

# Maturity Model for Microsoft 365 Practitioners

November 2025

## Practical Scenario: Copilot Adoption Level 300

🌟 Guest star 🌟 Pia Langenkrans

### Current Core Team

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Simon Doy  
Simon Hudson  
Sharon Weaver  
Pia Langenkrans  
Mats Warnolf

Sympmarc Consulting | @sympmarc  
iThink 365 | @simondoy (.bsky.social)  
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### Emeriti

Emily Mancini, Left Uncharted | @eemancini

*Initiative started by Sadie [Van Buren] Gilronan as the SharePoint Maturity Model in 2010*



# Agenda

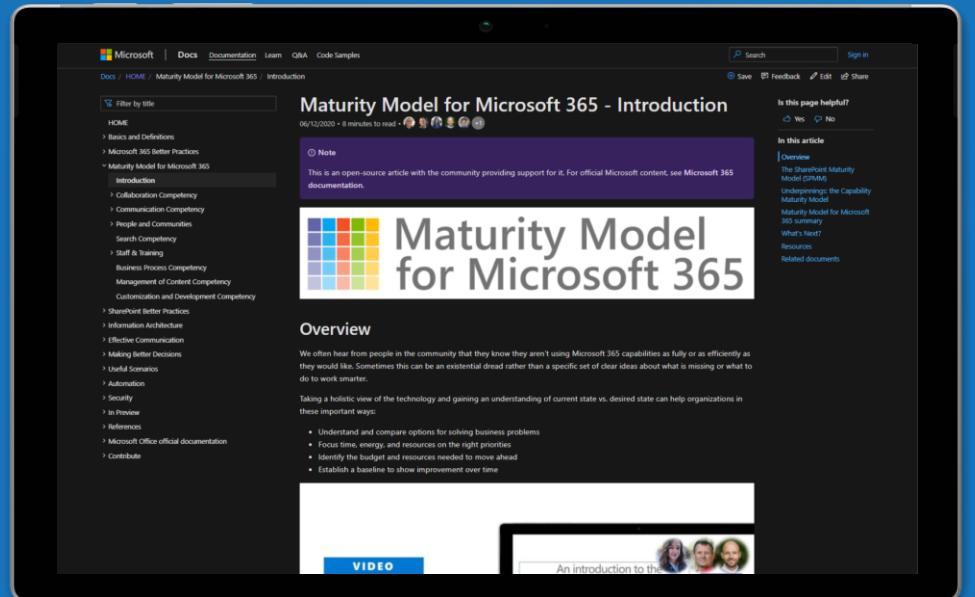
Practitioner & Maturity Model overview

- Artifacts and Updates
- Purpose

Shout-out & Picture Time  
**(Together Mode!)**

Contribute

The main event



The screenshot shows the Microsoft Docs interface for the 'Maturity Model for Microsoft 365 - Introduction' article. The page includes a sidebar with navigation links like 'HOME', 'Basic and Definitions', 'Microsoft 365 Better Practices', 'Maturity Model for Microsoft 365', 'Collaboration Competency', 'Communication Competency', 'People and Communities', 'Search Competency', 'Skills & Training', 'Business Process Competency', 'Management of Content Competency', 'Customization and Development Competency', 'SharePoint Better Practices', 'Information Architecture', 'Effective Communication', 'Making Better Decisions', 'Useful Scenarios', 'Automation', 'Security', 'In Progress', 'References', and 'Microsoft Office official documentation'. The main content area features a large title 'Maturity Model for Microsoft 365' with a grid icon, followed by sections for 'Overview', 'Note', and 'Is this page helpful?'. A video player at the bottom shows a thumbnail for 'An introduction to the MM4M365 model'.

