Checklist: Implementing SharePoint Content Types & Metadata

Phase I: Planning & Analysis

1. **Audit Existing Content:** Identify the top 5 most chaotic document libraries.
2. **Interview Stakeholders:** Talk to the primary users of those libraries. Ask them "How do you search for files right now?" and "What information would make finding files easier?".
3. **Define Key Document Classes:** Based on interviews, identify 3-5 critical business document classes (e.g., Contract, Invoice, Project Report, Policy, Meeting Notes).
4. **Identify Core Metadata:** For each document class, define 3-5 essential metadata fields (e.g., for a Contract: Client Name, Status, Expiration Date, Value).
5. **Plan Your Term Store:** Identify managed terms that can be reused across different content types (e.g., Department Names, Project Codes, Office Locations).

Phase II: Build & Configuration

1. **Create Site Columns:** For all identified metadata fields, create reusable Site Columns.
2. **Build Parent Content Types:** Create the base content types for your document classes using the new Site Columns.
3. **Create Child Content Types (if needed):** If you have variations (e.g., "Master Service Agreement" and "NDA" are both children of "Agreement"), create them now.
4. **Configure Term Store:** Build the term sets you planned in Phase I.
5. **Apply to a Pilot Library:** Add the new content types to a single "pilot" document library. Remove the default "Document" content type.
6. **Create Library Views:** Build custom views based on the new metadata to demonstrate filtering capabilities.

Phase III: Governance & Training

1. **Set Retention Policies:** Apply any necessary retention or archiving policies to the content types.
2. **Configure Versioning:** Ensure major and minor versioning is enabled on the library.
3. **Train Pilot Users:** Provide a short training session for the pilot group, showing them how to upload and tag documents correctly.
4. **Gather Feedback:** After one week, gather feedback from the pilot users and make adjustments.
5. **Schedule a Review:** Set a calendar reminder to review the metadata strategy in 6 months.