

# Transforming Knowledge Management with Microsoft 365 and Copilot

Strategies for the AI-Enhanced Workplace

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# Why?

*"If only HP knew  
what HP knows, we  
would be three  
times more  
productive."*

Lew Platt, former CEO, Hewlett-Packard

# Almost 30 years later, we still have KM challenges!

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Knowledge locked in silos – of people and repositories



Knowledge drain from people leaving the organization



Knowing where and what to search for is challenging – and it takes time



If you find something, can you trust it?



Low or no incentives to help others with time and expertise



Tacit knowledge is lost, disorganized, or discouraged

# The struggle is real: knowledge silos cost organizations wasted time and resources

**10%**

of employee time wasted per week searching for information needed to do their job<sup>1</sup>

**\$12.9  
Billion**

annual cost of poor data quality<sup>2</sup>

**29%**

of employees make compromised decisions based on assumptions when answers are not available<sup>3</sup>

**37%**

of employees become increasingly disengaged as they feel frustrated and overwhelmed<sup>3</sup>

1. [How Knowledge Mismanagement is Costing Your Company Millions](#) (2025)

2. [Gartner: How to improve your data quality](#) (2021)

3. The Modern Workplace Demands A New Approach To Knowledge Management – Forrester Report, March 2022 from a commissioned study in 2021 including organizations in the US, Germany, Switzerland, and Austria



We have some technology  
superpowers!

# Technology and AI are not enough: culture is critical ...

Reward and recognize collaborative behaviors

Ensure that knowledge seeking and sharing are built into work processes

Provide a safe space to ask questions AND share answers

# ... along with processes

- Knowledge acquisition
  - Understand what is needed and where it can be acquired
  - Prioritize what is essential
- Knowledge storage
  - Preserve what you acquire
  - Organize it to be found
  - Ensure that it can be accessed
- Knowledge distribution
  - Cultivate a knowledge sharing culture
  - Build in to work processes
  - Recognize and reward contributors AND re-users
- Knowledge application and optimization
  - Continuously improve processes
  - Provide training
  - Adapt to changing needs, technology, and organizational growth

# Not all knowledge is visible – you need different strategies for different types of knowledge

Visible

EXPLICIT KNOWLEDGE

DATA

VIDEOS

DOCUMENTS

PROCEDURES

INFORMATION

RECORDS

Invisible

TACIT KNOWLEDGE

EXPERIENCE

CONTEXT

INTUITION

OBSERVATION

INSIGHTS

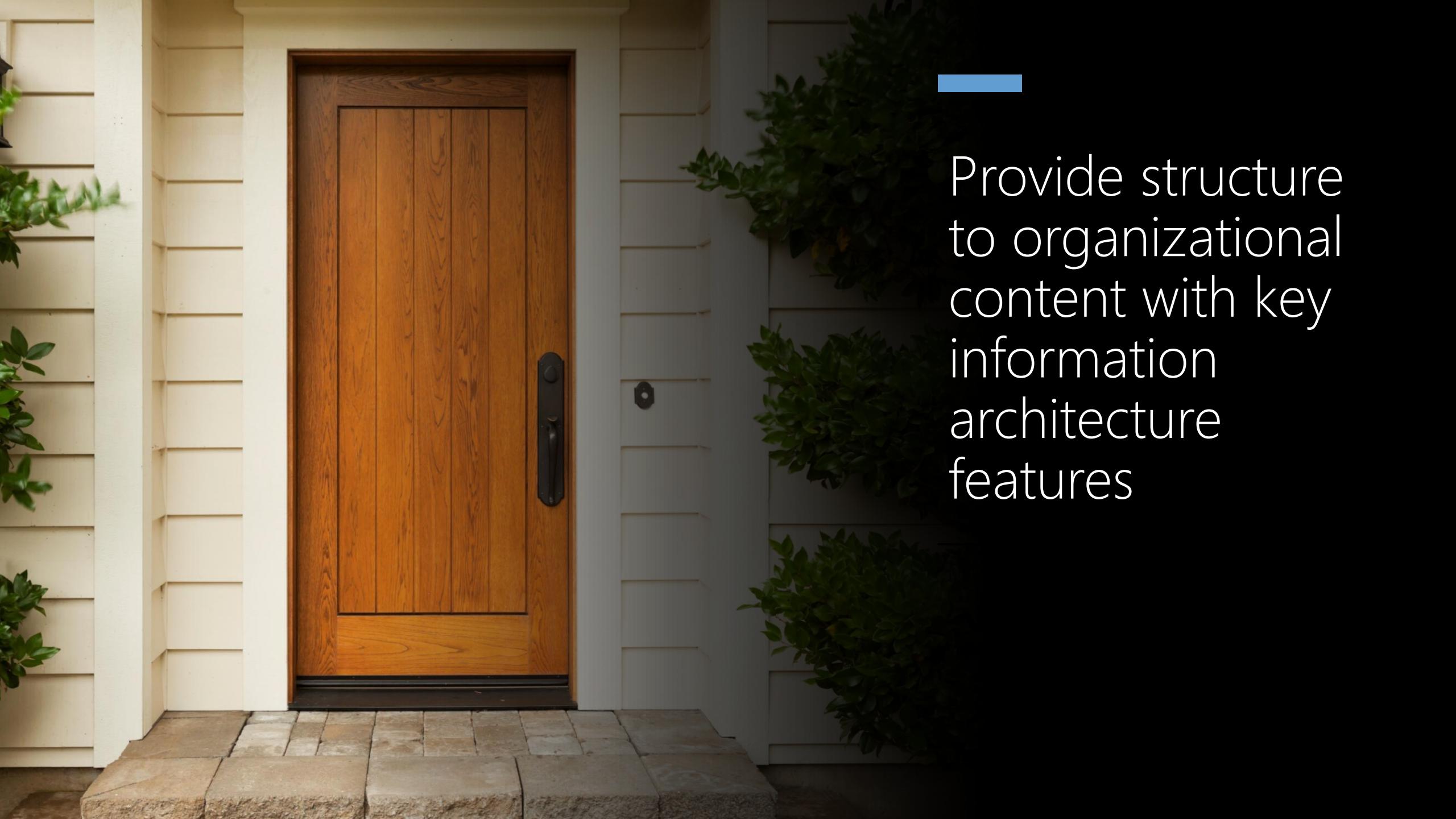
EXPERTISE

# SharePoint



# SharePoint is the hero app for explicit knowledge

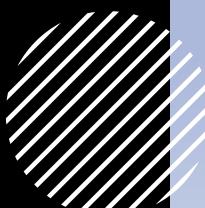
- Intranet as a centralized source of organizational content
  - Site structure to organize, secure, and manage (and ground Copilot agents) 
  - Navigation to complement search to improve findability
  - Authoritative pages for content and news with images, video and text
  - Organizational files and policies
  - Permissions to control content updates
  - Audiences to target content: right content to the right people at the right time
- Curated file repositories organized with metadata
- Search to find content using metadata and content
- Knowledge Agents to leverage AI to enhance content and help content managers maintain pages 



Provide structure  
to organizational  
content with key  
information  
architecture  
features



So, how do  
we optimize  
our  
architecture  
for KM?



Home site – top of the intranet



Hubs – collection of related sites



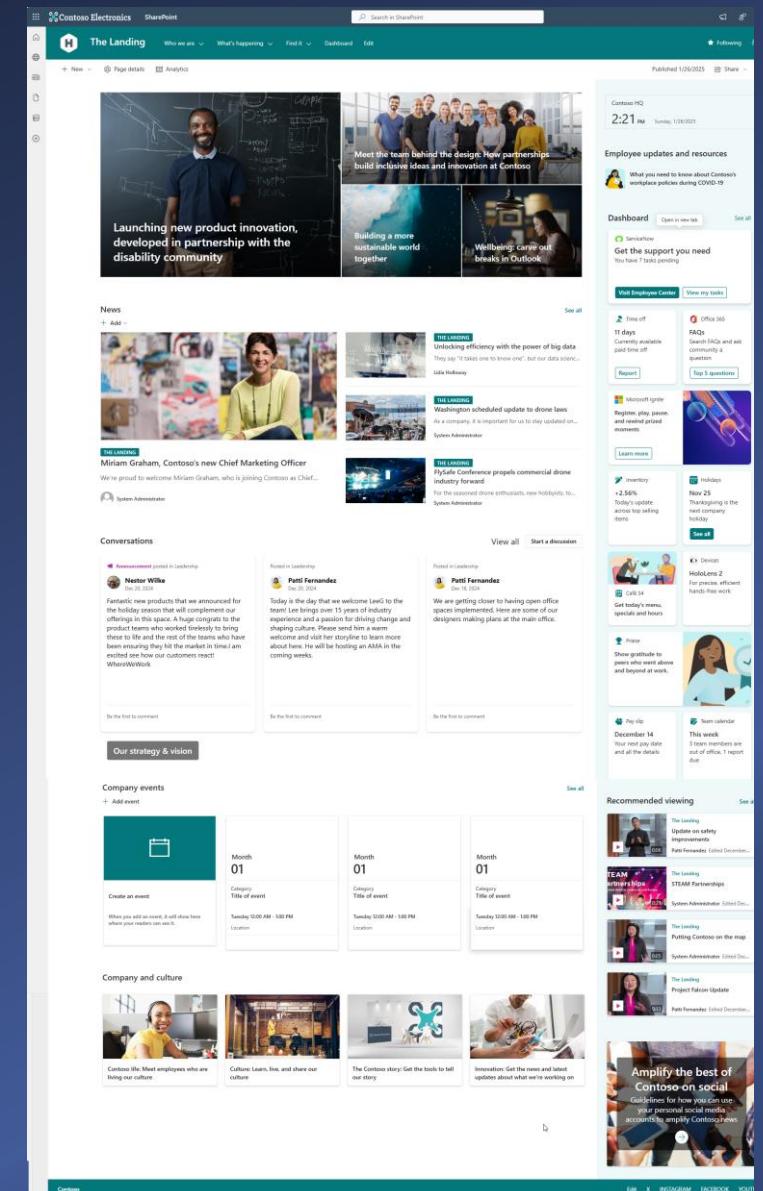
Sites – independent topics managed by  
the same group of people



Pages – elements of the story of a site

# Support knowledge discovery with a balance of us + me

- Curated content
  - Company and department news
  - Promotions – e.g., open enrollment
  - Cultural “touchstones”
  - Featured opportunities or content
- Targeted content
  - My tasks and apps (Connections dashboard)
- Personalized content
  - My documents (app bar)
  - My news (app bar)
  - My sites (app bar)
- Engagement opportunities
  - Embedded Viva Engage conversations



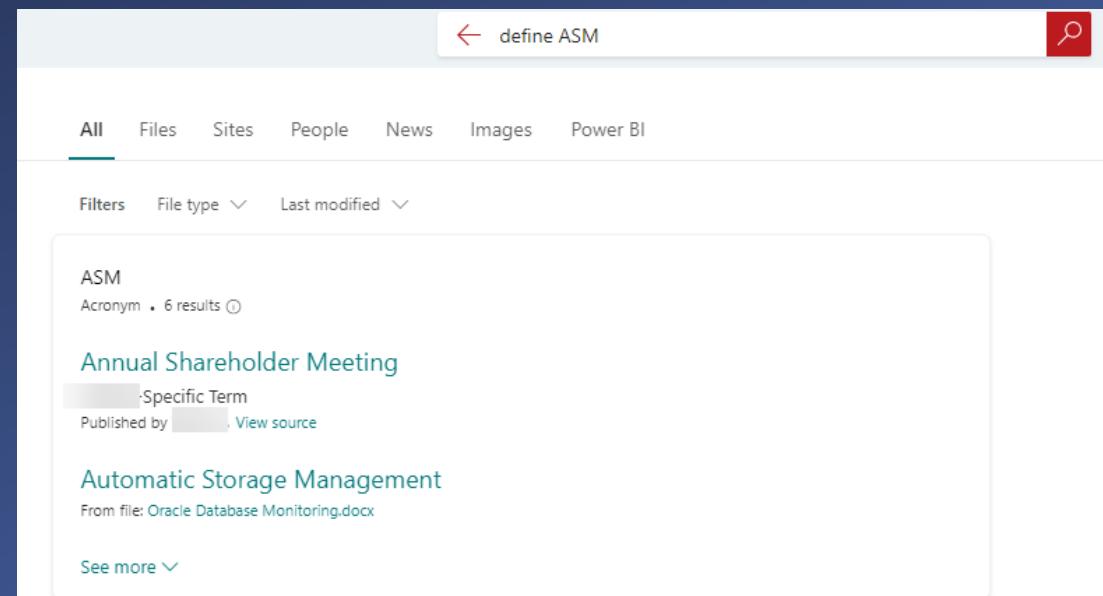
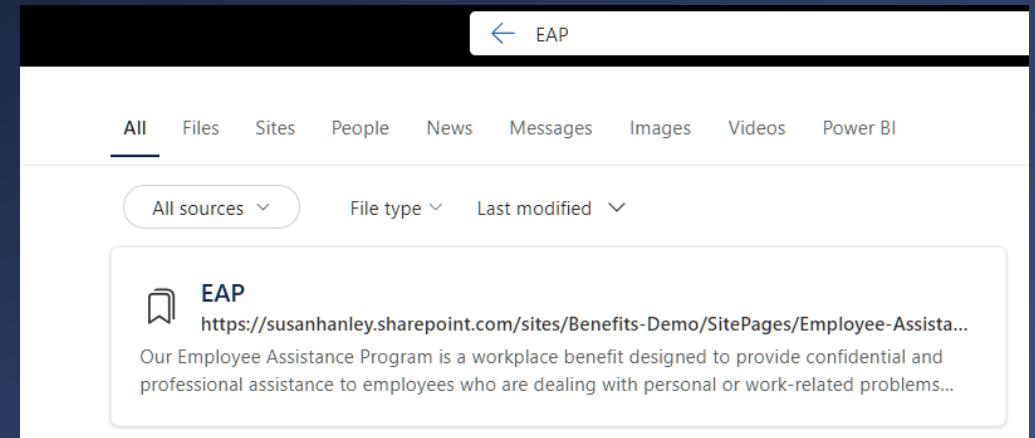


# Home Site KM superpowers ...

- Designated as an organization news site by default – prioritize discovery of news
- Includes search scoped to the entire tenant – find knowledge content everywhere, including bookmarks and acronyms
- Home icon in the SharePoint mobile app – find key content on your mobile device
- Configure global navigation (and the Viva Connections dashboard)
- Deliver your intranet in Microsoft Teams with Viva Connections

# Home site knowledge discovery superpowers

- Bookmarks and acronyms
  - Optimize search experiences to bring the most relevant content to the top of search results
- Custom verticals (e.g. Policies, official intranet sites)
- Configure *targeted* global navigation
- Configure Connections dashboard



# Do I need a site?

Every site comes with a Knowledge Agent and you can add your own SharePoint Agent to create custom agents relevant to the site and related content



 Topic	Topic has a lot of content such as lists for tracking, its own timeline of events, or a variety of documents on multiple topics
 Permissions	Delegate content management and restrict access to a specific group of people
 Time	Content is only viable for a short period of time - for example, for an event or a project
 Unique	Content is not "topically" or easily associated with any other primary business function
 News	Topic is one where you want to publish news and allow users to follow independently
 Knowledge Agent	Content provides a container to ground a permission and context-aware agent for discovery and content management

Knowledge exists in private and organization-wide containers – be aware of outcome goals and permission implications

Team Site (created with every Microsoft Team)

- **Collaborate** to get work done
- Edit permissions for everyone but site is generally private
- Permissions = Microsoft 365 Groups
- Navigation = Left OR Top (cascading or mega-menu)
- Extras: Shared Calendar, Email, Planner, OneNote, can be connected to a Microsoft Team

Communication Site (intranet)

- **Communicate**, share with a broad audience
- Small number of editors, large number of readers – site is generally open to read for all
- Permissions = SharePoint Groups (can include Microsoft Entra ID Groups)
- Navigation = Top (megamenu or cascading)
- Extras: None!

