Dexy

COPILOT READINESS ASSESSMENT

Trust Scorecard

How far your people and Copilot can trust the content on your SharePoint sites.

Prepared for: Northwind Legal

Scope: 206 SharePoint sites

Scan date: 14 October 2026

Sample report

This is a sample report, so you can see the format and depth of a Copilot readiness assessment.

1. Executive summary



TRUST SCORE

68 / 100 · Needs attention

How far your people and AI can trust your SharePoint content. By default it combines AI readiness and Security equally, and you can change the weighting. Poor security caps it, however tidy your content is.



AI READINESS

72 · Needs attention

Owned, up to date and free of duplicates.



SECURITY

64 · Needs attention

Items open to everyone, Anyone links, guest access, and direct shares to individuals.

What we found

- **Northwind Legal is close to Copilot-ready, but not yet safe to switch on broadly.** Security is 64, just 4 points above 60. If it drops below 60, the Trust Score is capped at 59, however good the content is.
- **Oversharing is concentrated.** Most of the security risk comes from 9 sites shared with everyone in the organization and 20 files with links that anyone can open.
- **Sharing to individuals is the hidden problem.** 27% of permission grants go to named people rather than groups, so access is hard to review and keeps growing.
- **Content ownership is patchy.** 17 key pages whose author has left or that have no assigned owner, and 49 key pages not updated in 12+ months. Microsoft Copilot will answer from them anyway.
- **Labeling and guest access lag behind.** 41% of documents in 12 high-value sites (sampled) carry no Microsoft Purview sensitivity label. 16 external guests (Microsoft Entra B2B) have access, and 6 of them haven't signed in for over 90 days.

Recommendation: we recommend fixing the four quick wins first (about 2 weeks) to lift Security above 70 before a wider Copilot rollout, then tackle ownership and labeling in a 60-day program. Estimated Trust Score after quick wins: **75** (this assumes Security rises to 71 and AI readiness to 78).

2. Scores in detail

Bands for all three scores: 80+ Good | 60–79 Needs attention | Below 60 At risk. The Trust Score weights AI readiness and Security equally by default (you can adjust this). If Security is under 60, the Trust Score can't go above 59. Storage is reported separately and does not count toward the Trust Score.

Security: 64 / 100

Signal	Count	Score impact	Severity
Items open to everyone in the organization or via Anyone links	1,790	−9	Needs attention
Files with Anyone (anonymous) links	20	−7	At risk
Sites open to everyone in the organization	9	−6	At risk
Anyone and organization-wide links with no expiry	58 (20 Anyone + 38 organization-wide)	−4	Needs attention
Direct shares to individuals vs group shares	27% / 73%	−5	Needs attention
External guests with access (6 inactive 90+ days)	16	−3	Needs attention
Sites with many unique permissions	7	−2	Low risk



Permission grants by type across all sites (sample figures). Target: under 10% direct grants.

AI readiness: 72 / 100

Factor	Result	Score
Ownership: key pages with a current, assigned owner	17 key pages whose author has left or that have no assigned owner	78
Site owners: sites with 2+ owners	4 sites with one owner	85
Currency: key pages updated in the last 12 months	49 key pages not updated in 12+ months	66
Freshness: documents in key sites updated in the last 12 months	84 stale items in key sites	70
Metadata and Purview labels	31 missing metadata · 41% unlabeled in 12 high-value sites (sampled)	61
Duplicate and out-of-date content	13 sets of identical files (exact matches)	74

Storage hygiene (scored separately, not part of the Trust Score): 71 / 100. 18% of storage in the top 10 sites is old file versions.

Methodology: Data gathered with a read-only app identity plus admin-center reports run by your SharePoint administrator. Some signals need SharePoint Advanced Management (included once at least one Microsoft Copilot license is assigned). Guest sign-in activity (used to find inactive guests) needs Microsoft Entra ID P1; access reviews of inactive users need Microsoft Entra ID Governance.

3. Findings ranked by risk

Each finding shows the evidence from the scan and the recommended fix. The licenses each fix needs are listed in section 5.

High **1. Anyone links on finance and HR files** — Quick win

Evidence: 20 files, including 4 payroll exports in *HR-Shared*, have anonymous links; all 20 are among the 58 links with no expiry. Copilot doesn't give access through Anyone links, but anyone with the URL can open the file.

Fix: Remove the links, set org-wide policy to block Anyone links, or force 7-day expiry and make them view-only; notify owners.

High **2. Sites shared with "Everyone except external users"** — Quick win

Evidence: 9 sites, including *Board Papers 2024* and *Legal Matters*, give access to "Everyone except external users" (every staff member), 436 users. Copilot can surface their content to every internal user through search, and through Copilot for anyone with a license.

Fix: Remove that access and ask site owners to review who has access (Site access review, a SharePoint Advanced Management feature). Meanwhile, keep the board and legal sites out of Copilot and search results (Restricted Content Discovery). Who can open them doesn't change, so we fix the permissions too. Caveats: people who recently opened the content can still find it, search within the site is unaffected, it doesn't cover OneDrive, it needs a Microsoft Copilot license plus SharePoint Advanced Management, and Microsoft positions it as a temporary measure while permissions are fixed.

