



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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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



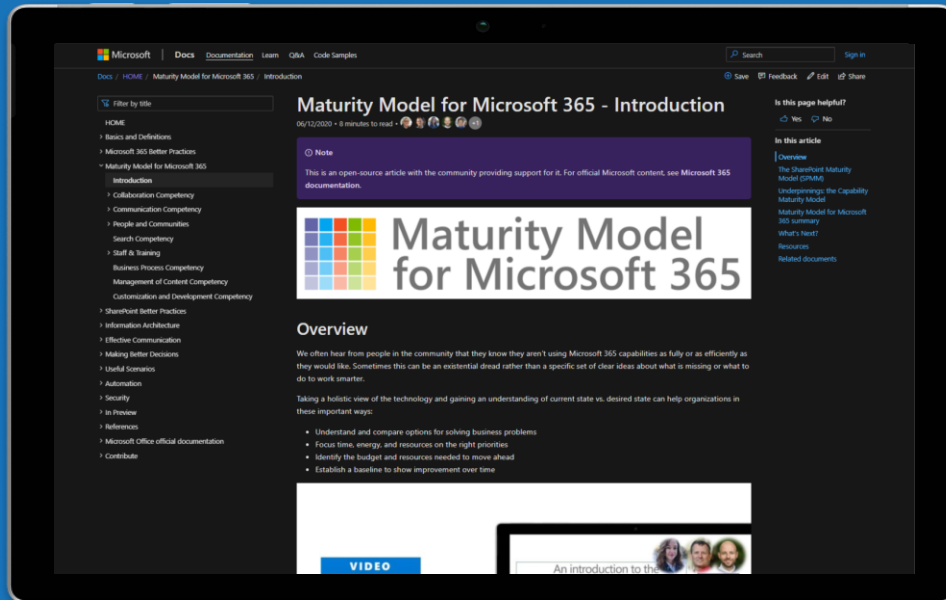
Shout-out &
Picture
Time
**(Together
Mode!)**



Contribute



The main
event



<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

PURPOSE

 <p>Improve organization through use of technology</p>	 <p>Benchmark company and department</p>
 <p>Select appropriate approach</p>	 <p>Develop an organizational business and technical roadmap based on:</p> <ul style="list-style-type: none">• What's possible• What's desired• Organization's culture and drivers
 <p>Lead and support strategic planning, with senior management</p>	 <p>Align implementation needs and objectives</p>
 <p>Discuss use of the platform with IT – not just technology</p>	 <p>Socialization tool</p>

