



SharePoint Automation Readiness & Audit Checklist

A functional framework to assess, plan, and secure your Power Automate workflows.

Phase 1: Environment & Metadata Audit

Do not proceed to automation until all items in Phase 1 are checked.

- **Library Structure:** Are all required columns clearly named and standardized?
- **Data Types:** Are you using precise data types (e.g., 'Choice' or 'Date') rather than open 'Single line of text' fields for routing decisions?
- **Lookup Limits:** Does the library have fewer than 12 lookup columns (to avoid Get Items throttling)?
- **Permission Cleanup:** Have unique item-level permissions been minimized to prevent workflow failures?
- **Process Owner:** Is there a designated business owner for this specific process (not just the IT developer)?

Phase 2: Workflow Logic & Architecture

Map your logic before building to ensure maintainable architecture.

- **Trigger Scope:** Is the trigger as narrow as possible? (e.g., using OData filter queries so the flow only runs when Status = 'Pending').
- **Branching Limit:** Can the conditional logic be explained in one simple sentence?
- **Modularity:** If the process is complex, is it broken down into smaller, connected workflows (Intake -> Approval -> Archive)?
- **Infinite Loop Prevention:** If the flow updates the item that triggered it, do you have a trigger condition to stop it from running repeatedly?
- **Naming Convention:** Does the flow name follow a standard taxonomy? (e.g., [Department] - [Process] - [Trigger])

Phase 3: Security, Governance & Scale

Ensure your automation respects enterprise compliance.

- **Access Control (RBAC):** Are flow execution and editing rights restricted only to authorized personnel?



- [] **Connector Audit:** Are you using only Standard connectors, or does this workflow require Premium licensing?
- [] **Service Accounts:** Is the workflow running under a dedicated service account rather than a personal user account?
- [] **Compliance Checks (DLP):** Does this workflow interact with external platforms? If yes, is it compliant with Data Loss Prevention policies?
- [] **Review Date:** Is a calendar reminder set for a quarterly review of this workflow's run history?

Risk & Impact Assessment Matrix

Use this matrix to determine the priority and risk level of your proposed automation.

Automation Scenario	Impact (Time Saved / Consistency)	Risk (Complexity / Security)	Recommended Action
Simple Notification (Teams alert on new item)	Low	Low	Build Immediately. Good for quick wins.
Single-stage Document Approval	Medium	Low	Build and Test. Ensure metadata is clean.
Multi-stage Financial Routing	High	Medium	Map meticulously. Requires modular flows and error handling.
External Integration (e.g.,	High	High	IT Review Required. Needs Premium



updating a 3rd party CRM)			connectors and DLP audit.
---------------------------	--	--	---------------------------