# Do I need a hub?



Multiple *related* sites



Shared search scope is important



Complex navigation that needs to be shared



SharePoint agent grounded in all the content in the hub

# Do I need a page?



Content is part of the “story” of the site (not independent)



Content explains or clarifies other pages on the site



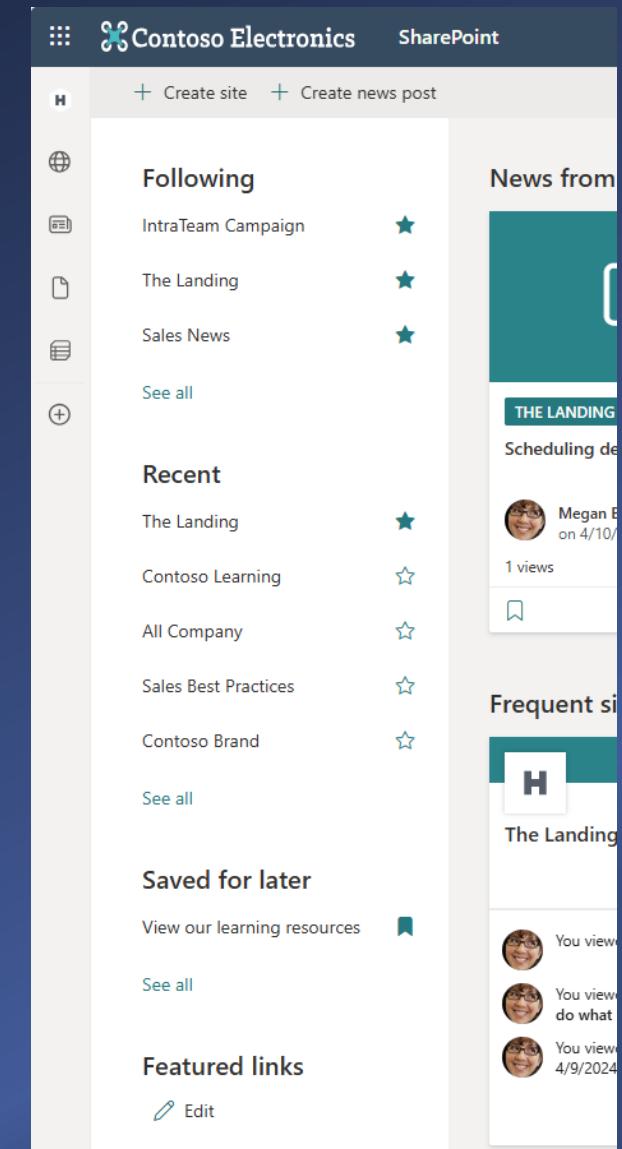
Topic is managed by the same people



Topic does not have a significant number of related documents or other assets

# Use site structure to make your own knowledge discovery experience in SharePoint

- Follow a site
  - Prioritizes news in the news feed
  - Notifications in Viva Connections for new news
  - Quickly return to places you care about
- Save a page for later
- Pin libraries and folders to quick access (for moving and copying files)
- Favorite files (discover in OneDrive)
- Site Owner: Pin files to top for shared knowledge discovery in library views

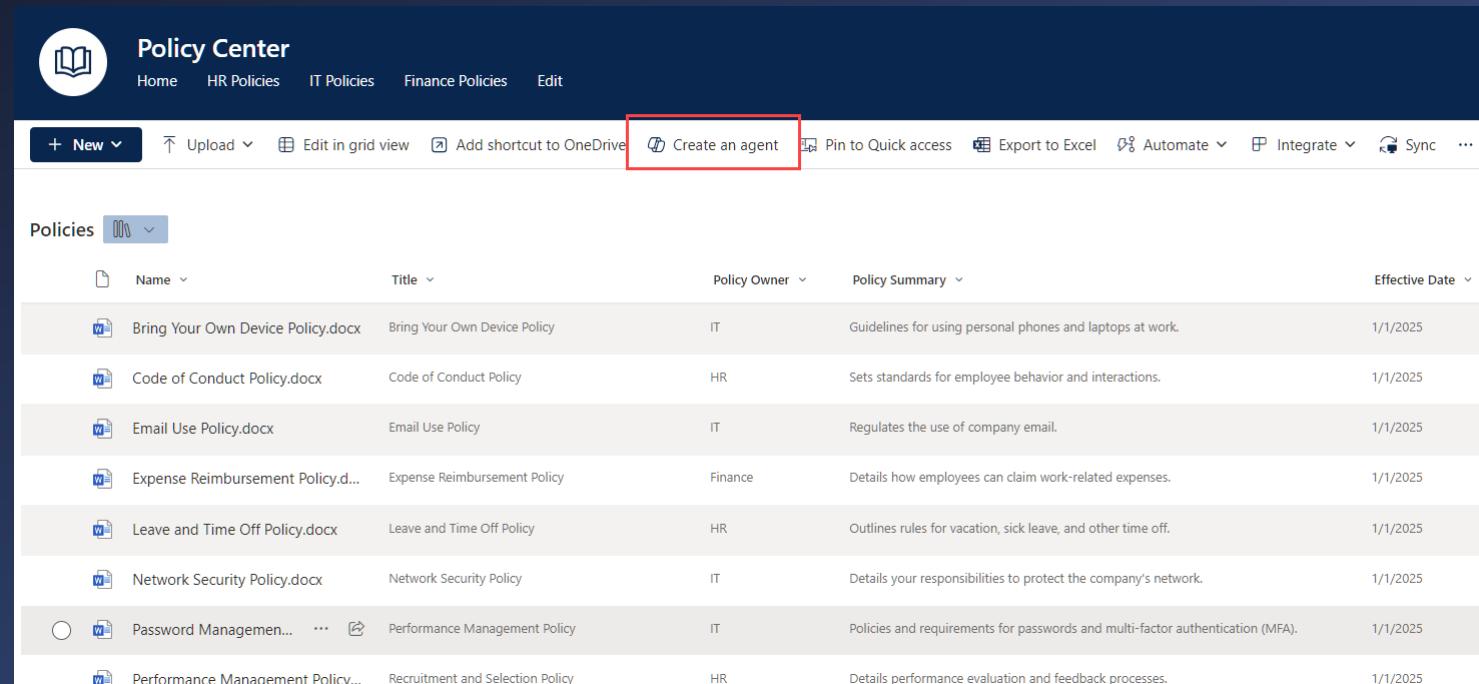


# Why is your site structure so important for KM?

- You manage permissions **at the site level** (If you're not, you should be!)
- Facilitates implementing your content governance policies
- Narrows the scope of search for users
- Allows each person to create their own knowledge-finding experience
- SharePoint and Knowledge Agents for SharePoint sites 

# Agents in SharePoint | Create an agent to match your outcome goals

- Create a copilot agent from a file selection (or entire site or hub)
- Customize the identity
- Customize the grounding knowledge
- Customize the behavior



The screenshot shows the SharePoint Policy Center interface. The top navigation bar includes links for Home, HR Policies, IT Policies, Finance Policies, and Edit. The main content area is titled 'Policies' and displays a list of policy documents. The columns in the list are Name, Title, Policy Owner, Policy Summary, and Effective Date. A red box highlights the 'Create an agent' button in the top navigation bar, which is located next to the 'Add shortcut to OneDrive' button. The policies listed are: Bring Your Own Device Policy, Code of Conduct Policy, Email Use Policy, Expense Reimbursement Policy, Leave and Time Off Policy, Network Security Policy, Password Management Policy, and Performance Management Policy.

Name	Title	Policy Owner	Policy Summary	Effective Date
Bring Your Own Device Policy.docx	Bring Your Own Device Policy	IT	Guidelines for using personal phones and laptops at work.	1/1/2025
Code of Conduct Policy.docx	Code of Conduct Policy	HR	Sets standards for employee behavior and interactions.	1/1/2025
Email Use Policy.docx	Email Use Policy	IT	Regulates the use of company email.	1/1/2025
Expense Reimbursement Policy.d...	Expense Reimbursement Policy	Finance	Details how employees can claim work-related expenses.	1/1/2025
Leave and Time Off Policy.docx	Leave and Time Off Policy	HR	Outlines rules for vacation, sick leave, and other time off.	1/1/2025
Network Security Policy.docx	Network Security Policy	IT	Details your responsibilities to protect the company's network.	1/1/2025
>Password Management Policy...	Performance Management Policy	IT	Policies and requirements for passwords and multi-factor authentication (MFA).	1/1/2025
Performance Management Policy...	Recruitment and Selection Policy	HR	Details performance evaluation and feedback processes.	1/1/2025

# What KM scenarios can SharePoint agents support?



## Training

Ask questions about training material



## Policy Center

Get policy answers without having to find or read long documents



## Onboarding

Guide new starters through training materials, company policies, and other essential resources



## Customer Support

Quick responses to common customer queries by accessing relevant information in SharePoint libraries



## Sales Support

Find case studies, product information, and other resources needed for presentations and client meetings

# But wait, there's more ... Knowledge Agent

- Organize your content automatically
  - Tags and classifies files with auto-filled metadata
  - Auto generated views

Organize this library

Software Engineer Resumes

Name	AI-generated Candidate	AI-generated Most recent title	AI-generated Professional summary
resume_RadaM_2025.docx	Rada Mihaylova	Sr. Software Engineer	Rada Mihaylova has experience as a senior engineer at Contoso, a backend developer at Fabrikam, and a software intern at Relatech. She has expertise in distributed systems, API design, and cloud infrastructure.
Gupta P resume.pdf	Pradeep Gupta	Full Stack Developer	Pradeep Gupta has experience as a backend intern at Northwind, a teaching assistant at UofT, and a freelance developer. He has expertise in Java, Spring Boot, and REST APIs.
final_resume_MiriamG.docx	Miriam Graham	Jr. Frontend Developer	Miriam Graham has experience as a frontend developer at Litware, a UX engineer at Tallspin Toys, and a design intern at Woodgrove Bank. She has expertise in React, accessibility, and design systems.
Resume_EEmilyB.docx	Emily Braun	Software Engineer	Emily Braun has experience as a software engineer at Contoso, a QA analyst at Fabrikam, and a research assistant at UBC. She has expertise in test automation, agile delivery, and CI/CD pipelines.
JLorenz 2025 resume.pdf	Johanna Lorenz	Backend Developer	Johanna Lorenz has experience as a backend engineer at Relatech, a systems analyst at All-in-One Staffing, and a software developer at TroySoft. She has expertise in .NET, SQL optimization, and microservices.

Knowledge Agent (preview)

Extract the full name of the candidate from the resume content... [see more](#)

Most recent title

Identify the candidate's most recent job title from the resume... [see more](#)

Professional summary

Summarize the candidate's professional background... [see more](#)

Type your message...

Save changes Cancel

AI-generated content may be incorrect.

Organize this library

Invoices

Name	Vendor	Amount due	Status
invoice_august_final.docx	Contoso	\$347.22	Approved
Payment receipt 2025.pdf	Contoso	\$1,284.50	Pending
Invoice Upload July.docx	Contoso	\$92.75	Approved
billing summary 2025.docx	Contoso	\$3,612.00	Approved
Invoice-Review-Aug.xlsx	Contoso	\$578.27	Rejected
invoice q3 entry.docx	Contoso	\$478.90	Pending

Vendor: Contoso

invoice_august_final.docx	Contoso	\$347.22	Approved
Payment receipt 2025.pdf	Contoso	\$1,284.50	Pending
Invoice Upload July.docx	Contoso	\$92.75	Approved
billing summary 2025.docx	Contoso	\$3,612.00	Approved
Invoice-Review-Aug.xlsx	Contoso	\$578.27	Rejected
invoice q3 entry.docx	Contoso	\$478.90	Pending

Vendor: ReleCloud

Invoice Final-Sept.pdf	ReleCloud	\$219.00	Approved
invoice_Summary July.xlsx	ReleCloud	\$875.60	Approved
Invoice 9823.pdf	ReleCloud	\$4,392.18	Pending

Knowledge Agent (preview)

Let me know when a new invoice over \$500 is added

Knowledge Agent

Sure! Creating the rule now, please finalize the rule in the popup.

New rule

When a new file is added, if the value of Amount due is greater than \$500, send an email to David Power

Type your message...

Save changes Cancel

AI-generated content may be incorrect.

