



SharePoint Intranet Readiness & Governance Checklist

Use this checklist to audit your current Microsoft 365 environment before deploying a new SharePoint intranet template. Identifying these gaps early prevents expert cannibalization, search failures, and low adoption rates.

Phase 1: Strategic Alignment & Use Cases

- **Primary Purpose Defined:** Have we explicitly defined whether this is an Organization Home (news-focused) or a Departmental Hub (collaboration-focused)?
- **Audience Segmentation:** Are our user groups clearly defined in Microsoft Entra ID (Azure AD) for targeting specific news and content?
- **Success Metrics Established:** Have we defined KPIs beyond pageviews (e.g., support deflection rate, task completion time)?

Phase 2: Information Architecture & Taxonomy

- **Global Navigation Plan:** Is there a clear strategy for the SharePoint App Bar (Global Navigation) vs. local site navigation?
- **Hub Site Strategy:** Have we designated which sites will act as "Hubs" to connect related templates and roll up news?
- **Term Store Configuration:** Is the enterprise metadata (Term Store) clean, standardized, and actively managed to ensure accurate search results?
- **Content Pruning:** Have we identified outdated or redundant content that must be archived or deleted before migration?

Phase 3: Governance & Security

- **Automated Provisioning:** Are workflows in place to prevent users from creating unauthorized, isolated sites (preventing sprawl)?
- **Ownership Matrix:** Does every major site and core policy document have a designated, active owner responsible for regular reviews?
- **Role-Based Access Control (RBAC):** Are permission levels strictly aligned with Microsoft 365 Groups (Owners, Members, Visitors)?
- **Data Loss Prevention (DLP):** Are sensitivity labels and compliance policies applied to protect confidential HR or financial data?

Phase 4: Adoption & Continuous Management



- [] **High-Demand Workflows Identified:** Are the top 5 most critical employee tasks (e.g., IT tickets, payroll access, onboarding) prominently linked?
- [] **Content Lifecycle Rules:** Is there a mandate (or automated alert) to review all major publishing pages every 90 days?
- [] **Training Protocol:** Do content publishers have basic training on using native web parts without resorting to complex, fragile workarounds?

Evaluation Score:

- **12-14 Checks:** You are primed for a smooth intranet launch.
- **8-11 Checks:** Proceed with caution. Address the missing structural elements during your pilot phase.
- **Under 8 Checks:** Stop. Deploying a template now will likely result in rapid degradation and poor adoption. Fix governance first.