

Transforming Knowledge Management with Microsoft 365 and Copilot

Strategies for the AI-Enhanced Workplace

Susan Hanley

www.susanhanley.com

@susanhanley



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!



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 job¹

**\$12.9
Billion**

annual cost of poor data quality²

29%

of employees make compromised decisions based on assumptions when answers are not available³

37%

of employees become increasingly disengaged as they feel frustrated and overwhelmed³

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

DATA

VIDEOS

DOCUMENTS

EXPLICIT KNOWLEDGE

PROCEDURES

INFORMATION

RECORDS

EXPERIENCE

CONTEXT

TACIT KNOWLEDGE

OBSERVATION

INTUITION

INSIGHTS



EXPERTISE

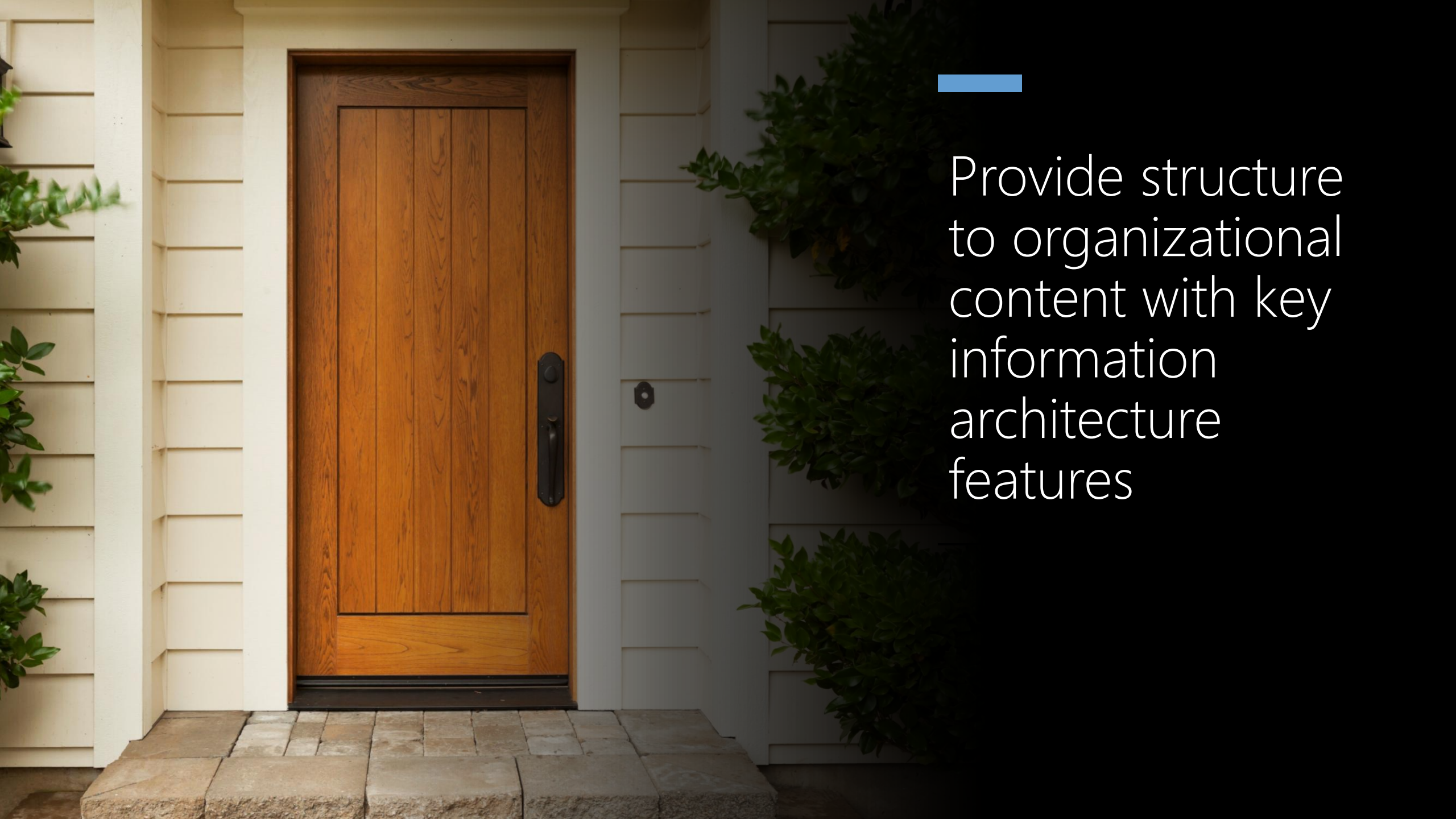
Invisible

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



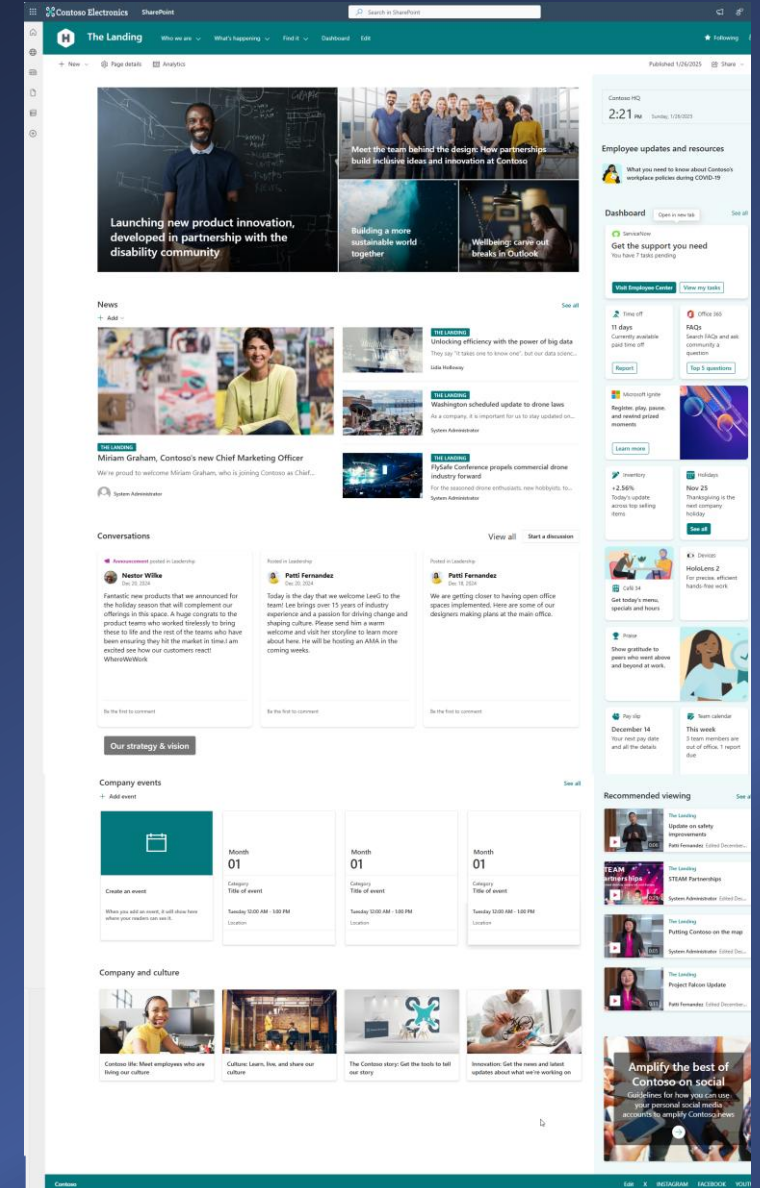
Sites – independent topics managed by
the same group of people



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



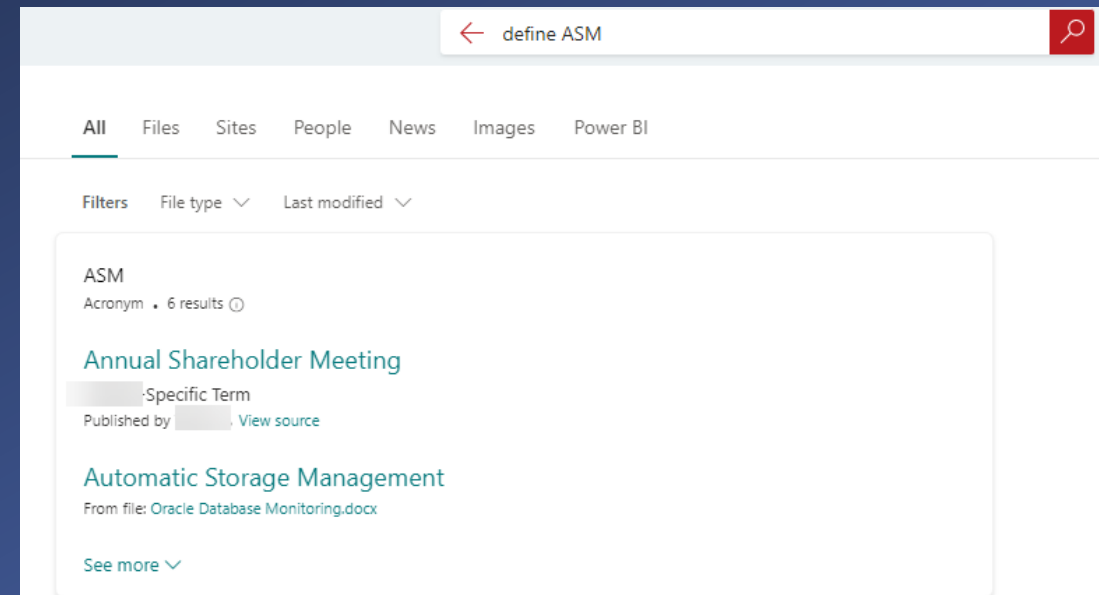
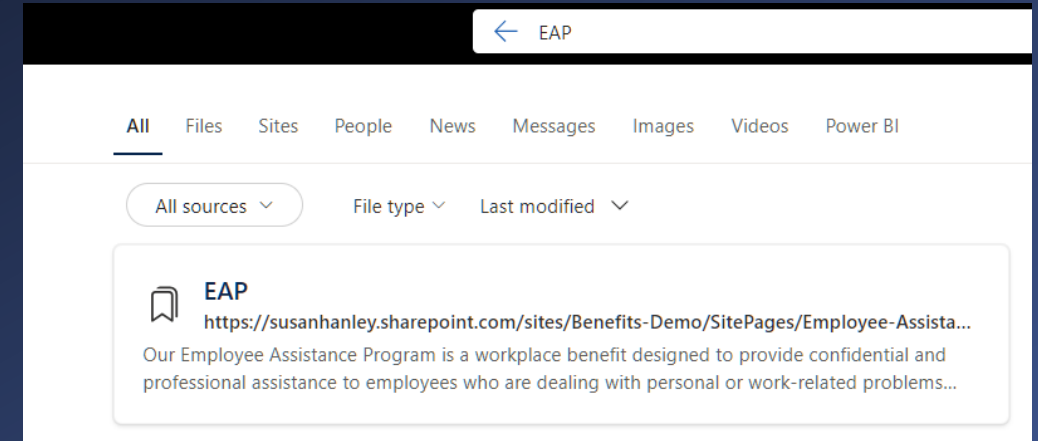


