

Maturity Model and AI Agents

Maturity Model for Microsoft 365 Practitioners

March 2025

★ Guest star ★

Simon Doy, iThink 365 | @simondoy (.bsky.social)

Current Core Team

Marc Anderson, Sympraxis Consulting | @sympmarc

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Sharon Weaver, Smarter Consulting | @sharoneweaver

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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

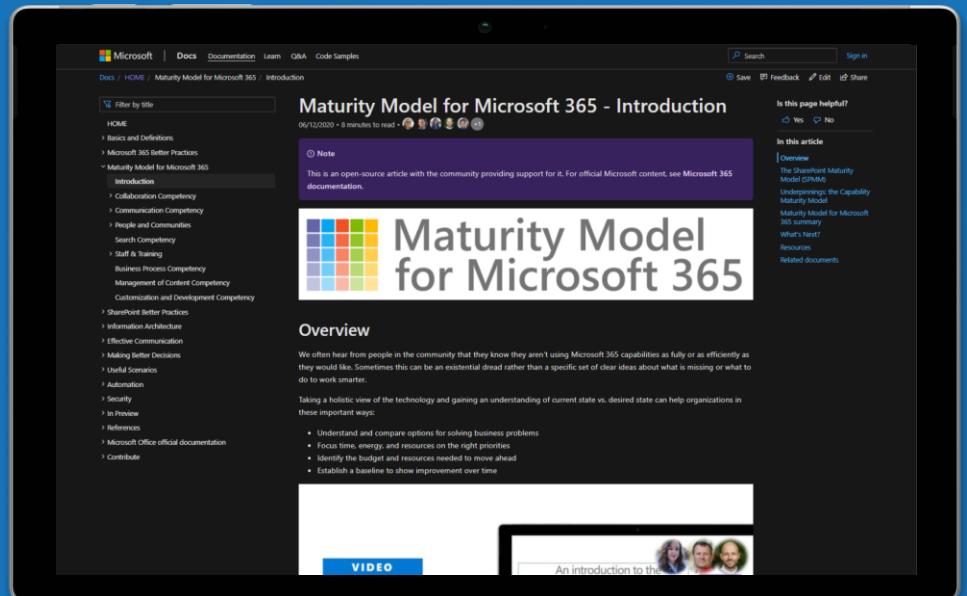
Practitioner & Maturity Model overview

- Artifacts and Updates
- Purpose

Shout-out & Picture Time
Together Mode!

Contribute

The main event



The screenshot shows the Microsoft Docs interface for the 'Maturity Model for Microsoft 365 - Introduction' article. The page title is 'Maturity Model for Microsoft 365 - Introduction'. It features a large image of a colorful bar chart with the text 'Maturity Model for Microsoft 365'. Below the image, there's an 'Overview' section with text about the maturity model and a 'VIDEO' button. The left sidebar contains a navigation menu with various categories like 'HOME', 'Basics and Definitions', 'Microsoft 365 Better Practices', 'Introduction', 'Collaboration Competency', 'Communication Competency', 'People and Communities', 'Search Competency', 'Staff & 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'.





Reminders

Join us every month!

Download the recurring calendar series:

