costs associated with the solution.

Flexibility represents the strategic value that can be obtained for some future additional investment building on top of the initial investment already made. Having the ability to capture that benefit has a PV that can be estimated.

Risks measure the uncertainty of benefit and cost estimates given: 1) the likelihood that estimates will meet original projections and 2) the likelihood that estimates will be tracked over time. TEI risk factors are based on "triangular distribution."

Present Value (PV)

The present or current value of (discounted) cost and benefit estimates given at an interest rate (the discount rate). The PV of costs and benefits feed into the total NPV of cash flows.

Net Present Value (NPV)

The present or current value of (discounted) future net cash flows given an interest rate (the discount rate). A positive project NPV normally indicates that the investment should be made unless other projects have higher NPVs.

Return on investment (ROI)

A project's expected return in percentage terms. ROI is calculated by dividing net benefits (benefits less costs) by costs.

Discount rate

The interest rate used in cash flow analysis to take into account the time value of money. Organizations typically use discount rates between 8% and 16%.

Payback period

The breakeven point for an investment. This is the point in time at which net benefits (benefits minus costs) equal initial investment or cost.

The initial investment column contains costs incurred at “time 0” or at the beginning of Year 1 that are not discounted. All other cash flows are discounted using the discount rate at the end of the year. PV calculations are calculated for each total cost and benefit estimate. NPV calculations in the summary tables are the sum of the initial investment and the discounted cash flows in each year. Sums and present value calculations of the Total Benefits, Total Costs, and Cash Flow tables may not exactly add up, as some rounding may occur.

APPENDIX B: ENDNOTES

¹ Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists solution providers in communicating their value proposition to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of business and technology initiatives to both senior management and other key stakeholders.

² Source: Forrester's 2023 Security Survey.



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