Microsoft

Maturity Model for Microsoft 365 Practitioners

September 2025

Business Process & Search Competency Update

✨ **Guest star** ✨ Simon Hudson

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]
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
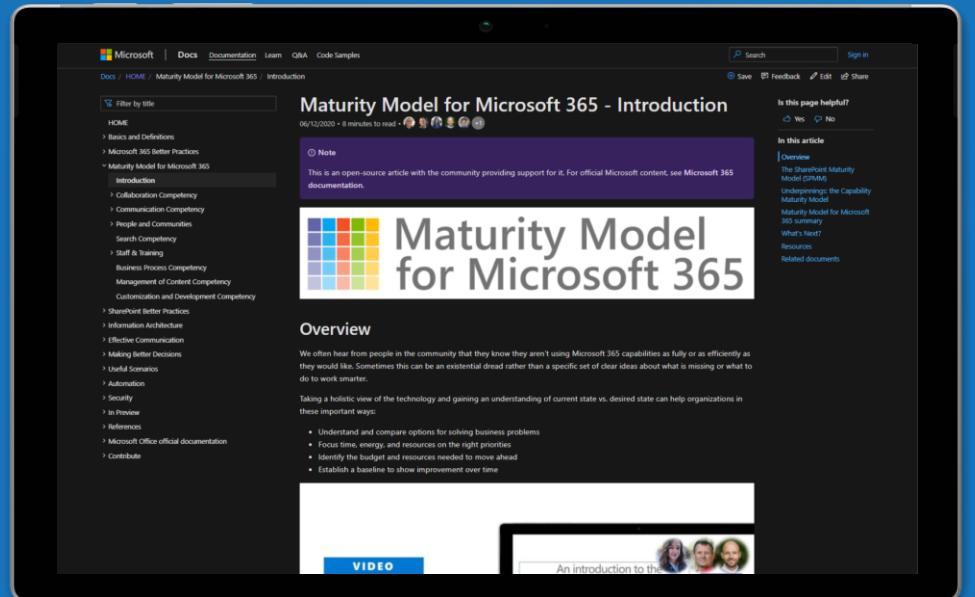
Practitioner & Maturity Model overview

- Artifacts and Updates
- Purpose

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

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

Simon Doy

Founder of iThink 365
Chief Technical Officer
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@simondoy

