Your SharePoint Permissions & Governance Checklist

I. Policy & Foundation

- Define and document your governance policy.
- Establish a governance steering committee with clear members.
- Identify and document key roles like Site Collection Admins and Site Owners.
- Create a clear policy on when to break permission inheritance.
- Plan your site structure to minimize the need for unique permissions.

II. Implementation & Best Practices

- Use Microsoft 365 or Security groups for all access management.
- Avoid assigning permissions directly to individual user accounts.
- Implement the principle of least privilege for all roles.
- Configure default sharing settings to be as restrictive as necessary.
- Develop a clear naming convention for permission groups.
- Provide mandatory training for all new Site Owners.

III. Auditing & Maintenance

- Schedule quarterly access reviews for all critical sites.
- Regularly audit for broken permission inheritance.
- Use SharePoint's built-in reports to check for external sharing.
- Remove former employees' access immediately upon departure.
- Review and update your governance policy annually.