



# Enterprise Query Rule & AI Readiness Audit Checklist

## Phase 1: Inventory & Preservation

- **Locate Active Rules:** Identify all custom query rules across tenant, site collection, and subsite levels.
- **Export XML Snapshot:** Generate and securely store an XML export of the current search configuration before making any modifications.
- **Identify Rule Owners:** Assign a business stakeholder to each active rule. Mark undocumented rules for immediate review.

## Phase 2: Intent & Relevance Audit

- **Review Query Logs:** Analyze top 50 abandoned queries and top 50 "no result" queries from the past 90 days.
- **Validate Promoted Links:** Test all promoted result URLs to ensure they resolve correctly and do not point to deprecated intranet portals.
- **Purge Redundancy:** Delete time-boxed campaign rules that have expired and consolidate overlapping rules causing expert cannibalization.

## Phase 3: Modernization & AI Readiness

- **Map to Semantic Index:** Identify legacy manual blocks that can be natively replaced by Microsoft Search Bookmarks or Q&A features.
- **Standardize Metadata:** Ensure underlying content types and term-set matches are governed by the central Term Store rather than ad-hoc text strings.
- **Verify Security Trimming:** Audit permissions on highly promoted canonical hubs to ensure restricted data remains invisible to unauthorized staff.

## Phase 4: Ongoing Governance



- [ ] **Establish Review Rhythm:** Schedule quarterly audits for high-traffic navigational queries and bi-annual reviews for niche department rules.
- [ ] **Document Changes:** Mandate that all future backend search modifications are logged in a central SharePoint governance tracking list.