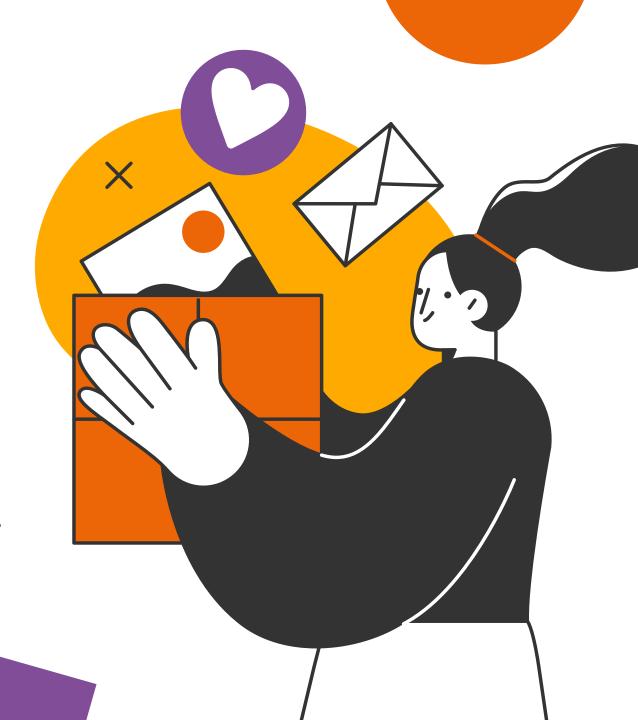**TEST YOUR ORGANISATION'S**

Content Management Maturity Level

Answer our simple 5-point self-assessment to determine where you stand and how to improve.

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advantage

Answer these questions

QUESTION 1

Where do you currently *save and manage your content*?

A We either save them on our desktop or use our on-premises file shares.

B We use a mix of document management platforms such as Dropbox, Opentext, iManage, Google Drive, Records Manager, and Microsoft 365 etc.

C We use a single content management platform like Microsoft 365, to provide modern collaboration and governance on our content.

QUESTION 2

How are *different file types* and their processes established?

A All files are saved in department-based storage structures like HR, Finance, IT, etc.

B Our files are stored by business activity (the thing I am doing) and automatically tagged with key business classification when we save them.

C Our files are stored by business activity, and we have a specific place with workflow for controlled documents like policies, case files, and contracts.

How is your *search and file sharing experience* with your current content management system?

A Not ideal. Knowing where to find and file things is hard, sharing large files is difficult.

B Good enough. I can quickly find the content I need but securely sharing sensitive information across different teams is a concern for me.

C It's excellent. I know where to file and find things and sensitive files are labelled with controls in place that prevent unauthorised sharing.

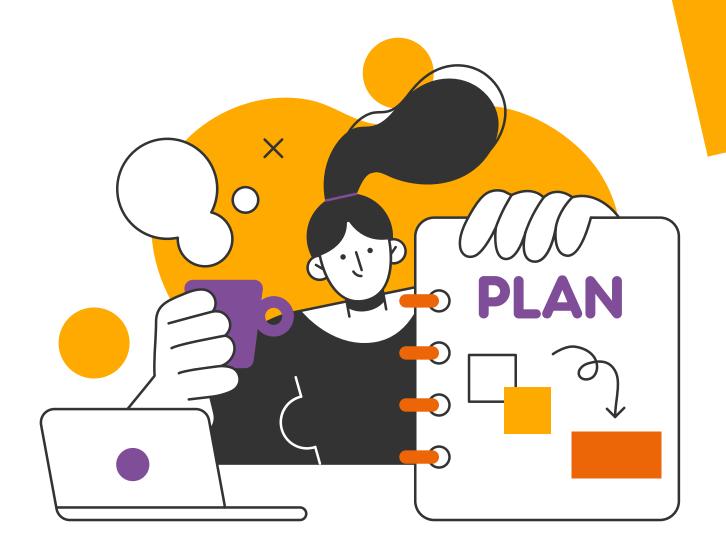## How do you *manage version control* with your documents?

A This is managed manually through different file names and when working on documents with others, we email attachments for them to update and send back to us.

B We have built in version control that manages our versioning automatically. When Co-authoring documents with colleagues our system tracks changes helping us to know who did what and when.

What is your current approach to *data governance and compliance*?

A We use file shares with traditional permissions to secure access.

B We use metadata to tag our files and have reasonable governance in place to reduce content sprawl.

C We use file shares or collaboration platforms for working documents and have a separate system where our records are filed.

D We have a single tool that provides both modern collaboration and comprehensive document management, with automated classification, built-in approval workflows, retention and disposal policies, and comprehensive compliance reporting.

What's your maturity level?

Give yourself these scores based on your answers: **A = 1**, **B = 2**, **C = 3**, **D = 4**.

GOOD

1 – 5 points

You still have a long way to go towards improving how you effectively manage and work with your content. Consider taking these steps to improve them.

⭐ **Move your on-premises file shares or to a modern cloud-based file sharing and document management platform.**

BETTER

6 – 10 points

Nice work! You've made a considerable effort to uplift your organisation's content management maturity. While this is good, you can still improve it by implementing some of these recommendations.

⭐ **Consolidate your content management systems in a single environment that's familiar to your users.**

⭐ **Put scalable and robust information protection and compliance in place.**

BEST

11 – 15 points

Congratulations! You have reached the highest level of maturity with your information management and compliance practices.

Your work is highly commendable towards ensuring that content management and compliance are simple and easy to achieve for your users.

For an optimal experience, ensure file content has automated metadata tagging, automated site provisioning, and in-depth reporting on the use of personal storage like OneDrive is in place and ensure multi-levelled case file security can be enabled.

The best content management experience has…

- Automated metadata.

- User-friendly 'activity' based structure.

- In-depth reporting.

- Sensitivity and retention management.

- Better quality of search results.

- Automated site provisioning.

- Best compliance for your organisation.

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