

Evidence Before Rollout: Fulton Hogan's M-Files AI Assessment

Working proof-of-concepts in the customer's own vault, not a paper comparison of vendors.

FULTON HOGAN · CHRISTCHURCH, NEW ZEALAND

HIGHLIGHTS

- Grounded and scored six candidate use cases against Fulton Hogan's own AI Solution Weighting model and advanced the three strongest as pilot candidates.
- Assessed Copilot licensing, indirect access pathways, M-Files Cloud versus on-premises direction, and BlueGPT integration feasibility.
- Built working POC agents: a Notice summarization and response-drafting agent, a PCP/QA review agent for failed and missing test records, and Aino metadata suggestion.
- Ran workshops with Document Controllers and QA Managers to validate results and prioritize which metadata properties actually mattered.
- Stood up M-Files development and pilot vaults with Aino installed and Copilot connected through the M-Files Connector for Microsoft Graph.
- Delivered Assessment Report v1.0 covering platform findings, cost scenarios, and a governance framework, with every finding graded by strength of evidence.

Customer Background

Fulton Hogan is a civil construction and infrastructure company headquartered in Christchurch, New Zealand, with operations across New Zealand and Australia. It delivers roading, transport, and land development projects, and produces aggregates, asphalt, and related construction materials. Document control, quality assurance, and records management sit close to the center of how it runs major projects.

Fulton Hogan already ran M-Files as its document management system of record and held Microsoft 365 E5 licensing across the organization. A corporate push toward AI was underway, and tender feedback flagged that competitors were putting forward more sophisticated AI-enabled document capabilities. TEAM IM was already Fulton Hogan's M-Files partner, so the company asked us to assess the options.

6 CANDIDATE USE CASES SCORED	3 PILOT CANDIDATES ADVANCED	300+ USER BASE TAGGING METADATA	29.5 DAYS ACROSS FOUR WORKSTREAMS
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The Problem To Be Solved

Fulton Hogan knew it wanted AI applied to document control and QA. What it did not have was a defensible view of which platform to use for what, or what a rollout would cost and risk. Three candidates were on the table with overlapping capabilities: M-Files Aino, Microsoft Copilot, and BlueGPT, the company's own GPT-5-based solution. Open questions ran from Copilot licensing and indirect access pathways to whether M-Files should move to Cloud, and none had answers grounded in more than vendor material.

Why Solving The Problem Was Important

Document control and QA are high-volume, high-stakes work at Fulton Hogan. Notice responses take roughly an hour each and happen daily. Metadata tagging was reported at three or more hours per day per person across a user base of 300-plus. Tender feedback had already made AI a competitive question rather than an efficiency one.

The risk ran the other way too. A poorly governed rollout could expose sensitive project content, break permission trimming, or route people around established processes. Where records management is part of how projects get delivered and defended, that is a compliance problem, not an IT inconvenience.

How TEAM IM Got Involved

Fulton Hogan moves faster on AI than most of its industry does, beginning this project with a working group running and real long-term investment behind it. The open question was how the myriad use cases they were evaluating would intersect with the business context managed in M-Files. We raised that intersection off the back of a long M-Files relationship, and rather than pitch a platform, we proposed a stream of work to ground and prove out the use cases that touched the vault. Scott Olesen, our VP of Services, took delivery of this one himself rather than handing it off, with Dwayne Parkinson and Fletcher Thomas as Solution Architects. The work was scoped under the existing Master Services Agreement and ran across four workstreams over about a month.

The Method

Rather than compare tools on paper, we built in Fulton Hogan's own environment and let observed behavior settle the arguments. We confirmed requirements and evaluation criteria, then configured development and pilot vaults: installing M-Files Aino, connecting M-Files to Copilot through the M-Files Connector for Microsoft Graph, standing up Azure services and Copilot Studio, and syncing representative project data.

Alongside the builds we scored six candidate use cases against Fulton Hogan's own AI Solution Weighting model, ran workshops with Document Controllers and QA Managers to pressure-test the results, and worked through licensing, indirect access pathways, and BlueGPT integration feasibility. Findings were graded by strength of evidence, separating what we directly observed from what stayed directional.

PROOF-OF-CONCEPT BUILDS

01

Notice summarization and response drafting.

A Copilot Studio agent that reads an incoming Notice, summarizes it, and drafts a response, using Power Automate to reach the M-Files REST API.

02

PCP and QA review.

An agent that reviews Process Control Plans for failed and missing test records, the kind of gap that is expensive to find late.

03

Automated metadata suggestion.

Aino applied to the metadata properties the workshops identified as priorities.

The End Result

The Assessment Report set out a multi-platform position rather than a single-vendor recommendation: Aino for vault-native document intelligence, Copilot for enterprise-wide productivity, and BlueGPT reserved for funded, governed custom scenarios. Licensing was modeled as a phased POC, Pilot, and Rollout sequence with decision gates, so spend tracks proven value instead of a projection. Fulton Hogan committed to a follow-on M-Files AI Pilot Implementation, taking the highest-value use cases into tightly scoped pilots.

Conclusion

The harder findings were not about the models. The biggest risks we surfaced were organizational: permission drift, shadow repositories, unclear ownership of content. Those are the things that turn a working demo into a governance incident at scale, and they are the reason the recommended path is gated rather than fast. TEAM IM continues as Fulton Hogan's M-Files partner into the pilot implementation, carrying forward the agents, the governance approach, and the decision gates defined during the assessment.



Fulton Hogan understood from the start that laying solid groundwork is what makes AI pay off later, and it's great to see that recognized. I'm proud of the relationship we've built with them, and we can't wait to move into the next stage together.

SCOTT OLESEN • VP OF SERVICES, TEAM IM

VALUE ADDED

- Fulton Hogan holds an evidence-based AI strategy that assigns each platform a defined role instead of leaving three overlapping options in contention.
- Previously open questions now have answers: Copilot licensing, M-Files Cloud versus on-premises direction, indirect access pathways, and BlueGPT integration feasibility.
- A phased licensing and governance model ties cost and scale to demonstrated value, with decision gates at each step.
- Leadership had enough confidence to commit to a follow-on pilot implementation rather than another round of evaluation.

SOFTWARE AND CLOUD SERVICES INVOLVED

M-Files: document management system of record and the environment every AI use case was assessed against

M-Files Connector for Microsoft Copilot: governed publishing of M-Files content for Copilot retrieval

Microsoft Power Automate: orchestration for Copilot agents calling the M-Files REST API

Microsoft Azure AI (Azure OpenAI, Azure AI Search): embeddings and vector index in the assessed RAG pattern

Autodesk Construction Cloud: evaluated as an indirect AI access pathway

M-Files Aino: vault-native AI for document summarization and metadata suggestion, including Aino at Scale

Microsoft Copilot and Copilot Studio: enterprise AI experience and custom agent authoring

Microsoft 365 (E5), Entra ID, Microsoft Graph, and Purview: identity, security, indexing, and audit

BlueGPT: Fulton Hogan's GPT-5-based solution, assessed for M-Files RAG integration feasibility

TEAM IM Professional Services