Knowledge Agent (preview)

Summarize this page

Ask a question

Improve this site

Create a page

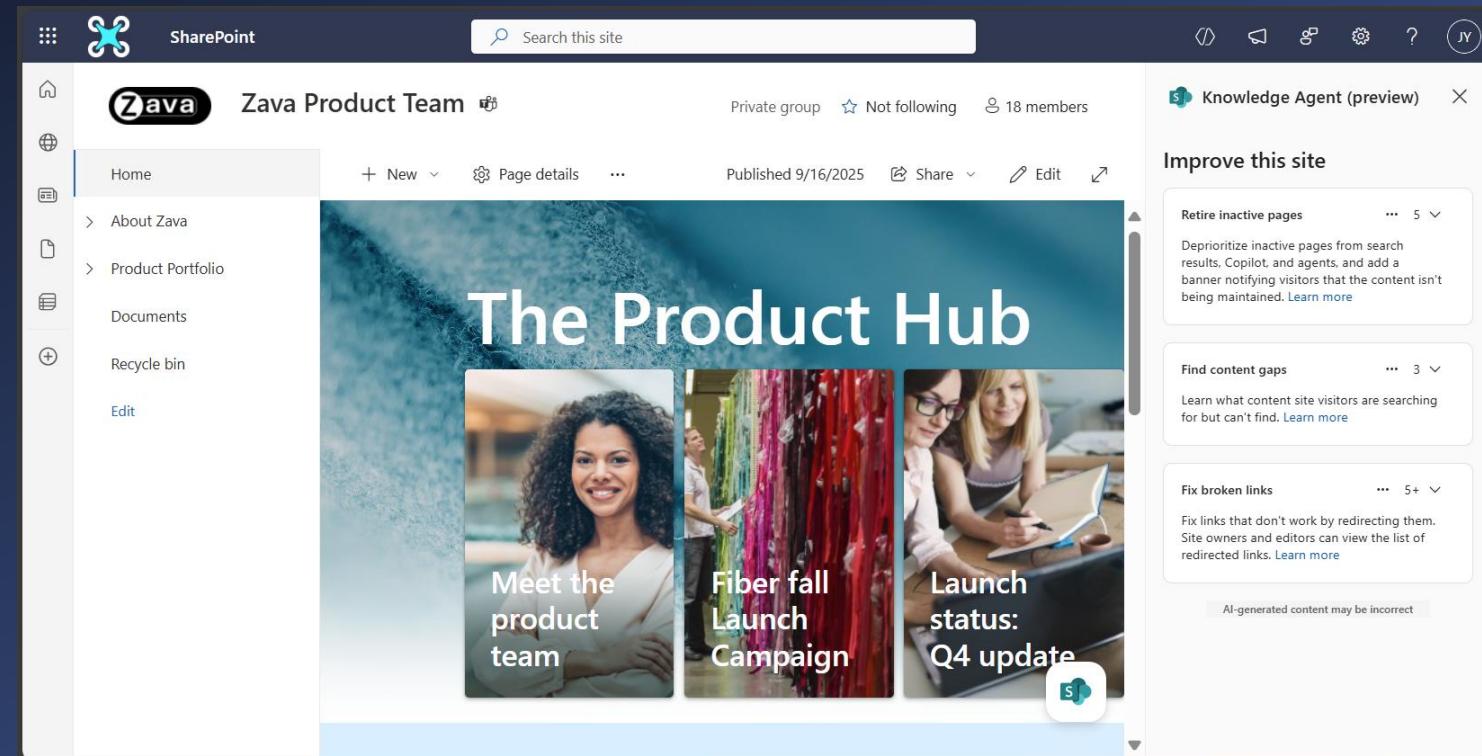
See more agents

Type your message...

Save changes

# Knowledge Agents help ensure that the content that is discovered is reliable

- Improve this site
  - Identify and retire inactive pages (flags each page, removes from search and Copilot, but links don't break)
  - Find content gaps by examining what people are searching for
  - Fix broken links!

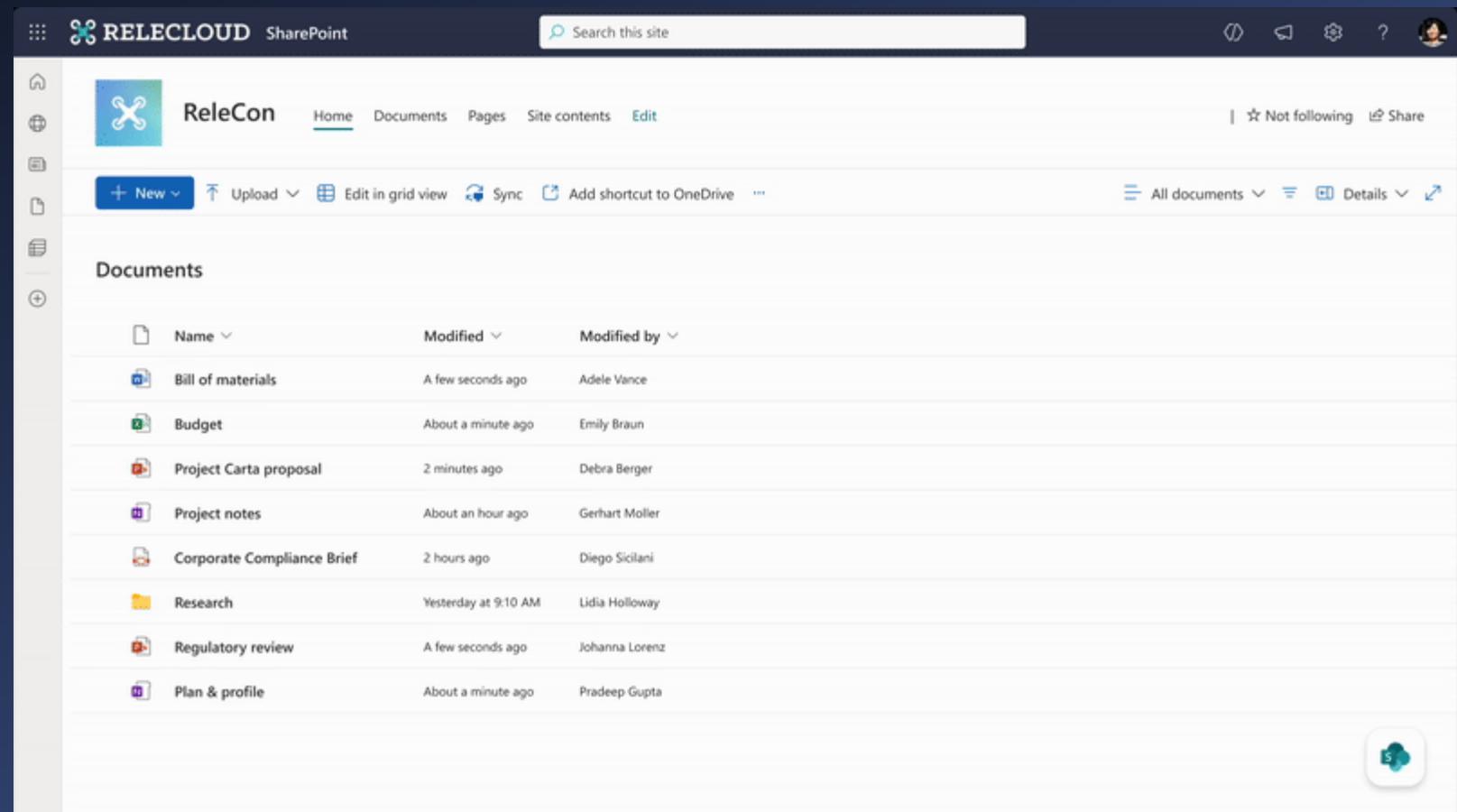


# Knowledge Agent is context-aware

- **Menu** adapts to where you are and what role you have, surfacing the most useful actions based on your current context.
  - **I'm the Site Owner**
    - View options like "Improve this site", which prompt you to fix broken links, retire outdated pages, or fill content gaps based on user behavior
  - **I own or can edit a document library**
    - See option to "Organize this library", "Set up rules," and "Create new views." Includes autofill metadata, classify documents, generate workflows, and create views to make content easier to navigate.
  - **I am a viewer of a site or library**
    - See "Ask a question", which opens a chat with the Knowledge Agent.
- Other actions: summarize the page, compare two documents, create an audio overview, or generate an FAQ

# Knowledge Agent in action

- Public preview  
NOW
- GA targeted for  
January 2026



RELECLOUD SharePoint

ReleCon

Home Documents Pages Site contents Edit

Search this site

+ New Upload Edit in grid view Sync Add shortcut to OneDrive ...

All documents Details

Documents

Name	Modified	Modified by
Bill of materials	A few seconds ago	Adele Vance
Budget	About a minute ago	Emily Braun
Project Carta proposal	2 minutes ago	Debra Berger
Project notes	About an hour ago	Gerhart Moller
Corporate Compliance Brief	2 hours ago	Diego Sicilani
Research	Yesterday at 9:10 AM	Lidia Holloway
Regulatory review	A few seconds ago	Johanna Lorenz
Plan & profile	About a minute ago	Pradeep Gupta

# Knowledge Agent – still a work in progress

- The good:
  - Identify and retire inactive pages (flags each page, removes from search and Copilot, but links don't break)
  - Find content gaps by examining what people are searching for
  - Fix broken links
  - Automatically applies metadata
- The not as good:
  - Localized to the site you are on – similar content might be tagged differently across sites
  - Metadata naming doesn't may not recognize organization best practices (names are created as list columns and suggested names include spaces: \_x0020\_ )
  - Columns only get applied to the default content type in the library
  - Cost is unclear - Will autofill columns be Pay-As-You-Go? Are users charged each time the agent is run, even if it is re-processing documents previously processed?
- Two great resources by Gabriel Karawani from ClearPeople:
  - [The Knowledge Agent in SharePoint - for KM & Innovation Leaders](#)
  - [Unpacking the Knowledge Agent in SharePoint – notes for technical & compliance teams](#)



# Configure navigation to guide users to top content



Core tasks connected with making products or services



About me (training, jobs, pay, benefits)



Core services (forms, travel, template, policies and procedures, IT and facility support, tools and apps)



Top tasks (what I need to do)



Finding people and collaborating



What's going on (news)



About the org/who we are (structure, charts, history, management)

# Navigation focus

- The **tasks** that employees perform
- The **terms** they use to describe those tasks



# Don't assume – Test!

## Planning and Design



Card sort – to understand how users associate content to categories



Site navigation draft – using the insights from the card sort



Tree test – to validate user journeys to most needed content



Revised site navigation

## Ongoing



Usability testing



Observation

Resource for online testing: [User Experience \(UX\) Research Platform | Optimal Workshop](#)

# SharePoint for tacit knowledge

- Find a name, explore expertise in context

The image displays two side-by-side screenshots of the SharePoint interface, illustrating how to find and explore user expertise.

**Left Screenshot (Course Catalog View):**

- The page title is "Documents > Course Catalog".
- A list of files is shown, including "A Comprehensive Brain Guide.wmv", "Ad Planning.pdf", "CE Annual Report.docx", "Communication Ideas.pptx", "Cost and Pricing Analysis - We...", "Dealing With Criticism.mp3", "Drone adaptations for manufacturing.mp4", "Eagle claw skills.mp4", "Gyro calibrations for urban navigation.mp4", "Learn a new language.mp4", "Learn a new skill.mp4", and "Learn Time Management.avi".
- The file "Cost and Pricing Analysis - We..." is selected, and a context menu is open over it.
- The context menu for "Cost and Pricing Analysis - We..." shows the user "Pradeep Gupta" as the modified by user.
- A detailed user profile for "Pradeep Gupta" is displayed in a modal window:
  - Profile picture of Pradeep Gupta.
  - Name: Pradeep Gupta.
  - Actions: Send email, LinkedIn, and more.
  - Contact information: Email (pradeepg@m365x70655253.onmicrosoft.com).
  - Reports to: Nestor Wilke.
  - LinkedIn link.
  - Message: Several possible matches for Pradeep Gupta.

**Right Screenshot (Organization View):**

- The page title is "Organization > Contoso Learning".
- The navigation bar includes "All", "Files", "Sites", "News", and "Images".
- The search bar shows the query "Cost and Pricing Analysis - Western Region".
- The results list the file "Cost and Pricing Analysis - Western Region" and indicates it was modified by "Pradeep Gupta" on August 4, 2017.
- A detailed user profile for "Pradeep Gupta" is displayed in a modal window:
  - Profile picture of Pradeep Gupta.
  - Name: Pradeep Gupta.
  - Actions: Send email, LinkedIn, and more.
  - Contact information: Email (pradeepg@m365x70655253.onmicrosoft.com).
  - Reports to: Nestor Wilke.
  - LinkedIn link.
  - Message: Several possible matches for Pradeep Gupta.

# How does SharePoint support KM outcomes?

- Curated knowledge repositories
  - With access to repositories curated and managed by experts, employees can trust that the information they see is accurate
  - But note the key word – **managed!** (appropriate permissions AND up-to-date)
- Organized content
  - Metadata to provide context on files – added by people as well as AI
- Secure access
  - Permission-trimming ensures that the most comprehensive and sensitive information can only be viewed by the intended audience
- Agents in SharePoint
  - Grounded in your authoritative content
  - Knowledge Agents to improve and organize your content

# OneDrive



# OneDrive for explicit knowledge discovery

- OneDrive is not just for *your* content – it helps you discover *all* files that you have permission to view
- Filter by People, Meetings (all files shared in meetings), and Media

The screenshot shows the OneDrive web interface for the 'Contoso Electronics' account. The left sidebar includes sections for 'Megan Bowen' (Home, My files, Shared, Favorites, Recycle bin), 'Browse files by' (People, Meetings, Media), 'Quick access' (Contoso Learning, The Landing, U.S. Sales, The Landing - MCAS Demos, The Landing - Dashboard, The Landing - Site Assets, The Landing - Contoso br..., The Landing - Demo Docs), and 'Storage'. The main area features a 'For you' section with cards for 'Cost and Pricing Analysis - Western Region' and 'CE Annual Report', both with 'Open' buttons. Below this is a 'Recent' section with tabs for All, Word, Excel, PowerPoint, and PDF, showing a list of files. The 'Recent' list includes: Event itinerary (My Lists, Opened Apr 30, Owner Megan Bowen), Design Ideas (Mark 8 Project Team, Opened Apr 18, Owner System Administrator), Engine Perf (Mark 8 Project Team, Opened Mar 17, Owner System Administrator), Mark 8 Public Launch Media Tracker (My Files, Opened Mar 16, Owner Megan Bowen), Marketing Strategy Future (The Landing, Opened Jan 19, Owner Megan Bowen), Contoso Marketing Principles - Confidential (The Landing, Opened Jan 19, Owner Megan Bowen), International Marketing Strategy (The Landing, Opened Jan 19, Owner Megan Bowen), Customer Data (The Landing, Opened Jan 19, Owner System Administrator), and Branding Elements (Contoso Brand, Opened Jan 18, Owner Alex Wilber). A 'Learn a new skill' section is also visible on the right.

Name	Opened	Owner	Activity
Event itinerary My Lists	Apr 30	Megan Bowen	
Design Ideas Mark 8 Project Team	Apr 18	System Administrator	
Engine Perf Mark 8 Project Team	Mar 17	System Administrator	
Mark 8 Public Launch Media Tracker My Files	Mar 16	Megan Bowen	
Marketing Strategy Future The Landing	Jan 19	Megan Bowen	
Contoso Marketing Principles - Confidential The Landing	Jan 19	Megan Bowen	
International Marketing Strategy The Landing	Jan 19	Megan Bowen	
Customer Data The Landing	Jan 19	System Administrator	
Branding Elements Contoso Brand	Jan 18	Alex Wilber	

# Viva Engage



# Viva Engage is the hero app for tacit knowledge



Connect people across the organization with leaders, coworkers, news, and knowledge



Empower leaders and communicators to reach, engage and listen at scale



Build effective **communities** to support business objectives and employee experience



Activate employees to contribute their energies, expertise, and ideas



Find **knowledge, experts, and answers** faster so that employees can be more productive

# Communities of practice

- Solve problems quickly
  - Raise awareness to a broad group of interested people
  - Ask questions and find answers
- Crowdsource ideas
  - Spur innovation and innovative solutions
- Transfer best practices
  - Find people who can qualify experience
  - Share good ideas
- Attract and retain talent
  - Provide an immediate sense of belonging for new starters
- Develop professional skills
  - Build connections across geographies, organization units, and physical space
  - Connect with experts

★ Viva Engage allows Admins to designate experts in a community (and people can self-nominate). Experts can verify an answer to mark as trustworthy and reliable.



Artificial Intelligence and Machine ... verified  
Focus on artificial intelligence and machine learning  
#ConnectedCommunities



Marketers at Microsoft verified  
Empowering all marketers at Microsoft to drive business growth today and in the future.