Home Site KM superpowers ...

- 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



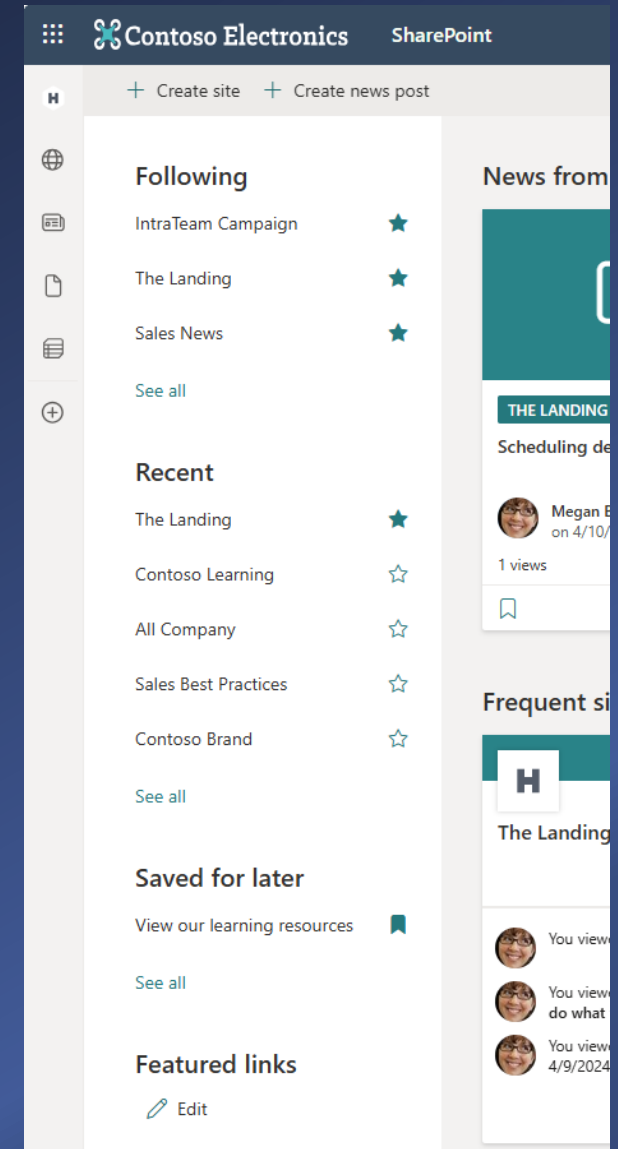
Topic is managed by the same people




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

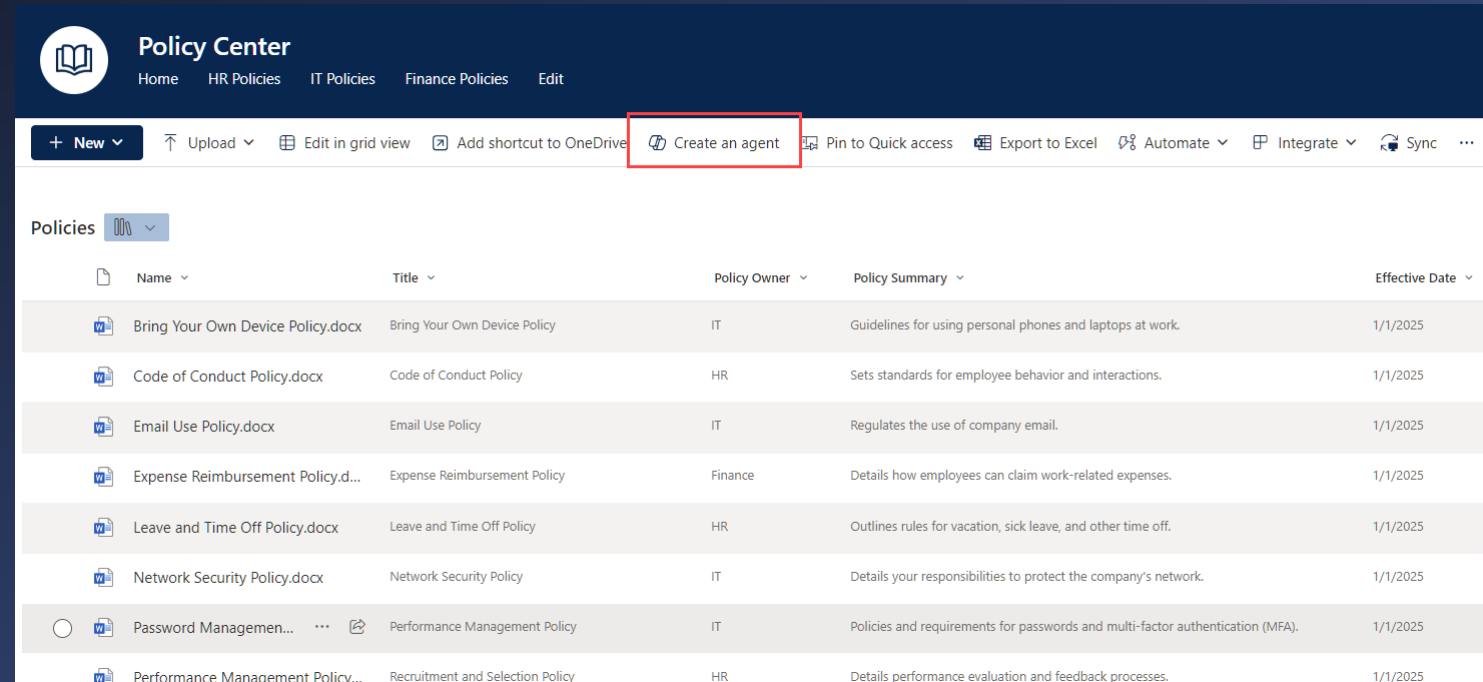


Why is your site structure so important for KM?

- 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 displays the SharePoint Policy Center interface. The top navigation bar includes a 'Policy Center' header with a book icon and tabs for 'Home', 'HR Policies', 'IT Policies', 'Finance Policies', and 'Edit'. Below this, a secondary navigation bar contains several action buttons: '+ New', 'Upload', 'Edit in grid view', 'Add shortcut to OneDrive', 'Create an agent' (highlighted with a red box), 'Pin to Quick access', 'Export to Excel', 'Automate', 'Integrate', and 'Sync'. The main content area is titled 'Policies' and features a table with the following columns: Name, Title, Policy Owner, Policy Summary, and Effective Date. The table lists eight policies, including 'Bring Your Own Device Policy.docx', 'Code of Conduct Policy.docx', 'Email Use Policy.docx', 'Expense Reimbursement Policy.d...', 'Leave and Time Off Policy.docx', 'Network Security Policy.docx', 'Password Managemen...', and 'Performance Management Policy...'. Each row provides details about the policy's title, owner, summary, and effective date.

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 Managemen...	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

Create your agent to point to up to 20 sources and add it to the Onboarding SharePoint site (content doesn't have to "live" on the Onboarding site)



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

The screenshot shows the 'Organize this library' interface in SharePoint for a library named 'Software Engineer Resumes'. The interface is in 'preview mode' and displays a table of resumes with columns for Name, Candidate, Most recent title, and Professional summary. The table contains five rows of resume data. To the right of the table, there are three 'Autofill prompt' cards for each column, each with an 'Edit', 'Remove', and 'Like' button. At the bottom right, there is a 'Knowledge Agent (preview)' panel with a search bar and a 'Type your message...' input field.

Name	Candidate	Most recent title	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 RelicCloud. 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 UoT, and a freelance developer. He has expertise in Java, Spring Boot, and RESTful APIs.
final_resume_MiriamG.docx	Miriam Graham	Jr. Frontend Developer	Miriam Graham has experience as a frontend developer at Litware, a UK engineer at Tailspin Toys, and a design intern at Woodgrove Bank. She has expertise in React, accessibility, and design systems.
Resume_EmilyB.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 UoT. 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 RelicCloud, a systems analyst at Alpine Ski House, and a junior developer at Trey Research. She has expertise in .NET, SQL optimization, and microservices.

