

Maturity Model for Microsoft 365 Practitioners

June 2025

Process Improvement Practical Scenario / AMA

🌟 Guest star 🌟 Carol Zollinger

Current Core Team

Marc Anderson	Sympraxis Consulting @sympmarc
Simon Doy	iThink 365 @simondoy (.bsky.social)
Simon Hudson	Novia Works @simonjhudson (.bsky.social)
Sharon Weaver	Smarter Consulting @sharoneweaver [On hiatus]
Galen Keene	Smarter Consulting @sdkeene [On hiatus]
Pia Langenkrans	Cloud 476 @zellery_se
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

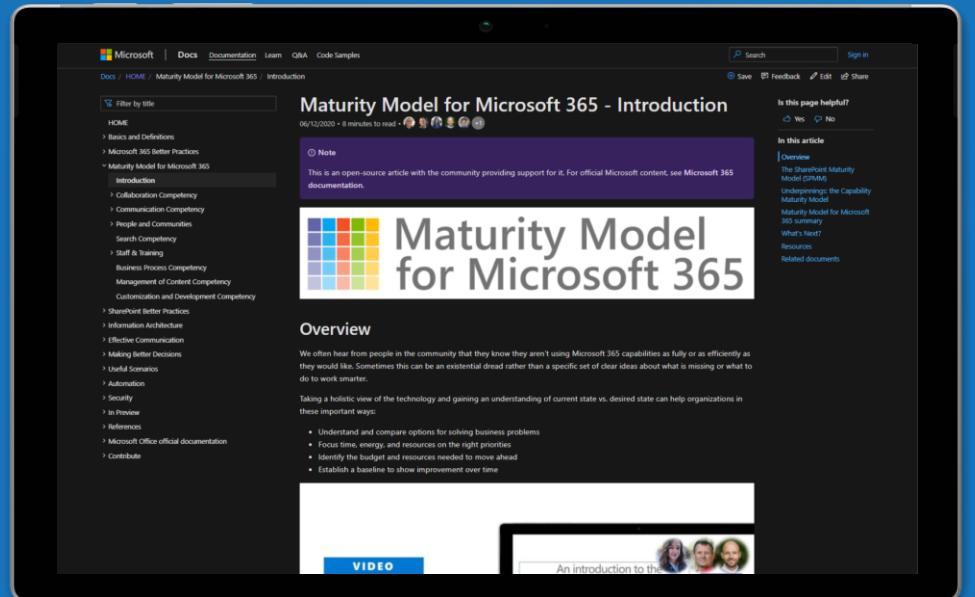
Practitioner & Maturity Model overview

- 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 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 colorful 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

Select appropriate approach

Lead and support strategic planning, with senior management

Discuss use of the platform with IT – not just technology

Benchmark company and department

Develop an organizational business and technical roadmap based on:

- What's possible
- What's desired
- Organization's culture and drivers

Align implementation needs and objectives

Socialization tool

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

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

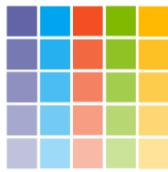
Staff & Training

Governance, Risk and Compliance



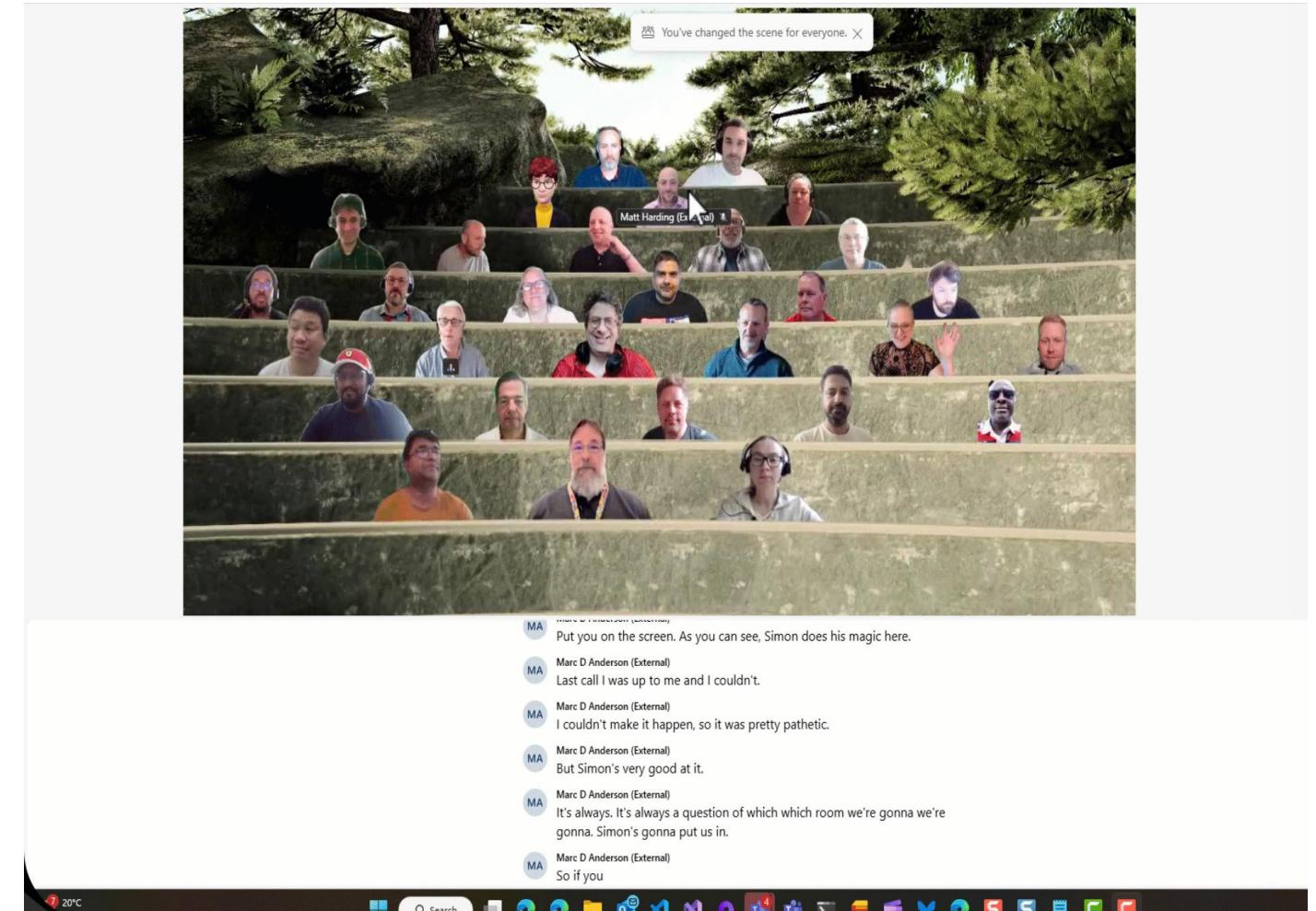
MM4M365 provides benchmarks to measure your organization

