



# SharePoint Hyper-Personalization: Tenant Readiness Checklist

Use this functional checklist to audit your Microsoft 365 environment before launching any hyper-personalization initiatives. A strong foundation in data governance and information architecture prevents targeting failures and reduces search noise.

## Phase 1: User Profile & Identity Audit

*Objective: Ensure your targeting signals are accurate and reliable.*

- **Completion Rate Check:** Verified that core Entra ID properties (Department, Job Title, Office Location) have at least an 85% completion rate across the tenant.
- **Attribute Selection:** Identified 2 to 3 high-value attributes (e.g., Role, Region) that will drive the primary personalization logic.
- **Ownership Assignment:** Clearly documented who owns the updates for each profile attribute (e.g., HR for Job Titles, IT for Department mappings).
- **Edge Case Review:** Tested how profile data behaves for contractors, hybrid workers, and external guests.

## Phase 2: Information Architecture & Metadata

*Objective: Structure your content so the system can serve it dynamically.*

- **Library Consolidation:** Merged fragmented, audience-specific folders into centralized document libraries where possible.
- **Managed Metadata:** Configured a unified term store to prevent the "same thing, three labels" problem (e.g., HR, Human Resources, People Ops).
- **Filter Validation:** Verified that primary document libraries and news hubs can be cleanly filtered using the chosen metadata columns.
- **Lifecycle Rules:** Established expiry dates and review status fields to automatically retire outdated personalized content.

## Phase 3: Governance & Data Privacy



*Objective: Build trust and ensure compliance with security standards.*

- [ ] **Transparency Protocol:** Drafted a clear statement for end-users explaining what profile data is being used to tailor their intranet experience.
- [ ] **Zero-Trust Verification:** Ensured that targeted views do not accidentally expose sensitive links or file names to users without underlying access permissions.
- [ ] **Telemetry Setup:** Activated the SharePoint Page Diagnostics tool or Application Insights to monitor page weight and load times.

#### **Phase 4: Experience Design Mapping**

*Objective: Plan the user interface without causing cognitive overload.*

- [ ] **First-Screen Strategy:** Mapped the hero section and top navigation to ensure the most critical personalized actions appear without scrolling.
- [ ] **The 70/30 Rule Check:** Confirmed that roughly 70% of the interface remains stable and shared, while only 30% dynamically shifts based on user context.
- [ ] **Fallback Default:** Designed a robust "default view" for users whose profile attributes are missing or incomplete.