

Low-Tech Social Networking

Warmup

Write your name, "avatar" and details on a Post-It and "upload" to the board

Examples:

- Your job role (IT Pro, BA, PM, etc...)
- Location
- Favorite TV Show
- AI opportunity you want to explore further
- Reason for attending AI+IM Summit
- First Time Attendee or Alumni

Make a Connection & Build a Network



AI for Information Management – What to Do and What NOT to Do

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Agenda

- Introductions
- Ten Ways to Manage Information with AI
- BONUS: Top AI Adoption Tip
- Five Ways Not to Manage Information with AI

Session Rules

- This is a “Tips and Tricks” Session
- Demos (few to none)
- Microsoft 365 being used as an example
- Patterns and principles are what matter
- SHORT session – find me later for questions.



Group introductions

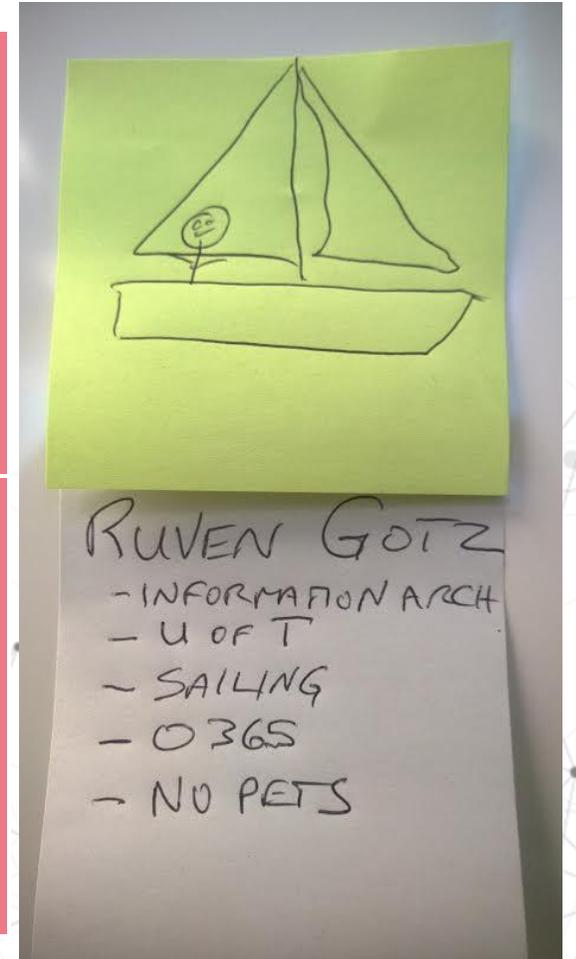
Low-tech social network

Low-tech social network

Draw your Avatar



"Tag" your Avatar



Add your name for the Avatar

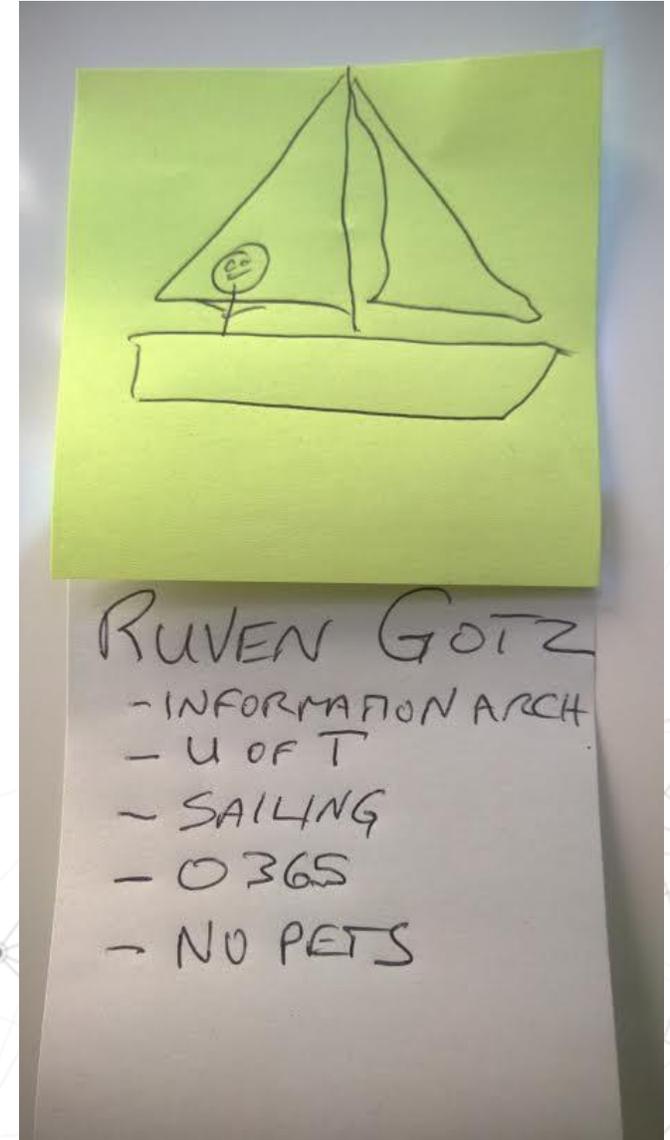
"Upload" your Avatar

RUVEN GOTZ
- INFORMATION ARCH
- U OF T
- SAILING
- O365
- NO PETS

Low-tech social network

FILL IN YOUR PROFILE on the Large Post-it provided

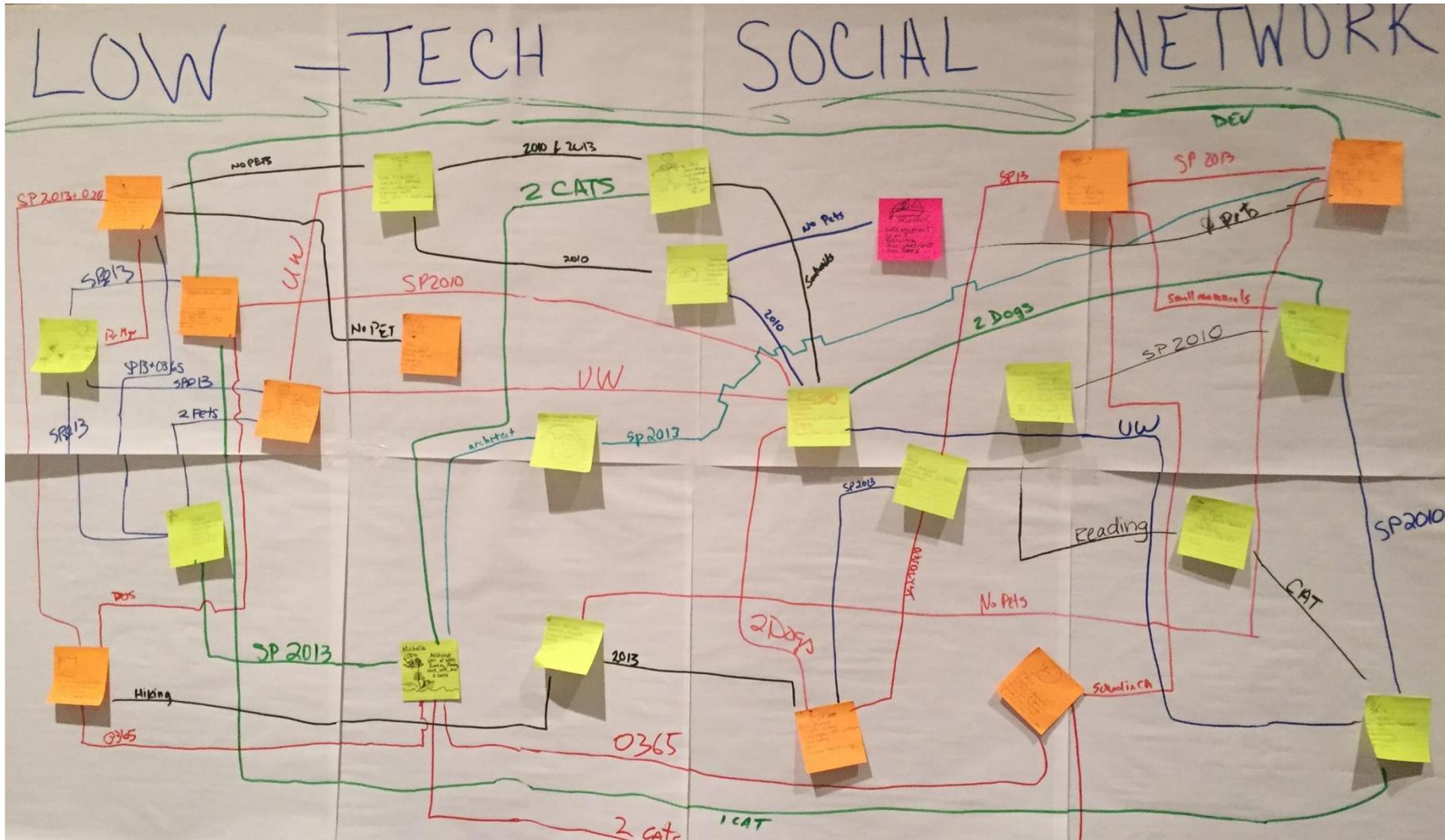
- Avatar (a picture that represents you)
- Your Name
- Your job role (IT Pro, BA, PM, etc...)
- Location
- Favorite TV Show
- AI opportunity you want to explore further
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Make a Connection & Build a Network