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

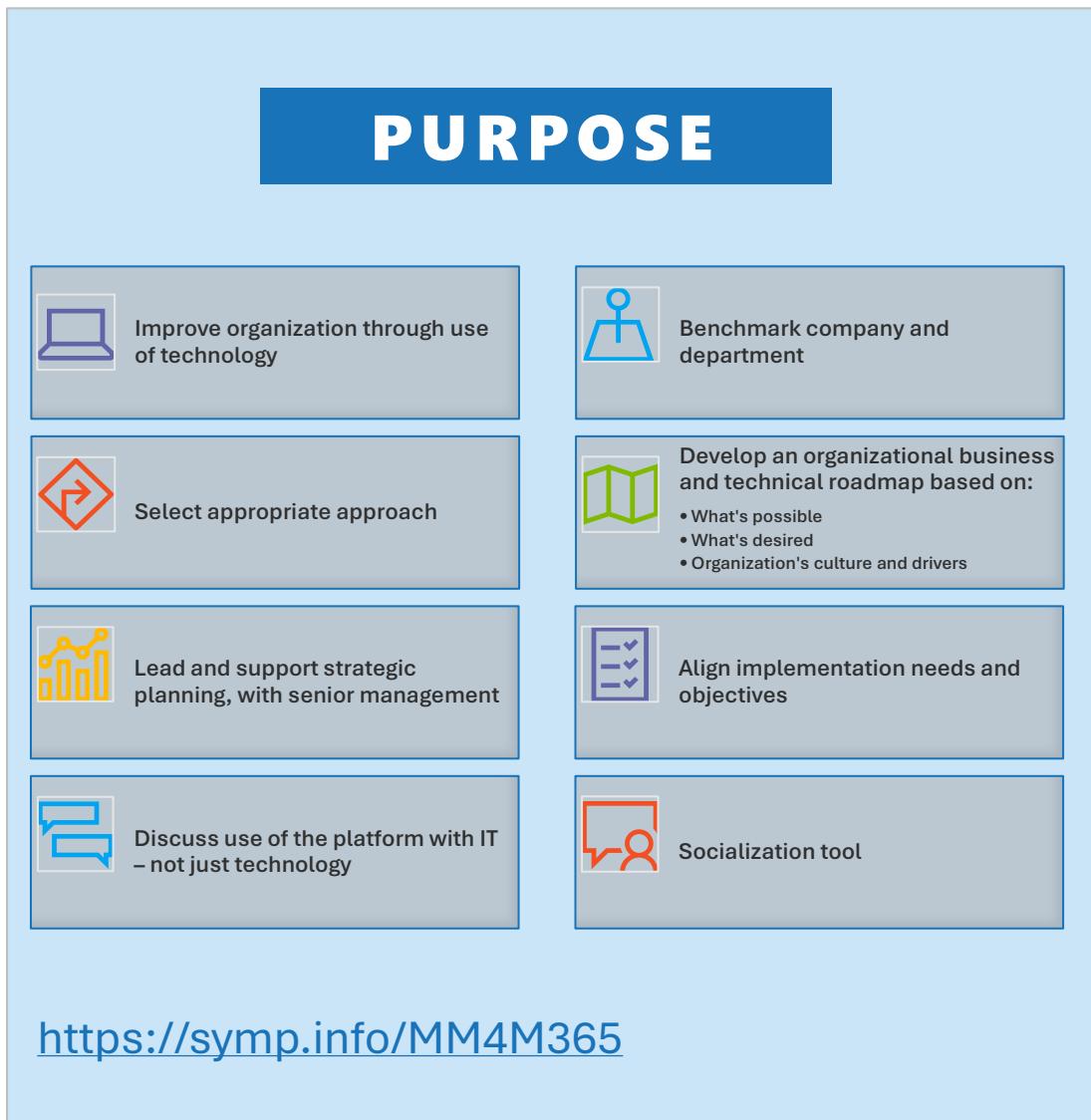
Join us via Meetup:

- [Global Microsoft 365 & Power Platform Meetup Events](#)



Purpose and articles on Microsoft Learn

Artifacts



<https://symp.info/MM4M365>

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

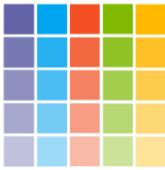
Staff & Training

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 Langenkranz ★	★ Core Team ★	★ Simon Doy ★	★ Simon Hudson ★	★ Galen Keene ★	

July 15	August 19	September 16	October 21	November 19	December 17
<i>Summer break</i>	<i>Summer break</i>				
None	None				

NEXT SESSION

April 15 at 10am ET / 7am PT

Practical Scenario on Branding

Third Tuesday of every month

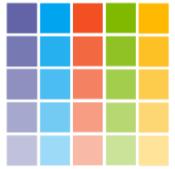
<https://aka.ms/mm4m365/invite>

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 sidebar with links like 'Sharing is Caring', 'Home', and 'Contribution Guidance'. A large blue banner in the center says 'PnP SHARING IS CARING' in white. To the left of the banner is a teal heart icon. Below the banner, the text 'Thank you, February attendees!' is displayed in a large, bold, black font. To the right of the text are two teal heart icons. The main content area lists names of attendees in three columns. The names are:

Aaron Haydon	Daniel Altieri	Joshua Meade
Aashish Khamkar	David Cross	Julie Artler
Adina Bradshaw	David Neeck	Katie Lux
Adrian Batey	David Pileggi	Kelly Bearne
Alan Flower	David Warner	Lance Yoder
Andrew Phung	Davy Stassen	Marc D Anderson
Andy Boyet	Deborah McIsaac	Martin Schmucker
Anju Gagneja	Dominic Irrcher	Matt Brinkhoff
Ashar Khan	Dominik Eickholz	Maximilian Schober
Bahareh Esfandiari	Emma Henry	med ach
Bill Sabey	Emmon Johnson	Mehdi Barati
Braden Fase	Ethan Harrison	Monika Pachera
Bryan King	Galen Keene	Nadia Guimarães
Carnegie Johnson	Giacomo Pozzoni	Narasimhan Madhavan
Carol J Shahan	Gretchen Kim	Oleg Münzer
Carol Zollinger	Heath Gieson	Oliver Menzel
Catheryn Mancarti	Ilan Ramot	Patrick Hall
Chris Clos	Iqbal Nadiadi	Pete Simpkins
Chris Gregory	Isaac Bertrand	Pia Langenkranz
Christene Costello	James Williams	Prabhu Nehru
Claudio Dodt	John Hill	Richard D. Riopel
Clément Betacorne	John Murdoch	Robert Proctor