The screenshot shows the 'Organize this library' interface in SharePoint for a library named 'Invoices'. The interface is in 'preview mode' and displays a table of invoices with columns for Name, Vendor, Amount due, and Status. The table contains two groups of invoices: one for 'Vendor: Contoso' and one for 'Vendor: RelicCloud'. To the right of the table, there is a 'Knowledge Agent (preview)' panel with a search bar and a 'Type your message...' input field.

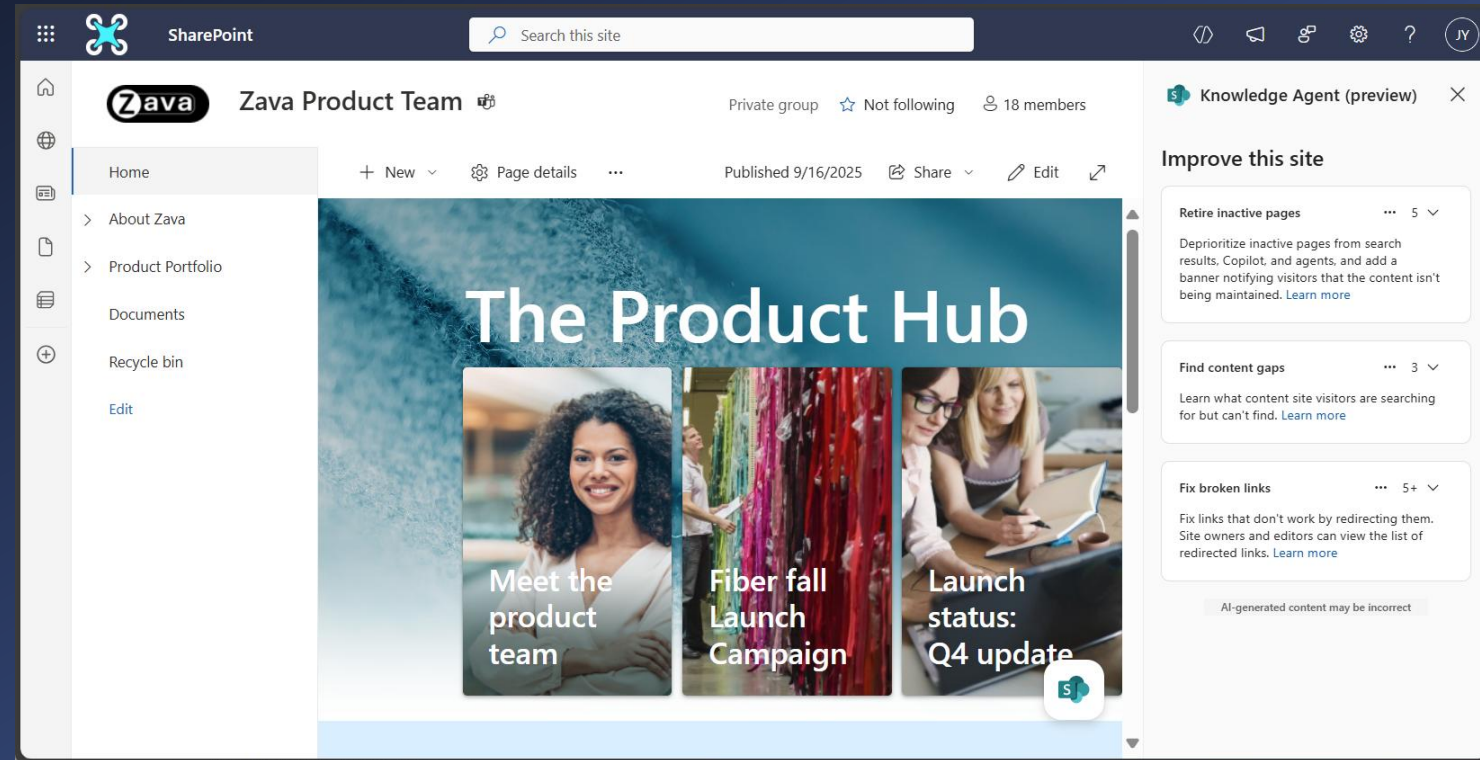
Name	Vendor	Amount due	Status
Vendor: Contoso			
Invoice_august_final.docx	Contoso	\$347.22	Approved
Payment receipt 2025.pdf	Contoso	\$1,284.50	Pending
Invoice Upload July.docx	Contoso	\$92.75	Approved
billing summary 2025.docx	Contoso	\$3,612.00	Approved
Invoice-Review-Aug.xlsx	Contoso	\$578.27	Rejected
Invoice q3 entry.docx	Contoso	\$478.90	Pending
Vendor: RelicCloud			
Invoice Final-Sept.pdf	RelicCloud	\$219.00	Approved
Invoice_Summary July.xlsx	RelicCloud	\$875.60	Approved
Invoice 9823.pdf	RelicCloud	\$4,392.18	Pending

The sidebar menu for the Knowledge Agent (preview) is located on the right side of the interface. It contains the following items:

- Summarize this page
- Ask a question
- Improve this site
- Create a page
- See more agents

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!

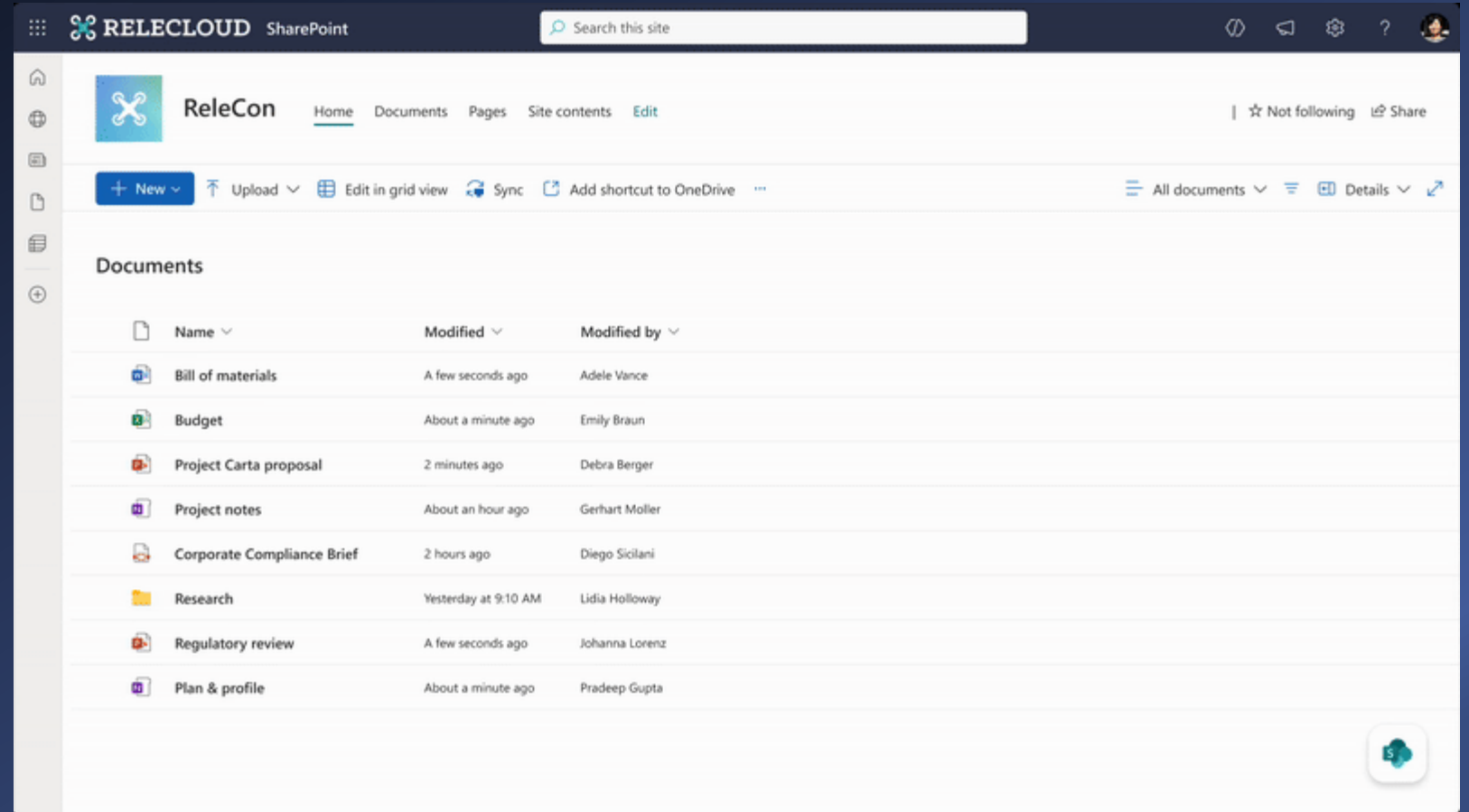


Knowledge Agent is context-aware

- **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



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

Documents > Course Catalog

Name	Modified	Modified By	+ Add column
A Comprehensive Brain Guide.wmv	November 6, 2023	Joni Sherman	
Ad Planning.pdf	November 6, 2023	Megan Bowen	
CE Annual Report.docx	November 6, 2023	Joni Sherman	
Communication Ideas.pptx	November 6, 2023	Megan Bowen	
Cost and Pricing Analysis - We...	November 6, 2023	Pradeep Gupta	
Dealing With Criticism.mp3	November 6, 2023	Joni Sherman	
Drone adaptations for manufacturing.mp4	November 6, 2023	Megan Bowen	
Eagle claw skills.mp4	November 6, 2023	Megan Bowen	
Gyro calibrations for urban navigation.mp4	November 6, 2023	Megan Bowen	
Learn a new language.mp4	November 6, 2023	Megan Bowen	
Learn a new skill.mp4	November 6, 2023	Megan Bowen	
Learn Time Management.avi	November 6, 2023	Joni Sherman	

Pradeep Gupta

Send email

Contact >

pradeepg@m365x70655253.onmicrosoft.com

Show more

Reports to >

Nestor Wilke

Show organization

LinkedIn >

Several possible matches for Pradeep Gupta

Organization > Contoso Learning

All Files Sites News Images

Filters File type Last modified

Cost and Pricing Analysis - Western Region

SharePoint • Contoso Learning > ... > Course Catalog

Pradeep Gupta modified on August 4, 2017

Pradeep Gupta

Send email

Contact >

pradeepg@m365x70655253.onmicrosoft.com

Show more

Reports to >

Nestor Wilke

Show organization

LinkedIn >

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 displays the OneDrive web interface for a user named Megan Bowen. The interface includes a left sidebar with navigation options like Home, My files, Shared, Favorites, Recycle bin, and Browse files by (People, Meetings, Media). The main area features a 'For you' section with three recommended items: 'Cost and Pricing Analysis - Western Region', 'CE Annual Report', and a 'Learn a new skill' link. Below this is a 'Recent' section with a table of files, filtered by 'All' (Word, Excel, PowerPoint, PDF). The table lists files with their names, opened dates, owners, and activity status. A hand cursor is pointing at the 'International Marketing Strategy' file.

