

# Information Architecture Quick Assessment Checklist



## Structure & Organisation

- ☐ Do you have a clear **site hierarchy** (Hub Sites, Communication Sites, Team Sites)?
- ☐ Are sites organised based on **departments, functions** or **projects**?
- ☐ Do you have **consistent naming conventions** for sites, libraries and lists?
- ☐ Are there duplicate or outdated sites that need to be cleaned up?



## Metadata & Taxonomy

- ☐ Have you **defined metadata and columns** instead of relying on folders?
- ☐ Do you use **content types** to standardise document templates?
- ☐ Is your **Term Store (Managed Metadata)** **set up** for organisation-wide consistency?
- ☐ Are users trained on how to apply metadata correctly?



## Permissions & Security

- ☐ Do you follow the **principle of least privilege** for site access?
- ☐ Are permissions **inherited rather than broken at lower levels**?
- ☐ Do you use **Microsoft 365 Groups** to manage access instead of direct permissions?
- ☐ Is **external sharing controlled and monitored**?



## Navigation & Findability

- ☐ Is the **site navigation intuitive** and **user-friendly**?
- ☐ Are important resources **easily accessible in a few clicks**?
- ☐ Are users leveraging **Search, Filters** and **Views** instead of relying on folders?
- ☐ Do you have a **document naming convention** to improve searchability?



## Governance & Maintenance

- ☐ Do you have an **IA governance plan** that defines roles & responsibilities?
- ☐ Are policies in place for **archiving, retention and content lifecycle**?
- ☐ Is there a **regular review process** to keep IA up-to-date?
- ☐ Have you identified **content owners** for managing sites and libraries?

## Pro Tips!

### Want a consistent tagging system?

Set up a Managed Metadata Term Store to create a standardised taxonomy for documents across your organisation.

### Make documents easier to find!

Use clear, keyword-rich file names instead of generic names like "Document1" or "FinalVersion"

## "A Well-Structured SharePoint = A More Productive Team"

Invest time in Information Architecture now, and you'll save hours of frustration later. Clear structure, smart metadata, and intuitive navigation make all the difference!