



# Your SharePoint Classic-to-Modern Migration Checklist

## Phase 1: Assessment & Inventory

- ☐ Run the SharePoint Modernization Scanner.
- ☐ Create a full inventory of all site collections and subsites.
- ☐ Identify all customizations (master pages, web parts, custom code).
- ☐ Analyze site usage data to identify active vs. inactive sites.
- ☐ Interview key site owners and business users for feedback.
- ☐ Classify content as Retain, Rebuild, or Archive (ROT analysis).

## Phase 2: Strategy & Planning

- ☐ Choose your migration approach (in-place, phased, or fresh start).
- ☐ Define the project scope, budget, and timeline.
- ☐ Assign roles and responsibilities (Project Manager, Tech Lead, etc.).
- ☐ Select a pilot group of sites for the initial migration.
- ☐ Develop a detailed communication plan for stakeholders and end-users.
- ☐ Schedule user training sessions and prepare support materials.

## Phase 3: Execution & Migration

- ☐ Set up and configure the SharePoint Migration Tool (SPMT).
- ☐ Remediate any identified blockers (e.g., long file paths, invalid characters).
- ☐ Execute the pilot migration.
- ☐ Use PnP PowerShell scripts to modernize classic pages.
- ☐ Rebuild necessary custom functionality using SPFx.
- ☐ Schedule main migration waves during off-peak hours.

## Phase 4: Validation & Adoption

- ☐ Perform a post-migration audit of content and permissions.
- ☐ Test all navigation links and functionality on new modern sites.
- ☐ Gather feedback from pilot users and make adjustments.
- ☐ Launch the new modern sites to the wider organization.
- ☐ Monitor performance and user feedback through established channels.
- ☐ Set the classic sites to read-only mode and eventually decommission them.