Example Low-tech Social Network



ABOUT SYNOZUR

www.synozur.com



Synozur is proud to be a woman-owned **boutique advisory agency** focused on transforming the business landscape for clients, making the desirable achievable.

Our **empathetic** approach is **tailored** to your unique journey, navigating the complexities of transformation and strategic planning with ease.

Our consultants have decades of experience delivering **global strategic advisory services** that elevate you to achieve breakthrough innovation.

With Synozur, we'll help set the heading for excellence.

CHRIS MCNULTY

Head of Strategic Markets

Chris is an award-winning **product, marketing and technology executive** with experience spanning generative AI, Copilot, and Microsoft 365 for knowledge management, content management, and automation.

Chris McNulty leads marketing and strategic customer engagement for Synozur.

Prior to working with Synozur, Chris was Director of Product Marketing for Microsoft 365, Copilot, SharePoint Premium, Teams, OneDrive, SharePoint, and Stream at Microsoft, where he oversaw customer communications, go-to-market, field readiness, channel partners and executive briefing engagements.

A co-creator of Microsoft Viva and Syntex, Chris's experience as CTO includes companies such as Dell and Quest Software and executive IT leadership at Santander, GMO, and State Street. He was first recognized as a SharePoint MVP in 2013. A frequent speaker at events around the globe, Chris is the author of the "SharePoint 2013 Consultant's Handbook" among other works, and holds several patents. He holds an MBA from Boston College in Investment Management and also hosts the Polaris podcast at <https://polaris.synozur.com>



Sailboat

Interactive

What's pushing you forward toward AI?

What are your goals?

What's holding you back?

Sailboat



Collaboration thinking



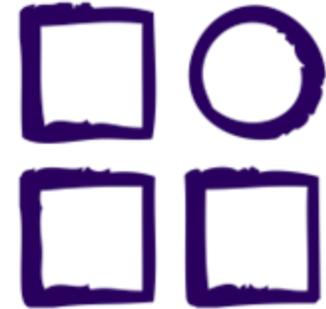
Stop, collaborate, and listen.

