

Evaluating Beacon: a guide for HR, compliance, managers and IT

Beacon is policy management and attestation for Microsoft 365. It's a solution accelerator: the foundation is already designed, and iomer builds your organization's version as a single deployment package and installs it in your tenant. Use this guide to run a fair evaluation, prepare for a walkthrough, and build a business case on your own numbers.

1 · WHAT TO CHECK

A checklist for each person evaluating Beacon

Bring these to the walkthrough. Each item is something you can see for yourself, with policies like yours.

HR and compliance

- ☐ Create a policy both ways: upload one of your Word or PDF files, then write one as a policy page.
- ☐ Start a new version and mark it minor. Do existing signatures still apply?
- ☐ Mark a policy reviewed. Does the next review date move without asking anyone to sign again?
- ☐ Export the audit log. Does it show the version, signature, date and whether the version is current?

Approvers and legal

- ☐ Compare a new version with the one staff see today, with the change summary.
- ☐ Does approval show how many people will be asked to sign, and by when?
- ☐ Try to approve a version you wrote. Beacon should stop you.
- ☐ Send a version back. Is a reason required, and is it logged?

Managers

- ☐ Can you see who on your team is overdue, and how late?
- ☐ Send one reminder, then Remind all.
- ☐ Record a paper sign-off for someone without a device. How is it marked?
- ☐ Verify a certification your team member submitted with evidence.

IT

- ☐ What exactly does iomer install, and where does it run?
- ☐ Where is the data stored, and is anything held outside your tenant?
- ☐ Which Microsoft 365 plans, Entra ID data and Power Automate capacity does it rely on?
- ☐ Which permissions does the package request? Ask for the list.
- ☐ How do changes and Microsoft 365 updates reach you, and how is it removed?

What regulators expect, and where Beacon keeps the evidence

MARKET	EXPECTATION	SOURCE
Canada	FINTRAC requires written compliance policies and procedures that are kept up to date and approved by a senior officer. OSFI's Guideline E-13 expects procedures that assure day-to-day compliance, with documentation to show it.	FINTRAC compliance program guidance; OSFI Guideline E-13
United States	The BSA/AML compliance program must be written and board-approved, with internal controls for timely updates. NCUA requires a written BSA policy approved by the board.	FFIEC BSA/AML Examination Manual; NCUA Examiner's Guide
United Kingdom	Firms must regularly review and update their policies, controls and procedures, keep a written record of them, and record the steps taken to communicate them.	Money Laundering Regulations 2017, regulation 19; FCA SYSC 6.1.1R

A summary to start a conversation, not legal advice.

EXPECTATION	WHERE BEACON KEEPS THE EVIDENCE
Approved	A named approver for each new policy and version, who confirms the approval or sends it back with a reason. The approver can never be the author.
Current	A review date for every policy, flagged ahead of time. Owners mark it reviewed, start a new version or retire it, and each step is logged.
Communicated	Each person in the audience is asked to sign each major version and on a schedule, with a due date. Overdue items go to their manager.
On record	A typed signature per person per version, the version history with approver and dates, the lifecycle audit trail, and an attestation export to CSV.

iomer reviewed FINTRAC's public notices of administrative monetary penalties against Canadian banks and credit unions published between June 2025 and May 2026. All four cited a failure to keep written compliance policies and procedures up to date. This is iomer's own count, not a FINTRAC statistic. Beacon supports a compliance program; it doesn't make an organization compliant on its own. Where a board approves policies, Beacon records the approval step; it doesn't replace the board's decision or minutes.

Questions to answer as a team

You don't need every answer for a first conversation. They tell us both how Beacon fits, who should be involved, and how big the job is.

QUESTION, AND WHAT THE ANSWER TELLS US		YOUR ANSWER
1	Where do your policies live today: Word or PDF files, intranet pages, or both? Tells us whether to lead with uploads, policy pages or both, and sizes the import.	
2	Who approves a new or changed policy, and how is that recorded? Email approvals map to Beacon's approval step. Several sequential stages need a conversation first.	
3	How often are policies reviewed, and how do you know one is overdue? A calendar reminder, or nothing, points to review cycles and the needs-attention list.	
4	How do you track who has signed off on a policy update? Email threads, paper forms or a spreadsheet point straight at Beacon's signature record.	
5	Have you had to show an auditor which version was in force, who approved it and who signed it? If it took days, version history and signatures by version matter most.	
6	Which certifications do you track expiry on, and who is told when one lapses? Sizes the certification side, and shows whether it's led by HR, safety or both.	
7	How often do policies need re-signing: every year, on every change, or both? Shapes your attestation cycles and the major and minor version rule.	
8	Who owns each policy today: HR, compliance, legal, IT, finance? Tells us who your policy owners and approvers are.	
9	How reliable are your Entra ID departments and manager fields? Audiences and manager escalation depend on them.	
10	Do any staff work without a computer or a Microsoft 365 account? Managers can record paper sign-offs for them, so plan who does it.	
11	Do you already have Hazel, or a knowledge centre for procedures? If so, we agree which content belongs there and which policies belong in Beacon.	
12	Do you use Journey, Laurel or Hazel, or plan to? They can share one SharePoint site design, Entra ID set-up and governance model.	

Measure today, then again 90 days after launch

Use your own numbers. iomer doesn't supply industry benchmarks for these, because they vary too much between organizations to be useful.

MEASURE	HOW TO MEASURE IT	TODAY	90 DAYS AFTER LAUNCH
Staff who must sign policies	Headcount of everyone in scope		
Policies that need sign-off	Count from your current library or intranet		
Policies past their review date	Count from your inventory, as a number and a percentage		
Staff who signed the current code of conduct	From your sign-off spreadsheet, as a percentage		
Days from a new version to full sign-off	From the last two policy changes		
Hours a month chasing and recording sign-offs	Ask HR, compliance and managers		
Certifications expired today	Count across managers' spreadsheets		
Days to assemble sign-off evidence for your last audit	Ask compliance or internal audit		

Time spent on sign-off, per year = hours a month chasing and recording sign-offs × 12.

Evidence effort = days to assemble sign-off evidence for an audit × audits or exams per year.

5 · NEXT STEPS

From first call to proposal

1 Discovery call How policies and sign-off work today and what matters most.	2 Walkthrough Thirty minutes with Beacon, set up with policies like yours.	3 Scoping workshop Policies, owners and approvers, review cycles, certification types and audiences.	4 Proposal A firm, fixed-price written proposal with a timeline.
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Book a walkthrough at www.iomer.com/accelerators/beacon/contact.html, call **780.424.3122** or email contactus@iomer.com.