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!



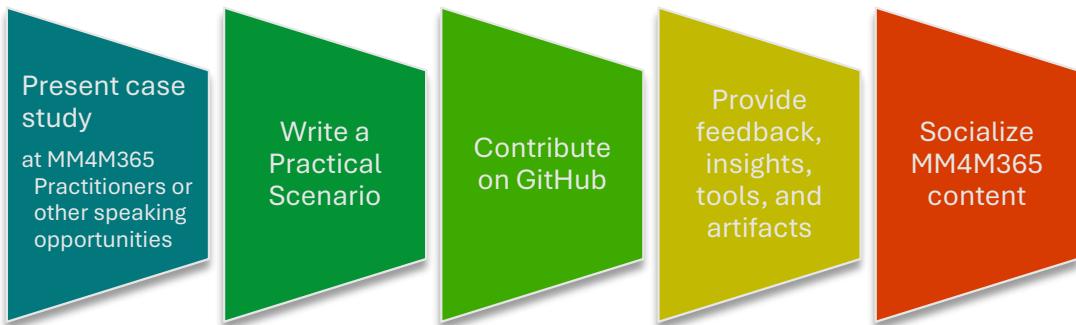


Overview

Practitioners for Maturity Model for Microsoft 365

Get Involved

<https://symp.info/SiCCommunityContentGuide>



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 19	December 17
<i>Summer break</i>	<i>Summer break</i>				
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

September 16 at 10am ET / 7am PT

How to transform into an AI-Driven Company: A Step-by-Step Guide

Third Tuesday of every month

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

The screenshot shows a website for 'PnP TRAINING' with a blue header bar. The header includes the logo 'PnP TRAINING', the title 'Sharing is Caring', a search bar, and a GitHub icon with the text 'GitHub 21 Stars · 108 Forks'. On the left, there's a sidebar with 'Sharing is Caring' and 'Home' links. The main content area features a large blue banner with the text 'PnP SHARING IS CARING' and 'Thank you, May attendees!' flanked by two teal hearts. Below this, there are three columns of names:

Column 1	Column 2	Column 3
AC	Daniela Diaz Davila	Kelly Bearne
Adrian Batey	David Cross	Konstantin C
Aleksandr Kirilin	David Neeck	Konstantin Chachanidze
Alexánder Meisel Roca	David Pileggi	Lance Yoder
Andrew Coffell	David Warner	Luke Schroeder
Andrew McCollum	Davy Stassen	Marc D Anderson
Andy Boyet	Dean	Martin Schmucker
Auden Rodriguez	Deb Walther	Mats Warnwolf
Avishek Mazumdar	Diego Domingos Da Silva	Matt Burback
Ayoola Apampa	Ed	Matt Harding
Bill Sabey	Eddie Liao	Mehdi Barati
Brad Galloway	Elena Tekin	Michael Nielsen
Braden Fase	Erik Benke	Monika Pachera
Carol J Shahan	Ferreira Alves David	Monty Evans
Carol Zollinger	Gretchen Kim	Morgan Patzwald
Chris Gregory	Hervé DORIER	Nadir Khan
Chris Schuh	Isaac Bertrand	Pankaj Gawande
Chris Stoneham	Janko Johannes Schoettl	Patrick Hall
Christene Costello	Jeremiah Werner	Paul Seifert
Clément Betacorne	Joshua Meade	Peter Paul Kirschner
Cody Streeter	Judy Walag	Pia Langenkranz
Colagio Danielle	Julie Jung	Rico Ho
Daniel Griffin	Karen E Harrington	Rivas, Ralph
Daniel Machado Bessa	Kavita Malik	Sam Bridegroom

