# Microsoft 365 Maturity Development

## The Microsoft 365 Maturity Model and its Implementation.

In today's rapidly evolving digital landscape, organizations are constantly seeking innovative ways to enhance workplace productivity, collaboration, and efficiency. Microsoft 365, a comprehensive suite of applications and services, has emerged as a transformative solution that empowers businesses to harness the power of cloud computing, mobility, and collaboration tools. As organizations adopt Microsoft 365 and its integrated tools, they embark on a journey of digital transformation that encompasses not only technology but also processes and cultural shifts.

# THIS WHITEPAPER

The Maturity Model for Microsoft 365 provides a roadmap for organizations to evolve and adapt to the dynamic demands of the modern workplace. In this whitepaper, we will outline the history of the Maturity Model for Microsoft 365, show the key dimensions, and explore the various stages of maturity and the associated benefits at each level from the foundational stages, where organizations establish basic collaboration tools, to the advanced stages, where seamless integration, automation, and data-driven insights become a reality.

As the model remains abstract, we'll demonstrate how Pack of 7 can assist you in not only assessing your current Microsoft 365 environment's maturity but also in designing and implementing steps that elevate it to the model's pinnacle, aligning with the initial strategic intent that prompted your organization's decision to adopt Microsoft 365 in the first place.

# THE HISTORY OF THE MATURITY MODEL FOR MICROSOFT 365

The Microsoft 365 Maturity Model is an extension of the SharePoint Maturity Model. Around the time SharePoint 2010 was launched, Sadie Van Buren conceptualized a robust framework known as the SharePoint Maturity Model (SPMM). This ingenious framework aimed to equip individuals engaged with the platform with a structured approach to:

- Understand their capabilities along multiple dimensions on a clearly defined scale.
- Decide which level to achieve for each dimension and in what time frame.
- Improve their capabilities in tangible ways by progressing to the next level.
- Compare their organization to their peers based on quantified surveys.

While the SPMM was initially tailored for SharePoint, which back then existed solely as an on-premises solution, its core principles retain their relevance.

The foundation of SPMM drew from the Capability Maturity Model (CMM), initially formulated through research at Carnegie Mellon University in 1986, with a primary focus on software development. The quintessential structure of the CMM was encapsulated in a 5-point scale, representing the following levels:

- **LEVEL 1 - INITIAL**
  Practices undocumented, driven in ad hoc, uncontrolled, and reactive manner

- **LEVEL 2 - REPEATABLE**
  Processes are documented or centrally managed

- **LEVEL 3 - DEFINED**
  Processes are well defined)

- **LEVEL 4 - CAPAPLE**
  Processes and quantitatively managed and agreed upon

- **LEVEL 5 - EFFICIENT**
  Deliberate process optimisation/improvement

# THE MATURITY MODEL
# FOR MICROSOFT 365

The Maturity Model for Microsoft 365 stands as a guiding framework for organizations to strategically chart their course through their transformational journey. The model offers a structured approach to assess, plan, and progress across different stages of Microsoft 365 adoption, enabling organizations to align their goals, capabilities, and strategies with their evolving technological landscape. By gauging their current state, identifying areas for improvement, and embracing best practices, businesses can leverage the full potential of Microsoft 365 to drive innovation, streamline workflows, and achieve sustainable growth.

The Maturity Model for Microsoft 365 concentrates on defining a set of business competencies that resonate with Microsoft 365 yet underpin real business activities.

## THE COMPETENCY PRINCIPLES

The business competencies form a toolkit based on the following principles:

- Non-partisan, i.e., informed by but not driven by today's features in any platform.
- Led by business needs rather than technology features.
- Identifies key business *and- technical competencies.
- Enables organizations to evaluate the current state in a systematic and consistent way.
- Applicable to various roles in the organization.

For each competency the model entails guidelines in a consistent format. Although these are clearly linked to Microsoft 365, the model deliberately avoids detailing features and functions, focusing on the business needs and processes in the competency guidelines. The model is permanently evolving. It expands the guidelines set to drill into the technologies; provide a 'how to' for achieving different levels with the tools Microsoft 365 provides; and highlight practical scenarios.

The different competencies are as follows:

- **Business Process**
- **Collaboration**
- **Communication**
- **Customization & Development**
- **Governance, Risk, and Compliance**
- **Infrastructure**
- **Management of Content**
- **People & Communities**
- **Search**
- **Staff & Training**

## THE LEVELS

Based on the SPMM (SharePoint Maturity Model), the Maturity Model for Microsoft 365 entails 5 Levels:

- **LEVEL 100 - INITIAL**
  Ad hoc, reactive, uncontrolled, chaotic, unstable.