M365 Community Docs
<https://aka.ms/m365-community-docs>

Artifacts

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

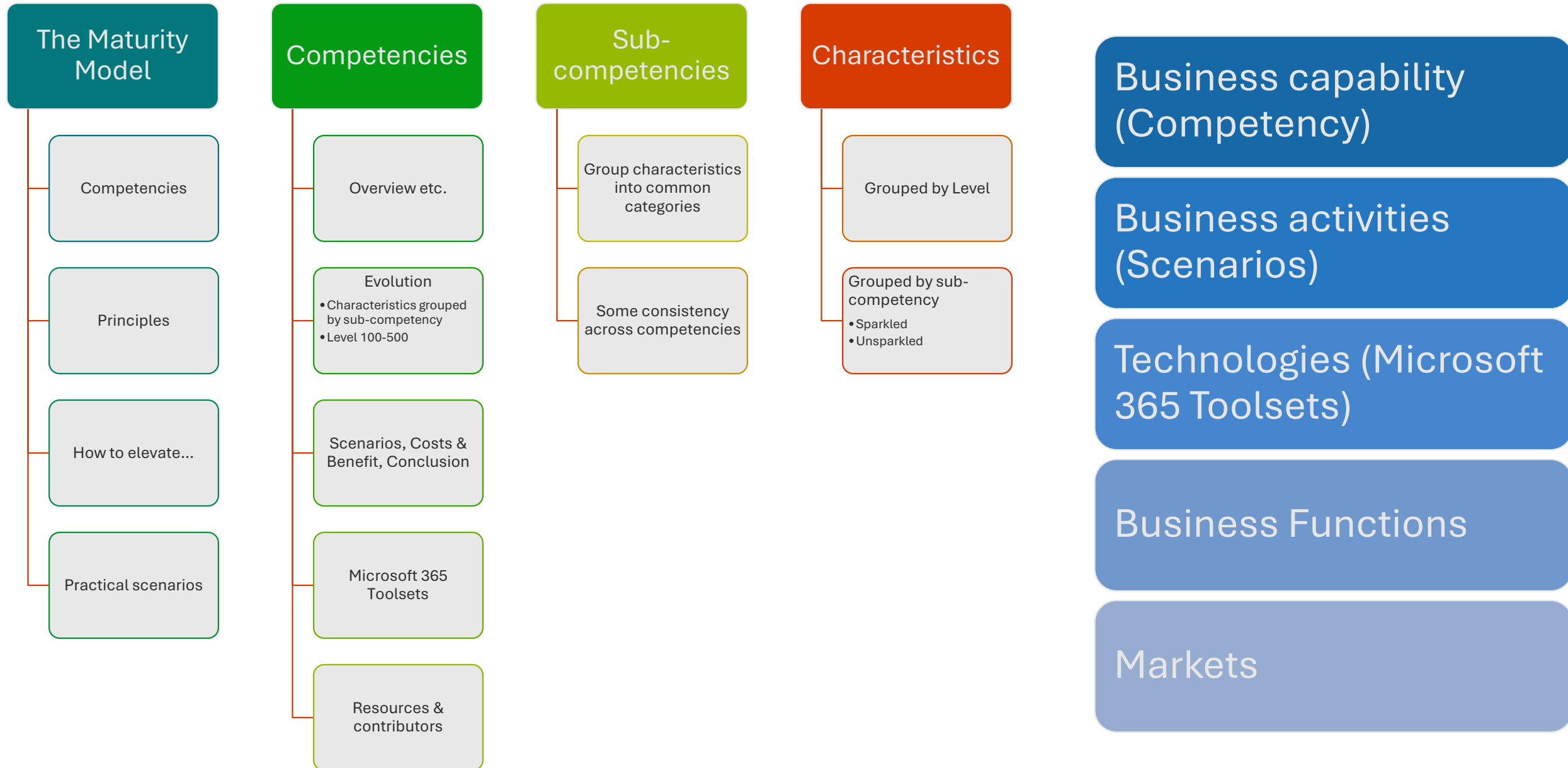
Supporting articles

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





Artefacts, structure, and scope





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

Write a
Practical
Scenario

Contribute
on GitHub

Provide
feedback,
insights,
tools, and
artifacts

Socialize
MM4M365
content

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 Langenkrans ★	★ Core Team ★	★ Simon Doy ★	★ Simon Hudson ★	★ Mats Warnolf ★	★ Carol Zollinger ★

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

PnP
TRAINING
Sharing is Caring
GitHub
 21 Stars · 108 Forks

Sharing is Caring

[Home](#)

[Contribution Guidance](#)

PnP SHARING IS CARING

Thank you, October attendees!

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- [PnP Contribution Challenge Rewards](#)

Aashish Khamkar Alberto Gutierrez Perez Alexánder Meisel Roca Artur Ashar Khan Athena Depper Braden Fase Carol J Shahan Carol Zollinger Clément Betacorne Craig Fischer Cristian Vulpe Daniel Machado Bessa Dave Kodjo David Cross David J. Rosenthal David Neeck David Sibert David Warner Deb Walther	Diego Domingos da Silva Dishant Gosalia Dominic Irrcher Dustin Smith Elena Tekin Elijah Angelman Emma Devine Ethan Harrison Ferrell Carr Giacomo Pozzoni Giovanni Jimenez Gregory S. Burns Gregory Zelfond Gretchun Kim Guido Zambarda Ian Tweedie Iqbal Nadiadi James Aitken Jeremiah Werner John Carter	Kate Watson Kathryn Dickerson Kausar Kelly Bearne Kumar P Kiran Lance Yoder Lauryn Haynie Leru Xu Mack Butzen Marc André Schröder-Zhou Marc D Anderson Mark Chilenski Mark Morris Martin Schmucker Mats Warnolf Matt Brinkhoff Michael Blumenthal Naim Murati Nick Stillings Patrick de Lanoy	Patrick Hall Pete Cox Pete Simpkins Pia Langenkranz Razan Majar Rocky Bisogno Rodríguez Ayala Sebastián Sharon Weaver Shaun Brown Simon Hudson Steibl Thomas Tara Saylor Taylor Sand Thomas Lensche Travis Luther Von Zantua Wayne Tietjen Yaroslav Ryaboshтан Zack Che
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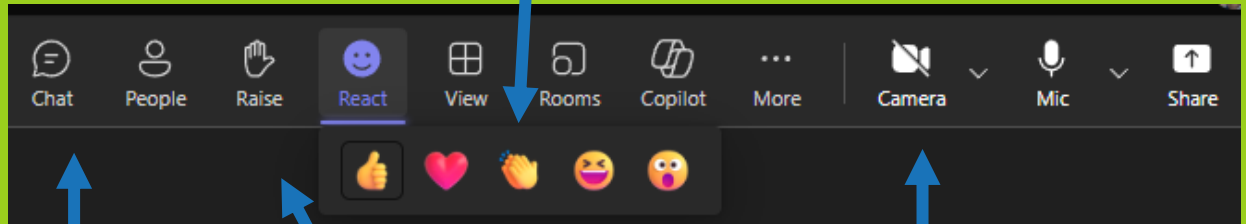
The Main Event

Practical Scenario: Copilot Adoption Level 300

PROTOCOL

Visually emote and support
Share reactions while others
are speaking

Come off mute
and share your
thoughts



Ask
questions,
offer insights,
talk to each
other

Raise your hand to say your piece
(and put it down again!)

