Maturity Model and AI Agents

Maturity Model for Microsoft 365 Practitioners

March 2025

⭐ Guest star ⭐

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Current Core Team

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Mats Warnolf, Mats Warnolf AB | @MatsWarnolf

Emeriti

Emily Mancini, Left Uncharted | @eemancini
Initiative started by Sadie [Van Buren] Gilronan as the SharePoint Maturity Model in 2010

Agenda

Practitioner & Maturity Model overview

- Artifacts and Updates
- Purpose

→ Shout-out & Picture Time (**Together Mode!**) → Contribute → The main event

Reminders

Join us every month!

Download the recurring calendar series:

- https://aka.ms/mm4m365/invite

Join us via Meetup:

- Global Microsoft 365 & Power Platform Meetup Events

Purpose and articles on Microsoft Learn

PURPOSE

- Improve organization through use of technology
- Benchmark company and department
- Select appropriate approach
- Develop an organizational business and technical roadmap based on:
  - What's possible
  - What's desired
  - Organization's culture and drivers
- Lead and support strategic planning, with senior management
- Align implementation needs and objectives
- Discuss use of the platform with IT – not just technology
- Socialization tool

https://symp.info/MM4M365

Artifacts

Published competencies

- Governance, Risk & Compliance ✨
- Business Process
- AI & Cognitive Business ✨
- Collaboration ✨
- Communication ✨
- Customization & Development
- Management of Content
- Infrastructure
- People & Communities
- Search
- Staff & Training
- Employee Experience

Practical Scenarios

- Microsoft 365 Service Change Management
- Servicing Microsoft 365 Apps

Tools

- Running a MM4M365 workshop
- Practitioner meeting recordings

In progress competencies

- Data & Analytics
- Security

Supporting articles

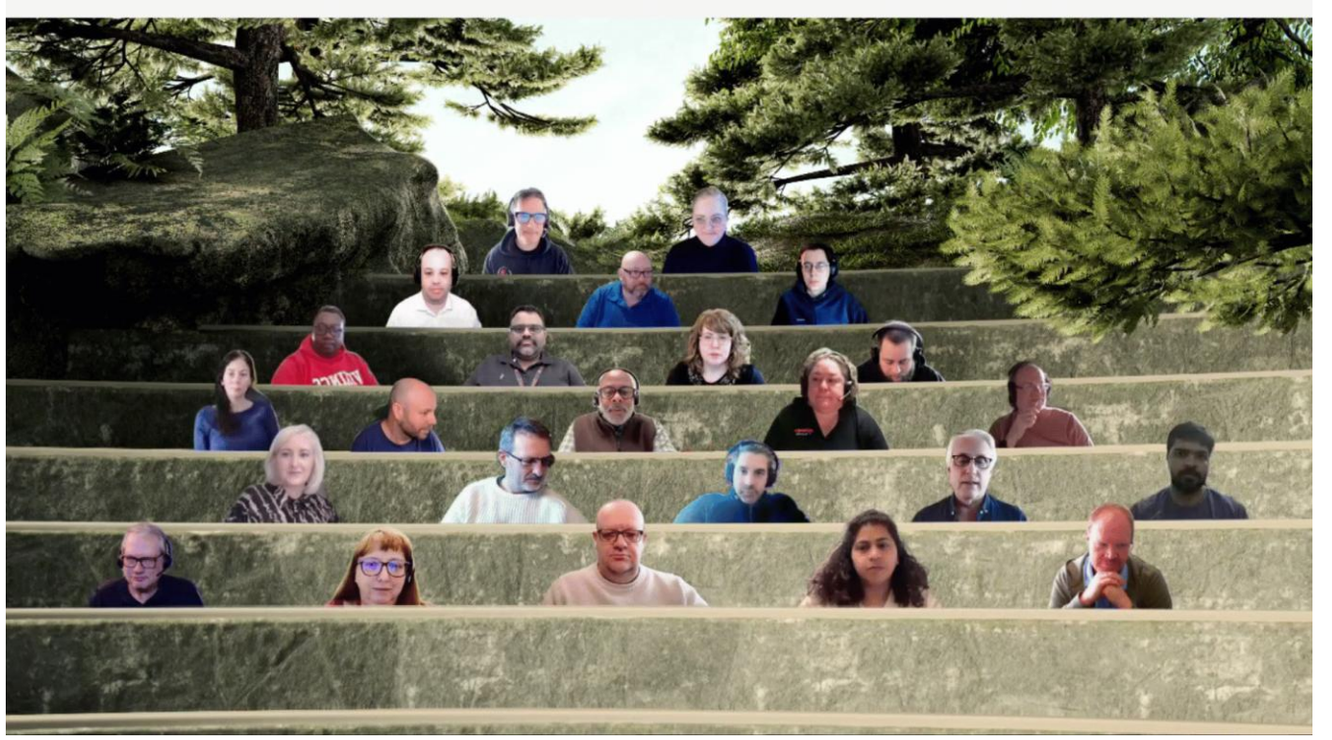
- Principles of…
- Search
- Communication
- How to elevate…
- Collaboration
- Communication
- People & Communities
- Staff & Training
- Governance, Risk and Compliance