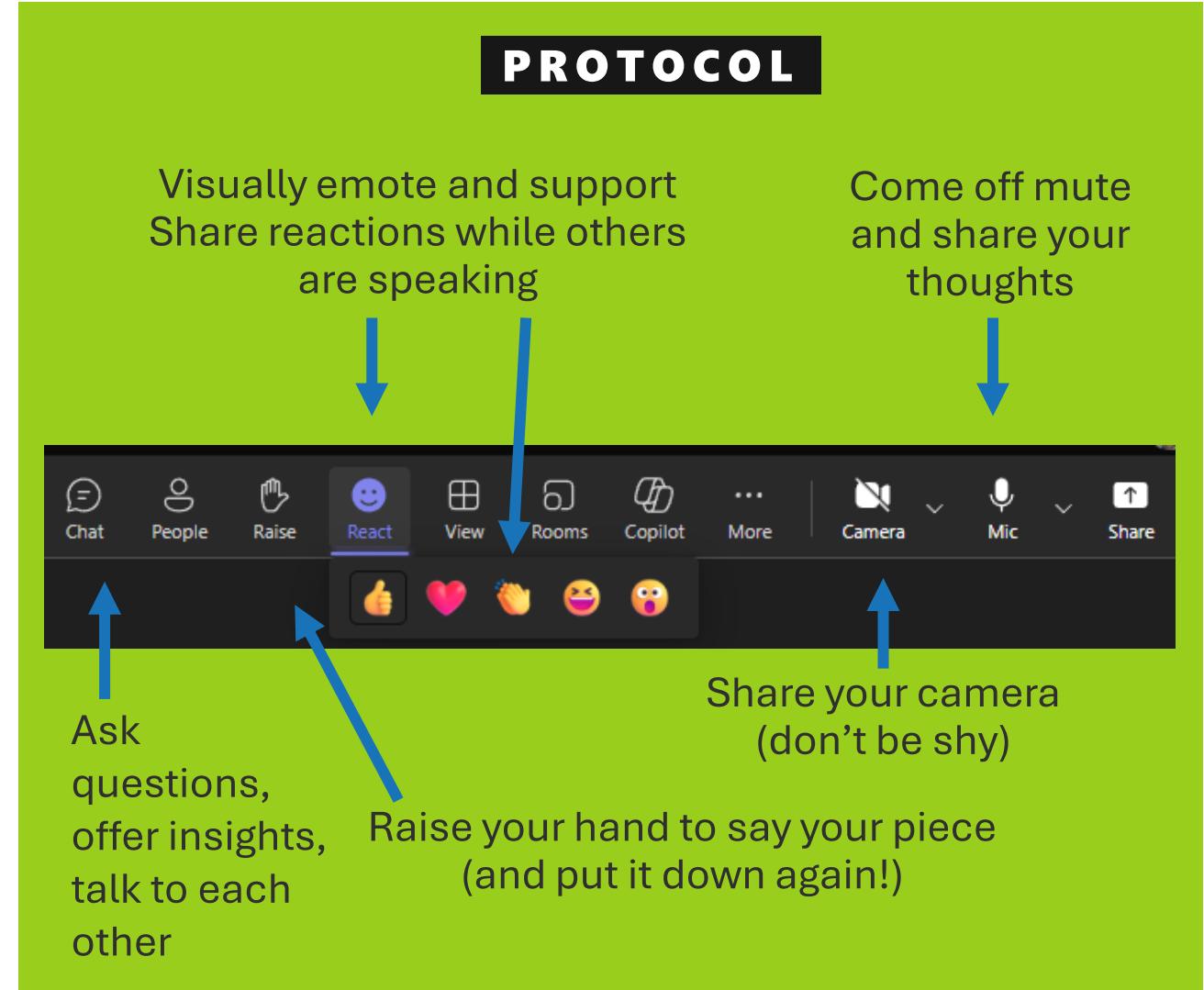
On the right side of the page, there are two columns of names:

Column 1	Column 2
Sanjiv Sharma	Yaroslav Ryaboshtan
Sarah Morse	Zac Basham
Sarah Nelson	
Shalini Jogula	
Sharad Richardet	
Shaun Brown	
Simon Doy	
Simon Hudson	
Steibl Thomas	
Sunny Joat	
Taylor Sand	
Thomas Conway	
Thomas Lindner	
Thomas Scharl	
Tony Derricott	
Tony Graves	
Vivek Jagga	



The Main Event

Process Improvement Practical Scenario / AMA

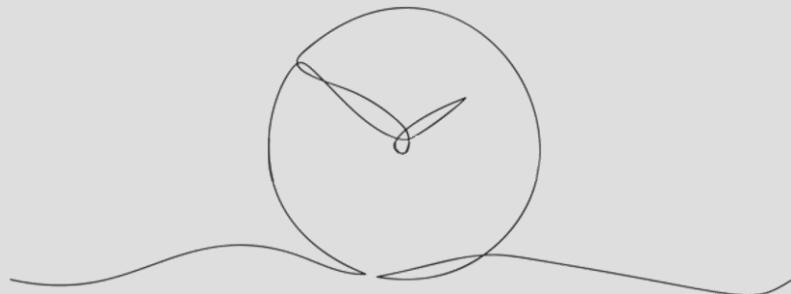




Timesheet corrections

Taking the process from 100 to 300(ish)

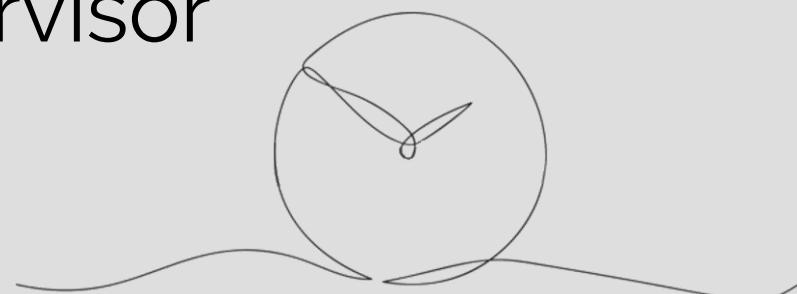
June 17, 2025





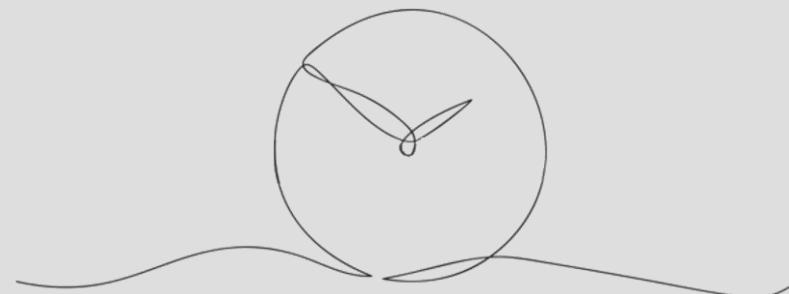
The problem

- Residential mental health agency that runs three shifts around the clock
- Direct care workers clock in and out, sometimes multiple times on the same shift because of moving from one department to another with a different funding source
- Mistakes have to be fixed by a supervisor
- Twice a month, timesheets must be verified