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



Build effective communities to support business objectives and employee experience



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



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



Activate employees to contribute their energies, expertise, and ideas

Across Outlook & Teams | Across Tenants | Powered by Copilot & AI

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.



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

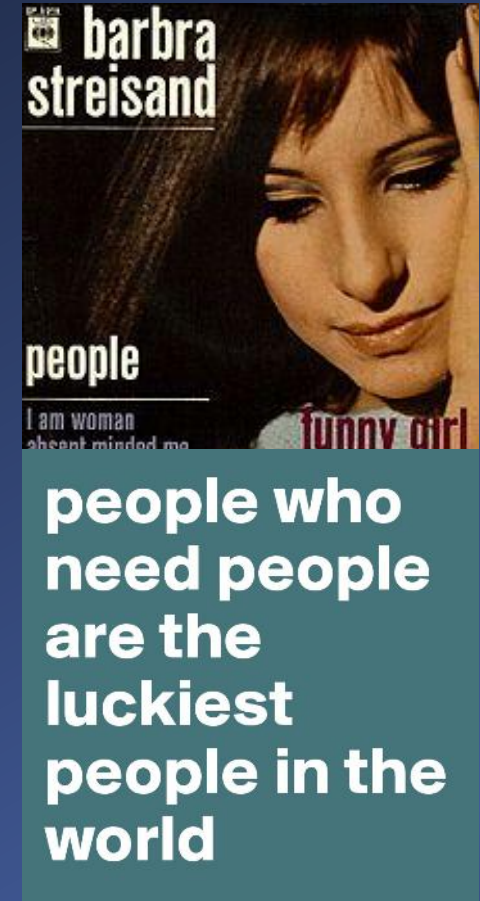
Roles for members typically remain consistent

Often dissolved when mission is accomplished

Mostly private

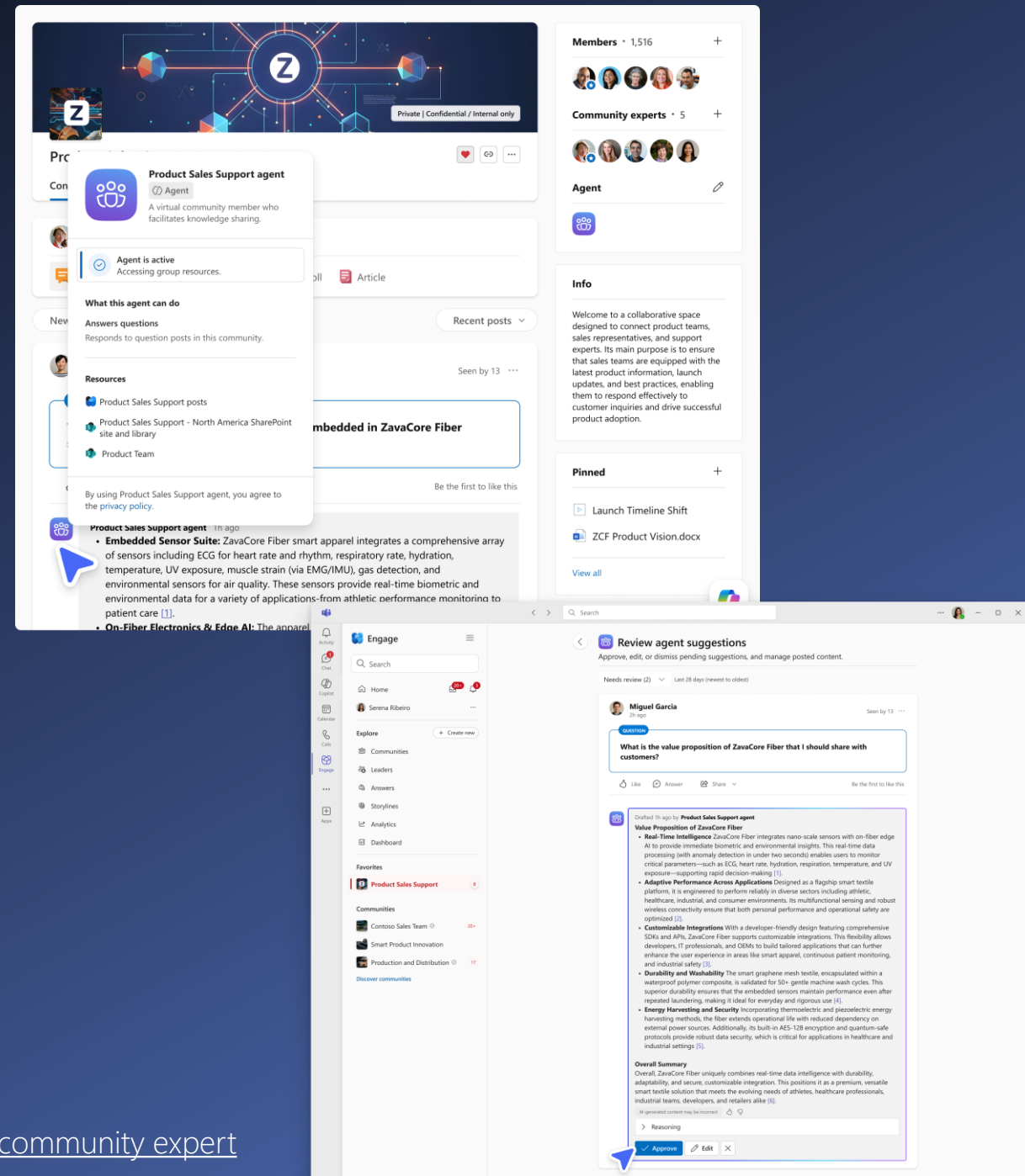
Communities help people turbocharge search (and AI!)

- 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

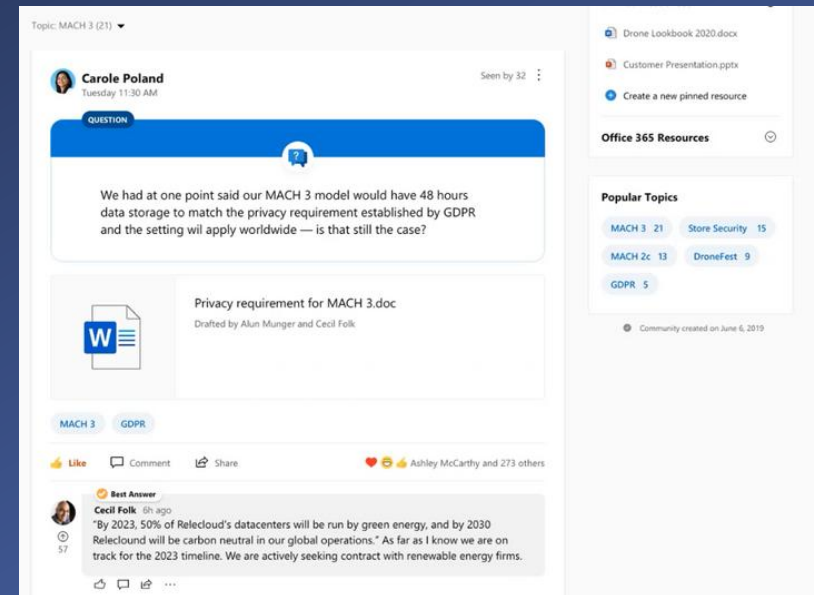
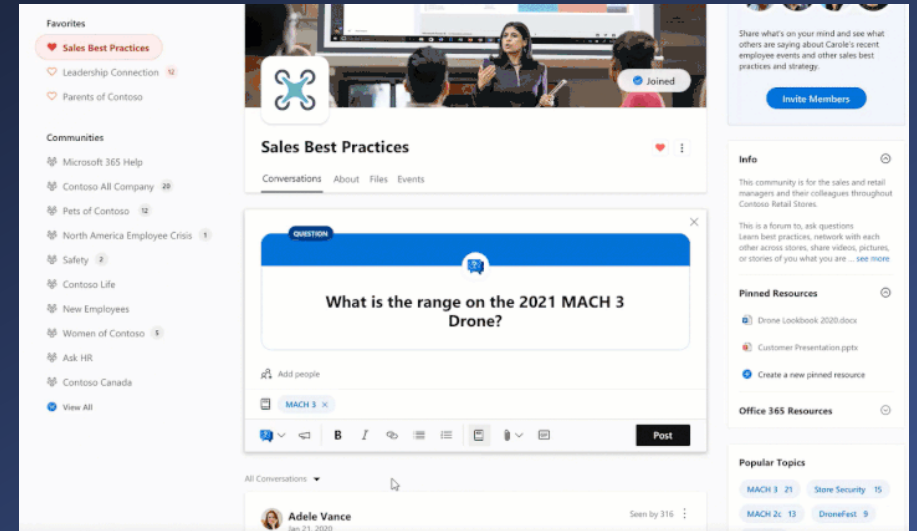
- AI-powered assistants designed to help answer questions from community members
- Agent refers to past conversations and community SharePoint resources to generate responses to unanswered questions.
- Helps community members get timely, accurate information
- Admin can determine how the agent will work 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