MM4M365 provides benchmarks to measure your organization

Maturity Level	Description/characteristics	Intent
Level 500 Optimizing	Optimal, systematic, statistical, improvement-focus, automated, assured, proactive	“We want to ensure all the key processes are always effective and resilient, while designing the same into anything new we do”
Level 400 Predictable	Productive, interactive, responsive, enhanced, effective, adaptable, quality	“Let’s make things even better by measuring, analyzing and taking actions to improve based on that“
Level 300 Defined	Documented, policy-driven, planned, controlled, stable	“We have defined our processes, policies and procedures, everyone seems to be doing the right thing; let’s keep doing that”
Level 200 Managed	Routine, legacy, fire-fighting, variable, personally managed	“We should ensure everyone knows what they should be doing”
Level 100 Initial	Ad hoc, reactive, uncontrolled, chaotic, unstable, not designed	“Let’s keep putting the fires out and keep the lights on!”

PnP Picture Time!

- Please turn your video on and we'll grab a Together Mode pic with everyone who wants to be seen to be here.
- We are together in this as a community!



Overview

Practitioners for Maturity Model for Microsoft 365

Get Involved

https://symp.info/SiCCommunityContentGuide

- Present case study (at MM4M365 Practitioners or other speaking opportunities)
- Contribute on GitHub
- Provide feedback, insights, tools, and artifacts
- Socialize content

Run a MM4M365 workshop

- https://symp.info/MM4M365Workshop

Recordings

- http://mmvideos.m365.ms/

Purpose

- Safe space to:
  - Share & test your thoughts
  - Guide the process and content
  - Decide how to promote your use of the Maturity Model
  - Hone your pitch

Discussion-based monthly meeting

- Understand the competencies & measuring maturity
- Awareness of new assets
- Feedback on the maturity model
- Sharing anecdotes and success stories
- Mapping technology, maturity level & competencies
- Running

Upcoming topics in 2025

January 21	February 18	March 18	April 15	May 20	June 17
Getting Leadership Buy In	How to run a Maturity Model Workshop	Maturity Model and AI Agents	Practical Scenario on Branding	Security Culture	
⭐ Pia Langenkrans ⭐	⭐ Core Team ⭐	⭐ Simon Doy ⭐	⭐ Simon Hudson ⭐	⭐ Galen Keene ⭐	

July 15	August 19	September 16	October 21	November 19	December 17
Summer break	*Summer break*				
None	None				