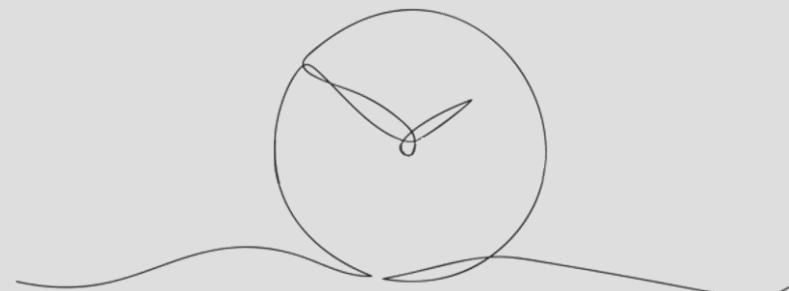
The problem

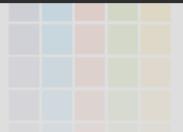
- Mistakes were not generally being fixed as they happened
- On approval days, employees would miss the approval deadline while they were busy trying to find someone to fix their mistakes
- Chaos ensued



The problem

- Employees were instructed to email their supervisor to have mistakes fixed, but ...
 - they forgot
 - they asked in the hallway and their supervisor forgot
 - their supervisor lost track of the mail in their firehose of an inbox
 - any number of other things



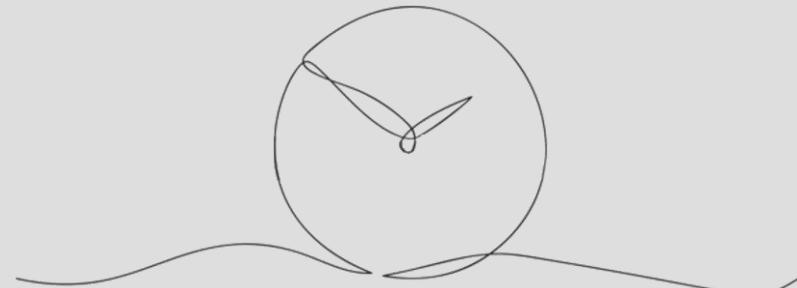


The problem

- For extra spice, there were missed punches from the biometric clock
- Diane the payroll manager spent most of two days every month tracking people down and was starting to hate life



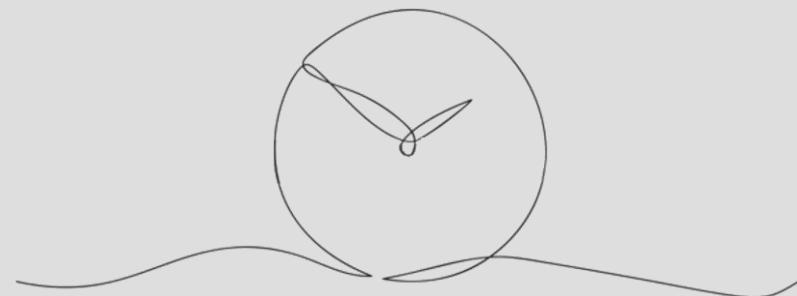
(not an actual picture of Diane)





The problem

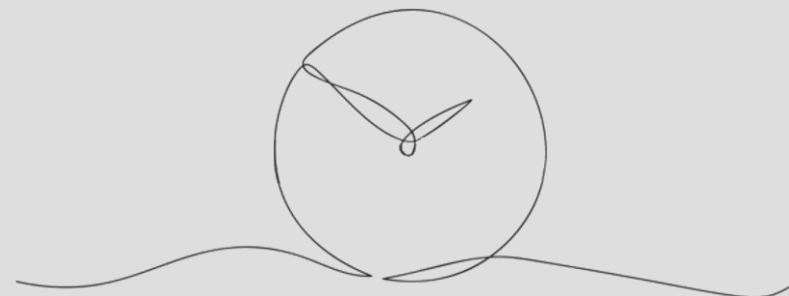
- Finance requested a way to make it **easier for employees** to make a correction request, and
- a way to make it **easier for supervisors** to keep track of requests and get them done ahead of approval days





The process

- Classic 100 level
- Everybody's hair on fire 🔥 all the time

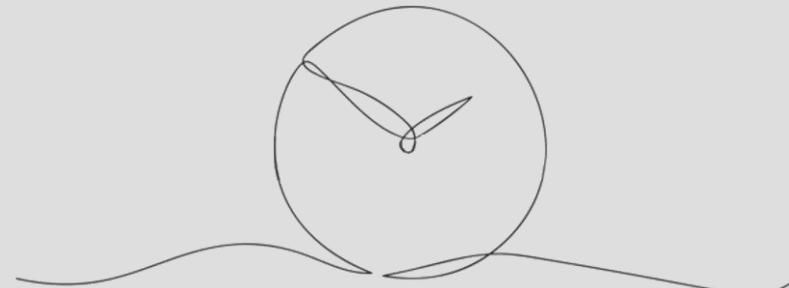


The process

Goals

- automate communication as much as possible
- make change requests simple and standardized
- allow supervisors to batch requests

... and most importantly, get **everyone using the same process** all the time.

