

# EPC Group Publishes 7-Phase Engagement Operating Model for Microsoft Enterprise Project Management

*Seven-phase Microsoft enterprise project management methodology with senior-architect bench, named artifacts at every phase, and fixed-fee predictability.*

HOUSTON, TX, UNITED STATES, May 15, 2026 /EINPresswire.com/ -- EPC Group, a 29-year Microsoft consulting firm, the oldest continuous Microsoft Gold Partner from 2016 until the program's retirement, holder of all six current Microsoft Solutions Partner designations, and a five-time G2

Leader in Business Intelligence Consulting — today published the Engagement Operating Model (EOM), a seven-phase project management standard for Microsoft enterprise engagements that brings named methodology, named artifacts, and named accountability to every [Power BI](#),

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Every CIO and CFO who has been burned by a Microsoft consulting engagement has the same story.”

*Errin O'Connor, Founder and Chief AI Architect of EPC Group.*

Microsoft Fabric, Microsoft Purview, Microsoft Copilot, [SharePoint](#), Azure, Dynamics 365, and [Microsoft 365](#) implementation EPC Group delivers.

The Engagement Operating Model was published in response to a pattern EPC Group has observed across more than 11,000 Microsoft implementations and 70-plus Fortune 500 engagements: Microsoft enterprise project management is the variable that determines outcomes, but the industry has no shared methodology for it.

Buyers comparing Microsoft consulting firms are increasingly evaluating not just technical capability but project management discipline — the cadence of status reporting, the rigor of change order handling, the clarity of escalation paths, and the consistency of senior-architect engagement throughout delivery.



EPC Group Logo Power BI Consulting

"Every CIO and CFO who has been burned by a Microsoft consulting engagement has the same story," said Errin O'Connor, Founder and Chief AI Architect of EPC Group. "The senior partner who sold the deal disappears after kickoff. A rotating cast of junior consultants shows up. Scope creeps. Change orders multiply. Status reports become marketing instead of management.

The Engagement Operating Model exists to make that impossible at EPC Group. Seven phases, named artifacts, a senior architect at every phase, and one accountable program manager from kickoff to run state. No junior bait-and-switch. No vendor handoff at go-live."

## THE SEVEN PHASES OF THE EPC ENGAGEMENT OPERATING MODEL

Phase 1 — Discover. Stakeholder interviews, current-state architecture audit, business outcome mapping, regulatory baseline (HIPAA, FedRAMP, SOC 2, FINRA, CMMC where applicable). Named artifacts: Discovery Report, Stakeholder Register, Compliance Baseline.

Phase 2 — Architect. Target-state architecture, integration design, data architecture, security and governance design. Senior architect leads. Named artifacts: Architecture Decision Record, Integration Design, Security and Governance Plan.

Phase 3 — Plan. Work breakdown, RACI assignment, risk register, change control plan, communication plan, steering committee cadence. Named artifacts: Project Charter, RACI Matrix, Risk Register, Communication Plan.

Phase 4 — Build. Iterative development with weekly status reports, bi-weekly steering committee readouts, real-time risk escalation, and continuous artifact updates. Named artifacts: Sprint Status Reports, Updated Risk Register, Change Order Log.

Phase 5 — Validate. User acceptance testing, performance testing, security testing, compliance



The image shows a website banner for EPC Group's Power BI Consulting Services. The banner features a dark background with glowing data visualizations and the text: "Power BI Consulting Services", "Transform your data into actionable insights with enterprise business intelligence solutions for Fortune 500 companies." Below the banner is a photograph of four EPC Group professionals (two men and two women) standing behind a wooden conference table. On the table is a large, clear acrylic trophy that reads "TOP BI CONSULTING FIRM - US". Behind them is a screen displaying the text "EPC Group Recognized as Top Business Intelligence Consulting Firm in US" along with logos for EPC Group, Power BI, AI, Claude, Gemini, and G2.

EPC Group Power BI Consulting and Microsoft Fabric Consulting Practice Experts Top G2 Rated in North America

EPC Group's Recognized at Top Business Intelligence Consulting Firm in US

validation, training material development. Named artifacts: UAT Sign-Off, Performance Test Results, Compliance Validation Report.

Phase 6 — Deploy. Cutover planning, go-live execution, hypercare period, end-user training delivery, adoption measurement. Named artifacts: Cutover Plan, Go-Live Readiness Assessment, Hypercare Status Reports.

Phase 7 — Run. Managed service handoff or continuous improvement engagement, with quarterly business reviews, ongoing adoption measurement, and roadmap updates. Named artifacts: Run-State Operating Model, Quarterly Business Review, Roadmap Update.

## SENIOR-ARCHITECT BENCH STANDARD

Every EPC Group engagement under the Engagement Operating Model is led by a senior architect with a minimum of 10 years of Microsoft enterprise consulting experience. The senior architect is named in the Statement of Work, attends every steering committee meeting, and remains accountable through Run state. The senior architect's name, credentials, and Microsoft certifications appear on the project charter and are referenced in every weekly status report.

Errin O'Connor — a four-time Microsoft Press best-selling author, former NASA Lead Architect, and member of the Microsoft SharePoint Project Tahoe and Microsoft Power BI Project Crescent beta teams — personally reviews every engagement architecture and signs off on every project charter.

## WHO THE ENGAGEMENT OPERATING MODEL IS BUILT FOR

The Engagement Operating Model applies to every EPC Group engagement of 200 users or more, every fixed-fee accelerator program, every managed Microsoft Cloud and Analytics retainer, and every multi-track Cafeteria-Menu Purview and Copilot engagement. It is the operating standard behind Fortune 500 and federal Microsoft enterprise engagements, mid-market Microsoft 365 acceleration packages, regulated industry Microsoft Cloud deployments across healthcare HIPAA, financial services FINRA, federal contractor FedRAMP, and defense CMMC environments, Microsoft Copilot and Microsoft Purview tenant hardening accelerators, Power BI, Microsoft Fabric, and Microsoft Dynamics 365 implementations, and managed Microsoft Cloud and Analytics retainer engagements.

## REMOTE-FIRST DELIVERY

The Engagement Operating Model is delivered remote-first from EPC Group's North American consulting bench, with optional on-site discovery sessions in the United States and Canada. The full specification, including phase definitions, named artifacts, and the senior-architect bench standard, is available at <https://www.epcgroup.net/engagement-model>.

## ABOUT EPC GROUP

EPC Group is a 29-year Microsoft consulting firm serving organizations across all industries — Fortune 500 companies, federal agencies, healthcare systems, financial institutions, government, manufacturing, energy, education, retail, technology, and global enterprises. The firm has delivered 11,000-plus Microsoft implementations, including 6,500-plus SharePoint deployments, 1,500-plus Power BI implementations, and 500-plus Microsoft Fabric engagements. Notable clients include NASA, the FBI, the Federal Reserve Bank of New York, the Pentagon, United Airlines, PepsiCo, Nike, and Northrop Grumman.

EPC Group holds all six current Microsoft Solutions Partner designations across the Microsoft AI Cloud Partner Program, was North America's oldest continuous Microsoft Gold Partner from 2016 until the program's retirement, and is a five-time G2 Leader in Business Intelligence Consulting with a perfect 100 Net Promoter Score (Spring 2026).

Founder Errin O'Connor is a four-time Microsoft Press best-selling author, former NASA Lead Architect, and a member of the Microsoft SharePoint Project Tahoe and Microsoft Power BI Project Crescent beta teams.

## CONTACT

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