<https://learn.microsoft.com/en-us/microsoft-365/community/index-mm4m365>  
or <https://symp.info/MM4M365>





# Reminders

**Join us every month!**

Download the recurring calendar series

<https://aka.ms/mm4m365/invite>

Global Microsoft 365 & Power Platform Meetup

<https://www.meetup.com/global-microsoft-365-dev-meetup/events/>



# Purpose and articles on Microsoft Learn

## Artifacts

### 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

### Published competencies

AI & Cognitive Business

Business Process

Collaboration

Communication

Customization & Development

Employee Experience

Governance, Risk & Compliance

Infrastructure

Management of Content

People & Communities

Search

Staff & Training

### Practical Scenarios

Microsoft 365 Service Change Management

Servicing Microsoft 365 Apps

Servicing Health Management

Enhancing Brand Management

Knowledge Management

### Tools

Running a MM4M365 workshop

Practitioner meeting recordings

### In progress competencies

Data & Analytics

Security

### Supporting articles

Search

Communication

### How to elevate...

Collaboration

Communication

People & Communities

Staff & Training

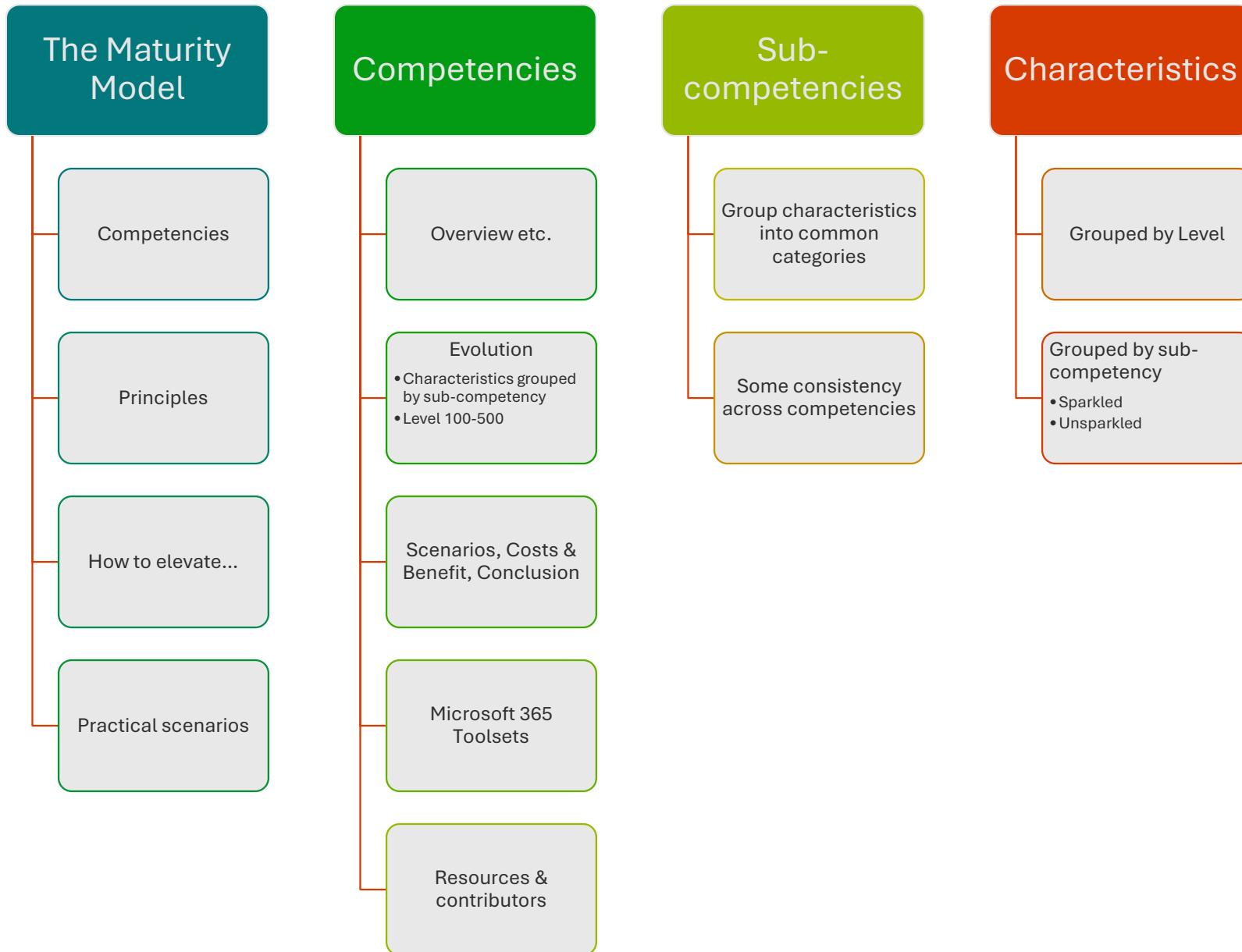
Governance, Risk and Compliance

## M365 Community Docs

<https://aka.ms/m365-community-docs>



# Artefacts, structure, and scope



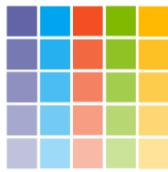
Business capability  
(Competency)