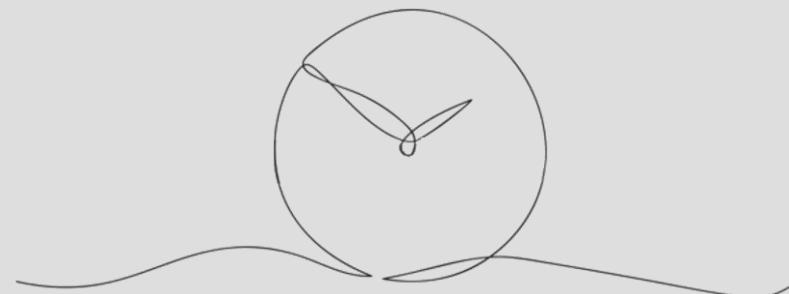




The process

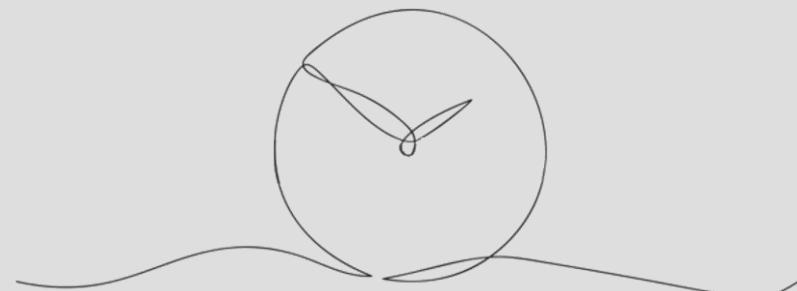
Maturity Model competency areas to address

- Business process
- Collaboration
- Employee experience
- Management of content



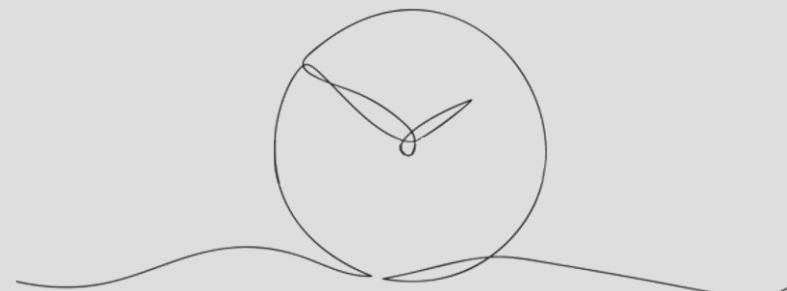
The process

- Asked many, many questions
- Looked for examples
- Decision to base everything on status was the foundation
- Presented alpha version to Operations Manager and Payroll Manager, then an adjusted beta version to selected supervisors and staff



The approach

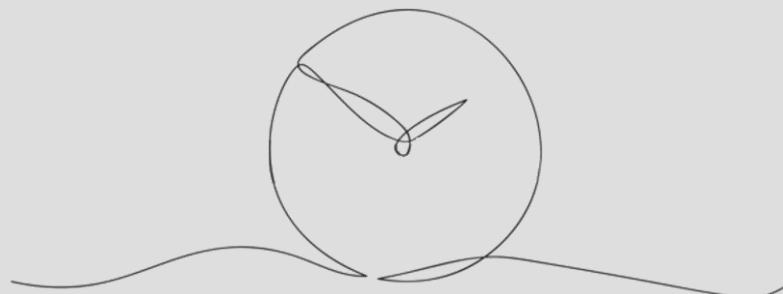
- Simple ticketing system based in a Microsoft List
- Any supervisor can look at and fix any ticket in the system, and can batch multiple requests together to be done when they have 15 minutes
- Employees have no direct access to the full ticket list, but create tickets using a simple Microsoft Form





The approach

- If a first-line supervisor doesn't have authority to fix a problem, they can escalate to the Operations manager
- The Operations manager in turn can escalate to Diane
- Diane is out of luck and has no one to escalate to



List

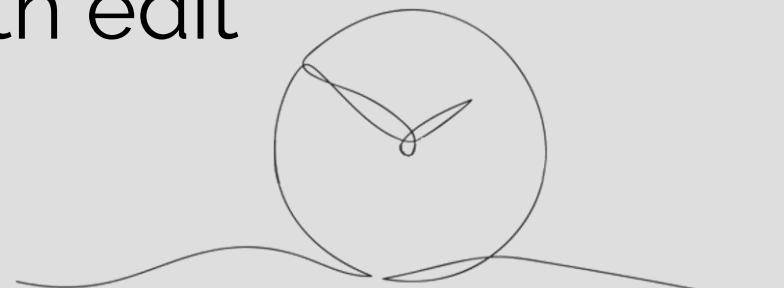
Supervisors Team Home Documents Site contents Recycle bin Edit Private group ★ Following 1 member

+ Add new item Edit in grid view Undo Share Copy link Export Forms Automate Integrate ... Details

Time punch correction request log ☆

Submitted	Submitter Email	Status	Action	Punch Correction	Other Issue	Action Taken By	Supervisor Notes	Escalated Action	Payroll Action	+ Add column
11/9/2023 02:55 PM	allenderc@bigtop.com	Escalated	This item has been escalated		I did not clock out of school at 2:30 pm 11/7/24	Carol Zollinger		This item has been escalated		
11/9/2023 04:26 PM	grownbg@bigtop.com	Open	Resolve Escalate	Forgot to clock out of school on Tuesday No. 7 at 2:30 pm				Resolve Escalate to Payroll	Resolve	
11/10/2023 04:04 PM	turnerj@bigtop.com	Open	Resolve Escalate		Forgot to transfer out of school			Resolve Escalate to Payroll	Resolve	
11/13/2023 01:29 PM	dunnd@bigtop.com	Open	Resolve Escalate		Clocked out three minutes late at 11:08 PM on 11/12/23			Resolve Escalate to Payroll	Resolve	
11/14/2023 10:18 PM	martina@bigtop.com	Open	Resolve Escalate	I forgot to clock in this morning. I got here at 12:05 PM				Resolve Escalate to Payroll	Resolve	
11/15/2023 07:07 AM	overdorff@bigtop.com	Escalated to Payroll	This item has been escalated to payroll	On Friday 11/10 I was in school from 8-10 am. I forgot to clock in and out. thank you!		Carol Zollinger		This item has been escalated to payroll		
11/15/2023 03:07 PM	overdorff@bigtop.com	Open	Resolve Escalate	I forgot to clock out of school today, 11/15/23. I need clocked out at 11AM.				Resolve Escalate to Payroll	Resolve	
11/15/2023 03:59 PM	turnerj@bigtop.com	Open	Resolve Escalate	11/15 at around 11 I clocked out instead of transferring out of school and then did it anyway after. My clock out time should be 4:00.				Resolve Escalate to Payroll	Resolve	

- List on the supervisors' team site with edit rights to the Operations manager and Diane



Submission form

Timesheet correction request form

Submit a timesheet correction request

Hi, Carol. When you submit this form, the owner will see your name and email address.