New Hires verified  
Welcome! Please share your onboarding tips, ask questions, and meet new people!

# Communities of practice should be part of your tacit knowledge management initiatives

## Communities

Created organically with many objectives

Membership defined by knowledge, voluntary

Members take on new roles based on interest and need

Exists while members believe they can contribute or benefit

Mostly open

## Teams

Driven by deliverables with shared results

Membership defined by task, assigned

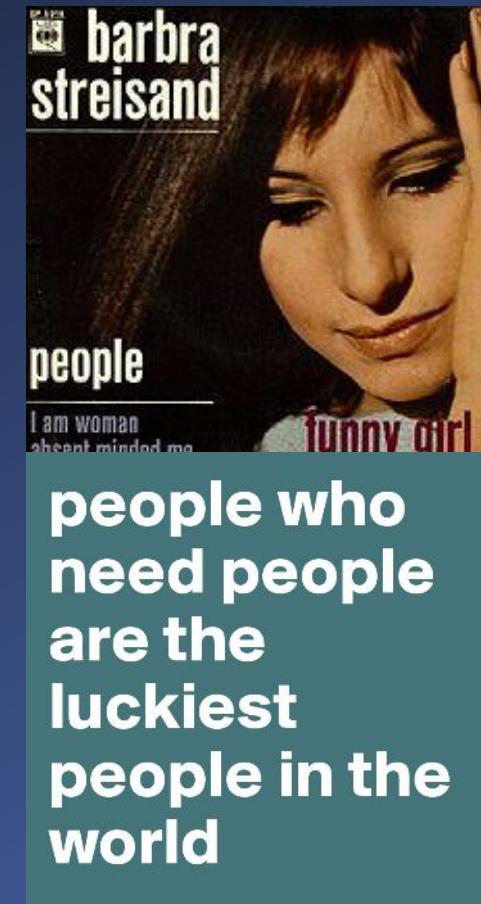
Roles for members typically remain consistent

Often dissolved when mission is accomplished

Mostly private

# Communities help people turbocharge search (and AI!)

- Find a person, get an example
  - Does anyone have an example of a ...?
  - We're trying to do x, has anyone done that before?
- Does anyone know someone who ...?
  - Use Viva Engage to provide qualitative search
  - Find the person who knows the person
- Answers in Viva (premium feature) connects people and answers to questions
- Viva Engage conversations in Microsoft and SharePoint Search – question posts from public Communities, Storylines, and Answers!
- New: Agents in communities



# Agents in Communities

- AI-powered assistants designed to help answer questions from community members
- Agent refers to past conversations and community SharePoint resources to generate responses to unanswered questions.
- Helps community members get timely, accurate information
- Admin can determine how the agent will work in context:
  - Require review before posting
  - Add a SharePoint site or library to support agent responses with deeper information
- Licensing:
  - Agents are available in Engage communities for users with a **Microsoft 365 Copilot license**
  - Community members without a Copilot license will be able to view agent interactions with other licensed members

The screenshot displays the Microsoft Viva Engage interface. On the left, a sidebar shows navigation options like Activity, Chat, Direct, Engage, Leader, Posts, Stories, and Analytics. The main area features a 'Product Sales Support agent' card with a purple icon, a bio, and a status message: 'Agent is active Accessing group resources.' Below this, a 'What this agent can do' section lists 'Answers questions' (Responds to question posts in this community) and a 'Resources' section with links to 'Product Sales Support posts', 'Product Sales Support - North America SharePoint site and library', and 'Product Team'. A note at the bottom states: 'By using Product Sales Support agent, you agree to the [privacy policy](#)'. To the right, a 'Recent posts' feed shows a post from 'Miguel Garcia' with the text: 'What is the position of ZavaCore Fiber that I should share with customers?'. Below the feed, a 'Review agent suggestions' section shows a card for 'Dafna Hugot - Product Sales Support agent' with a detailed description of the 'Value Proposition of ZavaCore Fiber' and a 'Reasoning' section. The top right corner shows a summary of community metrics: 'Members 1,516', 'Community experts 5', and 'Agent'. The bottom right corner shows a pinned item 'Launch Timeline Shift' and a file 'ZCF Product Vision.docx'.

Learn more: [Introducing agents in Viva Engage communities: Your AI-powered community expert](#)

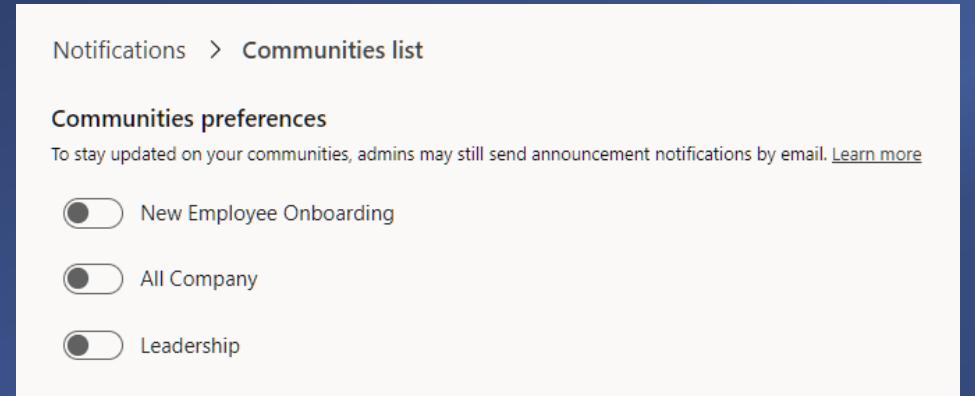
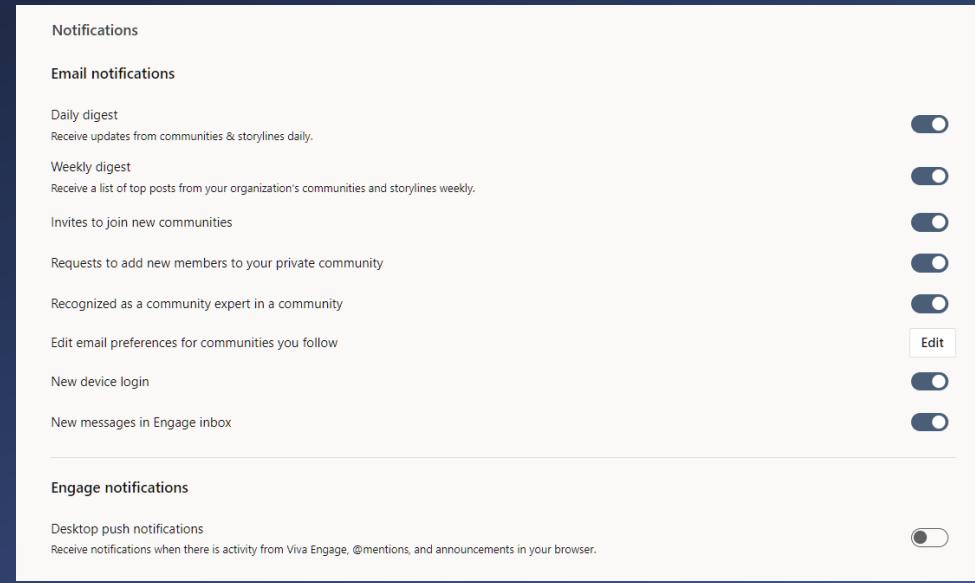
# Discover important topics

- Topic previews and descriptions
- Popular topics featured automatically
- Topic pages bring together content across the network tagged with the same topic
- Follow topics to get notified about new knowledge you care about

The image displays two screenshots of a Microsoft Teams topic page. The top screenshot shows the 'Sales Best Practices' topic page, which includes a video thumbnail of a woman speaking, a summary of the topic, and a list of pinned resources and popular topics. The bottom screenshot shows the 'Topic MACH 3' page, which includes a question from Carole Poland, a document titled 'Privacy requirement for MACH 3.doc', and a comment from Best Answer. Both pages feature a sidebar with community information and popular topics.

# Knowledge in my flow | Users choose notifications

- Make sure you include information about setting notification preferences in your launch education
- Email notifications are enabled unless the **individual user** turns them off
- Encourage users to “subscribe” to the daily activity feeds for the communities in which they are most interested



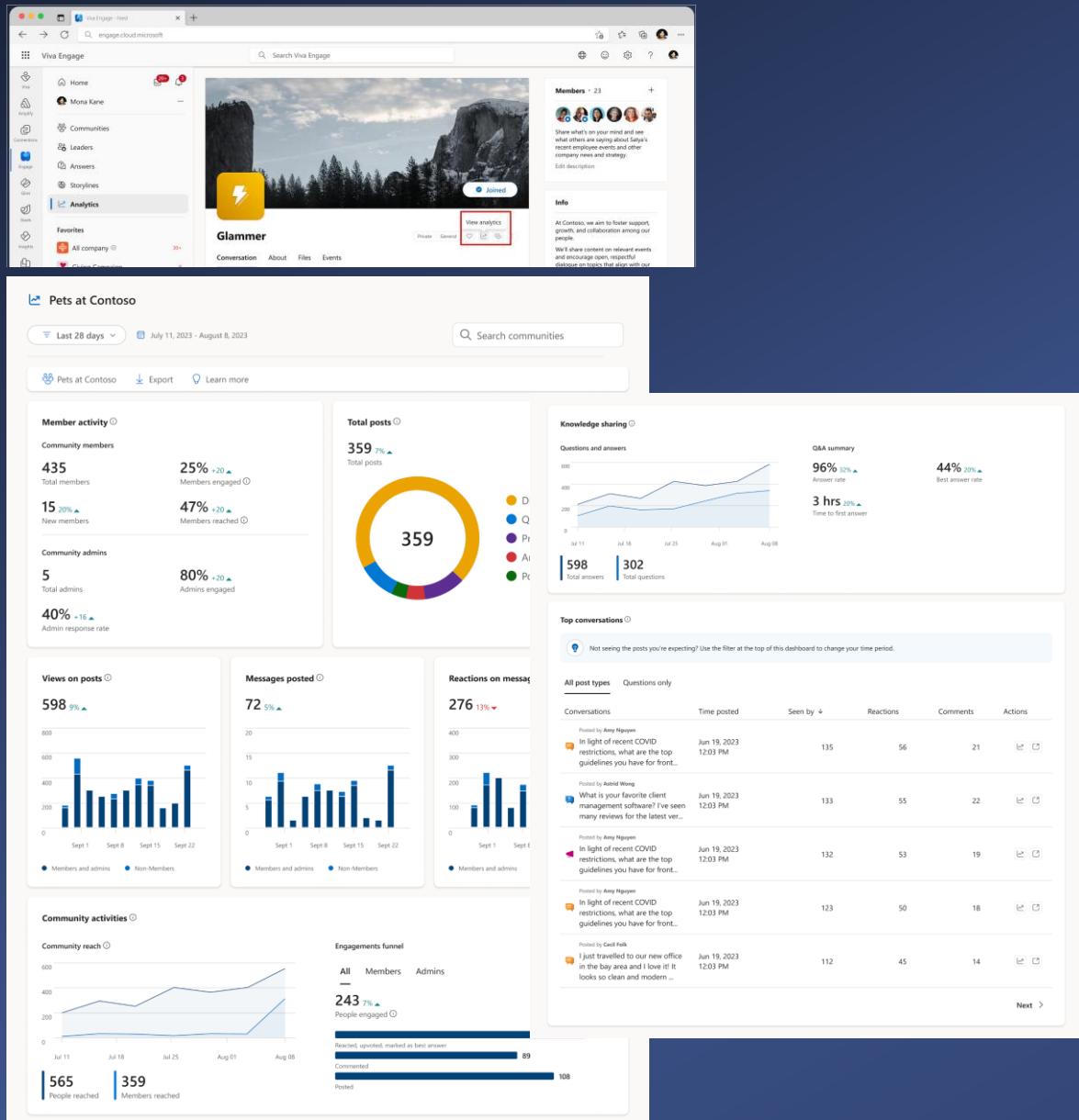
# Community Admins can create Announcements to override notifications

- Before: when an admin created a new Community Announcement, notification in Teams and Mobile Push immediately, followed by an email notification two hours later if the announcement was not opened already in Teams and/or Mobile Push
- Now, with smarter delivery:
  - Users receive the notification in **one channel only** - either Teams, Mobile Push, or Email
  - Notification channel may differ by user and is selected based on where a user has opened Engage notifications most frequently in the past 30 days
  - If the announcement is not opened **within two hours** in the first notification channel, a **secondary notification channel** will be sent, also determined by where a user opens Engage notifications most frequently
- “Essential” announcements can still be sent immediately



# Measure what matters | Community analytics

- Community analytics in real time. Access via Analytics icon from the community page header.
  - Data ranges to support periods of 7 days, 28 days, 90 days, and 365 days.
  - Top conversations table that displays the conversations with the most engagement in the community.
  - Q&A engagement metrics, including an overview of most popular questions.
- Measure community growth
  - Track new member creation, active people, their location, department and more to understand community reach and help tailor content to grow membership
- See how people engage
  - See how many conversations, comments, reactions, questions, answers, live events, and more were engaged with over time to help analyze what is working best
- Recognize catalysts and trends
  - Identify top conversations, questions, active contributors, champions and trends to measure event attendance, and knowledge dissemination
- Export data for deeper analysis



# How can you enable successful communities?

## Culture

- Reward and recognize collaborative behaviors
- Celebrate and promote successes
- Provide a safe space

## Process

- Ensure that each community has a clear identity and purpose
- Build knowledge seeking and sharing into work processes

## People

- Community leaders
- Subject matter experts
- Members

## Technology

- Viva Engage
- Answers in Viva

# Creating a safe space

- **One for all, all for one.** Encourage sharing so that people appreciate that if we all share, our jobs become easier and our work becomes more satisfying.
- **Make it easy.** Ensure that sharing is simple and can happen in the tools people use day-to-day. This is one of the biggest benefits of Viva Engage inside Teams.
- **Reward knowledge behaviors.** Demonstrate the importance of knowledge sharing by encouraging leaders to recognize knowledge sharing behaviors publicly. Sharing helps the organization and it also helps advance individual professional achievement.
- **Be kind.** Not every contribution may be the “ultimate” answer. People who contribute are making themselves vulnerable. Ensure that everyone responds with kindness and support.