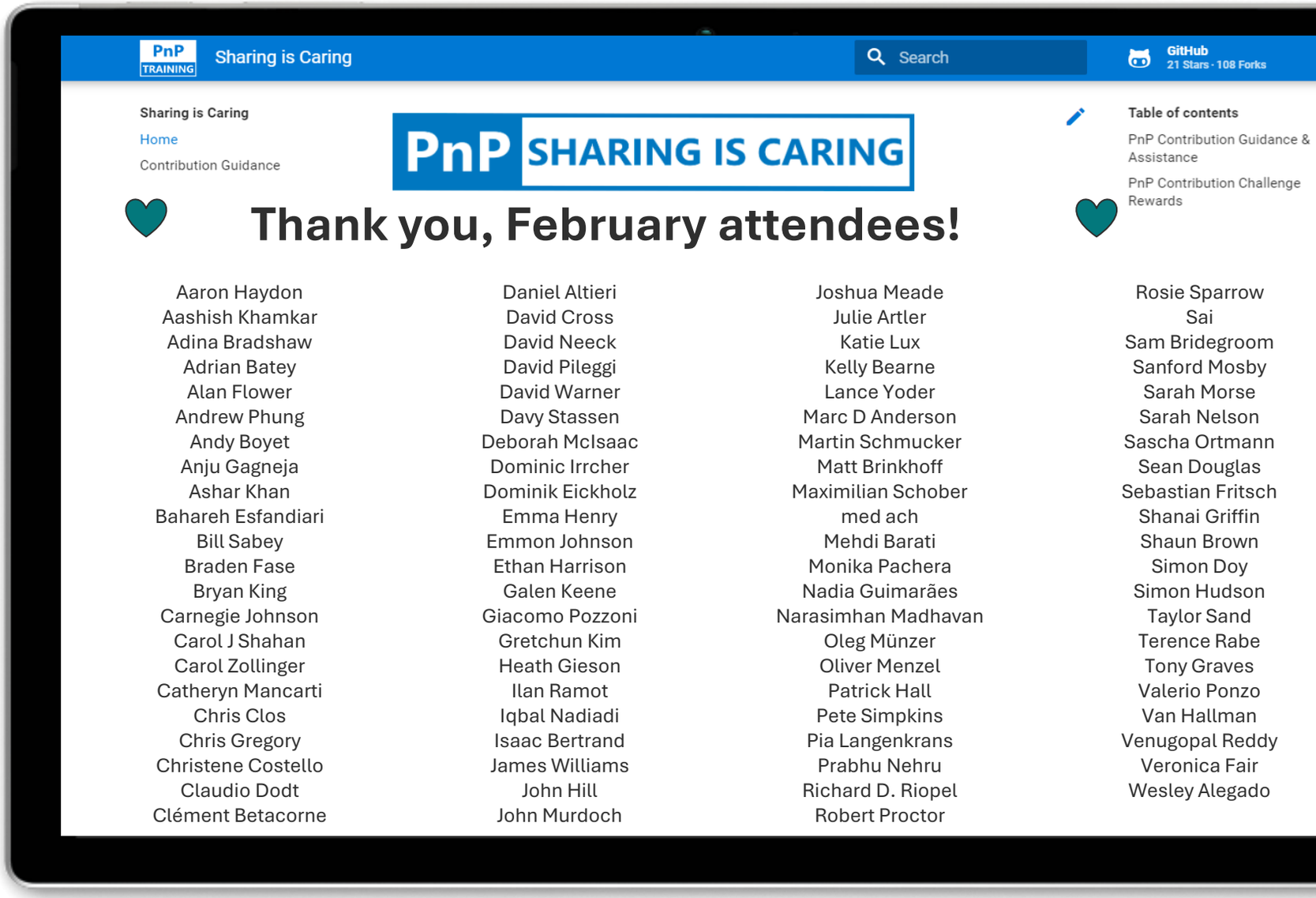
NEXT SESSION

April 15 at 10am ET / 7am PT

Practical Scenario on Branding

Third Tuesday of every month

https://aka.ms/mm4m365/invite

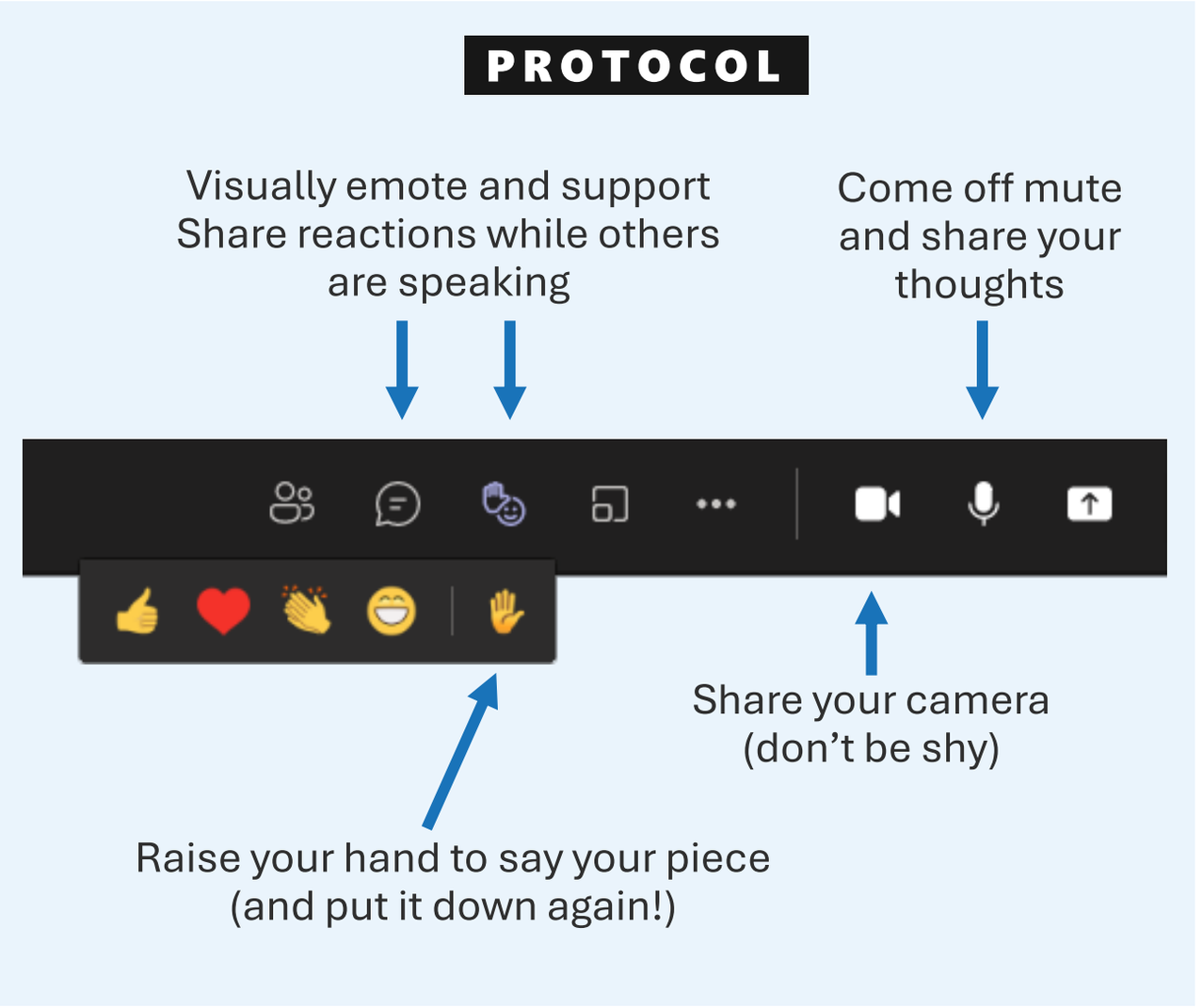


What are we working on?

- Data Analytics Competency
- Security Competency
- Management of Content review

The Main Event

Maturity Model and AI Agents



Simon Doy

iThink 365

Owner of iThink 365 and Solution Architect.

Mission: Drive Customer's Success through People, Process and Microsoft 365.

Developer, Consultant and Business Owner.

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What is the purpose of this session?

Introduce AI Agents

How do you start?

Apply Maturity Model to your thinking and journey

What is an AI Agent?

- Think of an AI Agent as a “*junior*” member of your team.
- You give them a task to do for you.
- They are powered by Generative AI.
- Copilot Agents are examples of AI Agents.
- They can triggered by external events, not just you.

AI Agent use cases

“Go and research into this organisation, Pancom and tell me the following pieces of information….”

“I have this bid proposal question…
Using our previous proposals, how should we answer this question….“

