

Copilot Readiness Checklist for SharePoint Worksheet

A practical worksheet for reviewing SharePoint readiness before Microsoft 365 Copilot pilot, rollout, or governance planning.

Use this worksheet to:

- Review SharePoint readiness before Microsoft 365 Copilot rollout.
- Identify oversharing, stale content, sensitive libraries, and source-of-truth gaps.
- Capture risks, owners, and priority actions.
- Turn the results into a 30-day, 60-day, and 90-day readiness roadmap.

How to Use This Worksheet

Use this worksheet to review current-state SharePoint readiness before Microsoft 365 Copilot pilot, rollout, or governance cleanup. Mark what actually happens in the environment, not what the policy says should happen. That difference is where many readiness gaps become visible.

Invite people who understand the environment from different angles: IT, SharePoint administrators, security, compliance, records, intranet owners, department leaders, knowledge owners, and site owners. A small group with the right knowledge is better than a large group with unclear responsibility.

Recommended process:

- Review each readiness area.
- Mark the status as Ready, Needs Review, Not Ready, or Not Applicable.
- Capture the main risk for each area.
- Assign an owner for each follow-up action.
- Separate quick cleanup from larger governance work.
- Turn the results into a 30-day, 60-day, and 90-day readiness plan.

Readiness Status Key

Status	What It Means
Ready	The area is reviewed, owned, and not creating a known risk before the next Copilot phase.
Needs Review	The area may be acceptable, but the team needs more evidence, owner input, or cleanup.
Not Ready	The area creates a meaningful risk to trust, security, content quality, or rollout confidence.
Not Applicable	The area does not apply to this site, content area, or rollout phase.

Readiness areas covered:

- Oversharing
- Stale Content
- Sensitive Libraries
- Source-of-Truth Libraries
- Metadata Consistency
- Search Quality
- Archive Readiness
- Site Ownership

Copilot Readiness Checklist for SharePoint Worksheet

Use this worksheet to review your current state. Mark each area, capture the main risk, identify an owner, and define the next priority action.

Readiness Area	Status	Main Risk	Owner	Priority Action
Oversharing				
Stale Content				
Sensitive Libraries				
Source-of-Truth Libraries				
Metadata Consistency				
Search Quality				
Archive Readiness				
Site Ownership				

Common patterns to look for:

- Oversharing and sensitive library issues usually point to permission governance gaps.
- Stale content and archive readiness issues usually point to weak lifecycle management.
- Source-of-truth and search issues usually point to unclear content authority.
- Metadata inconsistency often makes search, records, and AI readiness harder.
- Site ownership gaps usually explain why cleanup decisions stall.

Readiness Area Worksheets

Readiness Area 1: Oversharing

What you are reviewing: Whether users may have access to more SharePoint content than they need for their role.

Status: Ready Needs Review Not Ready N/A

Main risk:

Owner:

Priority action:

Questions to discuss:

- Which users have access to sensitive content?
- What groups are broader than they should be?
- Where are unique permissions used?
- Which sharing links are still active?
- Can administrators explain why access exists?
- What sites would create concern if Copilot surfaced their content?

Readiness Area 2: Stale Content

What you are reviewing: Whether outdated content remains accessible, searchable, or treated as useful.

Status: Ready Needs Review Not Ready N/A

Main risk:

Owner:

Priority action:

Questions to discuss:

- Which files are searchable but no longer current?
- Where do users find multiple answers?
- What pages have not been reviewed recently?
- What content should be archived before Copilot expands?
- Who owns the cleanup decision?
- How will stale content be prevented from returning?

Readiness Area Worksheets

Readiness Area 3: Sensitive Libraries

What you are reviewing: Whether sensitive content has the right location, owner, access model, and review cadence.

Status: Ready Needs Review Not Ready N/A

Main risk:

Owner:

Priority action:

Questions to discuss:

- Which libraries contain sensitive information?
- Who owns each sensitive library?
- What groups can access those libraries?
- Are sensitive files stored in the right sites?
- Should any libraries be split, restricted, or archived?
- Are external users present where they should not be?