On the far right, there's a vertical sidebar with sections for 'Table of contents', 'PnP Contribution Guidance & Assistance', 'PnP Contribution Challenge Rewards', and a list of names:

- Rosie Sparrow
- Sai
- Sam Bridegroom
- Sanford Mosby
- Sarah Morse
- Sarah Nelson
- Sascha Ortmann
- Sean Douglas
- Sebastian Fritsch
- Shanai Griffin
- Shaun Brown
- Simon Doy
- Simon Hudson
- Taylor Sand
- Terence Rabe
- Tony Graves
- Valerio Ponzo
- Van Hallman
- Venugopal Reddy
- Veronica Fair
- Wesley Alegado



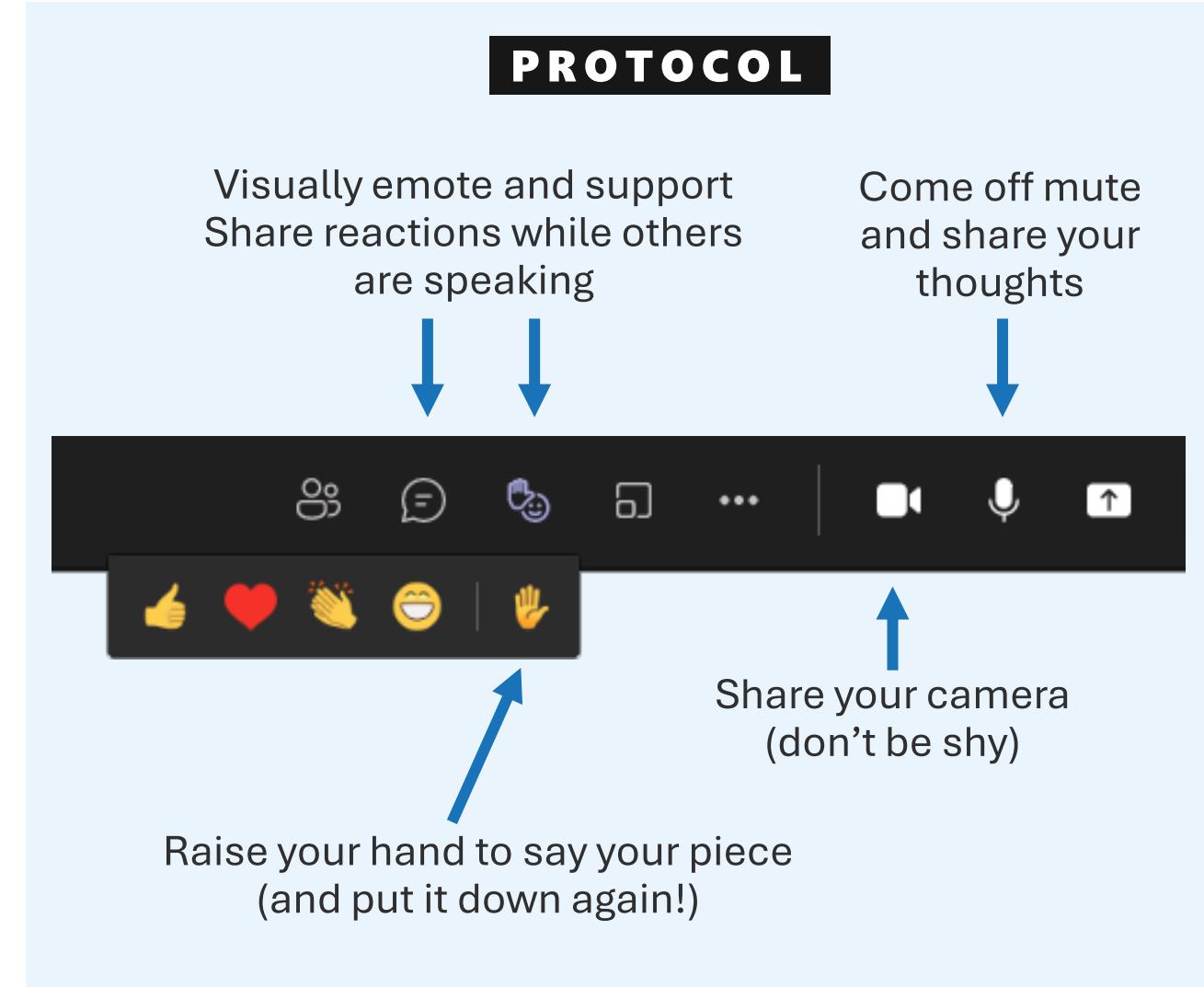
What are we working on?