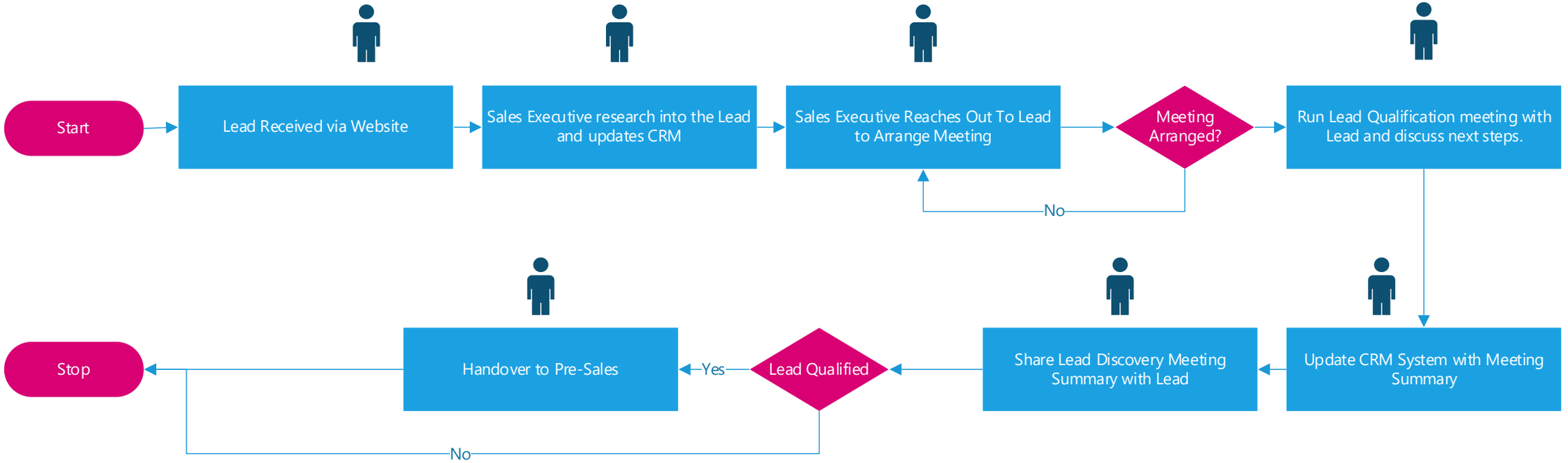
“When someone says something negative on Facebook tell me and give me a suitable response… “