Be present and listen.
Ask questions for follow-ups
and clarification.



Make ideas visible.

Write your ideas down.
When possible, draw
diagrams or sketches.
Visible ideas make ideas
tangible.



Build possibilities.

Build on other's ideas.
Say, "yes, and..." to combine
ideas and iterate quickly.
Our combined experience
reveals the best ideas to
work with.

How to sticky note

**One idea
per note**

**Phrases,
not
sentences**

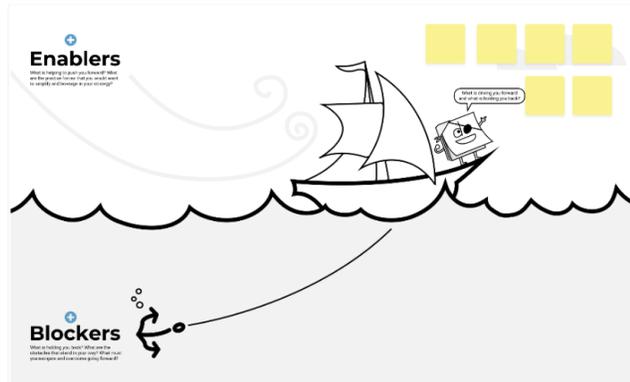
**WRITE IN
ALL CAPS**

Sailboat

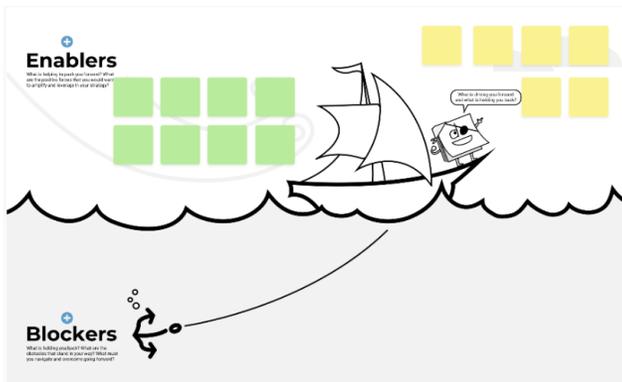
We will work together to understand the group's current issues and opportunities. This will reveal the current state landscape, so we can navigate to greater success.

Sailboat

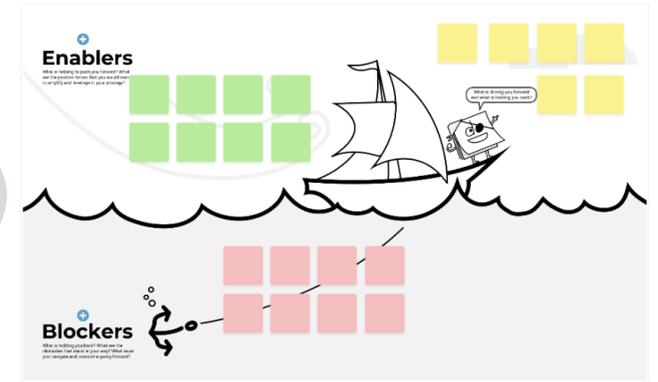
How it works



Brainstorm goals for AI at your organization



Brainstorm possible opportunities. What could be the wind in your organization's sails. What got you excited about collaborating with peers on this topic at this Summit?



Brainstorm current state issues. What are the threats and challenges that could create friction in realizing your opportunities related to AI.

Sailboat

What are your goals?

- Work individually to brainstorm your goals related to AI.
- What are your goals for AI at your organization/role?
- What do you hope enabling AI will accomplish?
- How would you define success for embracing AI in your role/organization?

Sailboat

What's the wind in your sails?

- Work individually to document the bright spots and opportunities.
- What opportunities could AI create? Why are you excited/curious about AI?
- What positives would you should you amplify and leverage?
- What help might you need?

