**Guidance for participants taking part in the Benchmarking exercise for version 2.0 of the Microsoft 365 Information Governance Maturity Model**

Thank you for agreeing to take part in the Microsoft 365 Maturity Model benchmarking exercise.

***What is the Microsoft 365 Maturity Model?***

The Microsoft 365 Maturity Model has been created by the UK’s [The National Archives](https://www.nationalarchives.gov.uk/) (TNA) as a practical assessment tool to provide guidance for organisations around their approach to information governance in Microsoft 365. Any organisation can use the Maturity Model to understand the areas of their usage of Microsoft 365 that align with best practices and conversely, those areas that might need improvement.

The Microsoft 365 Maturity Model is constructed from the following three elements:

* **Questions** – these interrogate how an organisation has decided to configure or use Microsoft 365.
* **Approaches** – these list a series of different ways that an organisation might have decided to configure or use Microsoft 365 in response to a specific question.
* **Grades –** these provide an appraisal of how optimal (or inadequate) the selected approach is considered to be.

The Maturity Model is freely available to use by any organisation. The current version of the Microsoft 365 Maturity Model is available on the IRMS website here - <https://irms.org.uk/page/M365MaturityModel>.

As Microsoft 365 is an evergreen platform that is continuously evolving, it is important that the model is kept up to date when updates and new features are introduced. The Microsoft 365 Maturity Model is intended to be a tool, for best practice for use of Microsoft 365 as well as information management.

**What is the Benchmarking exercise?**

The Microsoft 365 Maturity Model working group has recently created an updated version of the model. We now need to run a benchmarking exercise to establish a grade for each of the different approaches contained within this updated version of the Maturity Model. For example, one of the approaches is in relation to proof of disposition – is the most preferred approach manual, or an automated approach?

We are running this benchmarking exercise to establish Microsoft 365 best practices, based on the collective opinion of Information Management specialists working in public sector agencies around the world. This process will allow us to grade each of the different approaches contained within the Microsoft 365 Maturity Model as being either ‘optimal’, ‘adequate’, or ‘needing improvement’. As such, this benchmarking exercise is your opportunity to help inform what ‘good’ looks like in Microsoft 365.

**How we want feedback:**

* We need you to fill in the Benchmarking Template provided and send your responses to either [ville.lidberg@prov.vic.gov.au](mailto:ville.lidberg@prov.vic.gov.au) or [xander.hunter@prov.vic.gov.au](mailto:xander.hunter@prov.vic.gov.au) by COB 27 November 2024.
* When providing feedback on the model:
  + Where possible, please try to base your grade on Information/Records Management requirements, rather than thinking about other requirements such as how easy the system is to use or navigate.
  + When we have run previous benchmarking exercises, some respondents have provided grades for how well they themselves are doing. This is not what we are looking for. Instead, we ask each respondent to grade each approach based on how adequate you consider it to be (regardless of what your organisation does).
  + When providing your grades in the Benchmarking Template, please provide your updates in the ‘blue’ cells. The tabs you will need to fill in are the ‘About you’ cells, where we will gather information about your organisation, and the ‘Your grades’ cells. The glossary is a useful tab for key terminology.

For example, the retention section of the Microsoft 365 Maturity Model contains the following question:

‘*If you allow Team channel posts, what is your primary approach to managing records?*’

One of the approaches provided as a response to this question is

‘*We automatically delete Teams Chats on a regular basis. Staff are encouraged to avoid using Teams Chat for any exchange of important/valuable information and/or ensure that a record of the conversation is manually created elsewhere.*’

When providing your response during this benchmarking exercise, we do not want you to grade how well your organisation is currently complying, we instead want you to determine how adequate (or not) you consider this approach to be.

Please note that an optimal response does not have to be provided – you may not consider any responses to be optimal. For example, all responses could be adequate, or inadequate.

**How will your results/the responses you provide be used?**

The benchmarking exercise is anonymous. Your individual response will not be published externally and will only be accessible to members of the Microsoft 365 working group. We will retain anonymous cross-organisation statistics but will delete information specific to your organisation as soon as it has been collated.

By taking part in this benchmarking exercise, you acknowledge the information you provided us will be collated into anonymous cross-organisation statistics, which will include:

* Organisational sectors
* Approximate headcounts
* Relative sensitivity of information being processed

The reason for this is that we are able to compare whether responses are similar or otherwise, depending on the sector, location or country the organisation is from. This allows for more accurate benchmarking.

**Next steps**

* Results of benchmarking to be assessed. The individual coordinating your responses will keep you updated.
* Second version of the Maturity Assessment Model to be published within 2025