“I am in a sales discovery session, what questions have I not asked… “

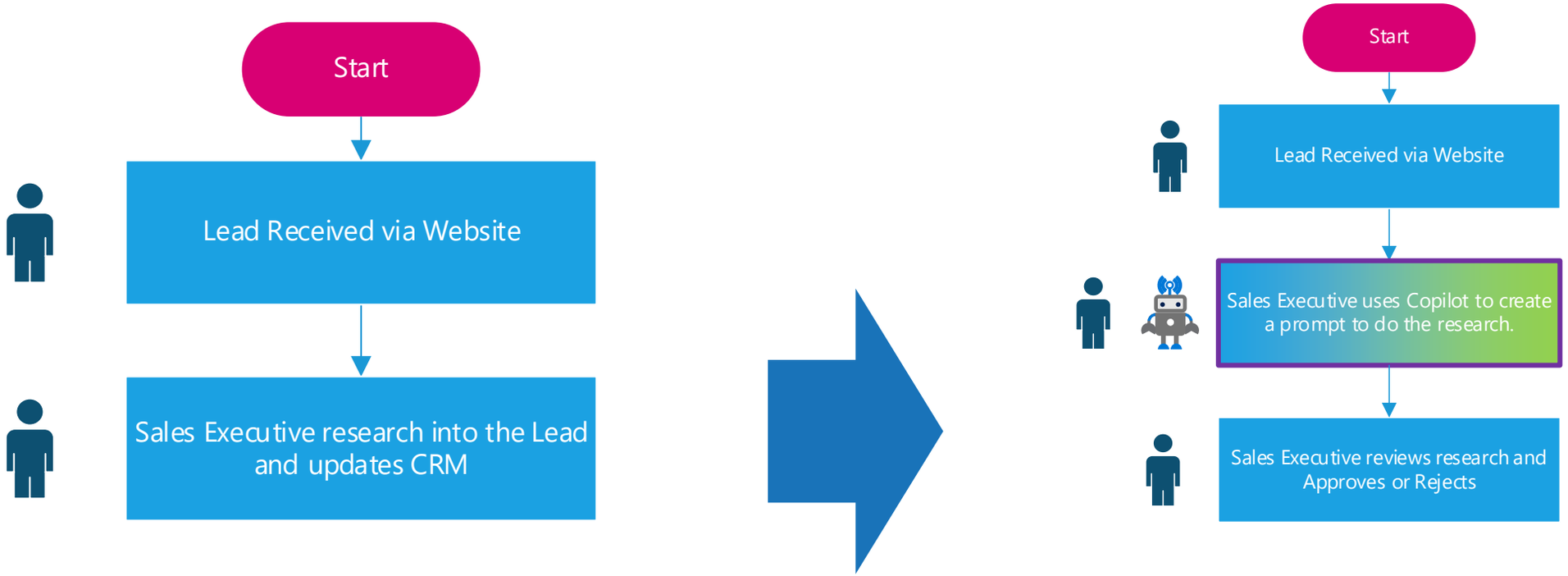
Maturity Model and AI Agents - TLDR

Maturity Level	Description/characteristics	Intent
Level 500 Optimizing	Optimal, systematic, statistical, improvement-focus, automated, assured, proactive	AI Agents are delivered across the organization. AI Agents support people, provide feedback and enhance their meetings and job performance. Do we really know yet?
Level 400 Predictable	Productive, interactive, responsive, enhanced, effective, adaptable, quality	Measurements in place for AI Agent. Agents have feedback loops, internal measurement. Feedback used to improve AI Agents. Is it still creating value?
Level 300 Defined	Documented, policy-driven, planned, controlled, stable	Guidelines on how to deliver AI Agents. day-to-day Team and Pre-sales Team are using AI Agents in their day-to-day work. Re-examine the AI Landscape.
Level 200 Managed	Routine, legacy, fire-fighting, variable, personally managed	We want to get Leadership Buy-in We have identified a use case with the Sales Team and they are piloting a proof-of-concept.
Level 100 Initial	Ad hoc, reactive, uncontrolled, chaotic, unstable, not designed	We are trying out experimenting with AI Agents but they are not in use in Production.

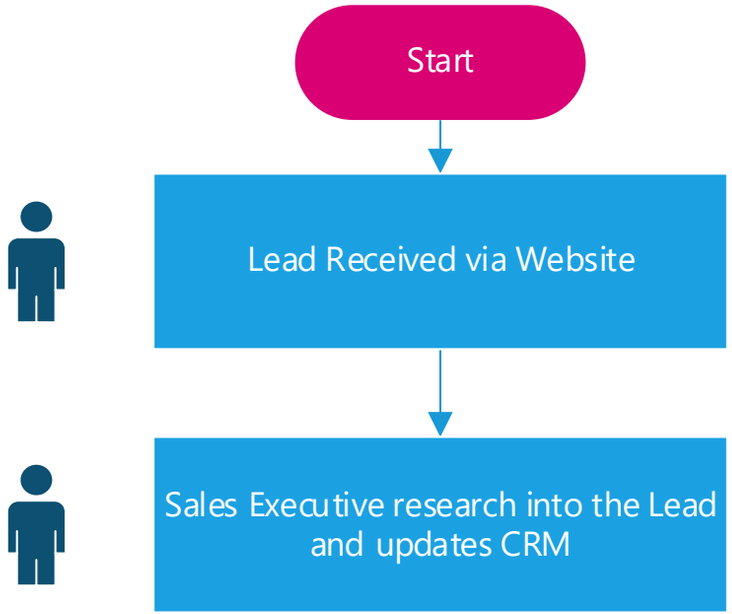
How about an example?
A Sales Lead Process

