



The 2026 Frontline SharePoint Readiness Checklist

Phase 1: Licensing & Identity Management

- **License Audit:** Confirmed that all deskless staff are assigned cost-effective F-SKU licenses (F1/F3) rather than unused E3/E5 plans.
- **Identity Provisioning:** Automated Microsoft Entra ID account creation to reduce the standard 3-5 day manual setup window.
- **Authentication Flow:** Configured Multi-Factor Authentication (MFA) utilizing the Microsoft Authenticator app for initial onboarding.
- **Token Management:** Established clear protocols for shift managers to handle expired Entra ID tokens without escalating to the corporate helpdesk.

Phase 2: Mobile Architecture & Delivery

- **Modern Sites Only:** Verified that all target communication hubs are built exclusively on Modern SharePoint sites (Classic sites are deprecated for mobile).
- **Viva Connections Setup:** Configured Microsoft Viva Connections to natively wrap the SharePoint hub inside the Microsoft Teams mobile application.
- **Dashboard Configuration:** Pinned the primary communications site to the top of the mobile dashboard to eliminate repetitive login prompts.
- **App Integration:** Embedded the Microsoft Shifts app directly into the Teams/Viva interface for seamless schedule management.

Phase 3: Security & Device Compliance

- **MDM/MAM Deployment:** Activated Microsoft Intune to manage corporate-owned devices and enforce Mobile Application Management (MAM) on BYOD hardware.



- [] **Data Isolation:** Implemented conditional access policies ensuring corporate data cannot be copied and pasted into personal mobile applications.
- [] **Access Control:** Audited Role-Based Access Control (RBAC) to guarantee frontline staff only see location-specific or role-specific documentation.

Phase 4: Content Governance & Usability

- [] **Metadata Transition:** Replaced deep folder hierarchies with metadata tags to power a search-driven mobile experience.
- [] **Automated Workflows:** Replaced paper checklists with digital Power Apps and connected them to Power Automate for instant Teams notifications.
- [] **Visual Navigation:** Swapped text-heavy navigation nodes for clear, recognizable visual icons optimized for mobile screens.
- [] **Archival Policy:** Established a strict automated lifecycle policy to archive outdated HR and safety manuals, mitigating compliance risks.