- **LEVEL 200 - MANAGED**
  Routine, legacy, firefighting, variable, personally managed.

- **LEVEL 300 - DEFINED**
  Documented, policy-driven, planned, controlled, stable.

- **LEVEL 400 - PREDICTABLE**
  Productive, interactive, responsive, enhanced, effective, adaptable, quality.

- **LEVEL 500 - OPTIMISING**
  Optimal, systematic, statistical, improvement-focus, automated, assured, proactive

For each competency the model describes the meaning of the competency and defines one set of characteristics for each of the 5 levels. For all 10 Competencies there are around 1000 characteristics in total.

**The Business Process Competency**
**LEVEL 200 - Managed**

**Description**

At level 200 maturity an organization tends to believe governance and compliance is a series of boxes to check. At this maturity level organizations acknowledge compliance regulations and standards. However, organizations may take a 'tick box' approach to Governance, Risk and Compliance (GRC). Policies have been written, intended to avoid the damages that level 100 organizations can face, but the polices are not enforced in the organization.

**Characteristics**

**People and Culture**

- Leadership understands and accepts the importance of governance and compliance but has not driven it into the organization nor recognized it as a business enabler.

- Some policies have been written but are not enforced or comprehensively adopted.

- No formal compliance roles in place or roles have been allocated but without suitable training or assessment of competence. Governance, Risk and Compliance relies on individuals being responsible for actions and approaches in their own areas.

- No formal GRC training; communication is ad hoc or occurs in response to a GRC event. Most employees are not aware of how governance, risk and compliance impact their daily work.

**People and Culture**

- Governance and compliance management is local, uncoordinated, or sporadic. It is dependent on individual people to action and monitor.

- Processes exist but are manual and lack standardization, making it hard to measure their effectiveness, enforce them or obtain an overview of activity and status.

- Limited collaboration between compliance and operational teams. Often compliance is an afterthought.

- Response to incidents is reactive /ad hoc, lacking consistency, formality and may result in ineffective actions.

- Risk management is perceived as a process.

**People and Culture**

- Storage locations for documentation and supporting evidence are inconsistent and fragmented.

- Basic technical controls may exist but may not be appropriately implemented to ensure compliance.

- There is a tendency to focus on email rather than a wider view of content and processes that need to be compliant.

- Technical controls to manage retention and deletion exist, however there are minimal processes to implement these effectively; retention and deletion is largely a manual, ad hoc activity, though there may be reminders and triggers in processes to act as prompts.

# MICROSOFT 365
# MATURITY DEVELOPMENT

As the Maturity Model for Microsoft 365 stays on a fairly abstract level, the question remains, how to implement level elevation in such a vast and complex system of competencies and characteristics combined with the massive size of the Microsoft 365 environment with all its services and features.

In our experience, having the competencies and characteristics makes up 25% of the conceptual part of your maturity journey. 75% lies in the implementation.

As an example, how to improve the characteristic "Storage locations for documentation and supporting evidence are inconsistent and fragmented." depends on the actual technical situation your organisation is in and the strategical goals that are set by management. It needs to be analysed/assessed, scoped, designed, and then implemented.

While this process might be small for certain characteristics, it can also burgeon into a significant undertaking, potentially demanding a standalone project to rectify.

This process of analysing/assessing > scoping > designing > implementing > nurturing is what we call "Microsoft 365 Maturity Development".

Pack of 7 combines many years of experience in Microsoft 365 & Azure Solution Integration with experience in the field of Platform Maturity beginning in 2010 with the SharePoint Maturity Model. In addition, over the years we developed the necessary tools, concepts and methods to manage a maturity development project.
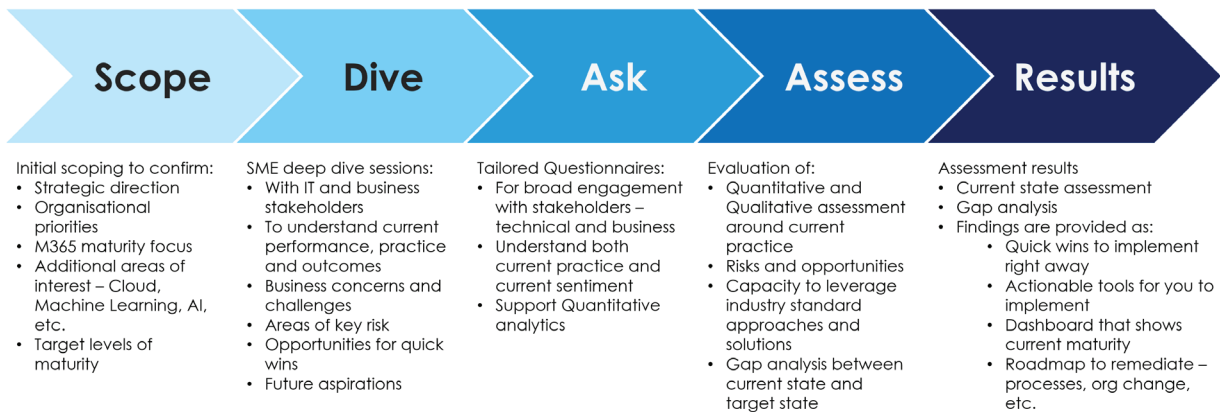
# PACK OF 7 SERVICE OFFERINGS