In our thoughts

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...
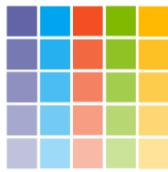
- Collaboration
- Communication
- People & Communities
- Staff & Training
- Governance, Risk and Compliance
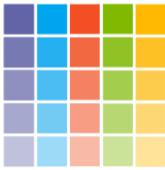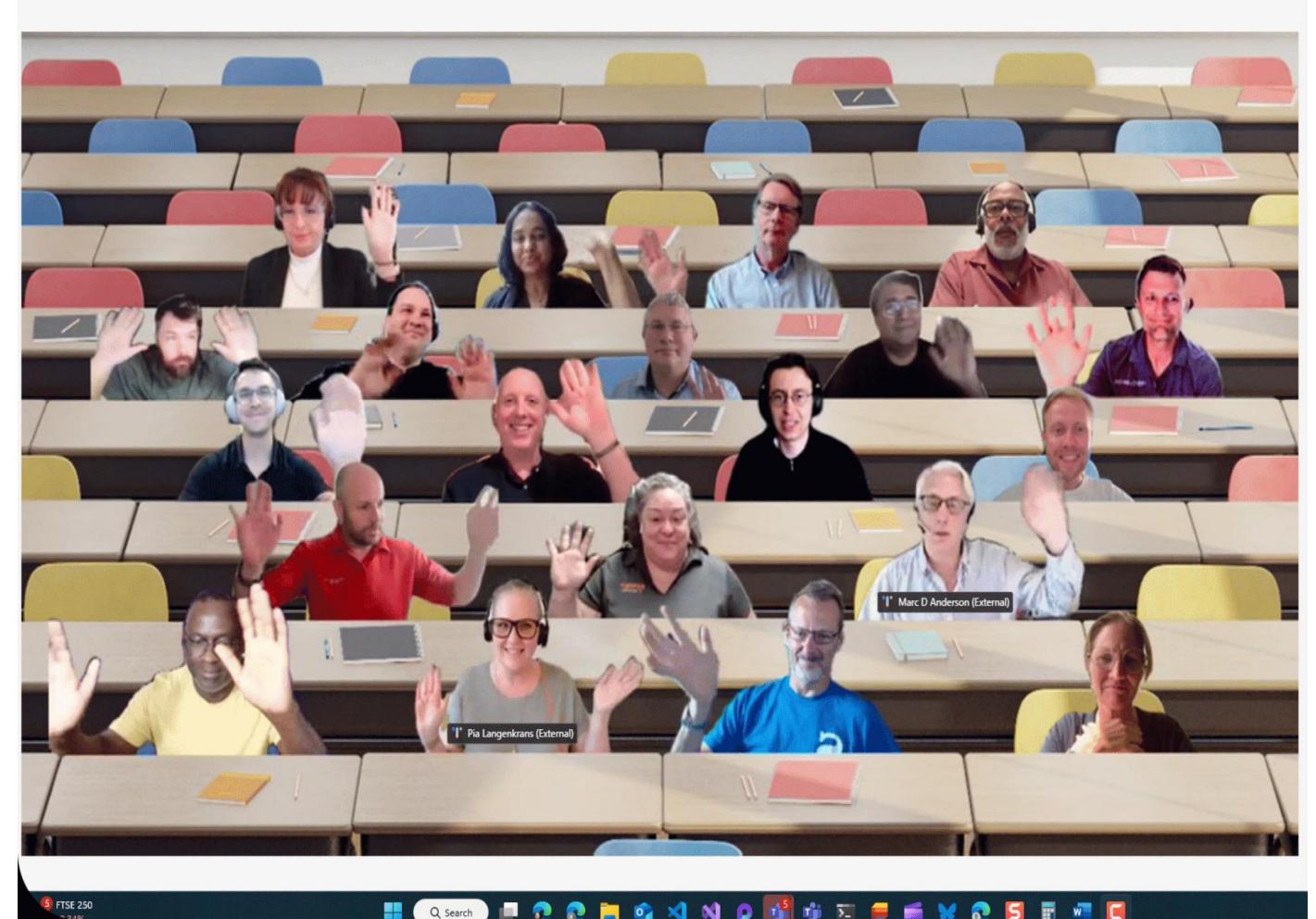
MM4M365 provides benchmarks to measure your organization

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!
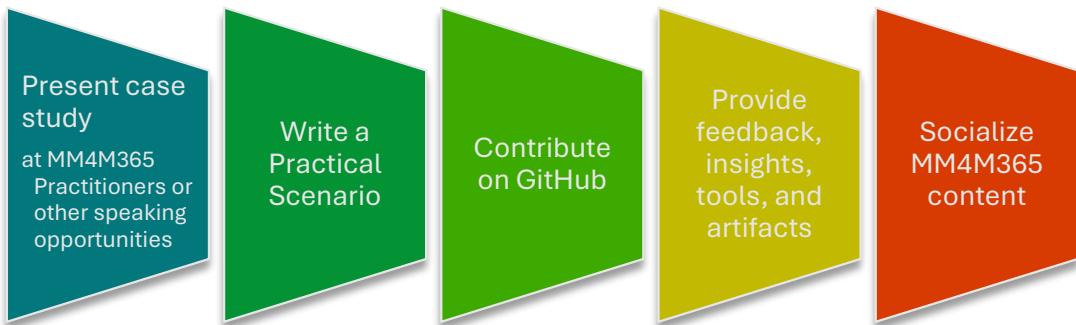
Overview

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
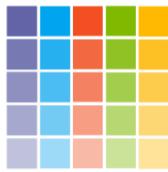
Purpose