Share your camera
(don't be shy)



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



Its a Trap!

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



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

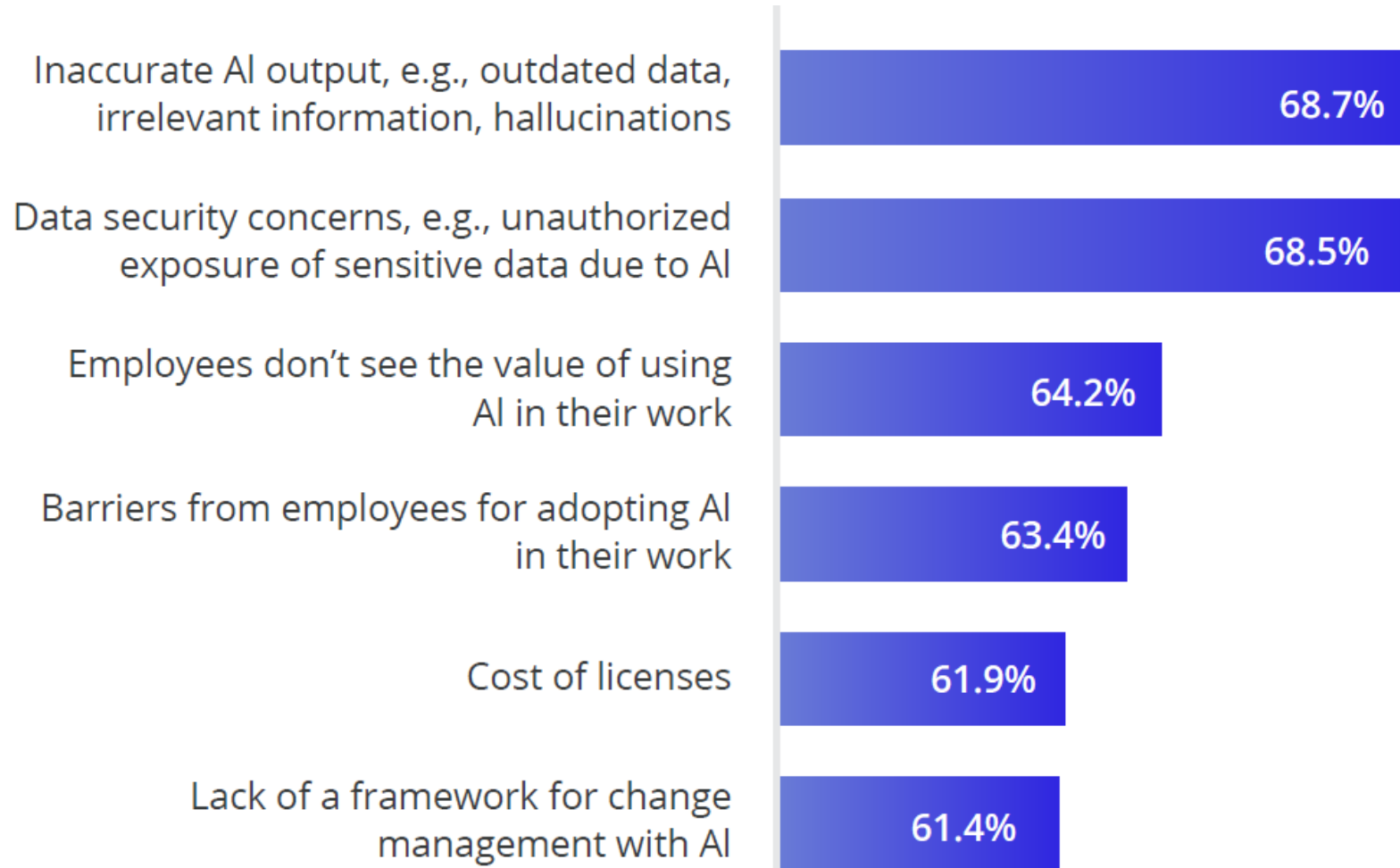
What We ARE Doing:

- ♥ 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

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.

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



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

Document,
measure,
prepare for
automation

STREAM 2 Staff & Training

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

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- Slide decks: <https://symp.info/MM4M365Slides>
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- BlueSky: [@mm4m365.org](#)

Take the Maturity Model Self-Assessment

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





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MATURITY MODEL FOR MICROSOFT 365

PnP



PARKER