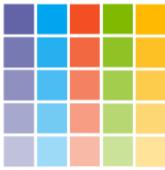
- Data Analytics Competency
- Security Competency
- Management of Content review



The Main Event

Maturity Model and AI Agents





Simon Doy



iThink³⁶⁵

Owner of iThink 365 and Solution Architect.

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

Developer, Consultant and Business Owner.



<http://www.linkedin.com/in/simondoy>



@simondoy.bsky.social

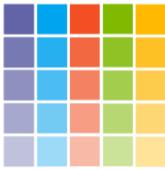
A photograph showing three people in an office environment. A woman in a light grey sweatshirt and beige pants points towards a whiteboard with her right hand. She is standing next to a man in a black t-shirt and blue jeans. Behind them, another person is partially visible. They are all looking towards the whiteboard. The background shows office cubicles and a wooden desk.

What is the purpose of this session?

Introduce AI Agents

How do you start?

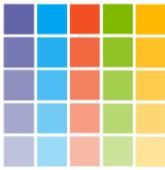
Apply Maturity Model to
your thinking and journey



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

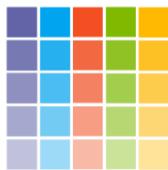
“Go and research into this organisation, Pancom and tell me the following pieces of information....”

“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...”



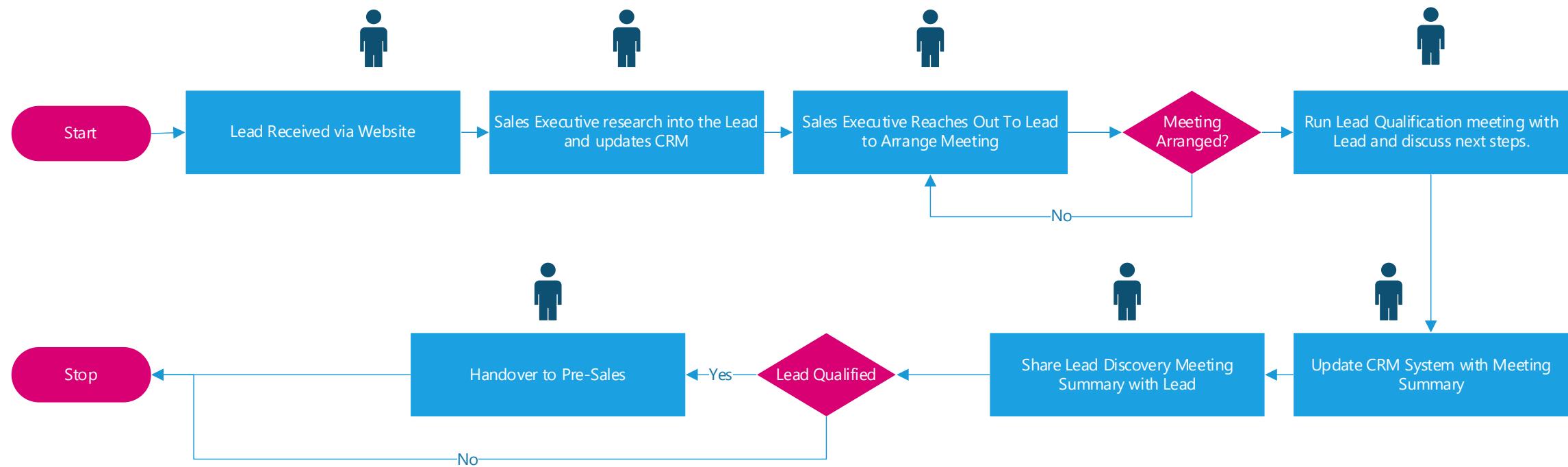


Maturity Model and AI Agents - TLDR

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.