* Required

1. I need ... *

a time punch correction

something else

2. Punch correction request *

Enter your answer

Submit

Microsoft 365

This content is created by the owner of the form. The data you submit will be sent to the form owner. Microsoft is not responsible for the privacy or security practices of its customers, including those of this form owner. Never give out your password.

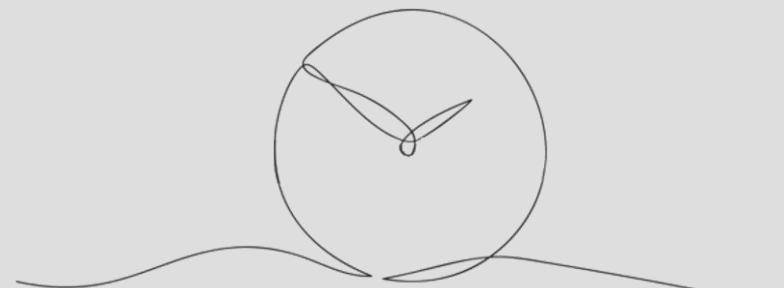
[Microsoft Forms](#) | AI-Powered surveys, quizzes and polls [Create my own form](#)

[Privacy and cookies](#) | [Terms of use](#)

Only place front line workers have view access

Can be submitted at 3:00 AM without bothering anyone else

Prominent link on department communication site



Supervisor view



Timesheet correction tickets

Nothing in the list below? Your fellow supervisors did you a solid and there's nothing left you need to do.

Open tickets

Submitted	Submitter Email	Action	Punch Correction	Other Issue	Supervisor Notes
11/9/2023 04:26 PM	grownbg@bigtop.com	Resolve Escalate	Forgot to clock out of school on Tuesday No. 7 at 2:30 pm		
11/10/2023 04:04 PM	turnerj@bigtop.com	Resolve Escalate		Forgot to transfer out of school	
11/13/2023 01:29 PM	dunnd@bigtop.com	Resolve Escalate		Clocked out three minutes late at 11:08 PM on 11/12/23	
11/14/2023 10:18 PM	martina@bigtop.com	Resolve Escalate	I forgot to clock in this morning. I got here at 12:05 PM		
11/15/2023 03:07 PM	ovendorfj@bigtop.com	Resolve Escalate		I forgot to clock out of school today, 11/15/23. I need clocked out at 11AM.	
11/15/2023 03:59 PM	turnerj@bigtop.com	Resolve Escalate		11/15 at around 11 I clocked out instead of transferring out of school and then did it anyway after. My clock out time should be 4:00.	

[Go to iPunchit](#)

Working with timesheet correction tickets 

- If the issue is simple and you are able to fix it, click **Resolve**. The ticket will disappear from this list and an email will be sent to the employee to let them know the issue is resolved.
- If you need to add **notes** for another supervisor or the Operations Manager, click the Supervisor Notes and type in the information. Press Tab > Enter, or click outside the notes area to save.
- If you can't fix it and it needs attention from the Operations manager, click **Escalate**. The ticket will disappear from this list and the Operations Manager will receive an email with a link to the escalated ticket.

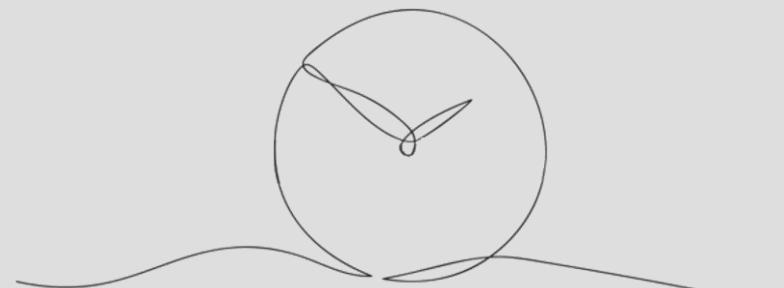
Fix the issue or add notes before you click Resolve or Escalate, since you will no longer be able to view ticket information from this list.

List web part in Supervisor view based on status "Open"

Every day at 10:00 AM a flow checks for tickets with the Status of Open and if any exists, send an email to the supervisors team

Embedded instructions

Link to timekeeping system



Operations Manager view

Escalated timesheet tickets

Escalated tickets – resolve or escalate to Payroll.

Go to iPunchIt

Open tickets

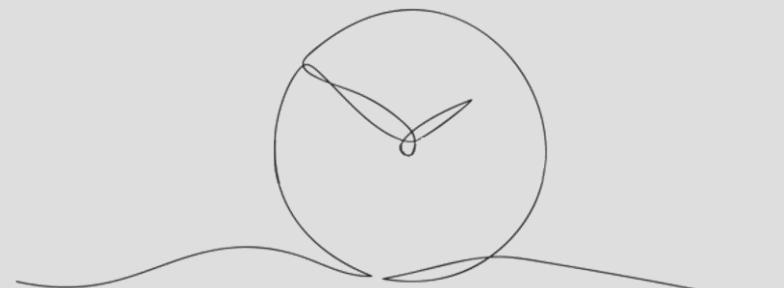
Submitted	Submitter Email	Action Taken By	Escalated Action	Punch Correction	Other Issue
11/9/2023 02:55 PM	allenderc@bigtop.com	Carol Zollinger	<input checked="" type="checkbox"/> Resolve <input type="checkbox"/> Escalate to Payroll		I did not clock out of school at 2:30 pm 11/7/24

Like 7 Views Save for later

List web part in OM view based on status “Escalated”

When a ticket gets Escalated status, an email goes to the OM

Link to timekeeping system



Payroll view

Timesheet correction requests escalated to Payroll

Remember to return to this screen and click Resolved to clear the ticket.