# Key KM features

- Configure as “official” for authoritative forums
- Public or private based on the topic and people involved
- Managed by SMEs (or wanna-SMEs) or designated leads
- Pin conversations to make key content more discoverable
- Designate a post as a question to track community responses
- Crowdsource knowledge with upvoting and best answer designations
- Organize posts with topics and #hashtags
- Search results from Viva Engage interleaved with SharePoint search – currently limited to question posts in public communities, Storylines, and Answers but more coming
- Community Expert designation in communities. Experts can endorse accurate and credible answers and be recognized as experts with a special label next to their name.
- Viva Engage knowledge in Microsoft 365 Copilot

The screenshot shows the Microsoft Viva Engage platform. At the top, there is a search bar with the text 'HR'. Below it, the 'Communities' section lists several communities: 'Contoso HR Outreach' (marked as official), 'HR Connect' (marked as official), and 'Human Resources Playbook'. The 'Human Resources Playbook' community is selected, showing its details: 'Viva Engage' and a 'Search' bar. On the left, a sidebar shows 'Mona Kane' as the user and links to 'Home Feed', 'Communities', 'Leaders', 'Answers', and 'Inbox'. Under 'Favorites', there are links to 'Giving Campaign', 'Contoso Canada', and 'Contoso Sales Team - Canada'. The main content area shows a pinned conversation from 'Contoso Sales Team - Canada' with a thumbnail image of a person speaking. Below it, there are sections for 'Conversations', 'About', 'Files', and 'Events'. A 'Share' button is visible. On the right, there are sections for 'Recent activity', 'Pinned Conversations', and 'Featured conversation'. The 'Pinned Conversations' section shows an announcement from 'Allan Munger' about town hall meetings. The 'Featured conversation' section shows a post from 'Johnie McConnell' about new team OKRs.

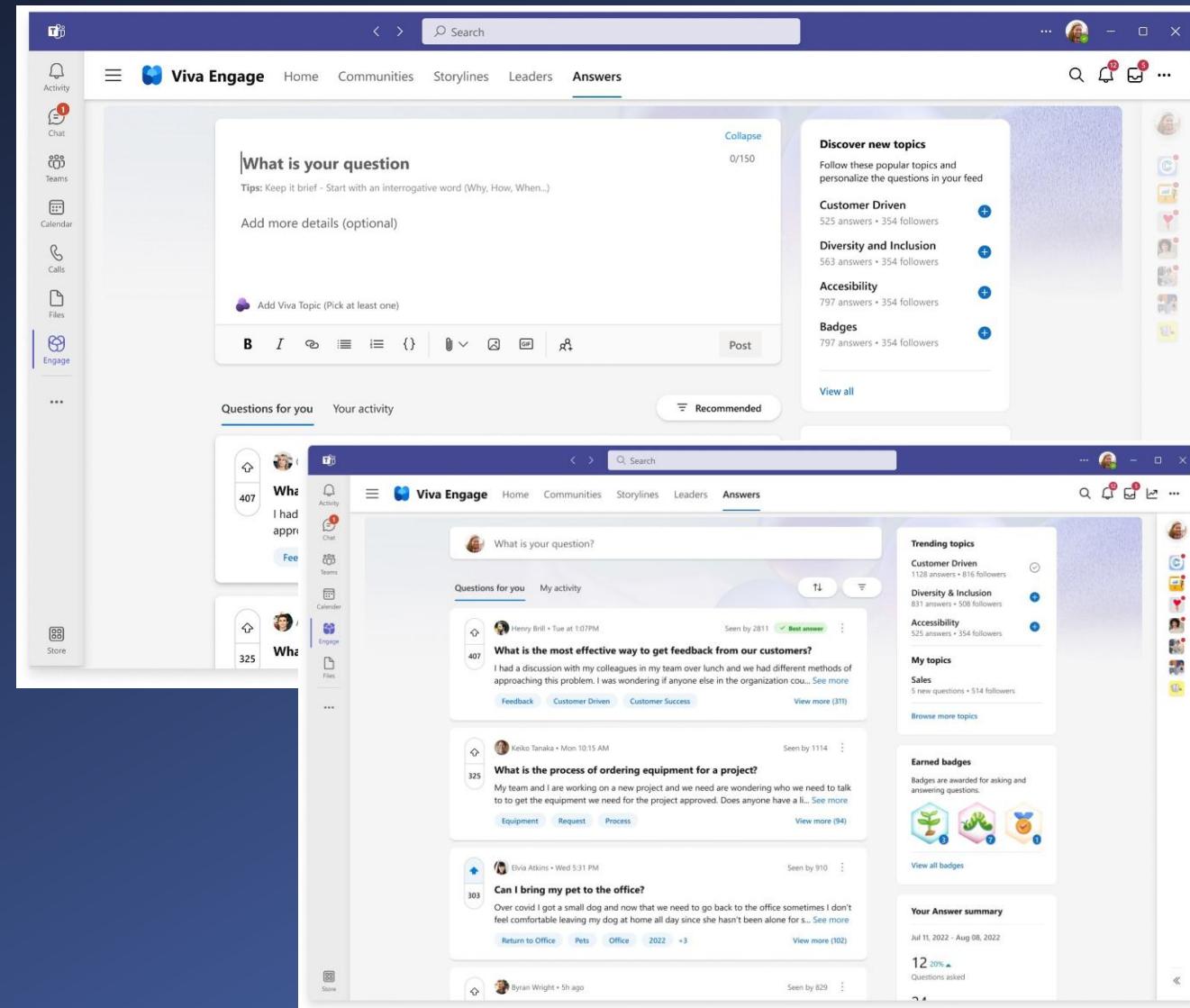
This screenshot shows a pinned conversation from Adele Vance. The post reads: 'At our facilities, we reduce and—where possible—eliminate waste through reuse of materials, source reduction, and recycling. All waste is handled and disposed of through safe and environmentally responsible methods to reach our Planet Blue goal.' Below the post, there is a 'Topic' tag labeled 'Planet Blue' and a 'Hashtag' tag labeled '#ContosoWin'. At the bottom, there are buttons for 'Like', 'Comment', 'Share', and 'Write a comment'.

# Answers in Viva



# Answers in Viva | Viva Suite or C&C license required

- Uses AI to surface and match employee questions to answers and experts
- Ask questions, find existing answers, or route questions to experts who can provide a new answer
- Highlights top solutions and prompt and reward people for contributing answers to the knowledge base
- Answers also in communities: Admins can turn on Answers functionality for their communities. See “related questions” in the question publisher, ask questions using titles and descriptions, and gain badges for answering questions.
- Mark selected answers as “Verified”



# What can you do in Answers in Viva?

- Ask a question and get an answer from AI which can recommend similar questions and answers or route your question to the right people for an answer
- Upvote crowdsourced responses or questions
- Mark best answer to reward contributors, encourage knowledge sharing, and help future askers
- Contribute knowledge by responding to questions
- See a personalized feed of questions that you may be able to answer
- Follow topics to stay up to date on areas of knowledge
- Tag people who might know the answer
- Search through previously asked and answered questions
- Designate an answer as a Verified Answer

# How can Viva Engage and Answers address the challenges of leveraging tacit knowledge?

- Save time and focus for SMEs
  - Not answering the same question multiple times, while monitoring personalized feeds of questions relevant to their expertise
- Enhance communities with Answers
  - Supercharge existing communities and create quick wins for new ones by bringing capabilities including AI-driven related questions into those communities
- Answers in the flow
  - Use Viva Engage, Search, Copilot, to access the valuable source of knowledge that your Answers in Viva questions, answers, and Engage conversations provide
- Import content automatically
  - Use the Answers intelligent importer to scan and ingest Q&A pairs from documents
- Monitor and improve
  - Admins can see detailed analytics on time saved, top questions being asked, and frequency of answers

# What is the difference between Answers in Viva and Agents in Viva Engage?

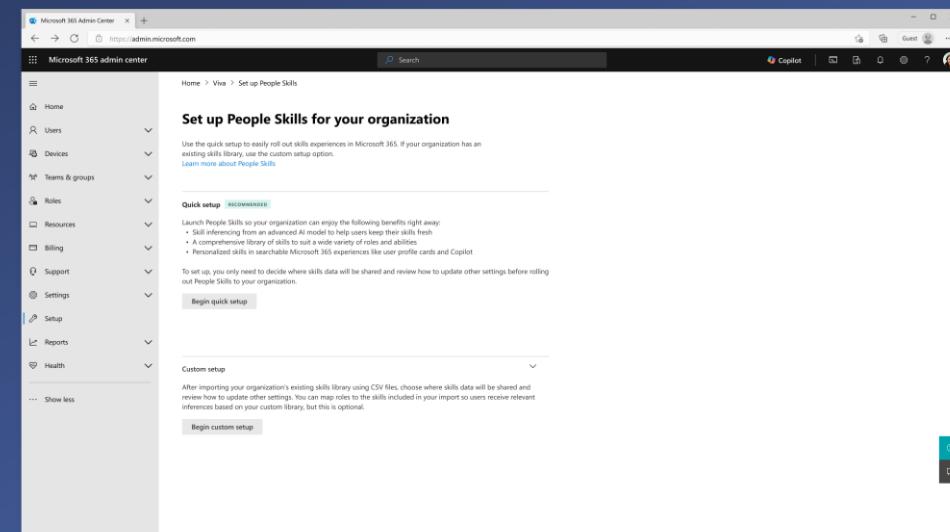
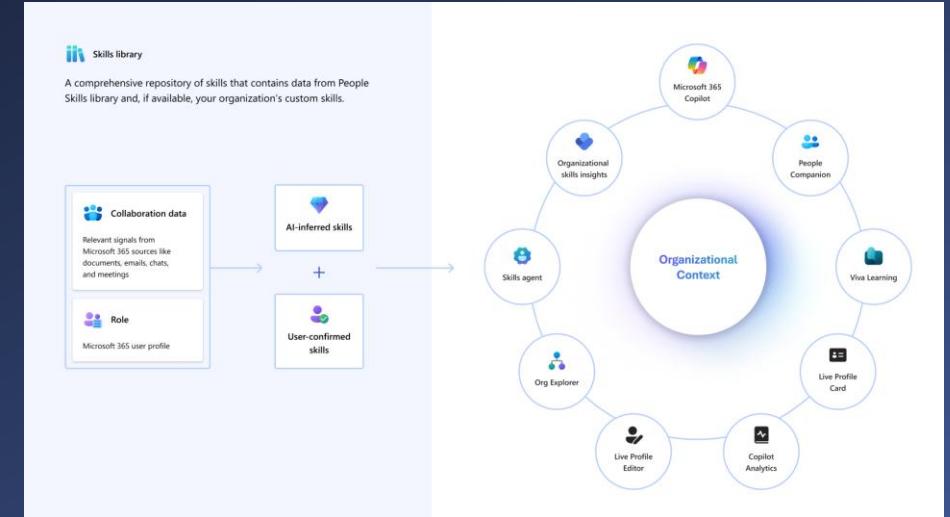
Feature	Answers in Viva	Agents in Viva Engage
Description	Structured Q&A experience where users ask questions and get answers from peers or experts, and benefit from natural language matching, recognition for contributors, and centralized (or community-based) knowledge.	AI-powered assistants that proactively draft answers to <i>unanswered</i> questions in communities. They use past conversations and (soon) SharePoint to generate responses. Admins configure whether agents post automatically or require review.
Purpose	Human-powered Q&A	AI-assisted knowledge drafting
Trigger	User asks a question	Agent scans for unanswered questions
Content source	Community members	Past threads + SharePoint (coming soon)
Review	Peer voting & best answer selection	Optional admin/expert review
Licensing	Viva Suite or C&C	Microsoft 365 Copilot License

# People Skills



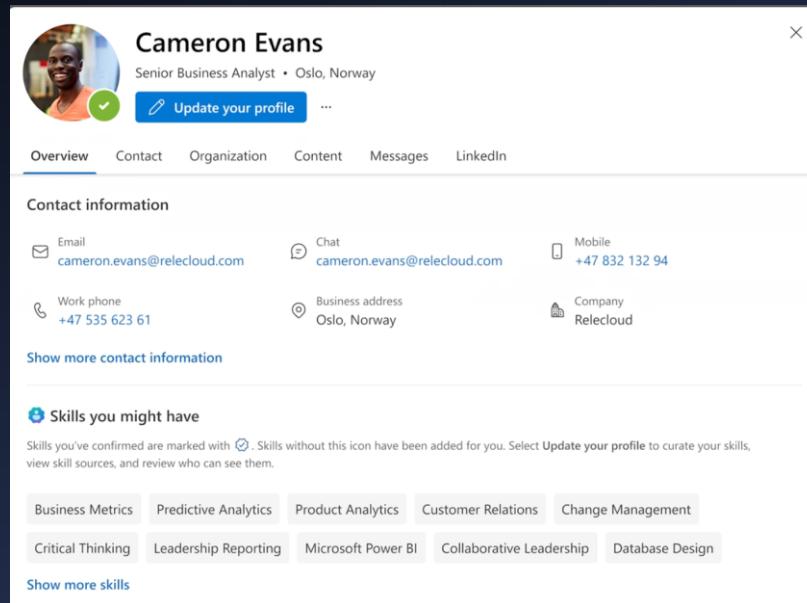
# People Skills

- Infers skillsets derived from your profile and activity mapped to a customizable built-in skills taxonomy
  - Frequent refresh cadence to stay up-to-date
  - Requires zero action by end users – users are in control of what is displayed
  - Takes <5 minutes to set up from Microsoft 365 admin center
  - Includes robust privacy and visibility controls at both the admin and user level
- Built-in taxonomy produced in partnership with LinkedIn or import your own



# Individual experience

View your suggested skills



Cameron Evans  
Senior Business Analyst • Oslo, Norway  
[Update your profile](#) ...

**Overview** Contact Organization Content Messages LinkedIn

**Contact information**

Email cameron.evans@relecloud.com	Chat cameron.evans@relecloud.com	Mobile +47 832 132 94
Work phone +47 535 623 61	Business address Oslo, Norway	Company Relecloud

**Skills you might have**

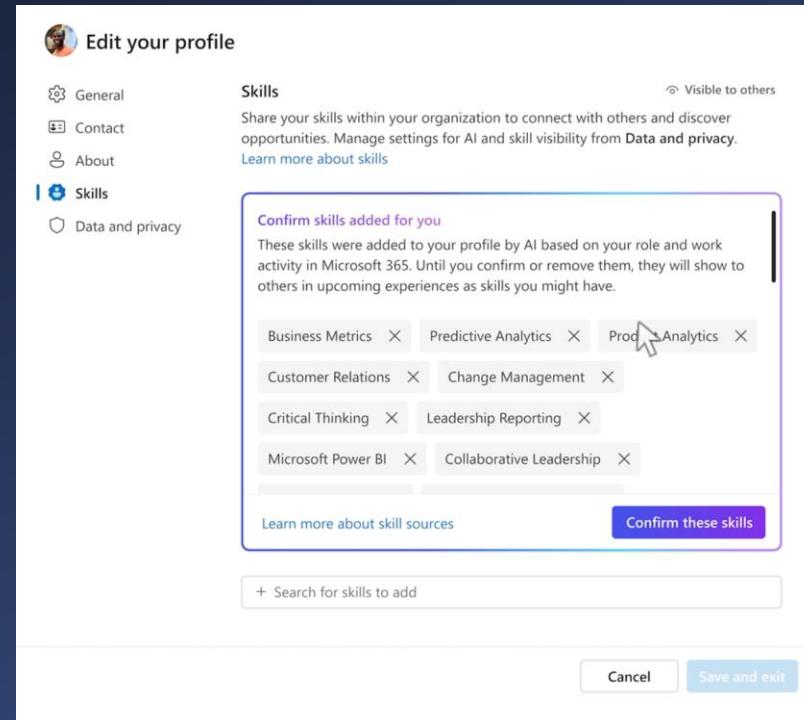
Skills you've confirmed are marked with . Skills without this icon have been added for you. Select [Update your profile](#) to curate your skills, view skill sources, and review who can see them.