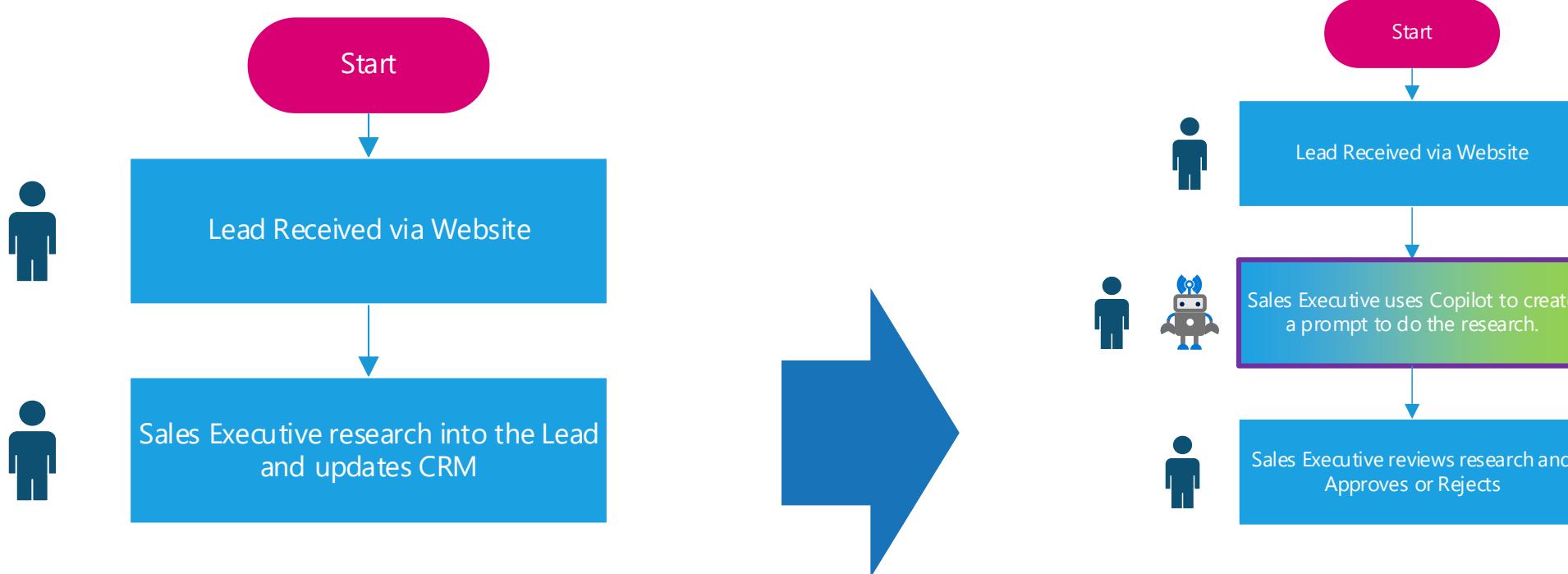
How about an example? A Sales Lead Process





How about an example?

