



Deployment Checklist

Phase 1: Governance & Planning

- Assign a Term Store Admin (Primary and Backup).
- Define the lifecycle policy (Who approves new terms?).
- Identify stakeholders for the vocabulary review.
- Determine the scope (Global vs Local sets).

Phase 2: Taxonomy Design

- Limit term hierarchy depth to 3 levels or fewer.
- Establish a synonym strategy for common business terms.
- Review naming conventions for consistency.
- Verify the content type integration requirements.

Phase 3: Technical Implementation

- Configure default Term Store permissions.
- Map columns to the correct term set branches.
- Enable Content Type Hub (CTH) if syndication is required.
- Setup search index configuration for new metadata.

Phase 4: Post-Deployment Verification

- Test tagging experience with a sample user group.
- Review Search Usage Reports for term effectiveness.
- Check for synchronization errors across site collections.