FROM PERSONAL FLUENCY TO TEAM CAPABILITY

Build capability across the tools. Create capacity in the work.

ADVANCED helps a capable team know what to use, when and why - then builds one live Microsoft 365 pattern with the rules to repeat it safely.

Fluency without an operating model stays personal.

People can prompt, but they repeat context, reach for the wrong tool, blur exact work with judgement and share agents without ownership. ADVANCED turns individual use into governed team capability.

IDEAL FIT · TEAM OF 6–8 + BASIC FLUENCY + APPROVED M365 COPILOT + SAFE LIVE WORK

WORK SURFACES
Word · Excel · PowerPoint · Teams / SharePoint

WORK PATTERN
Chat · Notebook · Agent

OPERATING RULES
Owner · warning · reviewer · limit

ADVANCED — Orient → Match → Build → Govern → Commit

4h	6-8	1-2	1
4-hour working session	active participants	role-relevant themes	governed work pattern

WITHOUT ADVANCED

App-by-app tips.
The same context rebuilt.
Exact and judgement work blurred.
Agents shared as experiments.

WITH ADVANCED

Tool matched to task.
One Notebook holds the context.
Repeated recipes become Agent candidates.
Ownership and human gates are named.

WHAT CHANGES BY THE END · £7,405 EX VAT

The team leaves with a live Microsoft 365 artefact, a repeatable POC · IMP · V&V pattern, a Notebook or Agent candidate, and draft operating rules for the next use.

TEAM builds fluency. · ADVANCED builds connected capability. · ACCELERATE redesigns one workflow. · ADVANCED PLUS builds the production asset. · FUNCTION scales the method.

HOW IT WORKS · MINDSET + METHOD + OPERATING RULES

Match the tool to the work. Make the pattern safe to repeat.

Use probabilistic AI to think and draft. Use deterministic structures for numbers, rules and the record.

O	M	B	V	G
ORIENT	MATCH	BUILD	V&V	GOVERN
Jobs + leverage	Exact or judgement	POC + IMP	Evidence + human	Owner + rules

WHAT HAPPENS

01 CHOOSE — Pick one live job and its work surface: Word, Excel, PowerPoint, Teams or SharePoint.

02 MATCH — Separate probabilistic judgement from deterministic calculations, rules, structure and version control.

03 BUILD — Use POC + IMP across the apps. Keep one bounded case in a Notebook; promote only a proven repeated recipe.

04 GOVERN — Run V&V. Name the owner, warning, reviewer, limit, approved sources, edit rights and review trigger.

MICROSOFT 365 MAY HELP

Word draft / redline · Excel model / check · PowerPoint story · Teams evidence · SharePoint source

HUMANS RETAIN

Judgement · source approval · numbers · risk calls · final record · escalation

REACH-FOR ORDER

CHAT: one question. NOTEBOOK: one thing, many questions. AGENT: one recipe, many runs. Use the simplest tool that solves the job.

OPERATING RULE AI may generate a formula, but the model calculates it. AI may draft the words, but a named human owns the record.

WHAT GETS INSTALLED

Task / Tool Map
Where to use Chat, Office, Notebook or Agent.

Determinism Map
What can be computed; what must be verified.

Live Artefact
Usable work from Word, Excel or PowerPoint.

Notebook / Agent Candidate
Bounded context or a proven repeated recipe.

V&V Gate
Sources, uncertainty, checks and sign-off.

Ownership + Operating Card
Owner, warning, reviewer, limit and review trigger.

Measure the pattern: time recycled, first-pass quality, rework and confidence. One governed pattern the team can repeat.

ARCADIS DELIVERY EVIDENCE · PURSUITS / BIDDING

From bid Notebook to governed Agent library.

In real work, the Arcadis Pursuits team turned live bidding practices into a bounded Notebook pattern, four reusable Agent patterns and explicit ownership controls.

1
bounded Notebook pattern per live pursuit

4
initial reusable Agent patterns

3
explicit ownership controls

The Notebook contains the pursuit. An Agent is a reusable product. Named people hold the pen.

BIDS + PROPOSALS · NOTEBOOKS + AGENTS ACROSS REAL WORK

BID NOTEBOOK · THE LAB
ITT + addenda · scoring matrix · approved prior work · client brief · SME evidence

BID LEAD OWNS
access · context · final pen

THE RIGHT MICROSOFT 365 SURFACE FOR THE JOB

WORD
Draft · redline · track the answer

EXCEL
Score · model · reconcile · check

POWERPOINT
Turn approved narrative into the pitch

TEAMS + SHAREPOINT
Collaborate · evidence · control source

SHARE THE REPEATABLE JOB · AN AGENT IS THE PRODUCT

01 ITT ANALYSER
Extract scoring, weightings and risk clauses.
Commercial lead re-reads flags.

02 WIN THEME GENERATOR
Candidate themes grounded in evidence and client need.
Capture manager challenges.

03 SECTION DRAFTER
First draft from methodology brief and approved prior wins.
Bid author edits and validates.

04 COMPLIANCE CHECKER
Audit the draft against the ITT and scoring matrix.
Senior reviews every matrix.

NAMED PEOPLE HOLD THE PEN · EVERY SHARED AGENT HAS AN OPERATING SHIELD

NAMED OWNER
purpose · access · lifecycle

NAMED WARNING
where it can mislead

NAMED REVIEWER
human acceptance gate

NAMED LIMIT
registered · versioned · reviewed · retired

Arcadis Pursuits operating plan · delivered session output · June 2026

HOW THE OUTPUT WORKS

NOTEBOOK Curates the live ITT, scoring, evidence and approved prior work.
OFFICE Word drafts, Excel checks, PowerPoint tells the story; Teams + SharePoint control collaboration and source.
AGENTS Package repeatable bid jobs for the team, with human review before use.

THE OPERATING BOUNDARY

Named people hold the pen.

Named owner, warning, reviewer and limit. Human acceptance remains explicit before any team-wide reuse.

NEXT STEP · Put the governed design to work on one live pursuit and measure reuse, quality and time recycled.