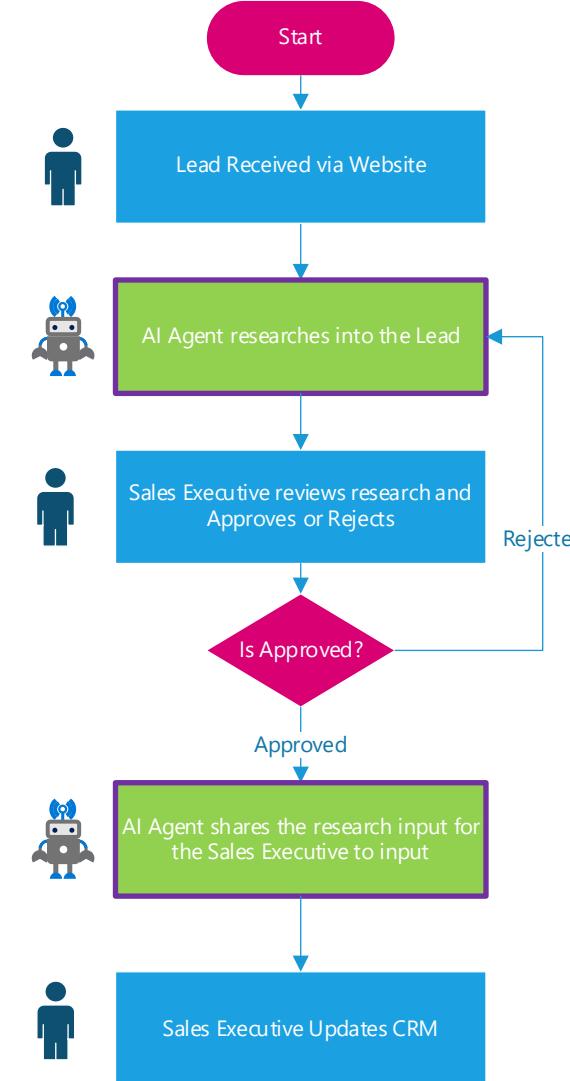
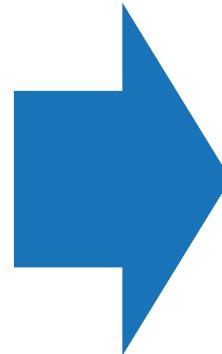
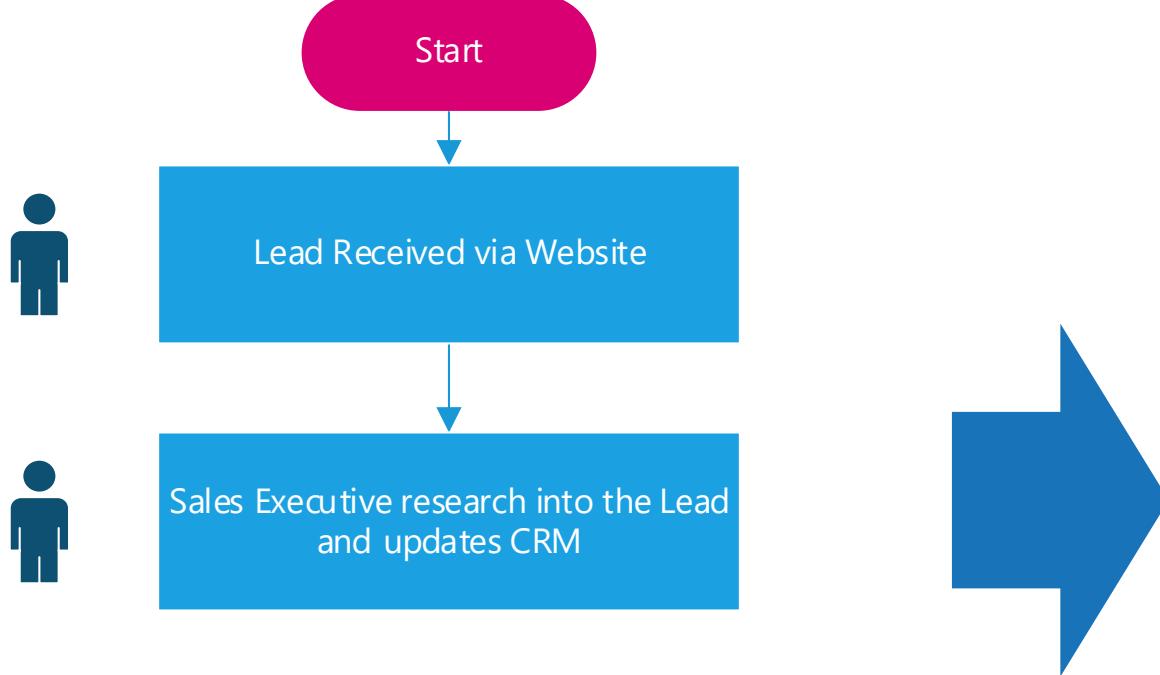
Step One: Understanding How To Use A Prompt





How about an example?