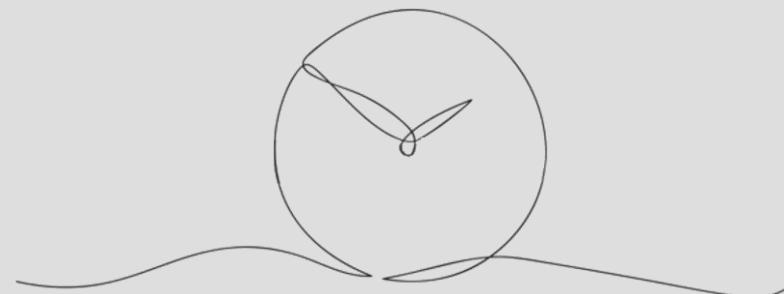
Go to iPunchIt

Submitted	Submitter Email	Action Taken By	Payroll Action	Punch Correct...	Other Issue	Supervisor Notes
11/15/2023 07:07 AM	overdorfj@bigtop.c...	Carol Zollinger	<input checked="" type="checkbox"/> Resolve	On Friday 11/10 I was in school from 8-10 am. I forgot to clock in and out. thank you!		

List web part in Payroll view based on status "Escalated to Payroll"

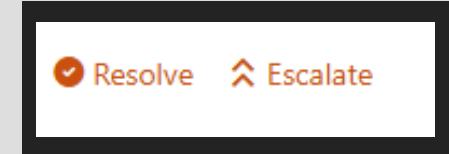
When a ticket gets Escalated to Payroll status, an email goes to Diane

Link to timekeeping system

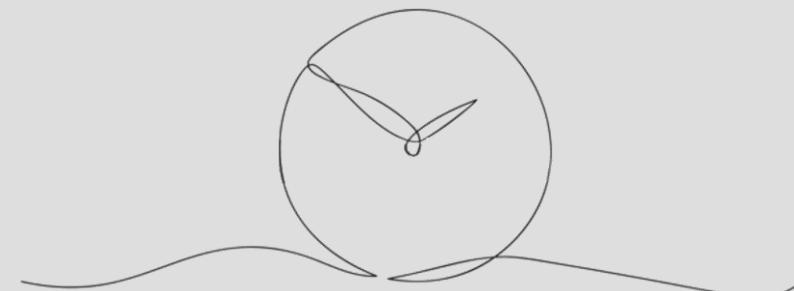


Behind the scenes

- JSON formatting on list columns
 - Clickable buttons
 - Action on click changes status field, which starts the appropriate Power Automate flow
 - Secondary action changes field to a text message indicating action taken



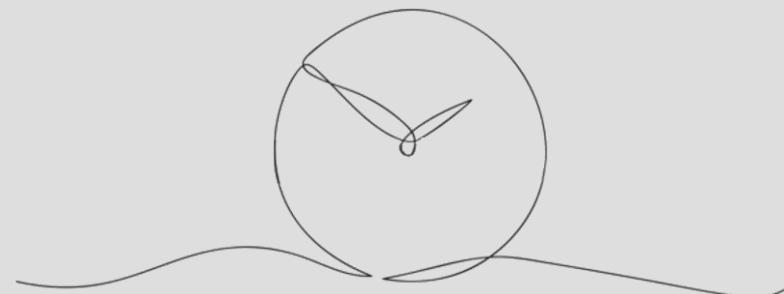
This item has been escalated to payroll



Behind the scenes

Power Automate flows

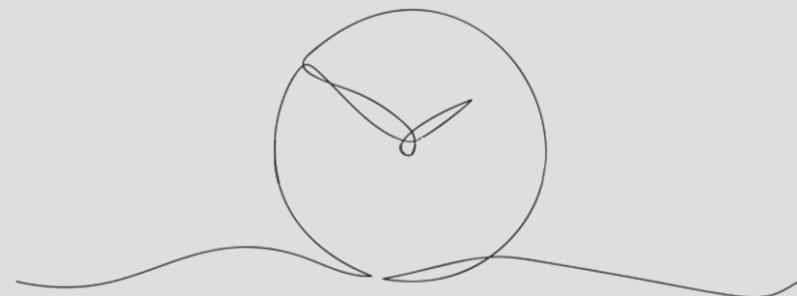
- Correction request to list
- Daily check for Open tickets
- Resolved
- Correction escalated
- Correction escalated to payroll



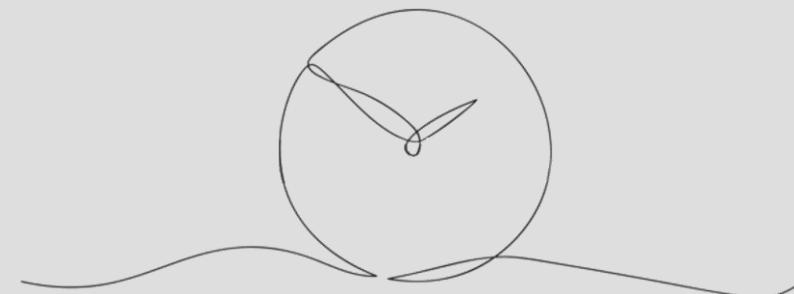


Rollout

- Embedded instruction where needed
- Easy to find (obvious on main communication page)
- Supervisors were very excited, which helped