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

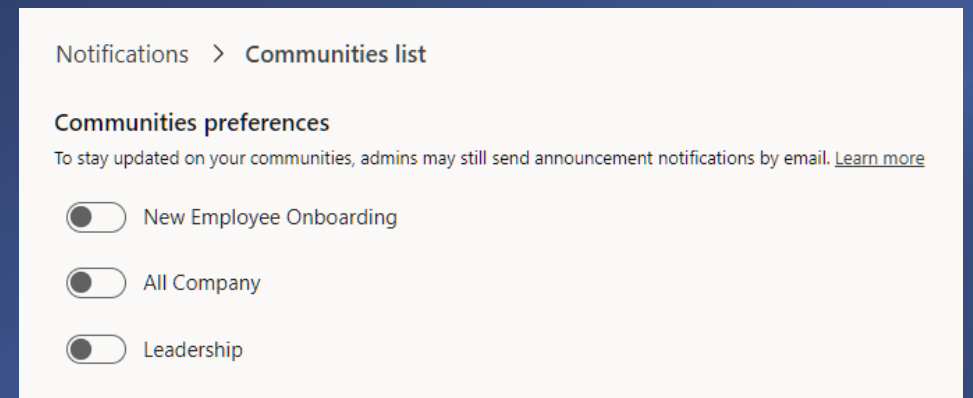
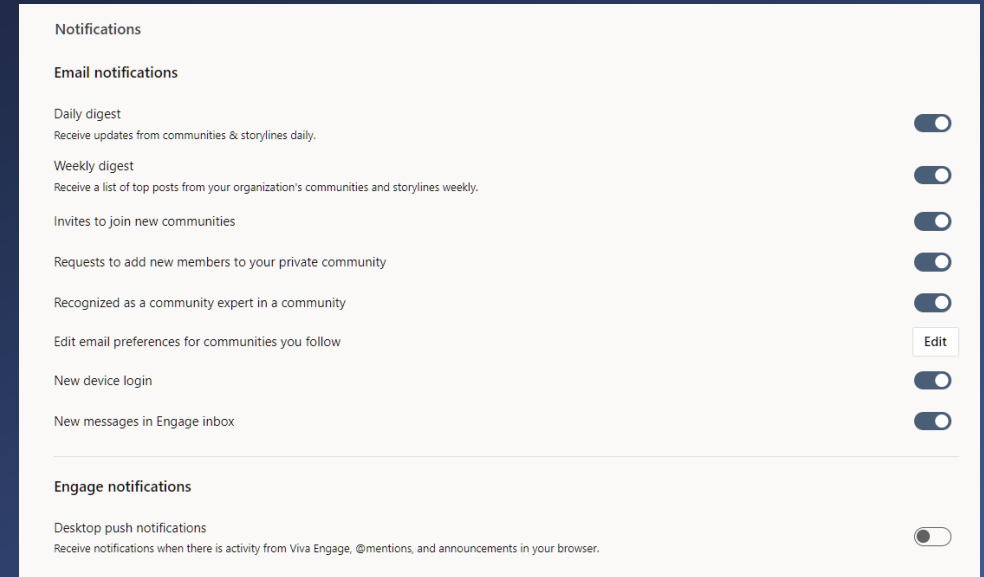
Discover important topics

- 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



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



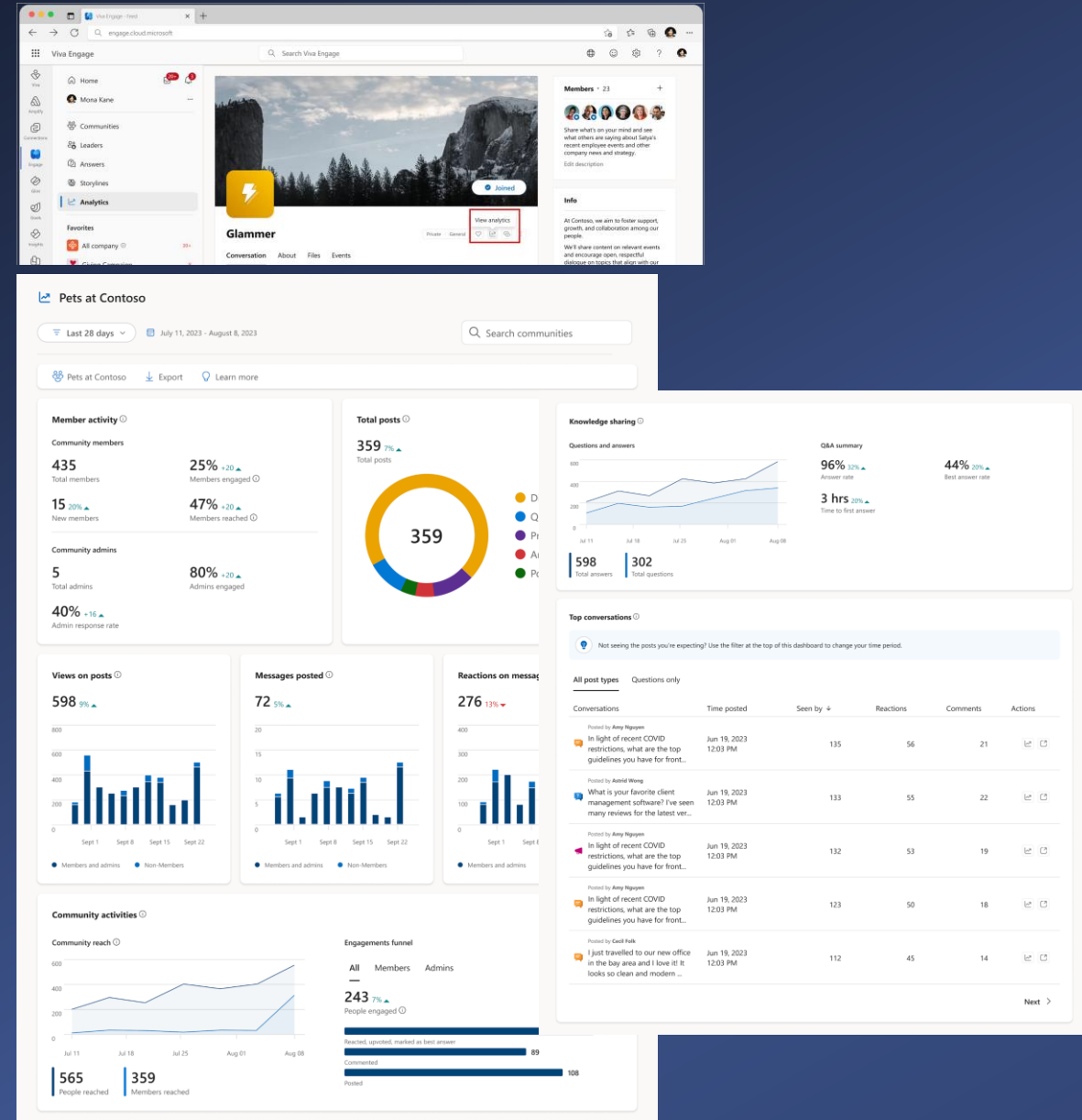
Community Admins can create Announcements to override notifications

