



# Viva Connections Implementation Checklist

## Phase 1: Planning & Prerequisites

- ☐ **Confirm Licensing:** Verify that your organization has the required Microsoft 365 or Office 365 licenses.
- ☐ **Assign Roles:** Identify and grant permissions to a SharePoint Administrator and a Teams Administrator.
- ☐ **Identify SharePoint Home Site:** Choose an existing modern SharePoint communication site or create a new one to serve as the home site.
- ☐ **Define Goals:** Clearly document what you want to achieve (e.g., improve communication, connect frontline workers).
- ☐ **Assemble a Stakeholder Team:** Include representatives from IT, HR, Communications, and other key departments.
- ☐ **Develop a Governance Plan:** Decide who can create content, approve news, and manage the dashboard.

## Phase 2: Build & Configuration

- ☐ **Set Up Home Site in SharePoint:** Officially designate your chosen site as the "Home Site" in the SharePoint admin center.
- ☐ **Design the Dashboard:**
  - ☐ Brainstorm and list the most needed tools and links for different employee groups.
  - ☐ Create dashboard cards for high-priority tasks.
  - ☐ Use the Card Designer for any custom needs.
- ☐ **Apply Audience Targeting:** Configure cards and resource links to appear only for relevant employee groups (Microsoft 365 Groups).
- ☐ **Curate Resources:** Populate the "Resources" section with essential, evergreen links. Avoid clutter.
- ☐ **Configure Global Navigation:** Ensure the SharePoint app bar navigation is logical and useful.
- ☐ **Test on Mobile:** Preview the entire experience on the Teams mobile app to ensure it's user-friendly.

### Phase 3: Launch & Adoption

- [ ] **Create a Communication Plan:** Draft announcements, teasers, and "what's in it for me" messaging.
- [ ] **Secure Executive Sponsorship:** Get a leader to champion the launch.
- [ ] **Build a Champions Network:** Train a group of power users to help their peers.
- [ ] **Prepare Training Materials:** Create short videos, FAQs, and quick-start guides.
- [ ] **Deploy the App in Teams:** Customize the app name/logo and pin it to the left-hand rail for all users in the Teams admin center.
- [ ] **Launch!** Officially announce the new platform.
- [ ] **Gather Feedback:** Use a dedicated channel or survey to collect user input.
- [ ] **Review Analytics:** Regularly check usage metrics for the home site and dashboard.
- [ ] **Iterate:** Schedule quarterly reviews to update the dashboard and resources based on feedback and analytics.