Checklist: Implementing SharePoint Content Types

A step-by-step guide to planning, creating, and deploying a robust content type strategy in SharePoint Online.

Phase 1: Planning & Analysis

- [ ] Identify major document categories (e.g., HR, Finance, Legal).
- [ ] Interview department heads to define specific document types (e.g., Invoice, Contract).
- [ ] For each document type, list essential metadata fields (e.g., Client Name, Due Date).
- [ ] Design the content type hierarchy (Parent -> Child relationships).
- [ ] Decide on the deployment strategy (Global via Content Type Hub vs. Departmental via Hub Site).

Phase 2: Creation & Configuration

- [ ] Create reusable Site Columns for all identified metadata.
- [ ] Create parent content types in the Content Type Hub or relevant Hub Site.
- [ ] Create child content types inheriting from the parents.
- [ ] Attach standardized document templates where needed (e.g., .docx, .xlsx).
- [ ] Publish the content types from the Hub.

Phase 3: Deployment & Training

- [ ] Add new content types to the relevant Document Libraries.
- [ ] Configure library views to display the new metadata columns.
- [ ] Prepare training materials (quick guides, videos) for end-users.
- [ ] Conduct training sessions focusing on the "why" behind metadata.
- [ ] Appoint champions in each department to provide support.