[Business Metrics](#) [Predictive Analytics](#) [Product Analytics](#) [Customer Relations](#) [Change Management](#)

[Critical Thinking](#) [Leadership Reporting](#) [Microsoft Power BI](#) [Collaborative Leadership](#) [Database Design](#)

[Show more skills](#)

Review and approve and add more



**Edit your profile**

**Skills** Visible to others

Share your skills within your organization to connect with others and discover opportunities. Manage settings for AI and skill visibility from [Data and privacy](#). [Learn more about skills](#)

**Confirm skills added for you**

These skills were added to your profile by AI based on your role and work activity in Microsoft 365. Until you confirm or remove them, they will show to others in upcoming experiences as skills you might have.

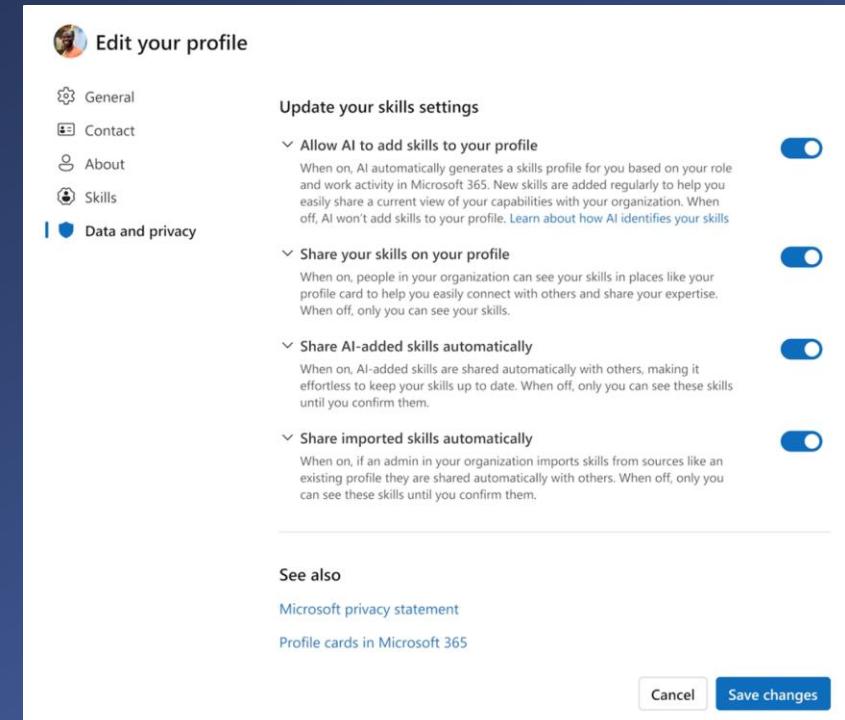
Business Metrics Predictive Analytics Proc   
Customer Relations Change Management   
Critical Thinking Leadership Reporting   
Microsoft Power BI Collaborative Leadership

[Learn more about skill sources](#) [Confirm these skills](#)

+ Search for skills to add

[Cancel](#) [Save and exit](#)

Determine your privacy settings



**Edit your profile**

**Data and privacy**

**Update your skills settings**

**Allow AI to add skills to your profile**  
When on, AI automatically generates a skills profile for you based on your role and work activity in Microsoft 365. New skills are added regularly to help you easily share a current view of your capabilities with your organization. When off, AI won't add skills to your profile. [Learn about how AI identifies your skills](#)

**Share your skills on your profile**  
When on, people in your organization can see your skills in places like your profile card to help you easily connect with others and share your expertise. When off, only you can see your skills.

**Share AI-added skills automatically**  
When on, AI-added skills are shared automatically with others, making it effortless to keep your skills up to date. When off, only you can see these skills until you confirm them.

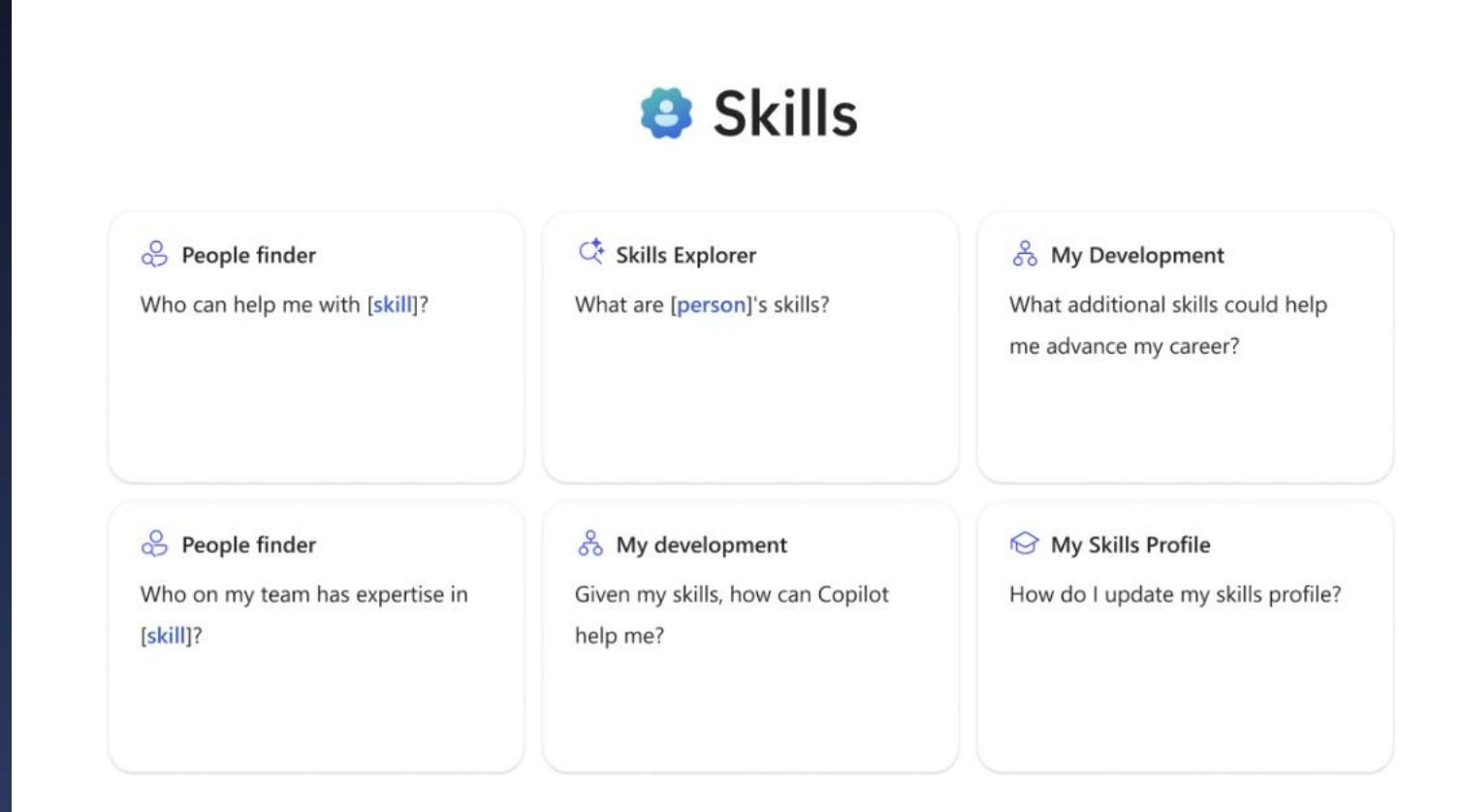
**Share imported skills automatically**  
When on, if an admin in your organization imports skills from sources like an existing profile they are shared automatically with others. When off, only you can see these skills until you confirm them.

**See also**

[Microsoft privacy statement](#)  
[Profile cards in Microsoft 365](#)

[Cancel](#) [Save changes](#)

# Locate expertise (and more)



**Skills**

**People finder**  
Who can help me with [skill]?

**Skills Explorer**  
What are [person]'s skills?

**My Development**  
What additional skills could help me advance my career?

**People finder**  
Who on my team has expertise in [skill]?

**My development**  
Given my skills, how can Copilot help me?

**My Skills Profile**  
How do I update my skills profile?

Search 

# We all struggle finding information ...

Can you share that  
PowerPoint you  
presented yesterday?

I need to find the  
most current industry  
research data for this  
client proposal.

I can't find our health  
insurance claim form.

Mark is no longer here,  
where can I find his  
project files?

Who is Peggy's  
manager?

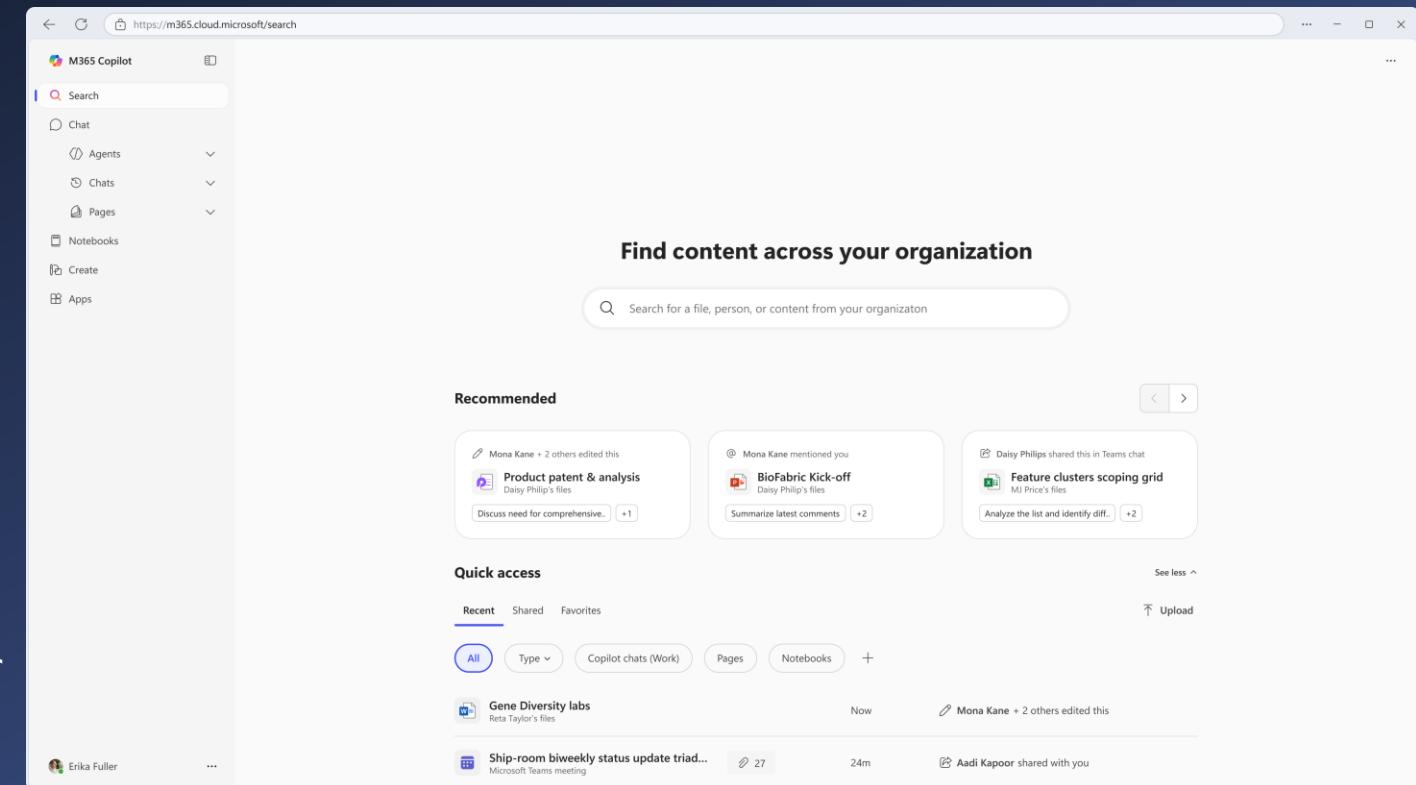
Where did I put that  
document I was working  
on?

I need directions to  
Building 92 for our  
meeting.

... and Microsoft Search is everywhere you search ...

# ... and now we also have Copilot Search

- Released in July 2025
- Interprets content across Microsoft 365 applications and beyond using connectors
- Find the results you need and seamlessly transition to chat for follow-up task completion
- Leverage the bookmarks and acronyms you curate for Microsoft Search
- Users need a Microsoft 365 Copilot license



# What is the difference between Microsoft 365 Copilot Search and Microsoft Search?

Feature	Microsoft 365 Copilot Search (paid)	Microsoft Search (free)
UI Entry Point	Microsoft 365 Copilot App (Web, Desktop, Mobile)	Microsoft 365 Copilot App (Web, Desktop, Mobile). SharePoint (organizational tab).
User Eligibility	Requires Microsoft 365 Copilot license	Included
Search Experience	AI-powered, semantic search; universal search across M365 & non-M365 sources; modern UX	Keyword-based search; interleaved results; Teams/Outlook in Messages vertical
Integration with Copilot Chat	Deep integration with Chat —via Copilot Chat answers	No integration
Security & Privacy	Enterprise-grade security and privacy; sensitivity labels in UX	Same baseline security; sensitivity labels in UX. Already available as default
Administration	No setup required; admin can configure bookmarks/acronyms. Admin analytics reports available.	Admin config for bookmarks/acronyms; Admin analytics available.
Future Updates	Document-level AI summary, enhanced people search, ranking/relevance and natural language improvements, and more.	N/A

# What is the difference between Copilot Search and Copilot Chat?

Feature	Microsoft 365 Copilot Search	Microsoft 365 Copilot Chat
Best for	Find what you need quickly	Generate deeper answers, create content and get the task done
Interaction style	Query-based (search box)	Conversational (chat-based)
Data sources	Microsoft Graph & third-party connectors	Microsoft Graph, third-party connectors, web



# What is most important no matter the experience?

- ✓ Your work email address and password verifies your identity
- ✓ You can only find content you have permission to see
- ✓ No one can see your files unless you've given them permission
- ✓ Copilot can only use and search can only find content that you are allowed to see