Business activities  
(Scenarios)

Technologies (Microsoft 365 Toolsets)

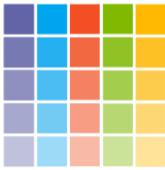
Business Functions

Markets



# MM4M365 provides benchmarks to measure your organization

Maturity Level	Description/characteristics	Intent
<b>Level 500 Optimizing</b>	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”
<b>Level 400 Predictable</b>	Productive, interactive, responsive, enhanced, effective, adaptable, quality	“Let’s make things even better by measuring, analyzing and taking actions to improve based on that”
<b>Level 300 Defined</b>	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”
<b>Level 200 Managed</b>	Routine, legacy, fire-fighting, variable, personally managed	“We should ensure everyone knows what they should be doing”
<b>Level 100 Initial</b>	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>



### Run a MM4M365 workshop

- <https://symp.info/MM4M365Workshop>

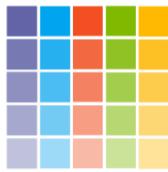
### Purpose

#### 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
- Share anecdotes and success stories
- Map technology, maturity level & competencies
- Run workshops



# 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: Enhancing Brand Management	Security Culture	Process Improvement Practical Scenario / AMA
★ Pia Langenkranz ★	★ Core Team ★	★ Simon Doy ★	★ Simon Hudson ★	★ Mats Warnolf ★	★ Carol Zollinger ★

July 15	August 19	September 16	October 21	November 18	December 16
Summer break	Summer break	Business Process & Search Competency Update	Revisiting the Communications Competency	Practical Scenario: Copilot Adoption Level 300	Winter break
None	None	★ Simon Hudson ★	★ Tara Saylor ★	★ Pia Langenkranz ★	None



# Upcoming topics in 2026

January 20	February 17	March 17	April 21	May 19	June 16
Maturity Model for Microsoft 365 Agent	TBD	Security Competency	TBD	TBD	TBD
★ Simon Doy ★			★ Mats Warnolf ★		

July 21	August 18	September 15	October 20	November 17	December 15
<i>Summer break</i>	<i>Summer break</i>	TBD	TBD	TBD	<i>Winter break</i>
None	None				None



# What we are working on

Governance Risk  
and Compliance

- Updated

Security Competency

- In process

Management of  
Content review

- In process

Knowledge  
Management  
Practical Scenario

- Ready to publish

Data Analytics  
Competency

- Seeking SME

## NEXT SESSION

January 20 at 10am ET / 7am PT

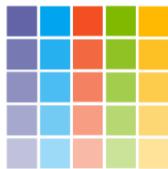
## Maturity Model for Microsoft 365 Agent

