



The Ultimate SharePoint Classic to Modern Migration Checklist

Phase 1: Analysis & Discovery

Run the SharePoint Modernization Scanner

- Execute the scanner on your tenant.
- Analyze the report for Classic site usage, active subsites, and customizations.
- Identify sites with heavy branding, custom master pages, or JavaScript injection.

Inventory Your Content & Functionality

- Create a list of all site collections and subsites.
- For each site, identify the owner, purpose, and last modification date.
- Document critical lists, libraries, and content types.
- Catalog all third-party web parts and custom solutions.
- Interview department heads to identify any business-critical features modern missing classic.

Define Migration Strategy

- Categorize each site: Migrate As-Is, Rebuild in Modern, or Archive/Delete.
- Prioritize sites for migration based on business impact and complexity.
- Create a high-level project timeline and budget.

Phase 2: Planning & Preparation

Establish Governance

- Define your new information architecture (Hub sites instead of subsites).
- Update your governance plan for site creation, permissions, and branding.
- Document policies for using Microsoft 365 Groups, Teams, and other connected services.

Prepare the Technical Environment



- Ensure you have the necessary admin permissions.
- Install and configure the PnP Modernization tools.
- Create a test/pilot environment with a copy of a representative Classic site.

Develop a Communication & Training Plan

- Identify key stakeholders and champions.
- Draft communications to inform users about the upcoming changes and benefits.
- Schedule training sessions on the SharePoint Modern Experience.

Phase 3: Execution & Migration

Run a Pilot Migration

- Select 1-2 low-risk, high-visibility sites for the pilot.
- Connect the Classic site(s) to a new Microsoft 365 Group.
- Use the PnP Page Transformation engine to convert pages.
- Manually review and remediate transformed pages.
- Gather feedback from pilot users.

Execute in Batches

- Begin migrating sites in prioritized batches according to your plan.
- Communicate with site owners before, during, and after their site's migration.
- Run page transformations and perform quality checks.
- Remap navigation and associate sites with their designated Hubs.

Address Customizations

- For required customizations, develop replacement solutions using the SharePoint Framework (SPFx).
- Test custom SPFx web parts and extensions thoroughly.

Phase 4: Post-Migration & Adoption

Validate and Finalize

- Perform a final validation with site owners to confirm all content and functionality works as expected.
- Set the original Classic sites to read-only mode for a set period.



Drive User Adoption

- Execute your training plan.
- Provide support through office hours, help guides, and a champion network.
- Share success stories to build momentum.

Decommission Classic Sites

- After the read-only period, back up and decommission the old Classic sites according to your retention policies.