- 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

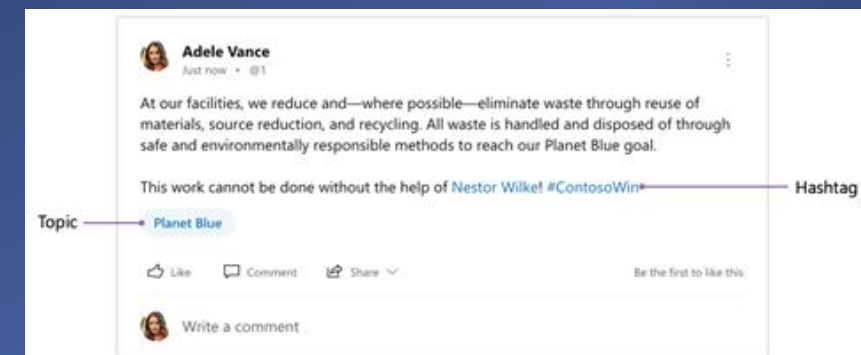
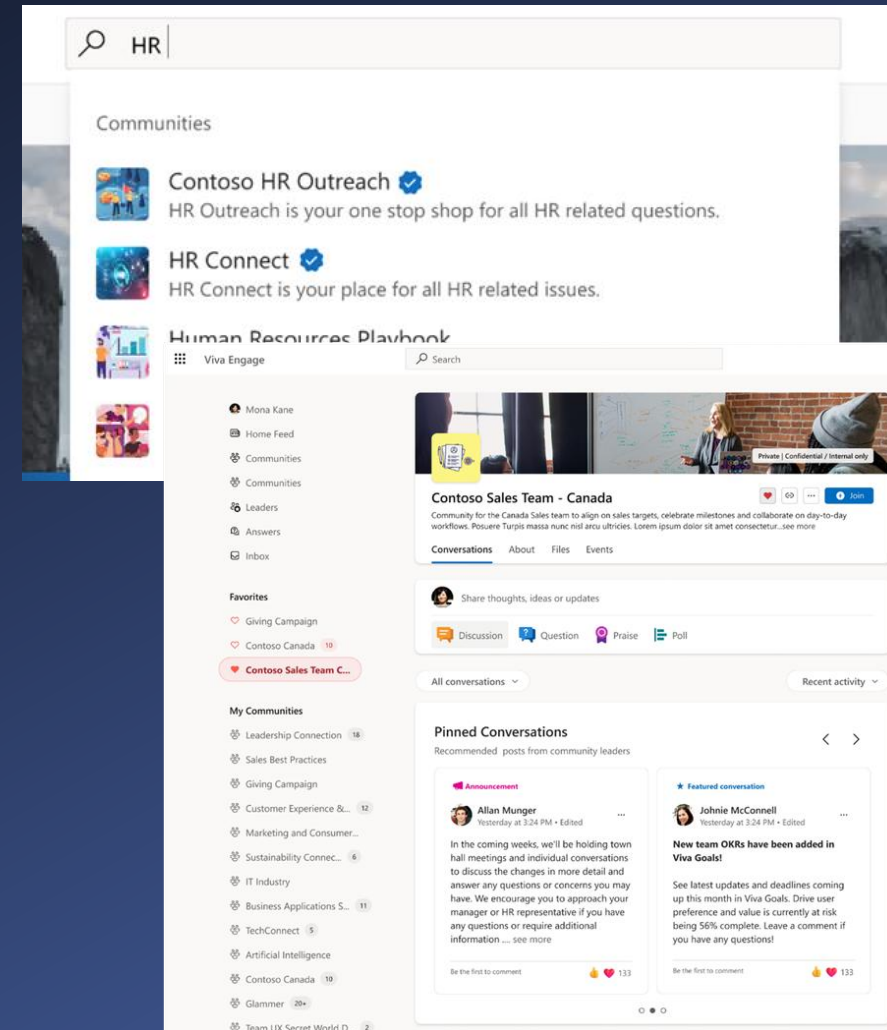
Creating a safe space

- **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

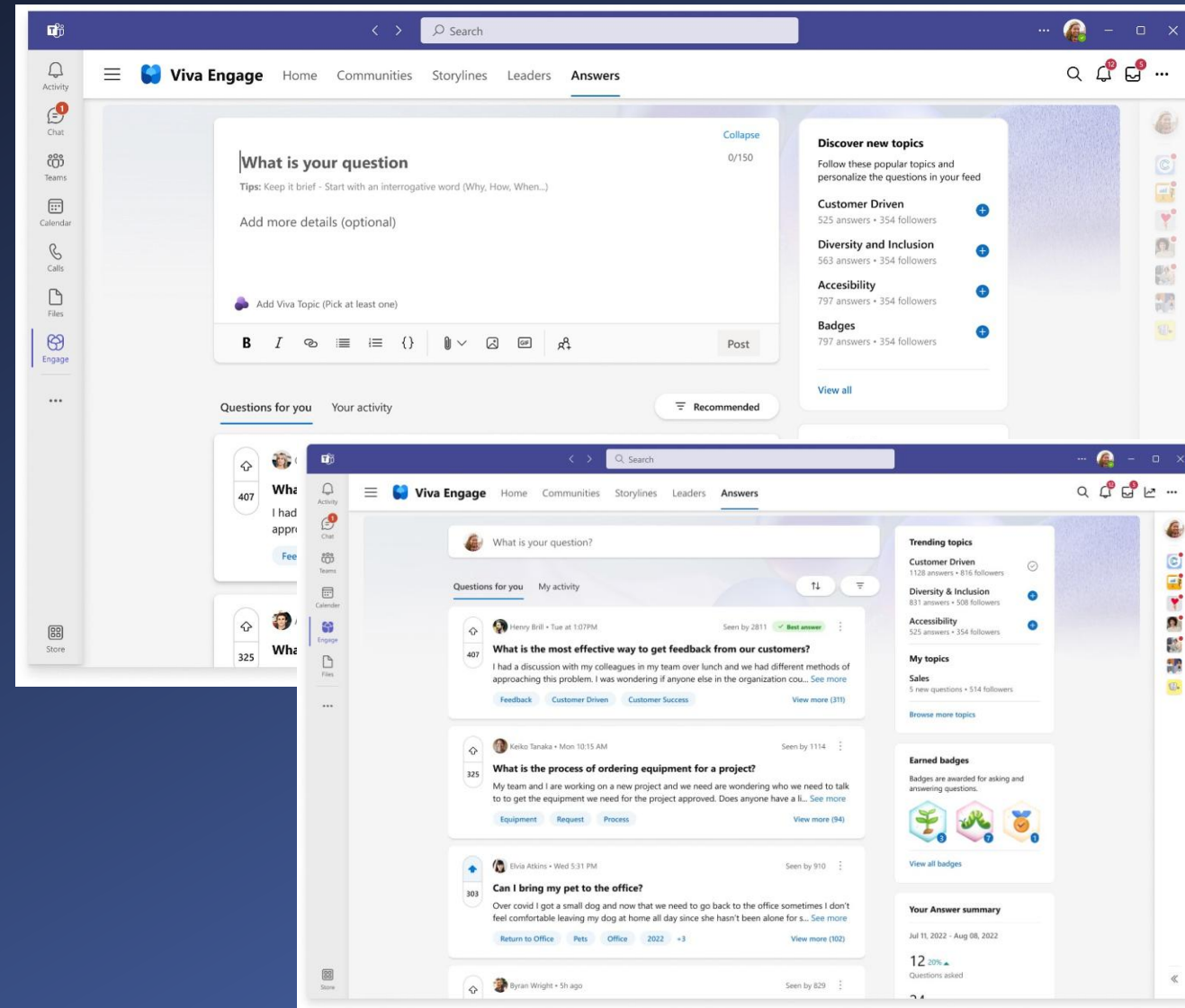
- Configure as “official” for authoritative forums
- Public or private based on the topic and people involved
- Managed by SMEs (or wanna-SMEs) or designated leads
- Pin conversations to make key content more discoverable
- Designate a post as a question to track community responses
- Crowdsourcing knowledge 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



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

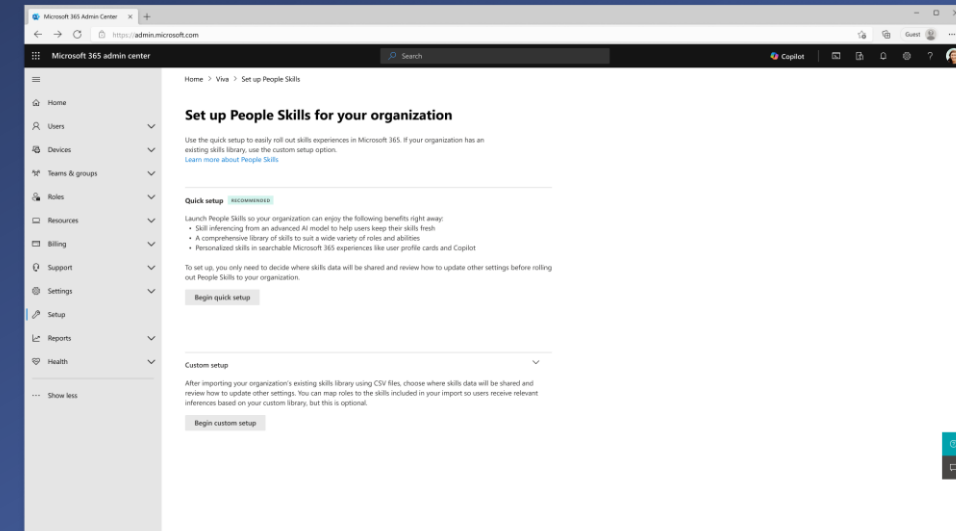
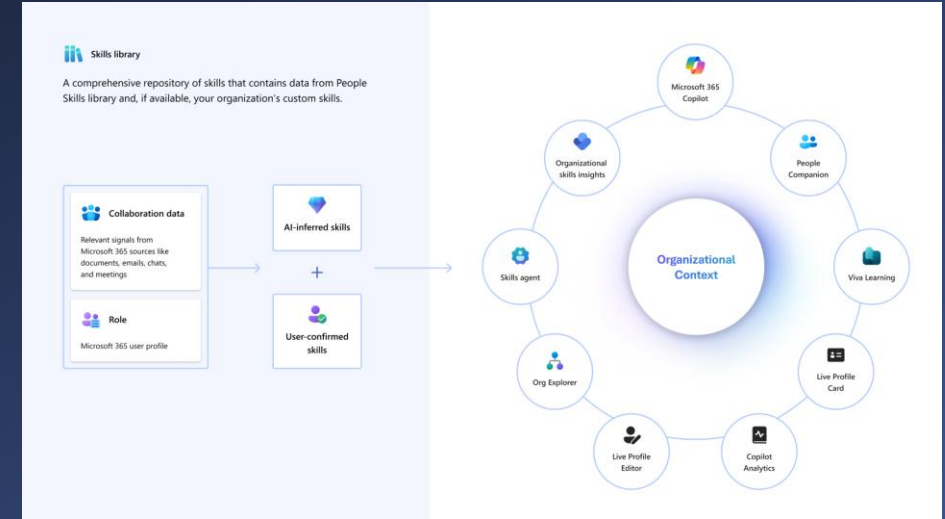
What is the difference between Answers in Viva and Agents in Viva Engage?

