



The Ultimate SharePoint Workflow Checklist

Phase 1: Planning & Design

- **Identify the Process:** Clearly define the business process you want to automate.
- **Define the Goal:** What is the desired outcome? (e.g., faster approvals, data archiving).
- **Map the Steps:** Whiteboard or diagram every step of the process from start to finish.
- **Identify Stakeholders:** Who needs to approve, be notified, or provide input?
- **Choose the Trigger:** What event starts the workflow? (e.g., item created, a schedule).
- **Determine Data Needs:** What information does the workflow need to access or update in SharePoint?

Phase 2: Building & Testing

- **Create a Solution:** Build the flow within a Power Platform Solution for better management.
- **Use a Service Account:** Create connections with a dedicated service account, not a personal user.
- **Build the Core Logic:** Add the primary actions based on your process map.
- **Implement Error Handling:** Add a "Configure run after" setting for failure notifications on critical steps.
- **Use Scopes for Grouping:** Group related actions into Scopes for better readability and error management.
- **Test with Sample Data:** Run the flow in a test environment using various scenarios (including expected failures).
- **Get User Feedback:** Ask a stakeholder to test the flow and provide feedback.

Phase 3: Deployment & Monitoring

- **Document the Workflow:** Briefly describe what the flow does, who owns it, and how it works.
- **Deploy to Production:** Export the solution from your test environment and import it into production.
- **Notify the Team:** Inform the relevant users that the new automated process is live.
- **Monitor Run History:** For the first few weeks, regularly check the flow's run history for any failures or unexpected behavior.
- **Set Up Logging (Optional):** For critical flows, add an action to log each run to a SharePoint list for auditing.
- **Review Periodically:** Set a calendar reminder to review the workflow's relevance and performance every 6-12 months.