

CLEAN THE BEACH BEFORE YOU BUILD YOUR M365 AGENT

Better data. Smarter agents. Greater value.

BEFORE

- ✗ Duplicate files
- ✗ Outdated documents
- ✗ Unknown ownership
- ✗ Unstructured data
- ✗ Hard to find
- ✗ Low trust

AFTER

- ✓ Clean and relevant data
- ✓ Clear ownership
- ✓ Up-to-date information
- ✓ Structured for AI
- ✓ Easy to find
- ✓ Trusted answers

CLEAN
Remove ROT data (Redundant, Obsolete, Trivial)

CLASSIFY
Add metadata and assign ownership

MIGRATE
Move into Teams and SharePoint

GOVERN
Establish lifecycle, permissions and accountability

ENABLE AGENTS
Empower Copilot and custom agents with trusted data

UNLOCKM365 | Unlock the full potential of Microsoft 365 with clean, trusted, and intelligent data. | www.unlockm365.com.au

You wouldn't build a beach house on a beach covered in junk.

So why build an AI agent on data your organisation hasn't cleaned up?

For many organisations, the excitement around Microsoft 365 Copilot and AI agents is focused on what AI can do.

But before asking what your AI agent can do, there is a more important question:

Can you trust the information it will use?

Your organisation may have years of documents sitting across file shares, OneDrive, SharePoint, Teams and email.

Some will be current. Some won't. Some will be duplicated. Some will have no obvious owner. And some may contain information that shouldn't be accessible to everyone.

That's your AI beach.

How clean is your organisation's AI beach?

If you're a business, community organisation or not-for-profit considering AI, don't start by asking which agent you should build. Start by asking whether your information is ready.

We have created a free AI Readiness Health Check to help you assess where your organisation is today.

Complete the health check and take advantage of a free 30-minute consultation to discuss your results and potential next steps.

👉 **Take the AI Readiness Health Check:** unlockm365.com.au/ai-readiness

Five Key Steps

1. CLEAN

Start by removing the rubbish.

Identify Redundant, Obsolete and Trivial (ROT) information and deal with it before migrating or making more information available to AI.

Don't simply move the mess from a file server into SharePoint.

Clean it up first.

2. CLASSIFY

Once you've cleaned up the information, understand what you have.

What is important? Who needs access?
How sensitive is it? Who owns it?

Good information needs' structure and clear ownership if you want AI to deliver reliable answers.  3. MIGRATE

You don't need to transform everything at once.

Start small.

Move active team information into the appropriate Teams channels and SharePoint locations, rather than continuing to rely on personal storage, email attachments and unmanaged file shares.

4. GOVERN

Cleaning your beach isn't a one-off exercise. An outdated document doesn't become trustworthy simply because AI can find it.

You need to keep it clean.

That means having appropriate:

- **Ownership / Permissions /Accountability**
- **Review processes**
- **Retention and lifecycle arrangements**

5. ENABLE AGENTS

Now you're ready to start thinking about AI agents.

When your information is clean, structured, current, appropriately governed and easy to find, you have a much stronger foundation for Microsoft 365 Copilot and custom AI agents.

And that's when AI can start delivering genuine value — helping your people find information, answer questions and reduce repetitive administrative work.

Clean the beach.

Build the foundations.

Then unleash the agents.