



Pre-Migration Shadow IT & Workflow Audit Checklist

A 4-phase framework to map user journeys and secure your 2026 digital workplace rollout.

Phase 1: Shadow IT Discovery

- **Run Network Traffic Analysis:** Work with IT to identify unsanctioned file-sharing or messaging apps (e.g., personal Google Drive, WhatsApp) accounting for more than 5% of network traffic.
- **Deploy Anonymous Departmental Surveys:** Ask frontline workers which unauthorized tools they use to "get things done faster." (Guarantee no penalties for honesty).
- **Consolidate the App Roster:** Create a master list comparing official company software versus the shadow tools actually in use.

Phase 2: Core Workflow Mapping

- **Identify Top 3 Daily Tasks:** Interview department heads (Sales, HR, Engineering) to define the three most frequent administrative actions their teams perform.
- **Measure Current Friction:** Calculate the average time and number of clicks it takes to complete these tasks on the current legacy system.
- **Define the "Golden Path":** Map how these exact tasks will be executed in the new platform using automated workflows or API connectors.

Phase 3: Integration & Security Triage

- **Verify API Readiness:** Confirm that critical third-party systems (Workday, Salesforce, BambooHR) have functional API connectors for your new intranet platform.
- **Audit Access Permissions:** Review current active directory groups to ensure strict Role-Based Access Control (RBAC) is ready for migration.



- [] **Validate Zero-Trust Protocols:** Ensure Single Sign-On (SSO) and Multi-Factor Authentication (MFA) are mandated for all cloud integrations.

Phase 4: Legacy Decommissioning Plan

- [] **Set the 90-Day Kill Switch:** Establish a hard date for retiring the old portal to prevent employees from splitting their attention.
- [] **Schedule Content Freeze:** Lock the legacy intranet from accepting new document uploads 30 days prior to launch.
- [] **Establish Support Fallbacks:** Designate IT peer mentors in each department for the first two weeks post-launch to handle immediate workflow blockages.