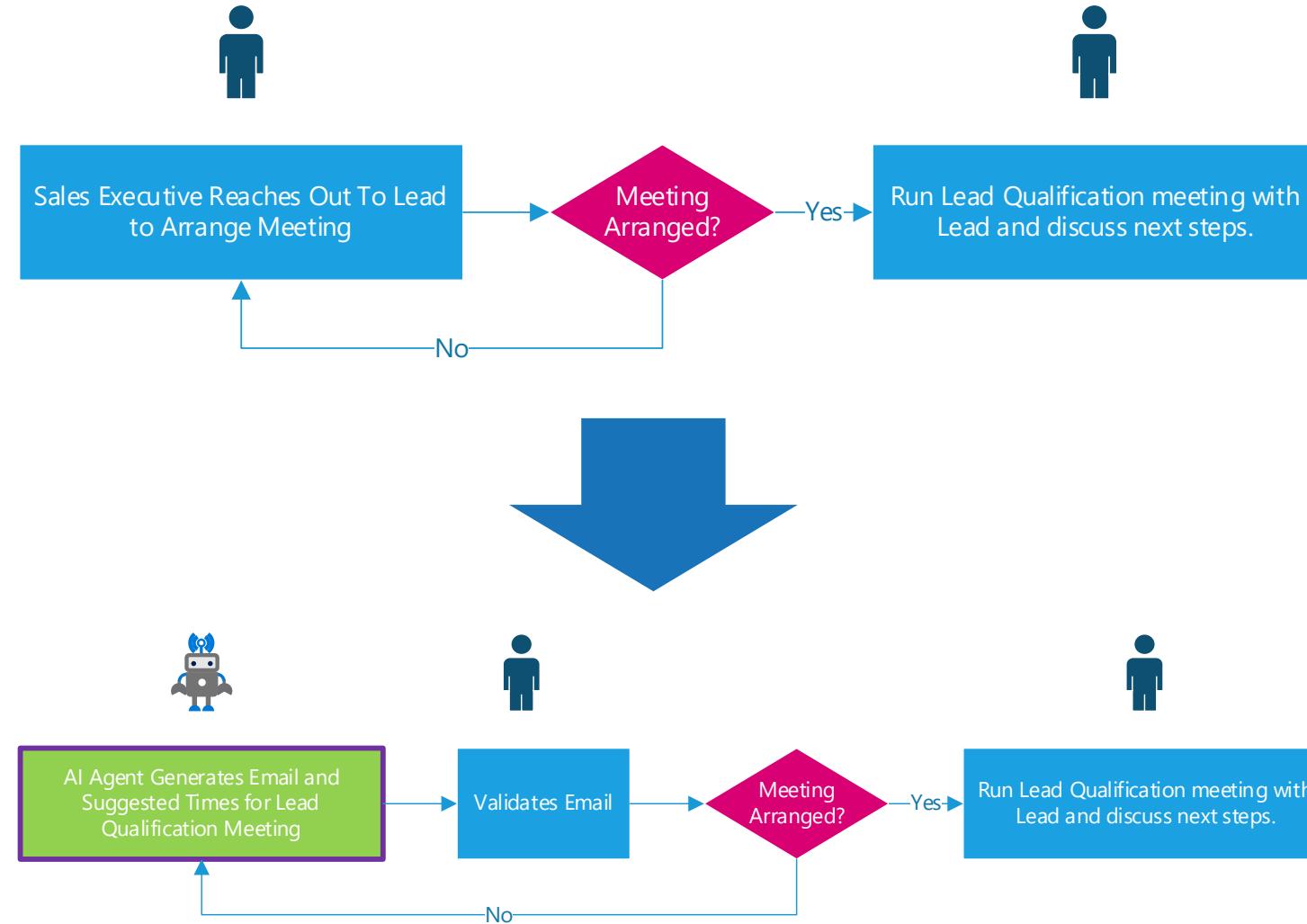
Step Two: Introduction of an Agent





How about an example?

Step Two: Add another AI Agent into the process



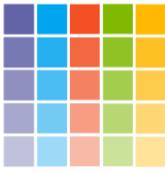


How mature do you need to be?

How do you know you are ready for AI Agents?

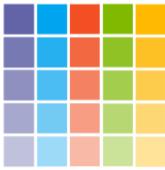
What do we need to do first?

What competencies are important to get you ready?



Maturity Model Competencies Involved in Your AI Agent Journey

Competency	Description
Cognitive Business	<p>AI awareness.</p> <p>The driver for AI Agents is everything that Cognitive Businesses are trying to achieve.</p>
Governance, Risk and Compliance	<p>The introduction of AI requires governance, risk assessment and compliance to be taken into consideration.</p> <p>Examples include AI Strategy, Responsible AI and Policies.</p> <p>Ensure we deliver AI to country and regional laws. e.g. EU AI Act.</p> <p>How do we manage Agent Sprawl? Dashboard to track number and usage.</p> <p>What level of governance is required to manage risk. E.g. internal AI Agents vs External AI Agents.</p>
Staff and Training	<p>Users will require staff and training to understand how to use the AI Agents.</p> <p>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.</p> <p>Developers need to receive training and understand how they can deliver value using Generative AI and Agents.</p>
Management of Content	<p>AI Agents rely on good quality content and so making sure content is well managed is key.</p> <p>Additionally, ensuring that content is secure, and people have access to only the content they should have through AI.</p>
Business Process	<p>In order to understand where AI Agents can be introduced into Business Processes they need to be digitized and well understood.</p>
Customization and Development	<p>The processes to design, build and deliver solutions are key.</p> <p>Organizations need to define how they deliver these tools and solutions.</p> <p>Where should solutions live?</p> <p>Do you have the extensibility points in place? APIs? Open API Specifications?</p>