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 19	December 17
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 Langenkrans ⭐	None

What we are working on

Governance Risk and Compliance	Security Competency	Management of Content review	Knowledge Management Practical Scenario	Data Analytics Competency
• Updated	• In process	• In process	• **Ready to publish**	• Seeking SME

PnP SHARING IS CARING

Thank you, June attendees!

|			
AC	David Pileggi	Kumar Latheesh	Raghav Jha
Ana Tenezaca	David Warner	Lance Yoder	Ralph Rivas
Anders Persson	Davy Stassen	Lauryn Haynie	Sachin Verma
Andrew Coffell	Deb Walther	Leru Xu	Sarah Morse
Anne Dymond	Devenkumar Bhatt	Marc D Anderson	Sarah Nelson
Artur	Dmitri Plotnikov	marsekalrizki	Sascha Ortmann
Avishek Mazumdar	Dominic Irrcher	Martin Schmucker	Sebastian Fritsch
Ayoola Apampa	Edwin Guzman	Mats Gustafsson	Shaun Brown
Benjamin Jones	Emma Smith	Mats Warnolf	Siddhartha Ghattamanen
Bill Sabey	Emmon Johnson	Matt Brinkhoff	Simon Doy
Braden Fase	Erica Jefferies	Matt Burback	Simon Hudson
Brian Bukowski	Francisco Quintero	Monty Evans	Stefanie E Schmitz
Bridget Graper	Giacomo Pozzoni	Mun Ghaleb	Taylor Sand
Carol J Shahan	Isaac Bertrand	Mythili R Sampathgiri	Thomas Lindner
Carol Zollinger	Jean Netry-Valere	Nadir Khan	Tony Graves
Chris Gregory	Jeff Coventry	Nick Stillings	Wayne Tietjen
Clément Betacorne	John Gardner	Nirav Raval	Yaroslav Ryaboshtan
Dan Balitewicz	Joshua Meade	Pankaj Gawande	Youssef Ajrindou
David Cross	Judy Walag	Patrick Hall	
David Gurney	Karen E Harrington	Pete Simpkins	
David Neeck	Kelly Bearne	Pia Langenkrans	
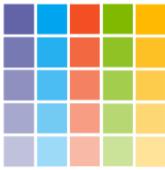
The Main Event

Business Process & Search Competency Update

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)

Overview

✨ **Major Maturity Model update** ✨
The Business Process competency and the Search competency have gone live with a raft of changes, extensions and improvements.

Restructured and extended for the rapidly changing technology and business landscape.

Heavily extended to incorporate #AI (and thereby #Copilot) search capabilities and approaches.
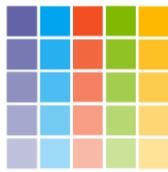
Plus sparkles, of course ✨

[Business Process Competency](#)

[Search Competency](#)

What's Changed - Business Process

General Updates Across All Levels

- **30 changed or new characteristics. No changes at Level 100.**

- **Better flow, revised grouping under key themes of General, GRC, Business Process**

- **More emphasis on user experience and interface as part of process design.**

- **Whole-system thinking and business integration are now explicitly mentioned as critical attributes.**

- **Agility, flexibility, and auditability have been added to the list of valuable process attributes.**

✨ **Key characteristics given more sparkle** ✨

Level 200 – Managed

✨ **New bullet points added:**

- Recognition of M365 functionality for automation.
- Process maps exist but documentation of technology solutions is weak.
- Business ownership of processes is inconsistent.
- No overarching automation strategy.
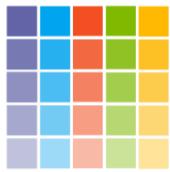
✨ **Highlighted the role of citizen developers and the risks of undocumented development.**

Level 300 – Defined

✨ **New emphasis on:**

- Transition from procedural workflows to dynamic orchestration.
- Centralised training and skill development.
- Managing citizen development.
- Minimal inconsistency between documented and deployed processes.
- Quality systems incorporating business process solutions.
- Tracking, performance metrics, and out-of-bounds notifications.