# Optimize Microsoft Search for knowledge discovery

Use out of box

Configure

Develop & Customize

Enough for most, if not all search needs. When in doubt, use out of box

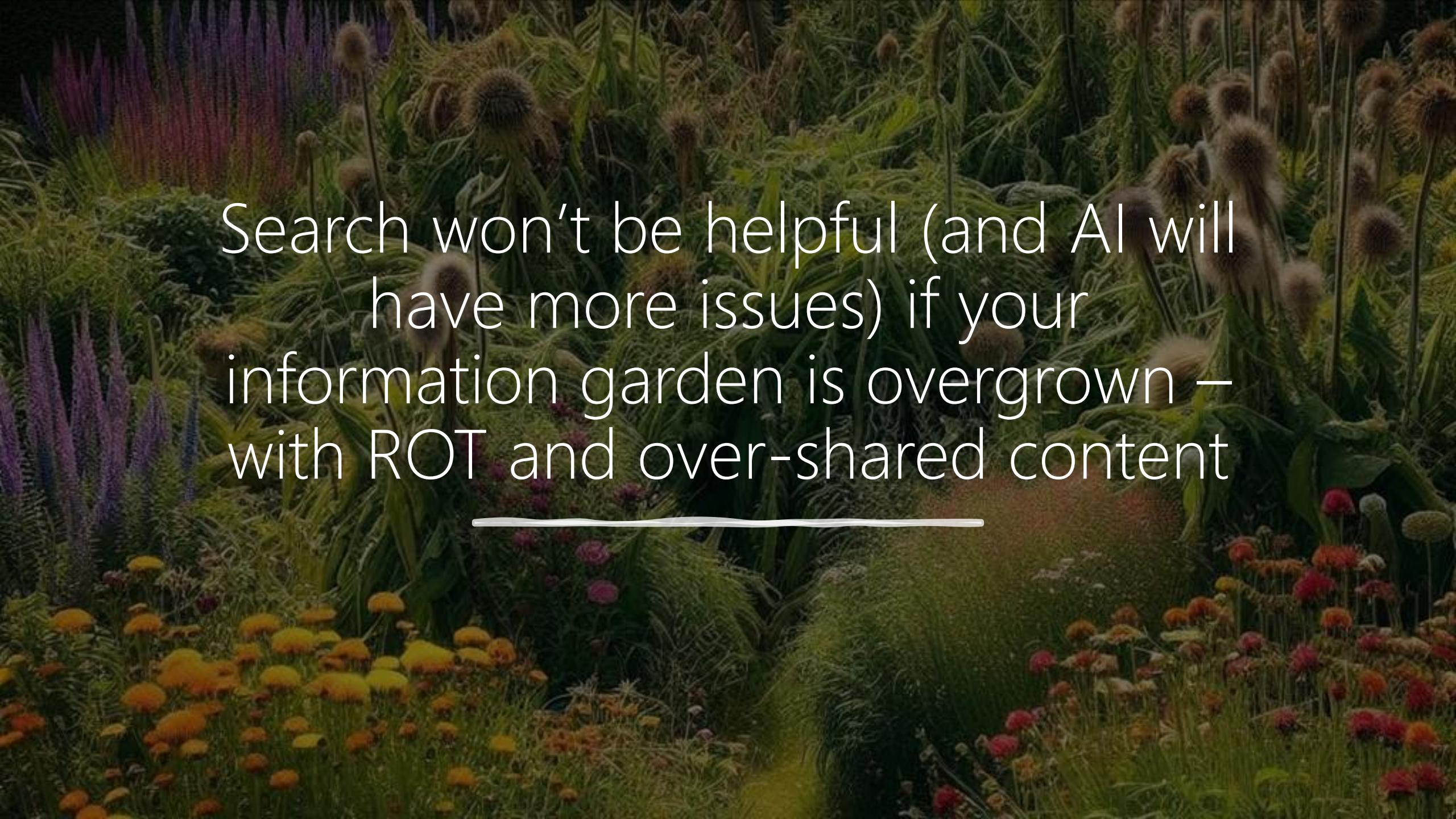
Set up bookmarks and acronyms. Change default scope, search box behavior

Make external content searchable via custom verticals and layouts

Solve specific business via custom pages using community or custom developed web parts, or stand-alone solutions

Less complex, least effort

More complex, most effort



Search won't be helpful (and AI will have more issues) if your information garden is overgrown – with ROT and over-shared content

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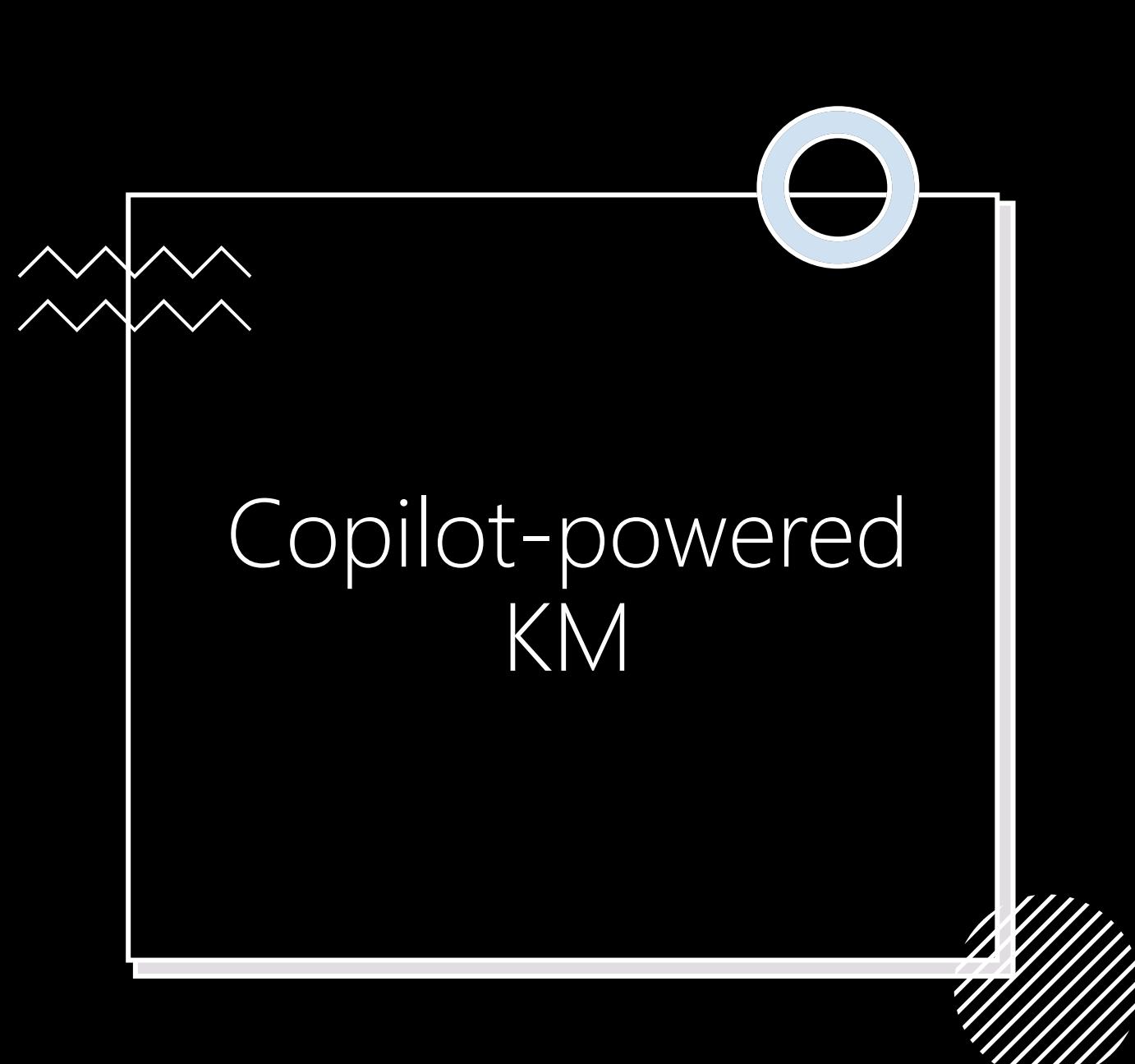
Governance is the most important key to successful search (and AI) outcomes – metadata helps improve search outcomes, but governance makes search more accurate and relevant

# Copilot



# From Viva Topics to Copilot for KM

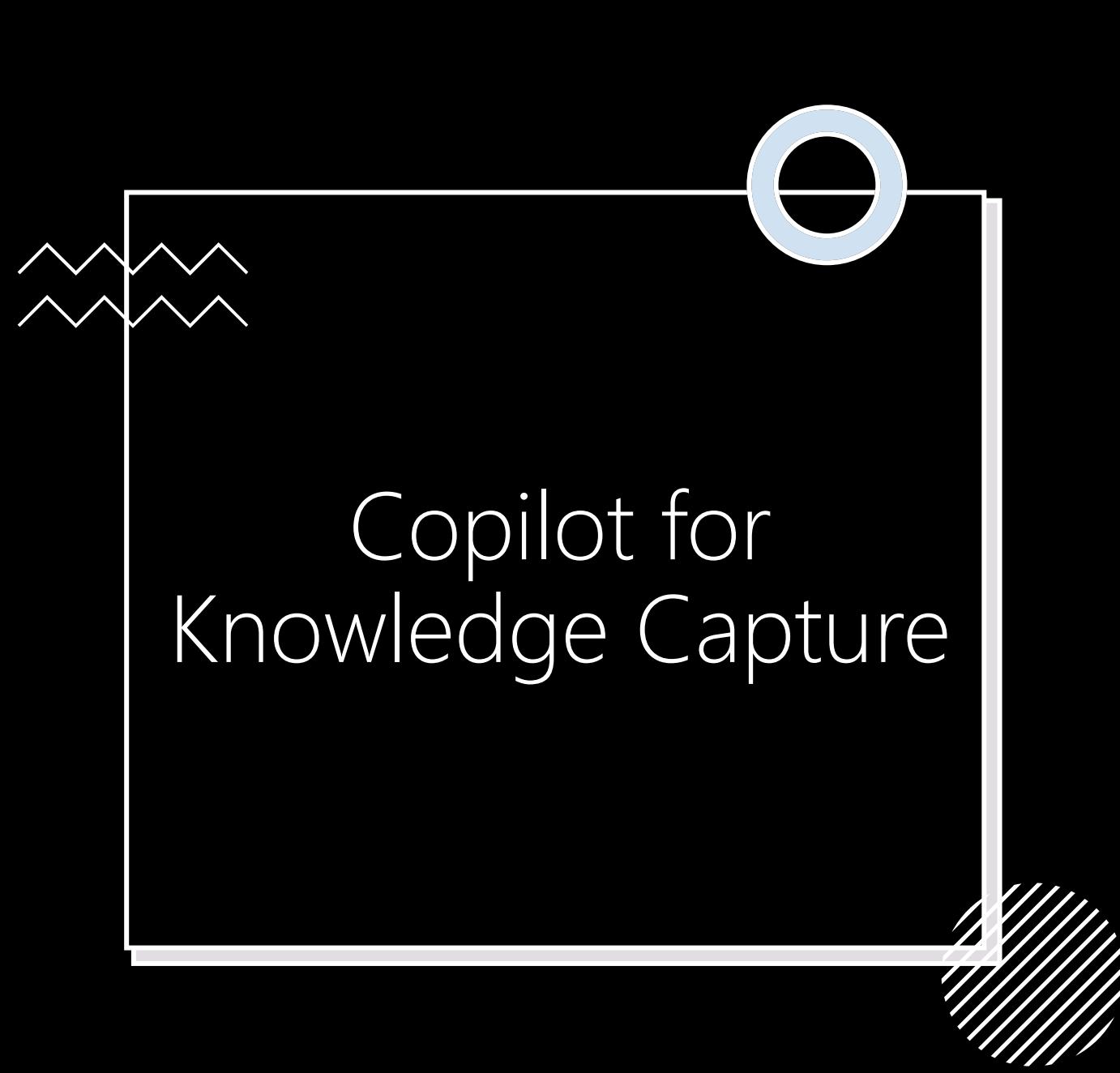
- Topics required a large investment to set up
- Copilot + Microsoft 365 apps can
  - Improve knowledge sharing and collaboration
  - Minimize the amount of setup
  - Deliver conversational knowledge in a way that is already integrated across the suite
- Is it the same? No. It doesn't have the real-time integration that Topics did – knowledge in the flow. Copilot can bring knowledge to you – *but for now, you have to ask for it.*



The diagram features a black rectangular box with a white border. Inside the box, the text 'Copilot-powered KM' is written in white. A white line extends from the top right corner of the box, ending in a blue circle with a horizontal line through it. Another white line extends from the bottom right corner of the box, ending in a circle filled with white diagonal lines. The background is black, and there are white wavy lines in the top left corner representing a sky.

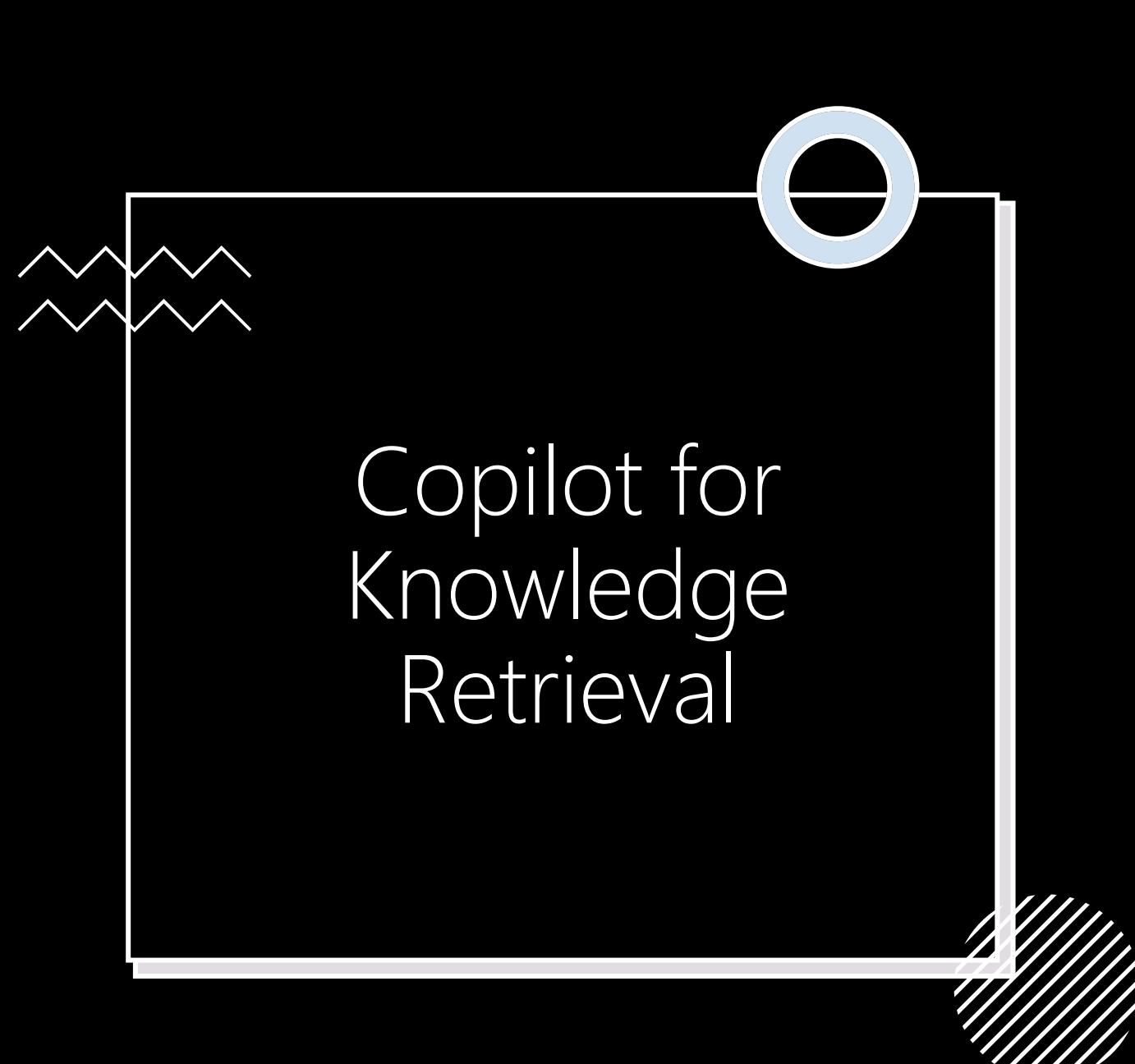
## Copilot-powered KM

- Generate new artifacts and content
- Summarize content
- Recommend content or knowledge assets
- Surface and identify expertise
- Enhance search through natural language and semantic index



