



# SharePoint Readiness and Governance Checklist

## Phase 1: Information Architecture & Content Quality

- Identify 3 to 5 high-priority sites for the initial rollout (e.g., HR, PMO, Policies).
- Archive or delete outdated libraries and legacy file shares.
- Verify that files have clear, descriptive naming conventions.
- Confirm that primary document libraries utilize metadata tagging rather than deep folder structures.
- Assign a dedicated content owner to every library included in the pilot.

## Phase 2: Permissions & Security (Microsoft Purview)

- Run a permissions audit to locate and resolve broken inheritance.
- Remove stale guest access and inactive user permissions from pilot sites.
- Apply Microsoft Purview sensitivity labels (e.g., "Highly Confidential") to restricted documents.
- Configure restricted content discovery for sensitive sites (like executive or legal hubs) to block AI crawling.

## Phase 3: Strategy & Licensing

- Count the number of "power users" who need daily AI access to define fixed subscription needs.
- Estimate the broader audience that will access ready-made agents occasionally.
- Select the billing model: assign full user subscriptions or set up a Pay-As-You-Go budget for broader consumption.
- Schedule a user training session focused on evaluating AI responses against source documents.