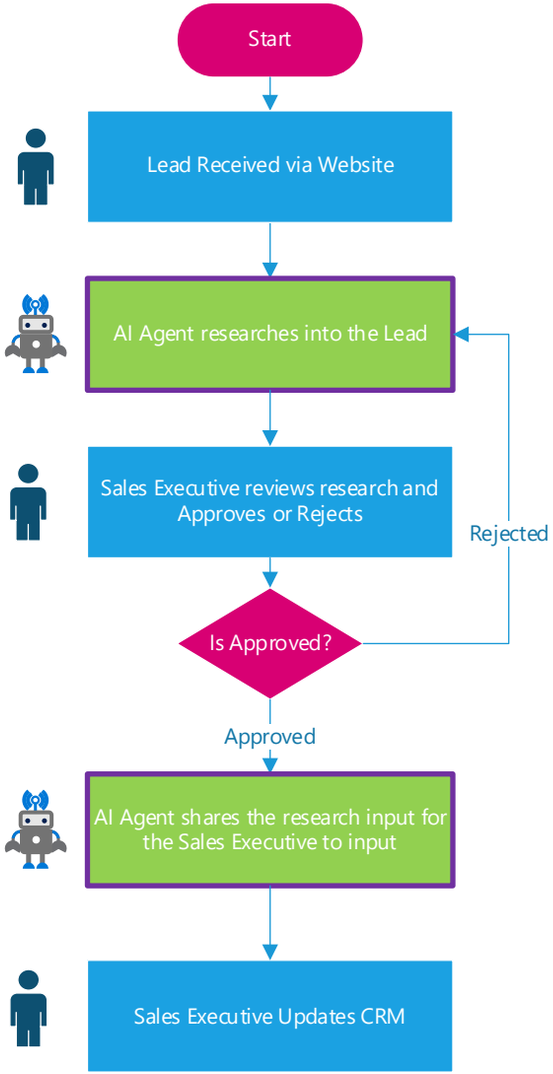


How about an example?
Step One: Understanding How To Use A Prompt

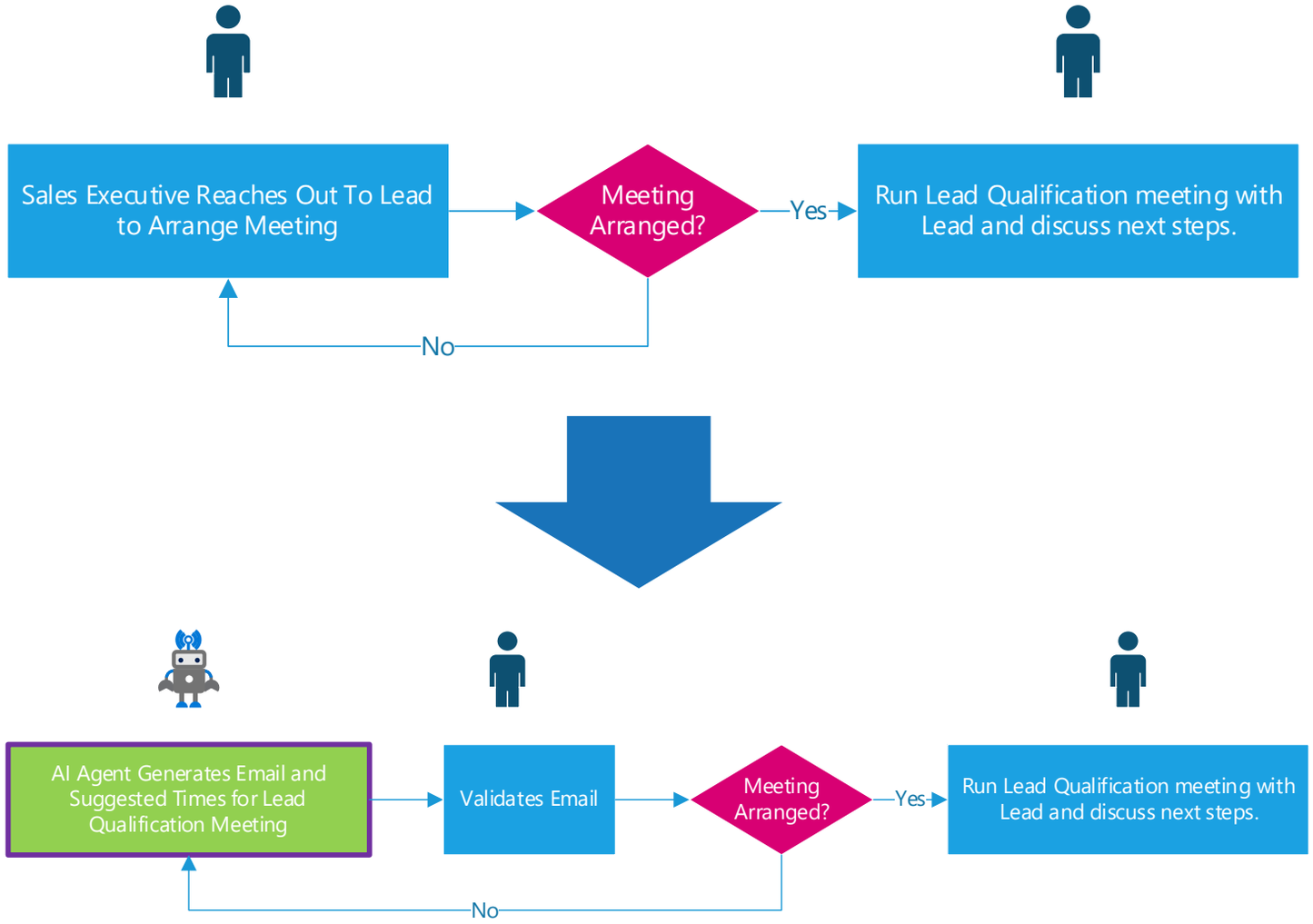


How about an example?
Step Two: Introduction of an Agent





How about an example?
Step Two: Add another AI Agent into the process



How mature do you need to be?