What's Changed - Business Process

Level 400 – Predictable

✨ New additions:

- Clear continuum from citizen-developed to fully managed solutions.
- APIs and information sources are well established.
- Technology standards and training programmes are in place.
- Business Process training is part of M365 onboarding.
- Formal documentation and audit practices.
- SPC (Statistical Process Control) may be enabled.

Level 500 – Optimizing

✨ New features:

- Power users can adapt workflows on the fly.
- Standardised components for reuse.
- Simulation and workload balancing using real data.
- Processes extend to external users.
- High-level continuous oversight and remodeling.
- Use of AI, SPC, and benchmarking for optimisation.
- Innovative automation approaches proactively introduced.

Updates to Scenarios
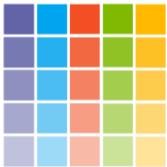
Toolsets now includes:

- **Copilot Studio**, **Sales Copilot**, and **Dynamics 365** integrations.
- Expanded list of Power Platform tools.

What's Changed - Search

| LEVEL	NEW ADDITIONS (AUG 2025)	PREVIOUSLY
Introduces **richer descriptions** and **new capabilities** at higher levels		
Level 200 – Managed	Some integration with Microsoft 365 search; limited metadata use.	Similar, but less emphasis on platform integration.
Level 300 – Defined	Metadata and taxonomy are used to improve search; some AI features may be piloted.	Focused on structured metadata and tagging.
Level 400 – Predictable	AI summarisation, conversational search, and scoped search introduced.	Advanced search tools, but no AI or synthesis.
Level 500 – Optimizing	Full integration of LLMs, multimodal search, and enterprise knowledge graphs. Search is proactive and adaptive.	Search is highly tuned but lacks AI-driven synthesis

What's Changed - Search

Conceptual Shifts

From "Search" to "Discovery": The competency now frames search as a tool for insight and synthesis, not just retrieval.

From "User-driven" to "System-assisted": AI and automation now play a central role in guiding users to relevant content.

From "Keyword-based" to "Conversational and Contextual": Natural language queries and contextual understanding are now core features. ✨
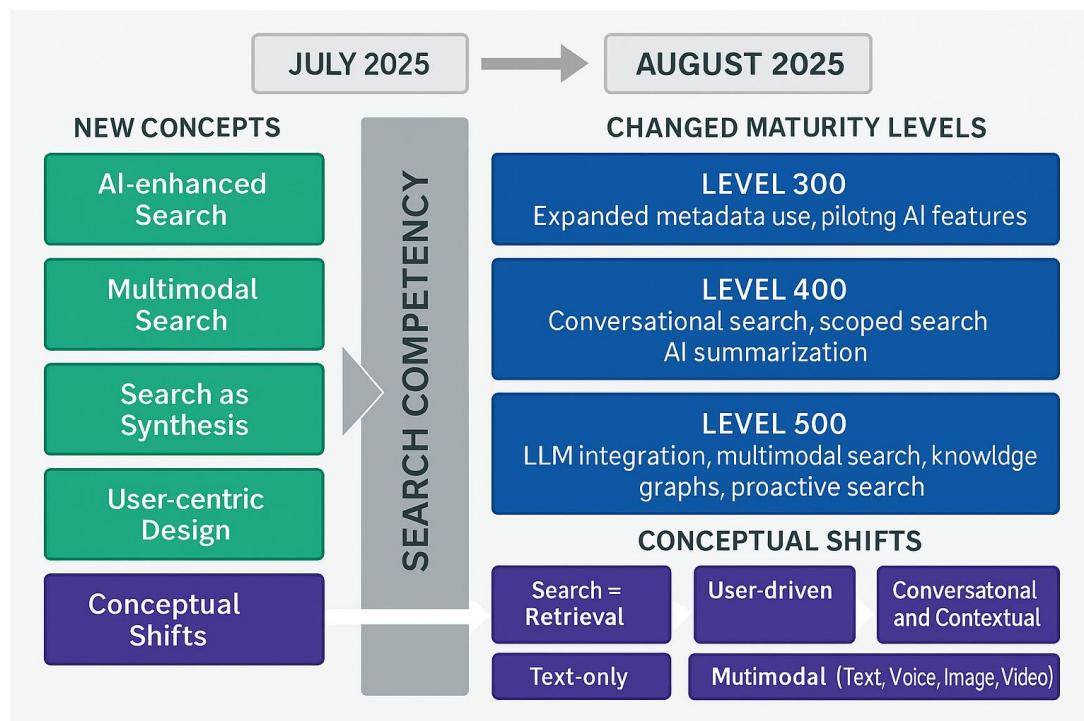
General Updates Across All Levels