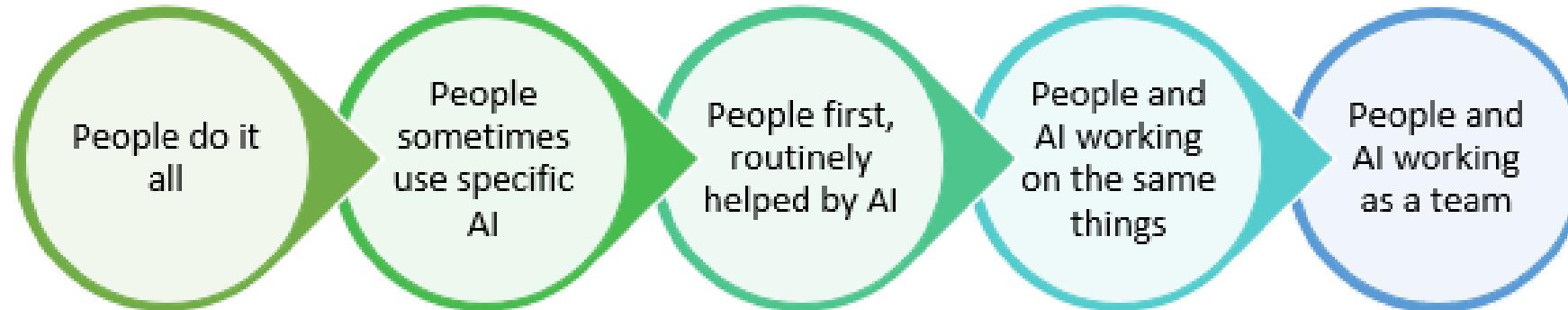
Maturity Model Competencies – Cognitive Business

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



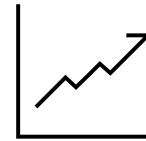
Risk Appetite – Internal
Agents? External Agents?



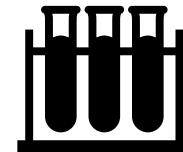
Maturity Model Competencies – Governance, Risk and Compliance



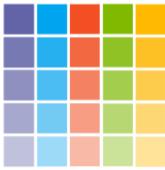
What content can Agents access?



Reporting – feedback and usage



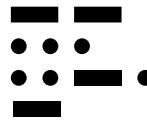
Security and Testing Policy



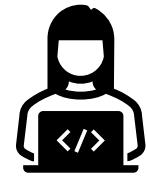
Maturity Model Competencies – Staff and Training



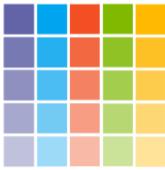
Understanding the role of Agents in the Modern Workplace.



How to write prompts, use them, identify an opportunity



Developer Training



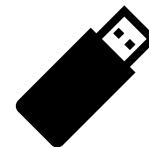
Maturity Model Competencies – Management of Content



Clean Data is essential for AI Agent performance.



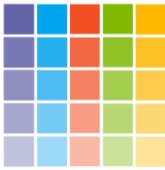
Archive out of date documents are out of scope.



Data retention policies



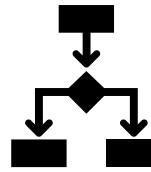
Security - protection from oversharing.



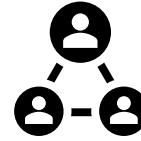
Maturity Model Competencies – Business Process



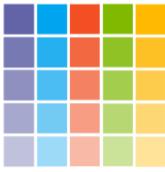
You have to have the process and it is documented first.



Ideally, you have a digital process to evolve.



Human in the loop.



Maturity Model Competencies – Customization and Development



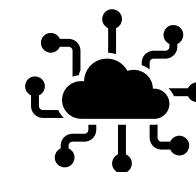
Should you build?



Good development practices.



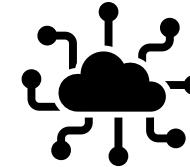
Dev Ops for continuous delivery and improvement.



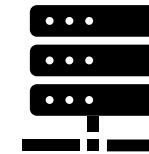
Extensibility hooks for the Agent to use.



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

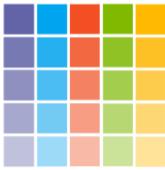
[Introducing Microsoft Copilot actions, new agents, and tools to empower IT | Microsoft 365 Blog](#)

[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





aka.ms/m365pnp