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

Show more contact information

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

General

Contact

About

Skills

Data and privacy

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

Product Analytics

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

General

Contact

About

Skills

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

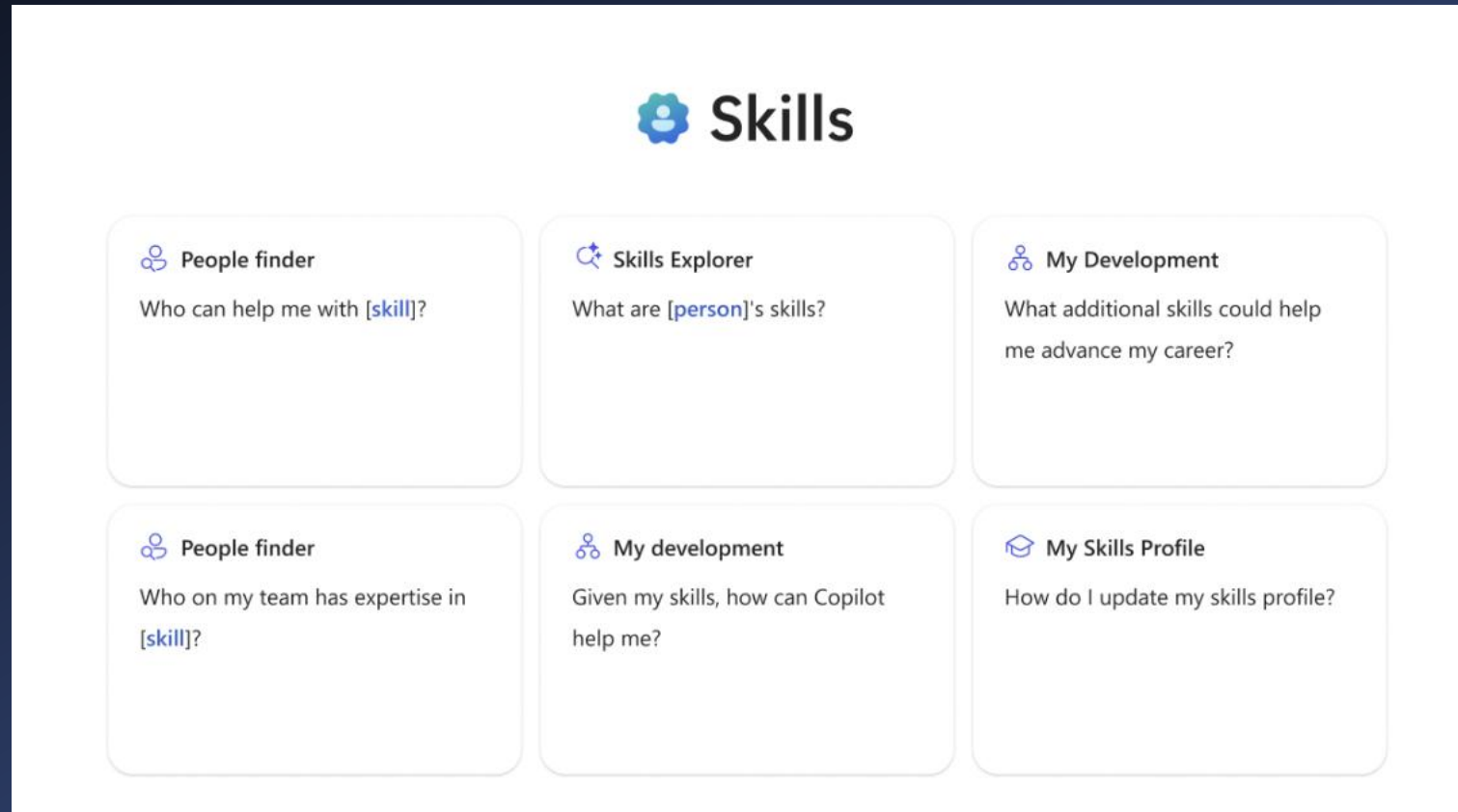
Microsoft privacy statement

Profile cards in Microsoft 365

Cancel

Save changes

Locate expertise (and more)



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?

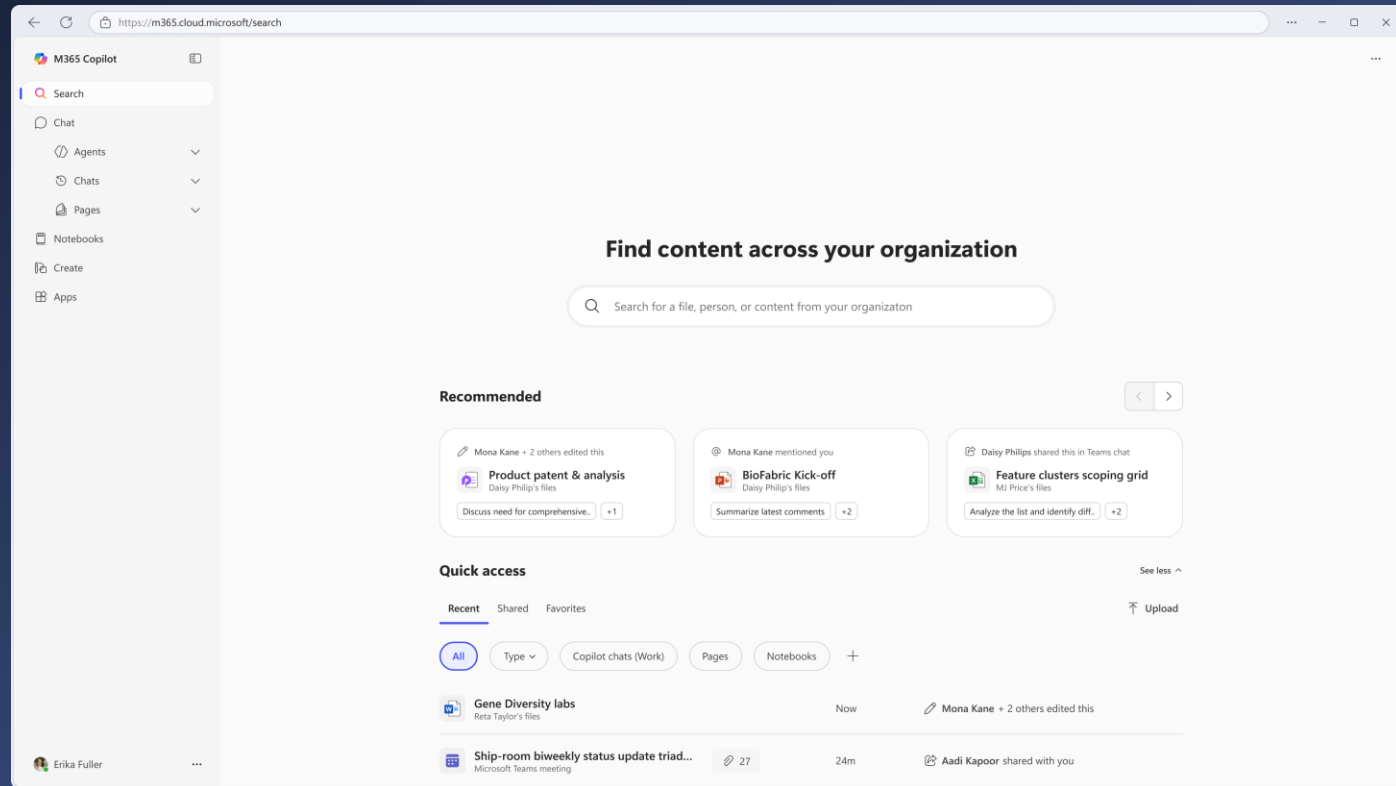
Where did I put that document I was working on?

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, created 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

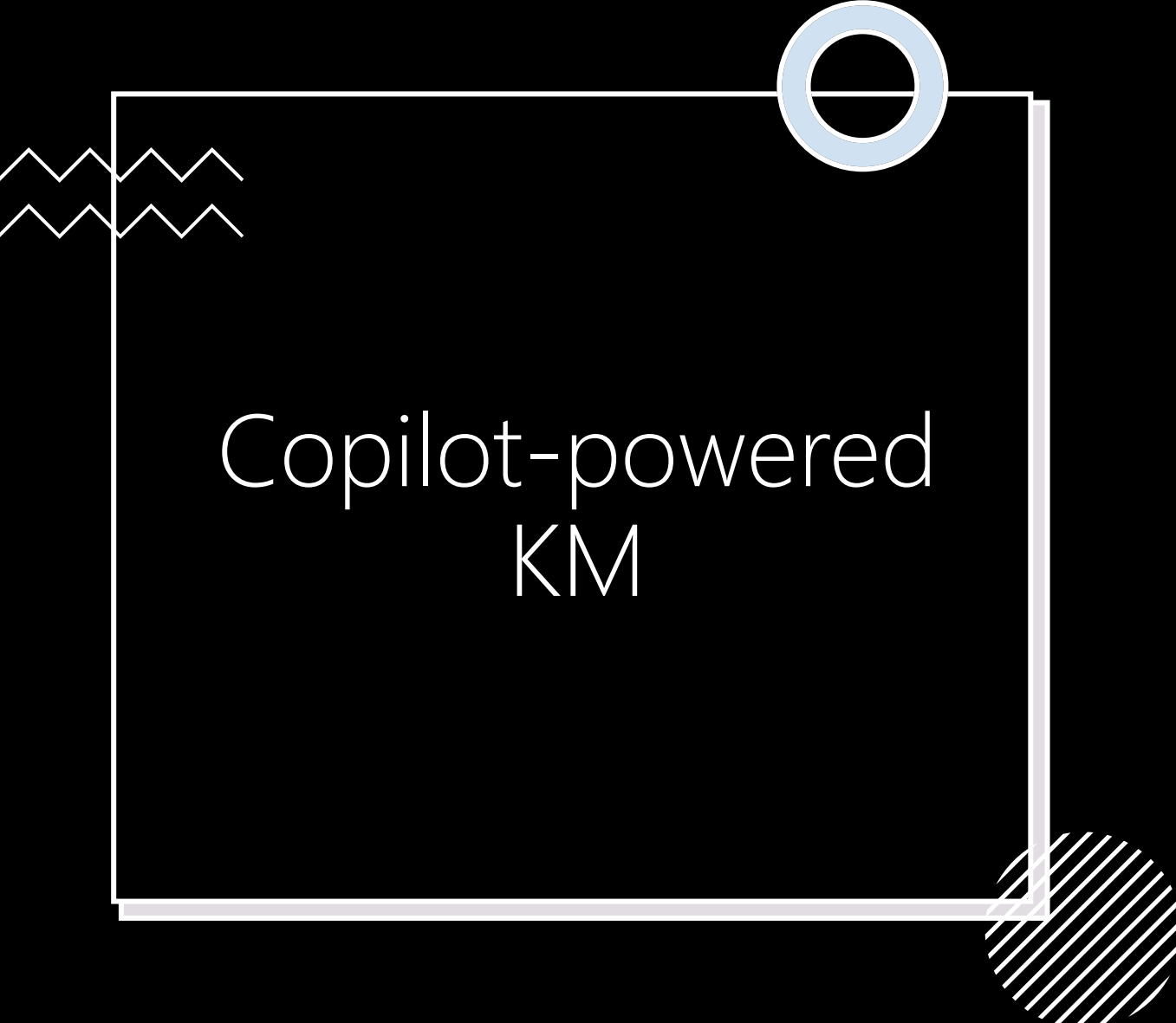
Governance is the most important key to successful search (and AI) outcomes – metadata helps improve search outcomes, but governance makes search more accurate and relevant