How do you know you are ready for AI Agents?

What do we need to do first?

What competencies are important to get you ready?

Maturity Model Competencies Involved in Your AI Agent Journey

Competency	Description
Cognitive Business	AI awareness. The driver for AI Agents is everything that Cognitive Businesses are trying to achieve.
Governance, Risk and Compliance	The introduction of AI requires governance, risk assessment and compliance to be taken into consideration. Examples include AI Strategy, Responsible AI and Policies. Ensure we deliver AI to country and regional laws. e.g. EU AI Act. How do we manage Agent Sprawl? Dashboard to track number and usage. What level of governance is required to manage risk. E.g. internal AI Agents vs External AI Agents.
Staff and Training	Users will require staff and training to understand how to use the AI Agents. Discuss about how the AI Agents are not going to take over jobs and they are being used to assist and support and do the boring tasks. Developers need to receive training and understand how they can deliver value using Generative AI and Agents.
Management of Content	AI Agents rely on good quality content and so making sure content is well managed is key. Additionally, ensuring that content is secure, and people have access to only the content they should have through AI.
Business Process	In order to understand where AI Agents can be introduced into Business Processes they need to be digitized and well understood.
Customization and Development	The processes to design, build and deliver solutions are key. Organizations need to define how they deliver these tools and solutions. Where should solutions live? Do you have the extensibility points in place? APIs? Open API Specifications?

Maturity Model Competencies – Cognitive Business

Responsible AI (RAI)

Awareness of AI

How do you know AI created the content?

Maturity Model Competencies – Governance, Risk and Compliance

AI Strategy and Policy

Responsible AI (RAI)

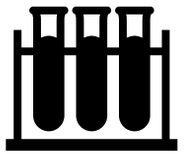
Management of Agents

Risk Appetite – Internal Agents? External Agents?

Maturity Model Competencies – Governance, Risk and Compliance

What content can Agents access?

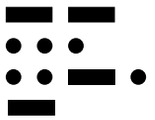
Reporting – feedback and usage



Security and Testing Policy

Maturity Model Competencies – Staff and Training

Understanding the role of Agents in the Modern Workplace.



How to write prompts, use them, identify an opportunity

Developer Training

Maturity Model Competencies – Management of Content

Clean Data is essential for AI Agent performance.

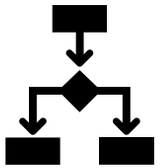
Archive out of date documents are out of scope.

Data retention policies

Security - protection from oversharing.

Maturity Model Competencies – Business Process

You have to have the process and it is documented first.



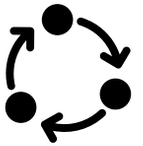
Ideally, you have a digital process to evolve.

Human in the loop.

Maturity Model Competencies – Customization and Development

Should you build?

Good development practices.

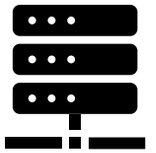


Dev Ops for continuous delivery and improvement.

Extensibility hooks for the Agent to use.

Maturity Model Competencies – Customization and Development

APIs, APIs that are described by Open API Specification



How do solutions move from Dev, Test, UAT and Production?

Responsible AI - Testing Strategy – Red teaming

Resources

Introducing Microsoft Copilot actions, new agents, and tools to empower IT| Microsoft 365 Blog

Use the Copilot Studio Agent Builder to Build Agents | Microsoft Learn

What is Azure AI Agent Service? - Azure AI services | Microsoft Learn

Copilot Connection Podcast

Ep 27 - Being responsible with Chris Huntingford

Thank you

Next MM4M365 monthly call

- **April 15 – 10 ET / 7 PT**
- *Third Tuesday of every month*
- https://aka.ms/mm4m365/invite

Take the Maturity Model Self-Assessment

- Fill out the Maturity Model Survey: https://symp.info/MM4M365Survey

Stay in touch

- Discussions in Github: https://symp.info/MM4M365Discussion
- YouTube: https://symp.info/MM4M365Videos
- Slide decks: https://symp.info/MM4M365Slides
- LinkedIn group: Maturity Model for Microsoft 365 Community
- Twitter/X: @M365Maturity | @M365CommDocs | #MM4M365