



## SharePoint Document Control Assessment

While SharePoint offers powerful collaboration capabilities, 85% of Fortune 500 companies discover significant gaps between what they need for comprehensive document management and what SharePoint delivers out-of-the-box, leading to compliance risks and operational inefficiencies.

Are you going down the right path? Let's find out. Score your organization by allotting one point per checkmark and see if your version of SharePoint is working for you.



### Document Control and Version Management

- We have enforced version control policies that cannot be bypassed by users
- Our document changes are fully tracked and auditable
- We can identify exactly who made specific content changes within documents
- We can prevent accidental document overwriting and deletions
- We maintain proper audit trails for regulatory compliance



### Workflow and Approvals

- We have automated approval workflows for document changes
- Our approval processes include multiple reviewers when necessary
- We have clear visibility into document approval status



### Document Organization

- Documents can be searched using metadata, not just basic folder structures
- We have consistent document management practices across the organization
- We maintain a "single source of truth" for documents



### Records Management

- We have implemented effective retention policies across document types
- We can easily implement legal holds when required
- Document disposition (archiving/deletion) is automated based on policies



### Security and Digital Rights

- We have implemented digital rights management for sensitive content
- Our document access controls are granular and role-based
- External sharing is governed by clear policies and supported by technical controls

#### Scoring Key

**0-5: Critical Optimization Needed** - SharePoint implementation faces significant document control risks and inefficiencies. Urgent attention required to core document management capabilities.

**6-11: Significant Improvement Potential** - Basic document management is in place, but substantial gaps remain in control, compliance, and efficiency. Focus on metadata structure, version control, and approval workflows.

**12-17: Well Optimized** - Strong document control with refined workflows and consistent practices. Focus on maintaining governance and exploring advanced capabilities.

Organizations that properly optimize SharePoint see up to 15% less time spent on document management and 85% better engagement. Moving beyond standard SharePoint limitations doesn't require replacing your entire system—targeted enhancements can transform your implementation from a basic document repository into a compliant, efficient document control solution.

**15%**

Less time spent on document management

**85%**

Better engagement

**For a detailed evaluation, [contact our SharePoint experts!](#)**