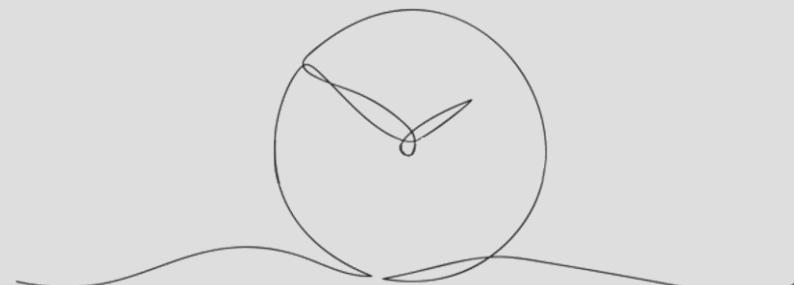
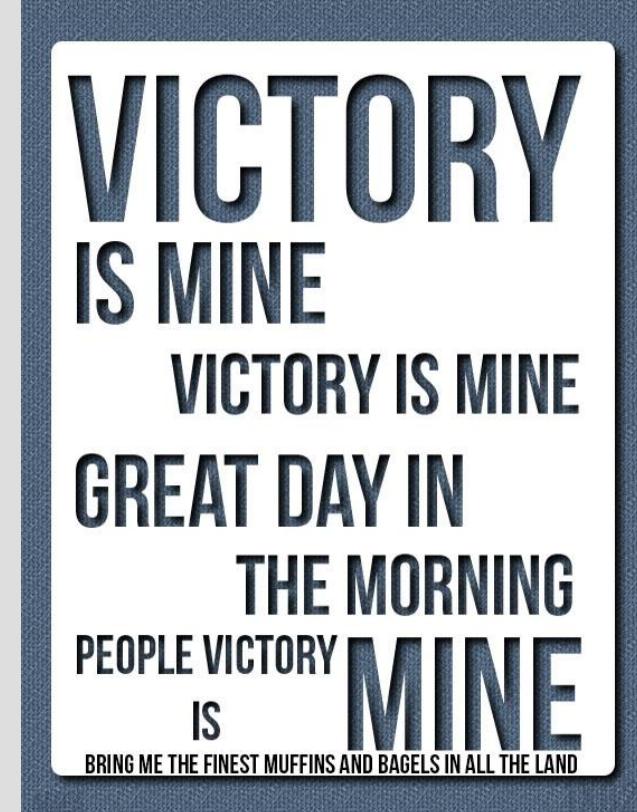
Demo



Reception and adoption

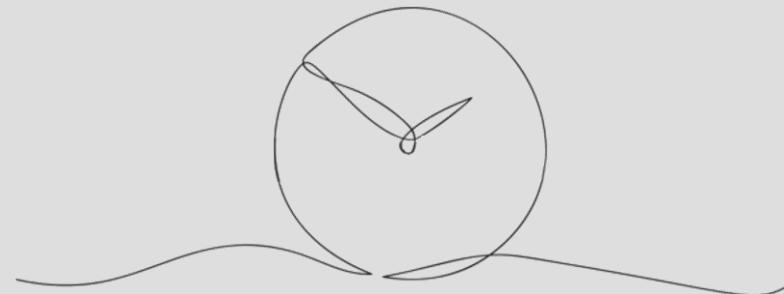
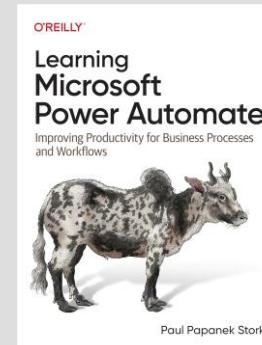
- Heard **nothing**
- ... but this time, no news really was good news.

(bonus points if you can name the show that quote comes from)



Resources

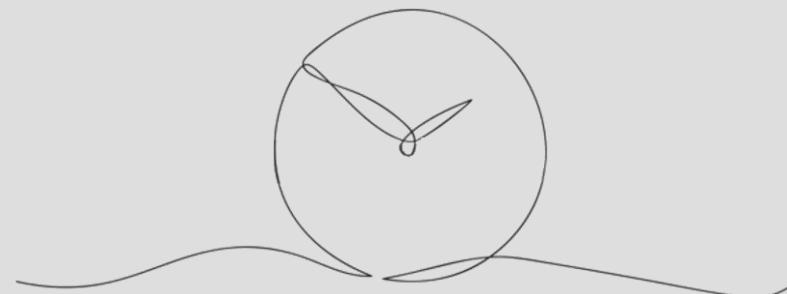
- Maturity Model documentation - <https://learn.microsoft.com/en-us/microsoft-365/community/microsoft365-maturity-model--intro>
- List formatting samples (GitHub) - <https://github.com/pnp/List-Formatting>
- Other Microsoft Community Calls - <https://pnp.github.io/#events> (weekly M365 & Power Platform, monthly Power Platform)
- *Learning Microsoft Power Automate*
by Paul Papanek Stork





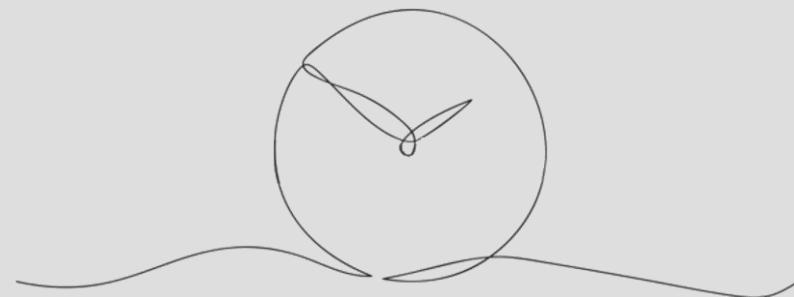
Find me

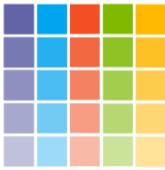
- LinkedIn – <https://www.linkedin.com/in/carol-zollinger/>
- Twitter – <https://x.com/carolzollinger>
- Email – carol.zollinger@summititsolutions.com
- In person – presenting at the North American Collaboration Summit in Branson, MO in September – <https://www.collabsummit.org/>





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Thank you

Next MM4M365 monthly call

September 16 – 10 ET / 7 PT

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

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