P-BON CONSULTING SERVICES, INC.

Technology. Strategy. Results.

Microsoft 365 & Office 365 Efficiency Training for Teams

A Live, Instructor-Led Workshop for Teams Underusing Their M365 Stack

TRAINING & SKILL DEVELOPMENT — INTERACTIVE WORKSHOP

SERVICE PROPOSAL — $299 PER SESSION

Prepared by

Wlad Pierre-François, Ph.D.

Founder & President, P-Bon Consulting Services, Inc.

info@pbonconsulting.com · (516) 734-1515 · pbonconsulting.com

August 2026

Table of Contents

1. Executive Summary

P-Bon Consulting Services, Inc. proposes the Microsoft 365 & Office 365 Efficiency Training for Teams, a 3-hour, live, instructor-led workshop for up to 15 staff, priced flat at $299 per session with the recording included for anyone who misses it live.

A recurring pattern among P-Bon's clients: the firm is paying for the full Microsoft 365 stack, and the team is still emailing attachments back and forth and losing track of versions in a shared drive. This session closes that specific gap — Outlook automation, Teams collaboration, SharePoint fundamentals, and secure file sharing — built by the same firm that configures these tenants for its regulated clients.

2. About P-Bon Consulting Services, Inc.

P-Bon Consulting Services, Inc. is an IT managed services and cybersecurity advisory firm founded and led by Wlad Pierre-François, Ph.D., serving law firms, medical practices, financial services companies, and small-to-midsize businesses across the NY Metro area. The firm's approach is compliance-native: every engagement — from a single toolkit to an ongoing managed IT program — is built with the regulatory realities of HIPAA, the NY SHIELD Act, NY DFS Part 500, SEC Reg S-P, and FINRA Rule 4511 already accounted for, not bolted on afterward.

Relevant qualifications for this offering:

- Direct experience training non-technical staff and clients on M365 administration and IT fundamentals as part of the firm's managed-IT client base — this session productizes that same training.
- Instruction grounded in real tenant configuration work, so the security angle (why attachments are a risk, why link permissions matter) is built in rather than generic.
- Established track record producing structured, outcomes-based training and client-facing documentation.

3. Statement of Need

M365 licensing is a fixed cost whether or not a team uses more than email and Word; the value gap between "licensed" and "actually using the tools" is one of the most common sources of wasted IT spend. Untrained use of file sharing — emailing sensitive attachments instead of using SharePoint/OneDrive links with proper permissions — is itself a security and compliance exposure for regulated clients, not just an efficiency loss.

4. Scope of Work & Deliverables

The session covers four practical blocks, each built around hands-on practice rather than lecture:

- Outlook automation and rules — inbox rules, Quick Steps, calendar scheduling shortcuts.
- Teams collaboration best practices — channels vs. chats, file co-authoring, meeting etiquette.
- SharePoint fundamentals — site structure, permissions basics, finding and organizing files.
- Secure file sharing — sharing links with appropriate permission levels instead of email attachments, and why that matters for client-data handling.

5. Methodology — How This Is Delivered

1. Pre-session intake — short survey to confirm the org's current M365 configuration and tailor examples to real workflows.
2. Live session — 3 hours, up to 15 participants, delivered online in modular blocks with hands-on practice.
3. Recording distribution — shared with all registered participants, including anyone who missed the live session.
4. Optional follow-up Q&A — a short slot within two weeks for questions that come up once staff start applying it.

6. Objectives & Success Metrics

Objective	Success Metric
Reduce email-attachment habit in favor of proper sharing	Participants demonstrate creating a permissioned SharePoint/OneDrive link during the session
Build baseline Outlook automation competency	Participants create at least one working inbox rule or Quick Step during the session
Establish shared Teams etiquette	Team leaves session with agreed norms for channels vs. chat vs. email
Make the training usable after the fact	100% of registered participants receive the recording regardless of live attendance

7. Who This Is For

Teams of up to 15 already licensed for Microsoft 365/Office 365 who are underusing the platform — most useful for firms that migrated to M365 without a structured rollout, or that have added staff who never got onboarded to the org's actual workflows.

8. Timeline

3 hours • Live online • Up to 15 people • Recording included

Stage	What Happens
Booking & scheduling	Session date/time confirmed at invoice
Pre-session intake	Sent 1 week before session
Live session	3 hours, scheduled date
Recording distribution	Within 24 hours of session
Optional follow-up Q&A	Within 2 weeks of session, on request

9. Team

Delivered live by Wlad Pierre-François, Ph.D.

10. What You Need to Provide

- Registration list (names/emails, up to 15 participants)
- Confirmation of whether the group is fully remote or a mix (affects platform setup)
- Completed pre-session intake

11. Investment

Line Item	Basis / What's Included	Cost
M365 & Office 365 Efficiency Training for Teams	3-hour live session, up to 15 participants, recording included	$299 per session
Additional sessions (larger teams, repeat cohorts)	Scoped and quoted separately	Quoted on request

Comparable instructor-led M365 workshops from training vendors commonly run $500–$1,000 or more per session, or are sold bundled into a much larger LMS subscription. This is priced as a standalone, single-session product.

12. Why P-Bon Consulting

- Taught by the same person who configures M365 tenants for regulated clients, so the security/compliance angle is built in, not generic.
- Small enough group size for real hands-on practice, not a webinar.

- Recording removes the "can't get everyone in one room" problem.

13. Next Steps

Request the training through the solutions page or contact page. An invoice follows immediately at the listed price; the session is scheduled once payment clears.

Not sure this is the right fit? A short conversation is cheaper than the wrong toolkit — reach out at info@pbonconsulting.com or (516) 734-1515 before requesting this item.