What's blocking your progress?

- Work individually to document the pain points, barriers, and issues you are facing or anticipate.
- What pain points do you face? What issues arise?
- What barriers do you face? What are your fears?
- What additional hurdles do you anticipate? (Time, Money, People, Organizational Maturity)

AI Retrospective 1

What's pushing you forward
toward AI?



Ten Ways to Manage Information with/for AI

“Manage”

1. Clean up overshared content

Manage Oversharing

- AI-powered reports for discovery and analytics
- Limit data access to essential users
- Conduct regular audits to identify oversharing

2. Clean up abandoned

Manage abandoned content (own

- Identify likely owners
- Manage lifecycle options with



Microsoft 365 Admin

Here's what I found:



Microsoft 365 Admin

Here are the most relevant updates for you, based on your role and usage.

Service health

I found 0 issues for your organization to act on, 0 active incidents and 11 advisories related to your service health.

[See details](#)

Message center

Out of 413 new update messages, 154 seem highly relevant to your organization

[See details](#)

Group insights

You have 5 groups without owners, and 9 with single owner

[See details](#)

Group owners are needed to monitor membership and access to group resources.

Ownerless groups

- [Review 5 ownerless groups](#) and appoint owners. Owners are needed to monitor membership and access to group resources.
- [Review 9 groups](#) with single owner
- [Create an ownerless group policy](#) to manage when owners are unavailable.

3. Clean up obsolete data

Manage obsolete content (aging)

- Identify at scale
- Dispose with policy and lifecycle

4. Use Microsoft 365 Archive



Remove content to lower cost storage

Remove for search and AI scope

Sustain compliance, security and recoverability for data integrity

5. AI for border control

Auditing and other reports, at scale, are too large for humans to read

Use AI to identify patterns and trends for policy shift

Prevent data from leaving trust boundary

5. AI for border control

The screenshot displays the SharePoint admin center interface. The left-hand navigation pane includes sections like Home, Sites, Containers, Policies, Settings, Content services, Migration, Reports, App insights, Change history, Content services, Data access governance (selected), OneDrive accounts, Advanced, API access, More features, and Advanced management (PRO).

The main content area is titled "Specific people" links shared externally. It features a summary for the last 28 days with two key metrics: "Number of sites scanned for this report" (87) and "Number of sites fulfilling this report criteria" (2). A blue button labeled "Download detailed report" is visible. Below the summary, there are filter buttons for Template: All, Sensitivity: All, External sharing: All, and Privacy: All. A table lists the top 100 sites with columns for Site name, URL, Site access review status, and Links created. Two rows are visible, with some information redacted by purple boxes.

On the right side, an "AI insights" panel is open, titled "Specific people" links shared externally. It contains two bullet points: "Sensitive sites with unmanaged device access" and "Multiple sites under one admin". A "Copy" button and a disclaimer "AI-generated content may be incorrect" are also present.

5. AI for border control

Change history PRO

Create and download custom CSV reports of site actions or organization setting changes within [Learn more about these reports](#)

[+](#) New report [📄](#) Create a copy [🔍](#) Get AI insights [🗑️](#) Delete [🔄](#) Refresh status

Report name	Report type	Report status
AIIM 2025 Sites	Site settings	🔄 Running (This might take a
2024 Autumn Site Changes	Site settings	✅ Completed

AI insights

2024 Autumn Site Changes

[🔍](#) Get more insights (2 of 3 left)

📘 Insights are based on a partial set of data, not the report as a whole. If you get more insights, they'll be based on the next set of data in this report. You can get insights up to 5 times per report, depending on the size of the report.