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.*



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.



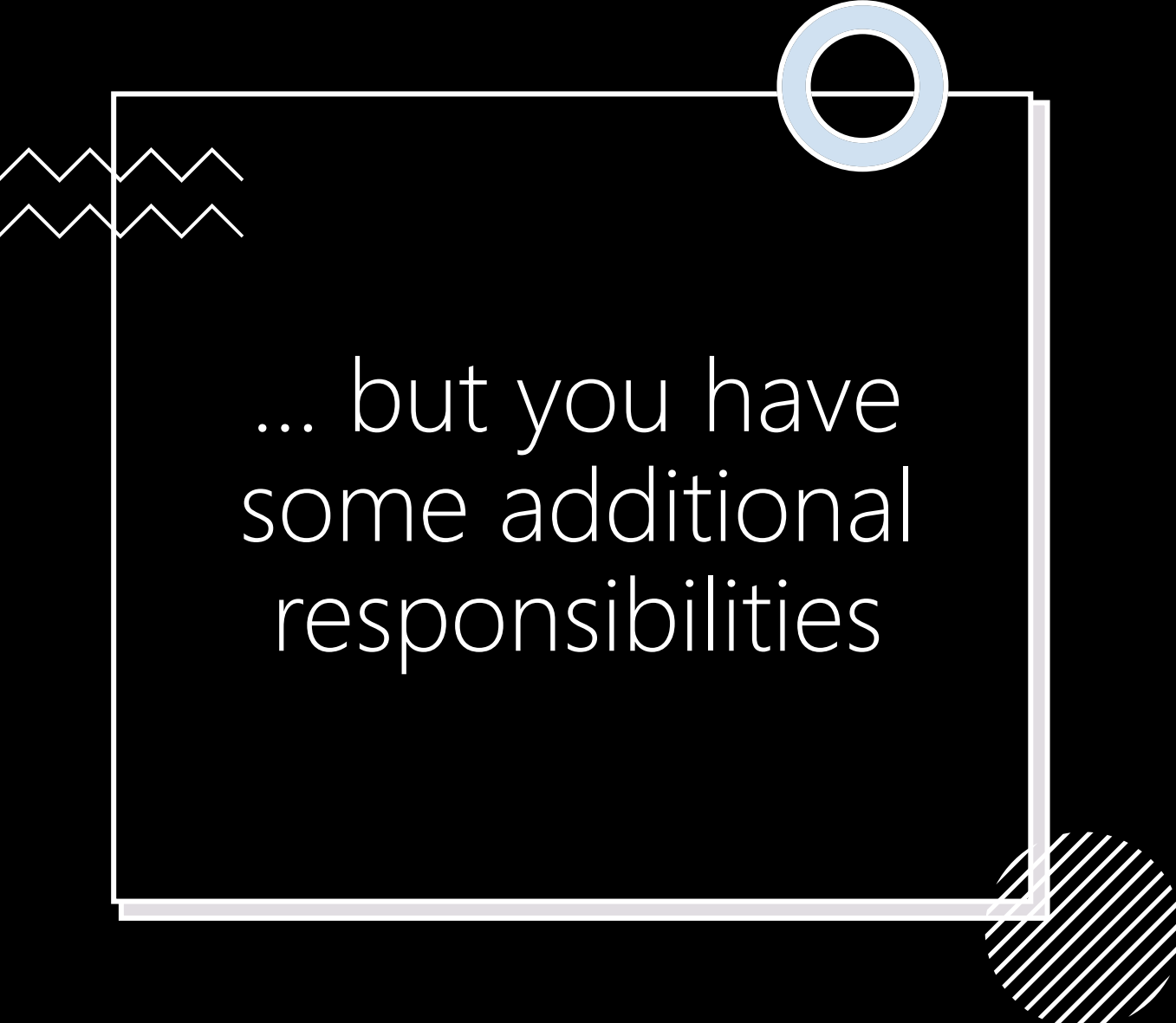
Copilot for Knowledge Retrieval

- 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)

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

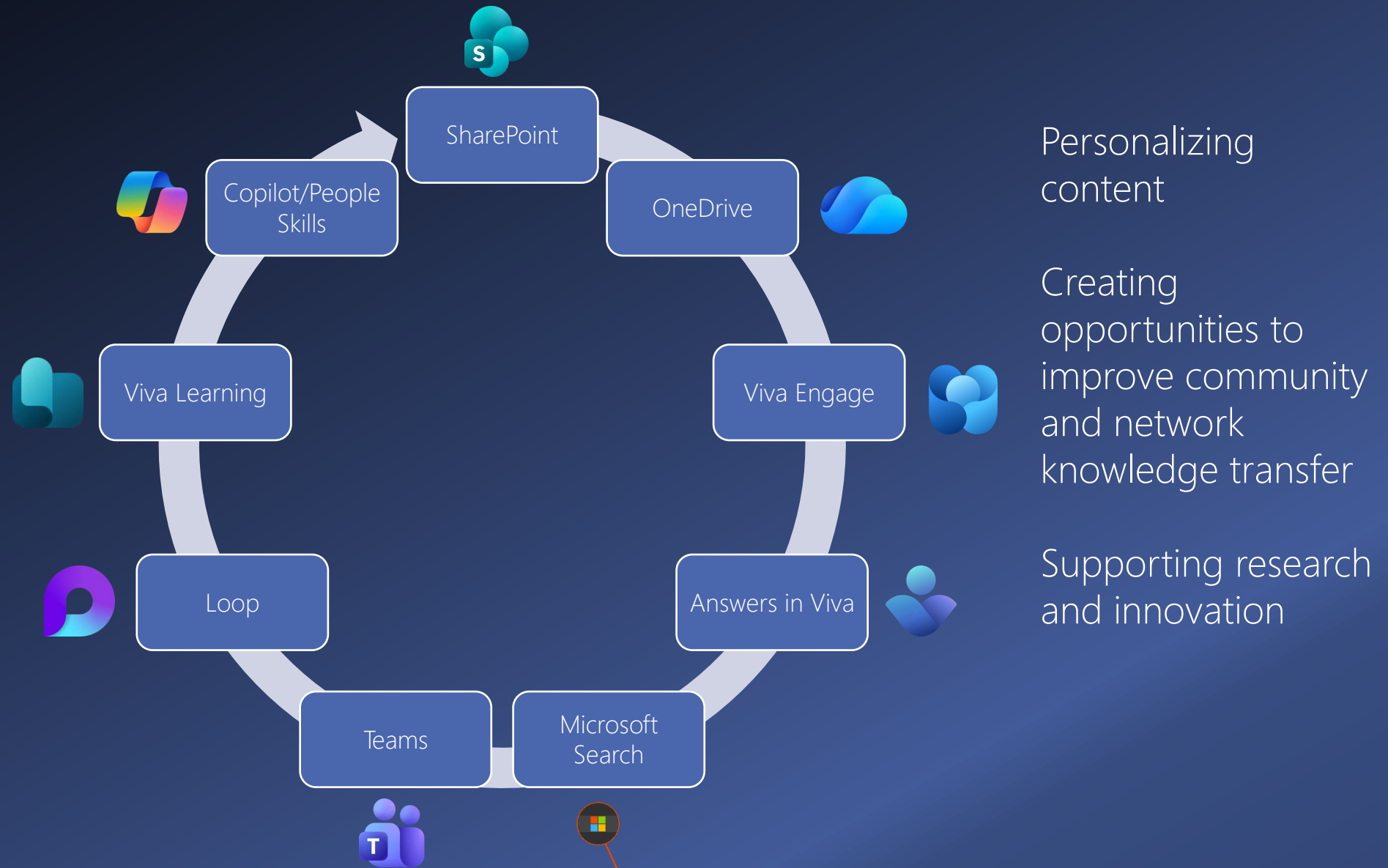


Human knowledge is contextual



Trust is a pre-requisite for knowledge sharing

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



Susan Hanley

sue@susanhanley.com

@susanhanley

www.susanhanley.com



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