In our maturity service, we split assessment and development into separate stages. Some clients come to us having already assessed their situation and knowing exactly what they need for the development phase. Others begin with an assessment to decide if they need development at all. And then, there are those who prefer an assessment first, followed directly by development to reach a specific level.

## Course of action in phase ASSESSMENT

Before the phase assessment, we organise a tailoring meeting to adapt the schedule to the customer's requirements.

The phase assessment entails the following steps:



| Scope | Dive | Ask | Assess | Results |
|---|---|---|---|---|
| Initial scoping to confirm:<br>• Strategic direction<br>• Organisational priorities<br>• M365 maturity focus<br>• Additional areas of interest – Cloud, Machine Learning, AI, etc.<br>• Target levels of maturity | SME deep dive sessions:<br>• With IT and business stakeholders<br>• To understand current performance, practice and outcomes<br>• Business concerns and challenges<br>• Areas of key risk<br>• Opportunities for quick wins<br>• Future aspirations | Tailored Questionnaires:<br>• For broad engagement with stakeholders – technical and business<br>• Understand both current practice and current sentiment<br>• Support Quantitative analytics | Evaluation of:<br>• Quantitative and Qualitative assessment around current practice<br>• Risks and opportunities<br>• Capacity to leverage industry standard approaches and solutions<br>• Gap analysis between current state and target state | Assessment results<br>• Current state assessment<br>• Gap analysis<br>• Findings are provided as:<br>  • Quick wins to implement right away<br>  • Actionable tools for you to implement<br>  • Dashboard that shows current maturity<br>  • Roadmap to remediate – processes, org change, etc. |

## Course of action in phase DEVELOPMENT

Before the phase development, we organise a tailoring meeting to adapt the schedule to the customer's requirements.

The phase development entails the following steps:

- **Implement quick wins**
- **Detail actions on scope level**
- **Estimate implementation of actions on scope level**
- **Prioritise actions**
- **Detail prioritised actions on design level**
- **Binding estimation for implementation of actions on design level**
- **Strategic decision for implementation of actions**
- **Implementation of decided actions**

# MOVING FORWARD WITH MICROSOFT 365 MATURITY

Maturing your Microsoft 365 environment can be complex and will vary from one organization to the next. Assessing your organisation, a function or a department is a good starting point that gives you a good basis to strategize the next steps. Furthermore, it identifies quick wins that can be implemented immediately at a comparatively low cost.

## FREE FIRST WORKSHOP

We offer a free first 4 hours workshop:

- **We present our assessment approach,**
- **discuss the scope and the object of assessment (organisation, function, department),**
- **elaborate a rough estimation and**
- **discuss next steps.**

**Elevate your Microsoft 365 environment maturity.
Contact our team.**

# ABOUT US

**Peter is the managing director at Pack of 7 in Brisbane Australia.**

Peter is a leading authority in Microsoft 365 Maturity & Governance, having assisted organizations of all sizes on their Microsoft 365 journey. With over three decades of experience in Microsoft technology, his expertise is both extensive and invaluable.

If you are interested in learning more about how to mature your Microsoft 365 environment, please contact Peter today.

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## ABOUT PACK OF 7

**Pack of 7 is a Microsoft Partner that specialises in Microsoft's Collaboration and Productivity cloud platform.**

- M365 Maturity & Governance
- Robotic Process Automation
- Cloud Solution Development
- Legacy System Cloud Migration

We are very proud of our extensive practical experience beginning with the first version of Office Server Extensions in early 2000 up to the full range of Microsoft's cloud productivity technologies like Power Platform, Microsoft 365, Teams and Azure today.

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