First set of insights

- **Over-sharing of sensitive content:** Multiple instances of sharing settings being changed from more strict to less strict settings. For example, cmcnulty@synozur.com changed the sharing setting on "zzzMasterClientTemplate-Project2" and "zzzMasterClientTemplate-Project3" from "ShareWithGuests: False" to "ShareWithGuests: True" on 10/21/2024. Review these changes to ensure sensitive content is not being over-shared.
- **Frequent changes by specific users:** cmcnulty@synozur.com made numerous changes across various sites, including user group changes and sharing settings. For example, cmcnulty@synozur.com changed user groups on "SynozurLeadership" multiple times between 9/5/2024 and 11/12/2024. Consider auditing the changes made by this user to ensure they align with organizational policies.
- **Potential data loss risk:** There are no instances of site deletions or significant storage limit changes in this report. However, it is important to monitor for any such actions in future reports to prevent accidental data loss.

[📄](#) Copy

AI-generated content may be incorrect

👍 🗨️



33

6. Generate data from meetings

Enable transcription for Teams meetings and calls

- Capture important information
- Make information accessible for future reference
- Transcription is key for search, eDiscovery etc.



Content is
Queen/King.....



TEXT is
Queen/King.....

7. Use AI to enrich data and metadata

Examples

- Custom properties
- OCR/Text
- Image Tagging
- IDP
- Summaries
- Translations
- Transcripts

8. Use standard models 95% of the time

Prebuilt "standard"

Prebuilt "PII"

Prebuilt "Contracts" etc.

9. Adopt automatic sensitivity classifications

Multiple approaches in Microsoft:

- Purview
- Syntex/SharePoint Premium
- Power Platform
- "Default" settings

10. Manage personal information with standard and SAVED prompts

What's the latest from [PERSON] , organized by emails, chats, and files?

Show me a table of my top messages and chats for the past 48 hours.

Outlook: Summary by Copilot

Discover and share through prompt galleries, communities etc.

Top Ten Uses of AI for Information Management

Remediate oversharing

Manage abandoned content

Dispose of obsolete content

Preserve but archive

AI for scaled monitoring

Generate new data from meetings

Enrich content with metadata

Use prebuilt models

Automate security classification

Manage personal information

BONUS: Best Tip for Using Copilot

Windows-H key activates the **dictate** feature
Allows voice input instead of typing

AI Retrospective 2

What's holding you back with AI?



Five Ways NOT to Manage Information with/for AI

1. Launching AI without a well-thought-out plan



Importance of a Strategic Plan

- Maximizes Copilot's benefits
- Avoids potential pitfalls

Planning Steps

- Define use cases and test
- Identify key stakeholders
- Develop a detailed roadmap

Pilot

- Training Curriculum to match intended use cases
- Adjust plan as needed for production

2. Assuming Copilot will handle all tasks perfectly



Copilot as a Tool

- Requires proper management
- Needs oversight to ensure accuracy
- Effectiveness depends on supervision

3. Starting exclusively with Information Technology (IT)

Avoid launching Copilot exclusively with IT

- IT may have less impactful use cases

Concentrate pilot licenses in departments with strong use cases

- Maximize adoption and impact

4. Providing pilot licenses predominantly to organization leaders



Targeting License Allocation

- Focus on content creators and data analysts
- Leaders may not have the best use cases for Copilot

5. Using amateur agents for IM

Self-built agents may increase cost and complexity without real impact

Top Five Misuses of AI for Information Management

No pilot or plan

Deployment without testing and sampling

Leadership-only rollout

IT-only rollout

Amateur agents

Conclusion

Resources

- Visit us and sign up for updates at www.synozur.com
- Join us at M365 Conference (Las Vegas) May 2025
- Join us at TechCon 365 (Seattle) June 20205
- Follow us on LinkedIn & Instagram to get the latest news and events
- Listen to polaris.synozur.com or intrazone.libsyn.com

A group of people's hands are raised, forming several heart shapes. The background is a solid, deep purple color. The hands are silhouetted against the background, and the hearts are formed by the fingers and thumbs. The overall mood is one of love, gratitude, and unity.

Thank you.

