



SharePoint Disaster Recovery Plan: The Essential Checklist

Use this checklist to build and validate your organization's SharePoint backup and recovery strategy.

Phase 1: Planning & Assessment

- Identify Key Stakeholders: List all business and IT leaders involved in the recovery process.
- Conduct Business Impact Analysis (BIA):
 - Identify critical SharePoint sites, libraries, and lists.
 - Determine the business impact of losing access to each critical asset.
- Define RTO & RPO:
 - Recovery Time Objective (RTO): What is the maximum acceptable downtime for SharePoint? (e.g., 4 hours)
 - Recovery Point Objective (RPO): What is the maximum acceptable data loss? (e.g., 1 hour)
- Review Compliance & Retention Needs:
 - Document all legal, regulatory, and internal data retention policies.
 - Ensure your backup strategy meets these retention policy requirements.

Phase 2: Solution & Configuration

- Evaluate Backup Solutions:
 - Assess the limitations of native Microsoft 365 tools.
 - Compare third-party backup vendors based on features (e.g., granular restore, security).
- Implement Backup Solution:
 - Configure backup frequency to meet your RPO.
 - Ensure backups are stored in a secure, isolated (air-gapped) location.
 - Set up alerts for backup failures or issues.
- Configure SharePoint Retention Labels:
 - Apply retention labels and policies to ensure automated data retention and disposal.

Phase 3: Documentation



- Create the Recovery Plan Document:
 - Document step-by-step restore procedures for different scenarios (e.g., single file restore, site restore).
 - Include a contact list with roles and responsibilities.
 - List all necessary credentials, software, and vendor support contacts.
- Store the Document Securely:
 - Keep digital copies in multiple, accessible locations.
 - Maintain at least one physical, off-site copy of the plan.

Phase 4: Testing & Maintenance

- Schedule Regular Restore Drills: Plan for testing at least twice a year.
- Conduct a Restore Drill:
 - Choose a non-critical site or list for the test.
 - Perform a point-in-time restore to a test environment.
 - Validate the integrity and completeness of the restored data.
- Analyze & Update:
 - Document the test results, including time taken and any issues encountered.
 - Update the SharePoint disaster recovery plan based on findings.
- Review and Revise Annually: Review the entire plan once a year or after any major changes to your IT infrastructure.