Readiness Area 4: Source-of-Truth Libraries

What you are reviewing: Whether official, current, and approved content is easy to identify and trust.

Status: Ready Needs Review Not Ready N/A

Main risk:

Owner:

Priority action:

Questions to discuss:

- Which library is the official source for each content type?
- Where do duplicate answers exist?
- What content do users trust most today?
- Which pages or libraries should become authoritative?
- Who approves updates to official content?
- Could a new employee tell which source is official?

Readiness Area Worksheets

Readiness Area 5: Metadata Consistency

What you are reviewing: Whether content uses fields, content types, terms, labels, and views in a predictable way.

Status: Ready Needs Review Not Ready N/A

Main risk:

Owner:

Priority action:

Questions to discuss:

- Which libraries rely only on folders?
- What metadata fields are useful today?
- Which fields are ignored by users?
- Where do similar libraries use different terms?
- Can users filter by meaningful business criteria?
- Who governs changes to metadata standards?

Readiness Area 6: Search Quality

What you are reviewing: Whether users can find trusted, current, and relevant content in SharePoint.

Status: Ready Needs Review Not Ready N/A

Main risk:

Owner:

Priority action:

Questions to discuss:

- What do users search for most often?
- Which searches return confusing results?
- Where do duplicate answers appear?
- What important pages are hard to find?
- Are old project sites still showing up?
- Which content should be cleaned up before Copilot expands?

Readiness Area Worksheets

Readiness Area 7: Archive Readiness

What you are reviewing: Whether inactive sites, stale libraries, old project content, and outdated information can be separated from active work.

Status: Ready Needs Review Not Ready N/A

Main risk:

Owner:

Priority action:

Questions to discuss:

- Which sites are inactive?
- What content should remain active?
- Which content should be archived?
- What content must be retained?
- Who approves archive decisions?
- Which old content should not influence current work?

Readiness Area 8: Site Ownership

What you are reviewing: Whether each important site has a current business owner, backup owner, and review responsibility.

Status: Ready Needs Review Not Ready N/A

Main risk:

Owner:

Priority action:

Questions to discuss:

- Who owns each major site?
- Is the owner still in the right role?
- Who is the backup owner?
- Who approves changes to permissions?
- Who decides whether content is stale?
- Who confirms whether the site is ready for Copilot?

Pilot and Rollout Planning Worksheet

Use this page to separate pilot readiness from broad rollout readiness. A small pilot should still have a clean enough SharePoint foundation to produce trusted results.

Before a Copilot Pilot

- High-risk sites
- Sensitive libraries
- Broad permission groups
- External sharing
- Old project sites
- Duplicate policy or procedure content
- Source-of-truth libraries
- Important intranet pages
- Search quality for common questions
- Site ownership for critical areas

Before Broad Rollout

- Sensitive content inventory
- Authoritative libraries confirmed
- Archive candidates reviewed
- Permission reviews completed
- Stale or duplicated content identified
- Cleanup owners assigned
- Rollout users defined
- Governance routines documented
- Leadership decisions captured
- Support process prepared

30-Day, 60-Day, and 90-Day Readiness Plan

Timeframe	Priority Actions	Owner	Completion Notes
30 days			
60 days			
90 days			

Planning note: A broad Copilot rollout should not be treated as a software deployment only. It is a change in how people find, summarize, and reuse organizational knowledge.

Turn Your Checklist Into a Copilot Readiness Roadmap

After reviewing all eight readiness areas, choose the three highest-risk gaps and turn them into a practical improvement plan. A checklist is useful only when it leads to decisions.

Top Three Copilot Readiness Priorities

Priority Gap	Why It Matters	Owner	Next Decision

30-60-90 Day Roadmap

Timeframe	Actions to Complete	Success Signal
First 30 days		
Next 60 days		
Next 90 days		

Need help reviewing your Copilot readiness checklist?

dataBridge helps organizations prepare SharePoint for Microsoft 365 Copilot by strengthening governance, permissions, content quality, ownership, metadata, search, archive planning, and adoption support.
getsharepoint.com/contact-us/