*Third Tuesday of every month*

<https://aka.ms/mm4m365/invite>

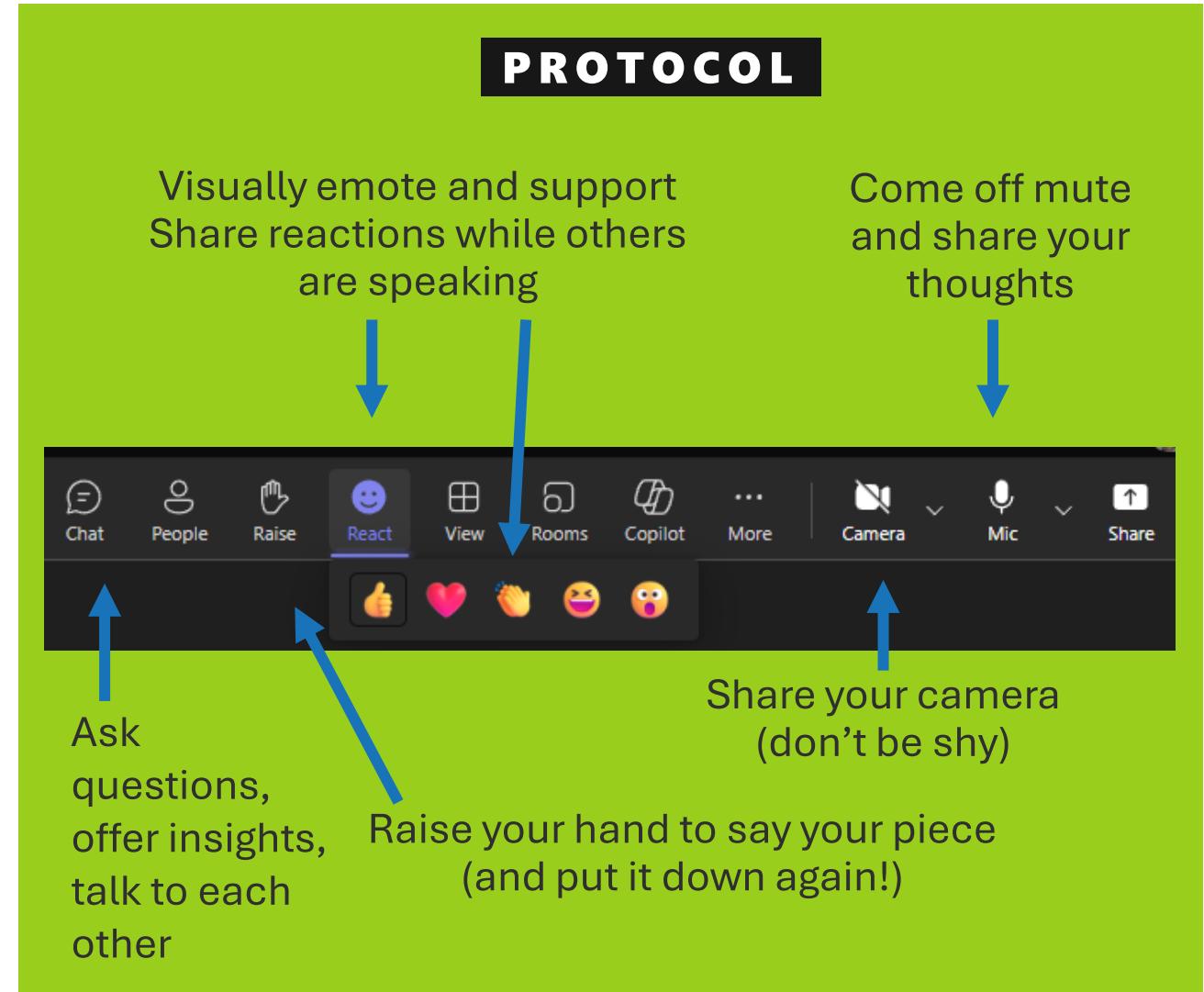
The screenshot shows a website with a blue header bar. On the left, there's a logo for "PnP TRAINING" and the text "Sharing is Caring". On the right, there's a search bar and a GitHub icon with the text "GitHub 21 Stars · 108 Forks". Below the header, there's a navigation menu with "Sharing is Caring", "Home", and "Contribution Guidance". A large blue banner in the center says "PnP SHARING IS CARING". Below it, the text "Thank you, October attendees!" is displayed. There are two teal heart icons, one on each side of the text. To the right of the text, there's a "Table of contents" section with links to "PnP Contribution Guidance & Assistance" and "PnP Contribution Challenge Rewards". The main content area lists the names of the attendees in three columns. The names listed are:

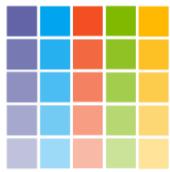
Aashish Khamkar	Diego Domingos da Silva	Kate Watson
Alberto Gutierrez Perez	Dishant Gosalia	Kathryn Dickerson
Alexánder Meisel Roca	Dominic Irrcher	Kausar
Artur	Dustin Smith	Kelly Bearne
Ashar Khan	Elena Tekin	Kumar P Kiran
Athena Depper	Elijah Angelman	Lance Yoder
Braden Fase	Emma Devine	Laurn Haynie
Carol J Shahan	Ethan Harrison	Leru Xu
Carol Zollinger	Ferrell Carr	Mack Butzen
Clément Betacorne	Giacomo Pozzoni	Marc André Schröder-Zhou
Craig Fischer	Giovanny Jimenez	Marc D Anderson
Cristian Vulpe	Gregory S. Burns	Mark Chilenski
Daniel Machado Bessa	Gregory Zelfond	Mark Morris
Dave Kodjo	Gretchen Kim	Martin Schmucker
David Cross	Guido Zambarda	Mats Warnolf
David J. Rosenthal	Ian Tweedie	Matt Brinkhoff
David Neeck	Iqbal Nadiadi	Michael Blumenthal
David Sibert	James Aitken	Naim Murati
David Warner	Jeremiah Werner	Nick Stillings
Deb Walther	John Carter	Patrick de Lanoy



# The Main Event

## Practical Scenario: Copilot Adoption Level 300





# What We Want: The Benefits Everyone Is Talking About

## Business Transformation (The Real Prize)

- Process Optimization - 30-50% cycle time reduction
- Customization & Development Democratized (Copilot Studio + Power Platform)
- Agents as Workforce - recruitment, sales, support agents 24/7
- Competitive Velocity - idea to implementation in weeks
- Strategic Capacity - humans focus on judgment, AI handles routine

## TIER 1: Individual Productivity (The Gateway Drug)

- Meeting Intelligence, Email Mastery, Document Creation
- Data Analysis, Knowledge Discovery
- Time savings: 4-6 hours/week

Reference: AvePoint 2025 AI Report -  
75% of people already use AI at work  
[Artificial Intelligence Report 2025 | AvePoint #ShiftHappens Insights](#)



# Where Most Organizations Are Today - Level 200

- Champions Program - enthusiastic volunteers testing and sharing
- Selective Licensing - power users and early adopters have access
- Experimentation Culture - people trying things, sharing tips
- IT Innovation Project - ongoing AI/automation experimentation
- AI Policy Exists - Legal/IT created guidelines
- Some Training - Lunch & learns, online resources
- Usage Metrics - tracking adoption rates
- Executive Awareness - leadership knows we're doing AI things

**If this looks like your organization - GOOD.**

You should feel good about this.  
This is Level 200.



...



But....



# The Truth About Level 200: It Feels Like Success Until...

## Phase 1 (Months 1-3): The Honeymoon

- Champions love it, cool demos, metrics look promising

## Phase 2 (Months 4-8): The Plateau

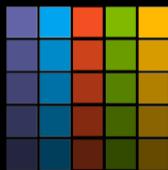
- Adoption stuck at 20-30%, champions can't scale
- 88.3% of organizations still in pilot mode

## Phase 3 (Months 9+): The Problems

- Quality issues, champion burnout, security near-misses
- Budget questions: 'Why are we paying for this?'
- Best people leaving for companies 'doing AI right'

**Level 200 feels like you're moving forward.**

But you're actually building technical and organizational debt.



# Level 200 Feels Like Success. That's Why It's Lethal.

**Level 200 is a STEPPING STONE, not a destination.**

**If you stop here and get comfortable, you will kill your business.**

## The False Confidence Problem:

90.6% believe they have 'effective IM programs'

But: Few have data classification and incident prevention

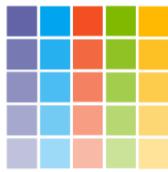
Result: Dangerous overconfidence



## Why Level 200 is Most Dangerous:

1. You've invested enough to hurt (\$500K-\$2M/year)
  - 81.9% expect ROI in 12 months
  - Reality: 85.7% slowed rollouts - delays of 6-12 months
2. Building technical debt at AI speed (Data up 25% YoY)
3. Competitors moving to 300 while you're comfortable
4. Your best people will leave

**It's a Trap!**



# The Real Consequences of Staying at Level 200

## PEOPLE RISKS



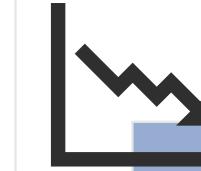
- Champion Burnout: 12-18 months
- Hero Dependency: Usage drops 60% when out
- Talent Drain: Best leave for competitors
- Two-Tier Workforce: Those with AI and those without - Culture fractures