30 changed or new characteristics.

No changes at Level 100.

✨ Key characteristics given more sparkle ✨

What's Changed - Search

	August 2025 update	Previously
AI-enhanced Search	Introduced as a major evolution: summarising across documents, extracting key points, answering in natural language using LLMs and knowledge graphs	Not present or only briefly mentioned.
Multi-modal Search	Search now includes text, voice, image, and live video/vision inputs and outputs	Not previously described.
Search as Synthesis	Emphasised that search is not just about finding but also about **understanding and discovery**	Focused more on retrieval and navigation.
Contextual Search	Search can be scoped to specific content sets or knowledge stores	Less emphasis on scoping or context.
User-centric Design	Stronger emphasis on helping users find what they need without knowing where it's stored	Previously focused more on keyword-based search.

What's Changed - Search

Total New Concepts Introduced	5	AI-enhanced search, multi-modal search, search as synthesis, contextual search, user-centric design
New or Expanded Capabilities at Maturity Levels	12	Spread across Levels 300–500. Includes AI summarisation, conversational search, scoped search, LLM integration
Changed Definitions or Scope Statements	2	Search now framed as synthesis and understanding, not just retrieval
New Examples or Scenarios	3	Includes finding expertise, discovering organisational knowledge, and synthesising across documents
Deprecated or Reframed Concepts	2	Keyword-based search and basic indexing are now considered legacy or foundational

Examples of new Search characteristics

GRC

300

Basic governance policies exist for search, but AI-driven search may not be explicitly covered.

The compliance team is aware of AI summarisation risks; early review processes are in place for sensitive domains.

400

The governance framework includes AI search, with defined roles for oversight and accountability. AI search governance is integrated into broader information governance, with regular audits of outputs.

500

AI search governance is subject to continuous improvement loop, using analytics and feedback to refine policies, with proactive compliance monitoring of AI outputs in high-risk areas.

AI risk posture reviewed regularly, with adjustments based on emerging regulations and technology changes.

Technology

200

AI search may be enabled in some areas, but without full semantic index configuration

300

Basic monitoring of AI search performance and adoption is available.

400

AI search is fully integrated across all relevant systems, with consistent semantic index coverage.

500

AI search is extended to all relevant enterprise platforms, including custom applications, providing focused retrieval and integration of knowledge. This supports multi-modal inputs (voice, image, text) and outputs (summaries, charts, action items).

User Experience

300

Users are educated on search and how to make best use of it. This includes standardised guidance on effective AI search use, including prompt examples.

400

Personalisation and AI memory are used to improve relevance and engagement.

AI search adoption metrics are tracked and reported to leadership.

500

AI is used to enhance search based on deeper knowledge of the user context and business activity.

Prompt libraries and role-specific templates are widely adopted to accelerate common tasks.
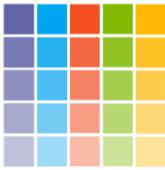
AI search experience is continuously refined based on behavioural analytics and feedback.

What have been the impacts of Copilot and other AI tools on your BP and Search experiences?

How are you adopting and adapting?

What other significant changes and updates should we be incorporating?

Thank you

Next MM4M365 monthly call

October 21 – 10 ET / 7 PT

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

Stay in touch

- 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