High **3. Sensitive content without Purview labels** — Bigger change

Evidence: 41% of documents in 12 high-value sites (sampled) have no sensitivity label; no auto-labeling policy is in place.

Fix: Set a default sensitivity label on those document libraries now; design auto-labeling for contracts and HR data (service-side auto-labeling needs Microsoft 365 E5, E5 Information Protection and Governance, Office 365 E5 or Microsoft Purview Suite). A default label applies only to new or edited files, so pair it with auto-labeling to reduce the unlabeled figure.

Medium **4. Direct shares to individuals** — Bigger change

Evidence: 27% of grants go to named people (4,290 of about 15,900 grants), mostly through Share dialogs in Teams and OneDrive.

Fix: Move access to Microsoft 365 groups; set the default sharing link to "Specific people"; clean top 10 sites.

Medium **5. Stale guest access** — Bigger change

Evidence: 16 external guests can reach content; 6 have not signed in for 90+ days; no access reviews configured.

Fix: Remove the 6 inactive guests; set up quarterly guest access reviews (requires Microsoft Entra ID Governance or Microsoft Entra Suite (some features work with Entra ID P2)).

Medium **6. Ownerless and out-of-date content** — Quick win

Evidence: 17 key pages whose author has left or that have no assigned owner; 49 key pages not updated in 12+ months. Copilot may quote outdated policies in its answers.

Fix: Assign owners and set up a page-owner review process every 6–12 months (manual, or with scheduled reminders). This isn't a built-in Microsoft feature: SharePoint Advanced Management site ownership policies notify at site level only.

Low **7. Links with no expiry** — Quick win

Evidence: 58 Anyone and organization-wide links have no expiry (20 Anyone + 38 organization-wide).

Fix: Set 90-day expiry for Anyone links in the SharePoint admin center, and expiry for "People in your organization" links via SharePoint Online PowerShell (Set-SPOTenant -CoreOrganizationSharingLinkMaxExpirationInDays and -OneDriveOrganizationSharingLinkMaxExpirationInDays).

Low **8. Duplicate and out-of-date content** — Bigger change

Evidence: 13 sets of identical files (exact matches) and 84 items unchanged in 12+ months in key sites.

Fix: Owners review and archive; use inactive sites policy for whole sites.

4. Quick wins vs bigger changes

Quick wins (2 weeks)

1. Remove 20 Anyone links; block them tenant-wide, or time-limit them and set them to view-only.
2. Remove “Everyone except external users” access from 9 sites; keep the board and legal sites out of Copilot and search results while permissions are fixed.
3. Assign owners to 17 key pages; start a page-owner review process (manual or scheduled reminders).
4. Set 90-day expiry for Anyone links in the SharePoint admin center, and expiry for “People in your organization” links via SharePoint Online PowerShell (Set-SPOTenant settings named in section 5).

Estimated: Security 64 → 71, AI readiness 72 → 78, Trust Score 68 → 75

Bigger changes (30–90 days)

1. Purview sensitivity labels: default library labels and auto-labeling (both need Microsoft 365 E5, E5 Information Protection and Governance or equivalent).
2. Move direct shares to group-based access; fix top 10 sites.
3. Guest access: remove 6 inactive guests, then quarterly guest access reviews (requires Microsoft Entra ID Governance or Microsoft Entra Suite (some features work with Entra ID P2)).
4. Ownership and review cycle across all sites.
5. Archive duplicates and stale content.

Estimated: Trust Score 75 → 84 (Good)

5. Licensing and prerequisites

Recommendation	What it needs
Anyone-link removal, link expiry, sharing defaults	Core SharePoint admin center; SharePoint Online PowerShell (Set-SPOTenant -CoreOrganizationSharingLinkMaxExpirationInDays and -OneDriveOrganizationSharingLinkMaxExpirationInDays) for organization-wide link expiry
Site access review, inactive sites policy, keeping sites out of Copilot and search	SharePoint Advanced Management (included once at least one Microsoft Copilot license is assigned in the tenant)
Default sensitivity labels on libraries	Microsoft 365 E5/A5/G5, Microsoft 365 E5 Information Protection and Governance, Office 365 E5 or Microsoft Purview Suite (E3 is not enough)
Service-side auto-labeling	Microsoft 365 E5, E5 Information Protection and Governance, Office 365 E5 or Microsoft Purview Suite
Quarterly guest access reviews	Microsoft Entra ID Governance or Microsoft Entra Suite (some features work with Entra ID P2)
Data access governance reports	SharePoint Advanced Management (E5 without SAM gets activity reports only)
Version history limits	Core SharePoint

6. Next steps

1. **Week 1:** agree an owner for each finding and approve the four quick wins; confirm licensing for the bigger changes.
2. **Weeks 1–2:** deliver quick wins; rescan to confirm Security above 70.
3. **Weeks 3–4:** remove the 6 inactive guests; agree the sensitivity label taxonomy and the group-based access model.
4. **Weeks 5–12:** labeling, group-based access and review cycle; monthly rescans.
5. **Week 12:** full rescan; compare against this baseline and confirm the estimated Trust Score of 84.
6. **Then:** roll Copilot out more widely, starting with the sites that score Good.