## QUALITY & RISK

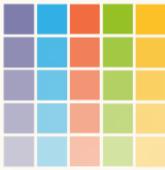


- **Air Canada:** AI hallucinated policy, court said "honor it anyway" - legal liability established
- **NYC Chatbot:** Told landlords to break discrimination laws - kept online with disclaimer
- **Deloitte:** \$440K gov report with fake citations - credibility destroyed
- **Zero-Click Attack:** EchoLeak stole Copilot data by just sending email (75.1% had AI security incidents)

## BUSINESS IMPACT



- No Measurable ROI: 81.9% expect ROI in 12 months
- Reality: 68.7% cite output issues, delays 6-12 months
- Process Chaos Amplified: Customer service gives inconsistent answers faster
- Information Chaos: Copilot can't find what humans can't find
- Users lose trust



# Before We Go Further: Thank You, and It's Going to Be Okay

## We Need to Acknowledge:

- Corona ? remote overnight
- Held together with duct tape
- Then AI at breakneck speed
- We're ALL exhausted

Every org has:

- McGyver solutions
- Skeletons in the closet
- Workarounds that became 'the process'
- People who've been heroes too long

## What We're NOT Doing:

- ✗ Looking for who's responsible
- ✗ Pointing fingers
- ✗ Letting toxic managers derail

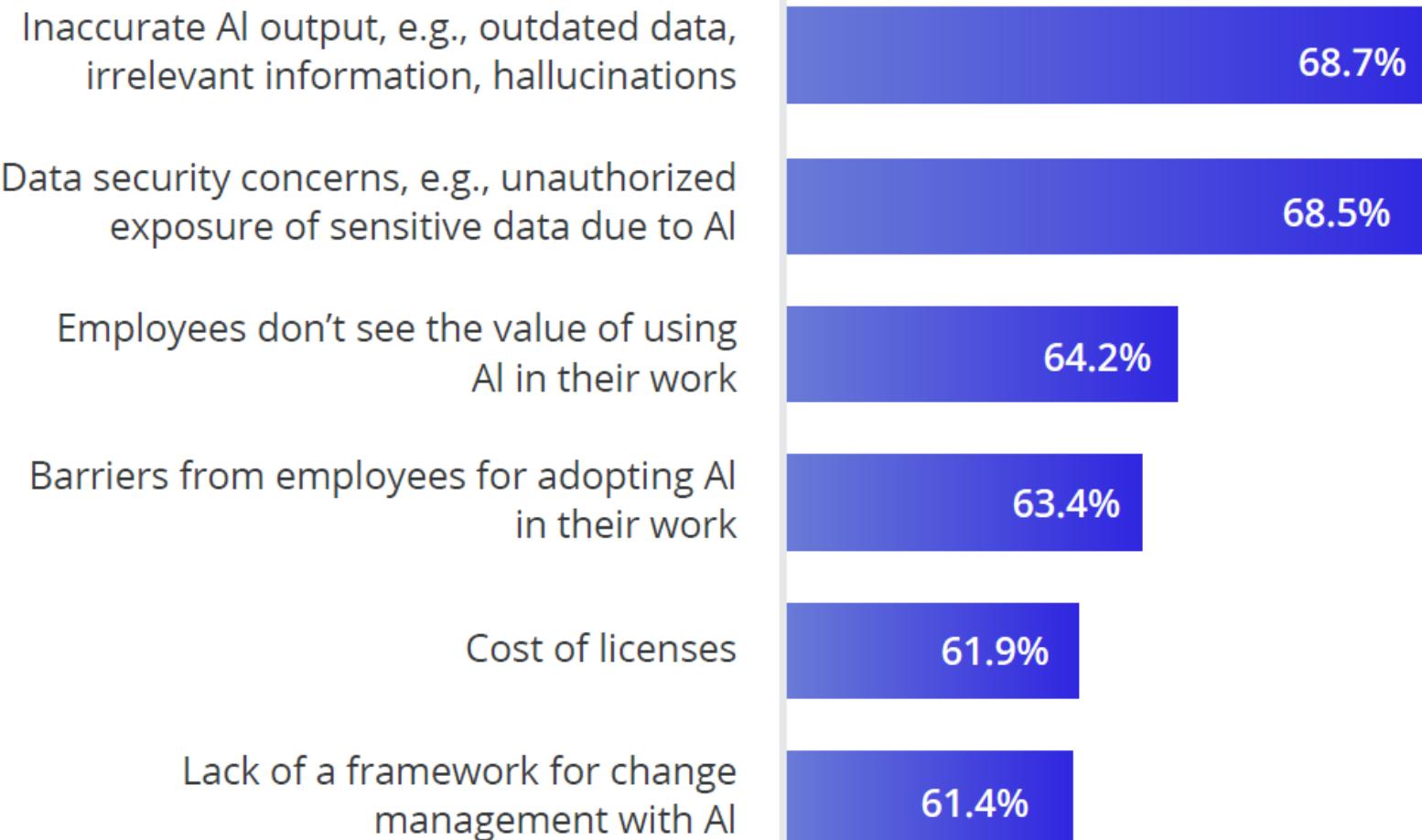
## What We ARE Doing:

- ❤️ Saying THANK YOU
- ❤️ Hugging it out, moving forward
- ❤️ Psychological safety - no blame
- ❤️ Making mistakes TOGETHER



# It's Not (just) Change Management - It's Your Foundation

## Top Blockers to AI Rollout:





# Why Level 200 Fails: The Missing Foundation

## Copilot/AI implementation

### Business Processes @ 300

- Documented, owned, measured, improved
- Ready for automation - clear enough that agents can execute

### Staff & Training @ 300

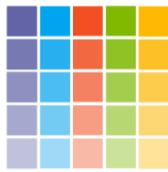
- Structured programs (HR-led, not ad-hoc)
- Steered competency frameworks with mandatory baselines
- Manager AI competency

### Management of Content & Information Architecture @ 300

- Structured, findable, governed, AI-optimized
- Legacy cleaned - can't stay at 100

### THE URGENCY:

- Data volumes up 25% year-over-year
  - AI expected to create 40% of new data next year
  - Bad IA compounds at AI speed
- All three pillars must reach 300, or AI becomes a liability multiplier.



# Luck favors the prepared

**Business Processes @ 300**

**Staff & Training @ 300**

**Management of Content & Information Architecture @ 300**

## From Level 200 (Personally Managed) to Level 300 (Defined):

- **Business ownership assigned**
  - Move from "whoever knows how to do this" to clear business process owners with accountability for performance and improvement
- **Documented systematically**
  - Transition from tribal knowledge and individual documentation to standardized, accessible process documentation across the organization
- **Measured with clear metrics**
  - Establish baseline measurements and KPIs so you know what "good" looks like and can track improvement (not just tracking activity, but outcomes)
- **Improvement mechanisms in place**
  - Create formal processes for capturing issues, evaluating changes, and implementing improvements rather than just firefighting
- **Clear enough for automation**
  - Document processes with sufficient precision that AI agents could reliably execute them - this is the critical test for Level 300 in the AI era

**The key shift:** From "Sam knows how to do this" to "The process is owned, documented, measured, and ready for systematic execution or automation."



# Luck favors the prepared

**Business Processes @ 300**

**Staff & Training @ 300**

**Management of Content & Information Architecture @ 300**

**From Level 200 (Ad-hoc/Volunteer) to Level 300 (Structured/Systematic):**

**HR owns the program, evaluates managers**

- HR-led learning & development programs where managers are evaluated on their teams' competency development, not individual assessments - this creates management accountability for adoption

**Manager AI competency FIRST, no exceptions**

- All managers master AI assistant competency before their teams - managers who think they're "too important" for training are making themselves obsolete since they'll need to manage AI agents next

**Champions appointed by managers, not volunteers**

- Appointed champions (max 4 hours/month with manager approval) who learn to a HIGH degree

**Competency frameworks with mandatory baselines**

- Structured programs defining role-specific requirements and minimum competencies - psychological safety with clear standards, professional delivery, and management-led adoption through example

**The key shift:** From "enthusiastic volunteers run training" to "managers are accountable for team competency, appointed champions become business process + AI integration experts, and systematic development ensures everyone reaches baseline - especially leadership who must manage agents next."



