

SharePoint Business Readiness Checklist



1. Define Your Business Goals

- ☐ Identify key problems SharePoint will solve (e.g., document management, collaboration, process automation)
- ☐ Determine what departments or teams will use SharePoint first
- ☐ Set clear objectives (e.g., reduce email attachments, streamline approvals, improve file searchability)



2. Define Your SharePoint Structure

- ☐ Decide how sites will be structured (e.g., department sites, project-based sites, company-wide document hub)
- ☐ Determine folder structure vs. metadata for document organisation
- ☐ Define naming conventions for consistency
- ☐ Identify necessary libraries, lists, and pages



3. Set Up SharePoint Permissions Properly

- ☐ Use SharePoint groups instead of assigning permissions individually
- ☐ Set up appropriate access levels (e.g., read-only vs. edit access)
- ☐ Restrict sensitive content using permission-controlled document libraries
- ☐ Establish a process for reviewing and updating permissions regularly



4. Automate & Integrate for Efficiency

- ☐ Identify key workflows that can be automated (e.g., document approvals, notifications, alerts)
- ☐ Set up Power Automate flows or SharePoint Alerts for important updates
- ☐ Integrate with Microsoft Teams for seamless collaboration
- ☐ Configure search filters and refiners to improve discoverability



5. Train & Support Your Team

- ☐ Provide hands-on training sessions or quick reference guides
- ☐ Create a 'How to Use This Site' page with key instructions
- ☐ Set up SharePoint Learning Pathways for self-paced learning
- ☐ Assign SharePoint champions within each team to support adoption



6. Monitor Adoption & Improve Continuously

- ☐ Track site engagement using SharePoint analytics
- ☐ Collect feedback from users and refine site structure as needed
- ☐ Schedule regular reviews of content, permissions, and workflows
- ☐ Keep documentation up to date with any process changes



FINAL CHECK: Ensure SharePoint is aligned with your business processes, teams know how to use it, and automations are in place to improve efficiency.