



SharePoint Retention Policies – Checklist

Download Your Checklist!

By the end of this article, you'll be able to download a checklist that helps you set up, enforce, and monitor SharePoint retention policies to protect content and maintain compliance.

1. Understand Retention Needs

- Identify regulatory & business requirements
- Define retention durations

2. Define Retention Policies

- Create policies in Compliance Center
- Map to governance strategy

3. Assign Policies to Sites & Libraries

- Apply policies to relevant sites, libraries, teams
- Ensure correct scope

4. Configure Retention Labels

- Configure labels for documents & records
- Train users on application

5. Automate Deletion & Archiving

- Automate archival of content
- Enable deletion after retention period

6. Communicate with Users

- Inform users of retention rules
- Provide guidance on labeling

7. Monitor & Report Compliance

- Track compliance with audit reports
- Monitor policy hits & exceptions

8. Review & Adjust Policies

- Periodically review needs
- Adjust durations & scope
- Update governance plan

Why This Checklist Matters:

Use this checklist to ensure your organization retains the right data for the right duration, reduces risk, and simplifies governance across your SharePoint environment.