



The Tool: SharePoint Search & AI-Readiness Audit Checklist

Phase 1: Governance & Infrastructure

- **Authority Definition:** Is there a single "Source of Truth" for every high-value policy or SOP?
- **Folder Depth Audit:** Are there libraries with more than 3 levels of nesting? (Goal: Flatten for AI retrieval).
- **Permission Review:** Are there any "Broken Inheritance" chains on critical libraries?
- **Purview Alignment:** Are Sensitivity Labels applied to at least 80% of sensitive documents?

Phase 2: Metadata & Content Quality

- **Title Hygiene:** Do top 100 search results have human-readable titles (no "v1_final_FINAL")?
- **SharePoint Premium Setup:** Is auto-tagging active for at least one high-volume library?
- **Managed Metadata:** Are global Term Sets used consistently across all departmental sites?
- **OCR Coverage:** Is text being extracted from images/PDFs for indexing?

Phase 3: AI & RAG Capabilities

- **Vector Readiness:** Has the tenant been audited for semantic vector indexing support?
- **Connector Health:** Are external data sources feeding into Microsoft Graph correctly?
- **Bookmark Strategy:** Have at least 20 "High-Intent" search terms been mapped to Bookmarks/Answers?
- **Prompt Grounding:** Have you tested Copilot outputs against 10 "Commonly Failed" queries?

Phase 4: Success Telemetry

- **MRR Tracking:** Is the Mean Reciprocal Rank for core queries higher than 0.7?
- **Abandonment Rate:** Is the search abandonment rate below 15%?
- **User Sentiment:** Has a quarterly search satisfaction survey been conducted?