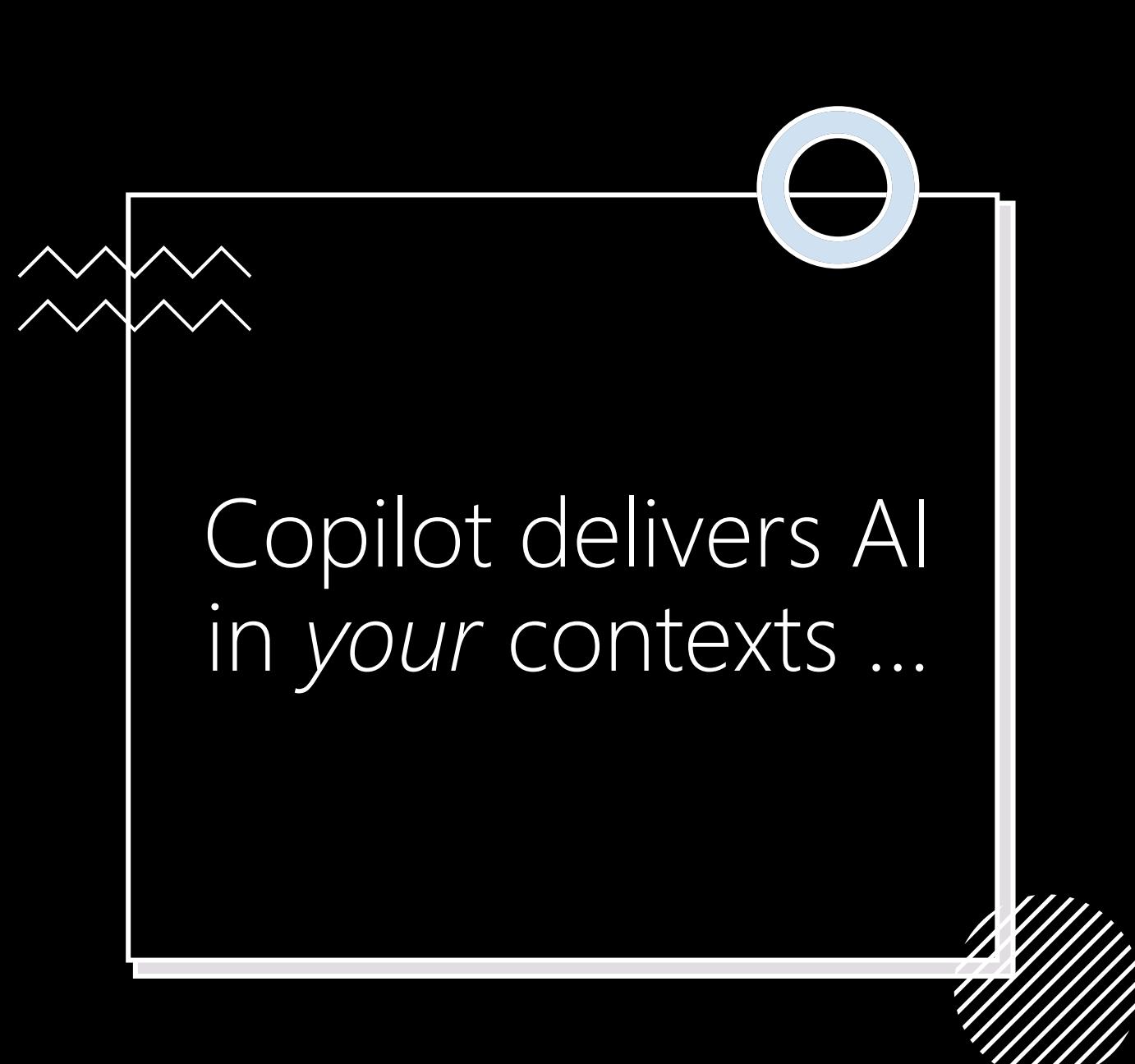
# Copilot for Knowledge Capture

- **Automated Metadata Extraction.** Reason over content to automatically identify key information and insights and add to content metadata.
- **Content Creation.** Convert unstructured text into organized data formats for easier searchability and analysis.
- **Summarization and Synthesis.** Condense large volumes of information into concise summaries, highlighting critical points and trends.
- **Question Answering.** Answer specific questions about captured knowledge, providing quick and efficient access to information.



# Copilot for Knowledge Retrieval

- Semantic Search. AI understands the meaning behind search queries, delivering more relevant results than keyword-based systems.
- Contextual Awareness. AI considers the user's past interactions and current context to refine search suggestions and prioritize relevant information.
- Personalized Recommendations. AI learns user preferences. and suggests knowledge sources.
- Natural Language Interactions. AI enables users to search for knowledge using natural language, making retrieval more intuitive and accessible.



Copilot delivers AI  
in *your* contexts ...

- Embedded in Microsoft 365 apps to minimize context switching
  - Summarize content in meetings
  - Summarize content in one or more files
- Easily create custom Copilot Agents to ground discovery in specific authoritative sources (e.g. Policies)



... but you have  
some additional  
responsibilities

- It's YOUR responsibility to shore up your governance – permissions, out of date content, multiple versions, etc.
- You are responsible for validating answers
- Uses metadata for relevance, but not to ground answer scope (yet)
- Without custom Copilots (Copilot agents), doesn't know what is your authoritative content

(Today) Assumes you know how to write a prompt

# How can Copilot improve knowledge flow?

---

*Difficulty in finding relevant content*

Summarize and structure content in a way that makes sense, allowing users to quickly get to the content that matters – reduce onboarding time, help people stay current, explain acronyms

---

*Inefficient content curation and tagging*

Automate the tagging of content, making it a natural part of the process rather than trying to compel users to do it (Knowledge Agents)

---

*Information overload and difficulty in identifying high-quality knowledge*

Help to identify and archive redundant, outdated or trivial content that compromises the accuracy of an enterprise search or gen AI solution (Knowledge Agents)

---

*Lack of integration and automation in KM processes*

Automate key knowledge processes and surface the best content, such as automating the process for post-project knowledge capture (channel agent in Teams, Copilot in apps)

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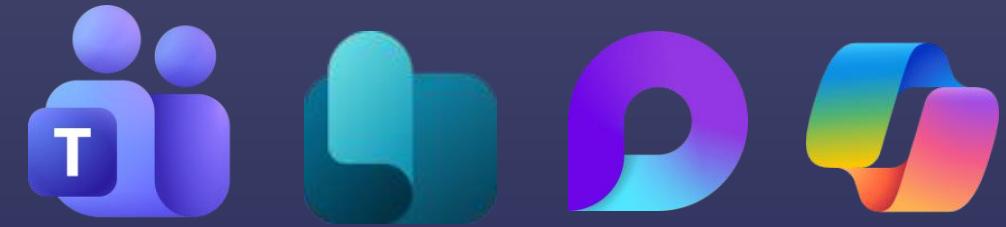
*Challenges with search effectiveness*

Help improve data quality to improve even simple search outcomes

# Copilot or traditional search for gathering knowledge?

Use Case	Best Tool	Why
Breaking news or real-time updates	 Traditional Search	Search engines index the latest news and updates from across the web in real time.
Summarizing complex topics	 Copilot	Copilot can synthesize information from multiple sources and explain it clearly and concisely.
Step-by-step instructions or tutorials	 Copilot	Great for walking through processes like "how to create a pivot table" or "how to write a business case."
Finding a specific website or product	 Traditional Search	Search engines are optimized for locating exact URLs, brands, or shopping results.
Comparing multiple products across multiple websites	 Copilot	Copilot can generate tables that compare content across multiple sites and along multiple dimensions.
Drafting content (emails, reports, posts)	 Copilot	Copilot can generate, edit, and refine content based on your tone, audience, and goals.
Fact-checking or verifying claims	 Traditional Search	Best for cross-referencing multiple sources and checking credibility.
Brainstorming ideas	 Copilot	Ideal for generating creative ideas, names, strategies, or outlines.
Local recommendations (restaurants, events)	 Traditional Search	Search engines provide location-aware results and reviews.
Data analysis or visualization	 Copilot	Can help analyze data, create charts, and explain insights.
Quick definitions or conversions	 Traditional Search	Fast and accurate for things like "1 USD to EUR" or "define: epistemology"
Understanding context or nuance	 Copilot	Can interpret ambiguous questions and provide tailored responses.
Finding citations or academic sources	 Traditional Search	Better for accessing scholarly databases and official publications.

# Friends and Family



# Friends and family apps to improve the exchange of knowledge in the organization

- Teams 
  - Knowledge exchange within work teams
- Loop 
  - Shared view of components that sync across apps in real time – to ensure that team members always have a common view
  - Templates to enable people to quickly co-create and organize knowledge
- Viva Learning 
  - Learning resources in the flow of my work – recommended to me by my colleagues and my interests
  - Content sources both inside and outside my organization
- Copilot Pages 
  - Loop pages to allow teams to interactively edit and update a shared page, integrating data from various sources – multiplayer AI collaboration

# Keep in mind, it's not all technology | Process matters

- "My Contoso experience" lunch and learn or master class
- Mentoring and shadowing
- Send people to conferences – but only if they do a lunch and learn or webinar when they return
  - Better still, send people in groups!
- Watch webinars as a team
- Training and education
- Make sure people have the right incentives and recognition to contribute AND re-use

# Keep in mind, it's not all technology | Culture matters

Culture is like your organization's operating system.

"It works invisibly in the background to connect your apps and help you get things done. You also expect it to be regularly updated with enhancements, performance improvements, and new features. The same is true for company culture. The operating system needs to be updated to ensure that it's staying current with where the company is and where it's going."

-- *Christy Lake, Chief People Officer at Twilio*

Culture matters  
if you want to  
transform  
knowledge flow



You can't command people's knowledge



Conversation is critical for KM



Human knowledge is contextual



Trust is a pre-requisite for knowledge sharing

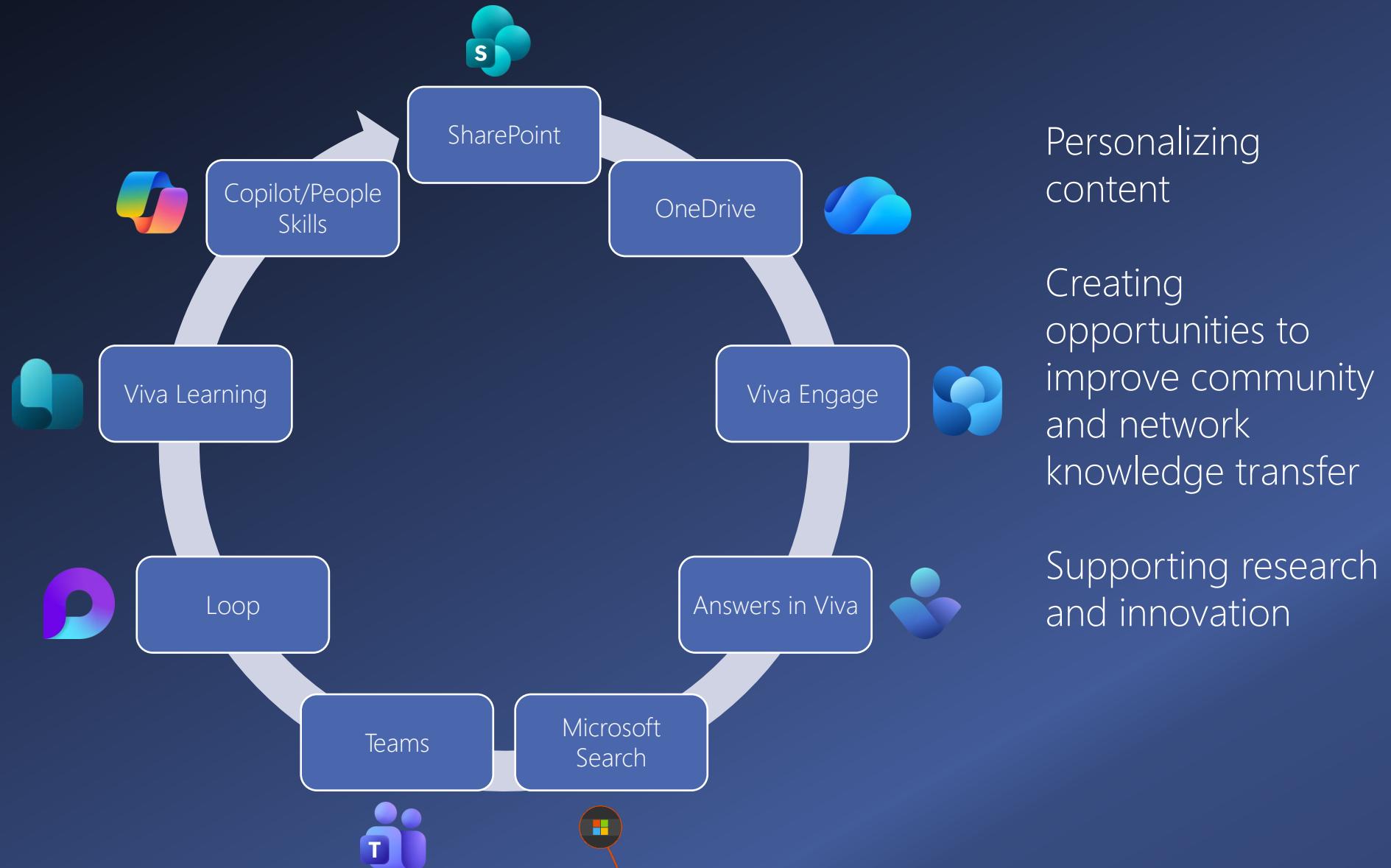
# But you have technology superpowers to help unlock your explicit and tacit knowledge – KM + AI!

Managing data and content governance

Auto-tagging and classifying content

Answering questions with AI-driven tools

Locating experts and expertise



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- Information Architecture
- User Adoption
- Governance
- Metrics
- Knowledge Management
- Intranets & Collaboration Solutions