# Luck favors the prepared

**Business Processes @ 300**

**Staff & Training @ 300**

**Management of Content & Information Architecture @ 300**

**From Level 200 (Tribal Knowledge/Individual Folders) to Level 300 (Structured/Governed):**

## **Metadata taxonomy standardized**

- Company-wide metadata scheme with required vs. optional fields, controlled vocabularies, and governance for evolution - this is what makes content findable by AI, not folder structures

## **Legacy cleanup begins NOW**

- Start identifying and removing ROT (Redundant, Obsolete, Trivial) content systematically

## **Structured, findable, governed**

- Documented information architecture where content can be discovered through metadata and search, not tribal knowledge of folder locations

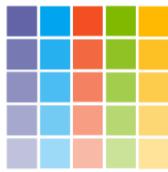
## **AI-optimized for retrieval**

- Content is classified, tagged, and structured so AI agents can reliably find and use it

## **Lifecycle management policies active**

- Retention, archiving, and disposition policies are defined and enforced automatically based on content type and metadata - not manual cleanup projects when storage costs spike

**The key shift:** From "we migrated our file server chaos to SharePoint" to "our information architecture is designed for AI-era discovery, with systematic classification, governed metadata, and automated lifecycle management."



# Stop Measuring the Wrong Things

What matters



## Level 200 Metrics

- Copilot usage rates
- Number of prompts
- Active users
- License utilization



Lame



## Level 300 Metrics

- Process cycle time: 'Customer onboarding: 14 days → 6 days'
- Quality improvement: 'Error rates: 12% → 3%'
- Customer impact: 'NPS +15 points, resolution time -40%'
- Revenue per employee: +25%

## Level 400 Metrics

- Agent output quality scores
- Agent ROI: 'Offer agent: 60% faster proposals, 20% higher win rate'



Future





# The Parallel Path

## Program

### STREAM 1 Business Process

Business process owners, Process analysts, Business architects

### STREAM 2 Staff & Training

Document, measure, prepare for automation

HR/L&D professionals, Manager development, Appointed champions

Build competency frameworks, systematic training

### STREAM 3 Information Architecture

Information architects, Records managers, Data governance specialists

Legacy cleanup, metadata, AI optimization

The streams are staffed by different people with different Expertise with the same goal - All Moving Simultaneously

- Transparent Coordination
- Shared Governance
- Cross-Stream Sync
- Common Milestones



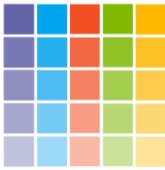
# Level 400 Sneak Peek: Agents Need Managers

## Managing people

## Managing AI Agents

<b>Work Description</b> Define roles, responsibilities, expected outcomes	≈	<b>Tasks &amp; Scope</b> Define what the agent does, business process it executes
<b>Instructions &amp; Training</b> How-to's, procedures, standards to follow	≈	<b>Prompts &amp; Configuration</b> Instructions, context, guardrails, how to execute process
<b>Performance Reviews</b> Evaluate quality, accuracy, efficiency of work	≈	<b>Quality Control &amp; KPIs</b> Monitor outputs, measure accuracy, track business outcomes
<b>A Manager</b> Updates processes, develops capability, ensures outcomes	≈	<b>A Business Process Owner</b> Updates agent instructions, refines processes, ensures value

**At Level 400:** AI agents aren't IT's problem to manage—they're business resources that need business owners who understand the process, update the instructions, and drive continuous improvement.



# Thank you

Next MM4M365 monthly call

**January 20 – 10 ET / 7 PT**

*Third Tuesday of every month:* <https://aka.ms/mm4m365/invite>

## Stay in touch

- Articles: <https://aka.ms/m365-community-docs>
- Newsletter: [Sign up](#)
- LinkedIn group: [Maturity Model for Microsoft 365 Community](#)
- YouTube: <http://mmvideos.m365.ms/>
- Slide decks: <https://symp.info/MM4M365Slides>
- Twitter/X: [@M365Maturity](#) | [@M365CommDocs](#) | #MM4M365
- BlueSky: [@mm4m365.org](#)

## Take the Maturity Model Self-Assessment

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





aka.ms/m365pnp





# MATURITY MODEL FOR MICROSOFT 365

PnP



## PARKER