

# File Share to SharePoint Migration Readiness Matrix

A worksheet that helps prospects evaluate what should move, archive, restructure, or exclude.

Use this worksheet before moving shared drive content into SharePoint. It helps teams separate content that is ready to move from content that should be archived, restructured, or excluded so the migration does not recreate folder sprawl, broken ownership, stale documents, or permission risk in Microsoft 365.

## Migration decision paths

### Move

Current, owned, active content that can map cleanly to SharePoint.

### Archive

Historical content that should be retained, protected, and accessed only when needed.

### Restructure

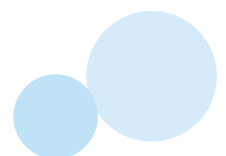
Valuable content that needs ownership, folders, metadata, or permission cleanup first.

### Exclude

Obsolete, personal, duplicate, unsupported, or inappropriate content that should not migrate.

## What this worksheet includes

- A file share readiness scorecard
- A move, archive, restructure, or exclude decision matrix
- A source inventory and evidence log
- A 30 / 60 / 90-day migration planning roadmap



# How to Use This Matrix

Complete this worksheet with the people who understand the source content, the business process, the compliance requirements, and the SharePoint destination. Start by scoring logical content groups, not every individual file.

<p><b>Inventory</b></p> <p>Group source locations by owner, purpose, and content type.</p>	<p><b>Score</b></p> <p>Rate each area from 1 to 5 using evidence, not preference.</p>	<p><b>Decide</b></p> <p>Assign each group to move, archive, restructure, or exclude.</p>	<p><b>Plan</b></p> <p>Turn decisions into a practical migration roadmap.</p>
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## Scoring Scale

Score	Meaning	Use this score when...
1	Critical issue	Owner, value, permissions, or retention status is unknown or risky.
2	Weak	Some value exists, but cleanup is needed before migration.
3	Usable	Content can migrate with targeted structure or metadata refinement.
4	Strong	Current, owned, active content that maps well to SharePoint.
5	Ready	Clear owner, audience, lifecycle, permissions, and migration path.

### Consulting note

Do not treat migration as a file copy. A clean migration starts with ownership, disposition, permissions, and structure decisions before content is moved.

## Assessment Details

Organization / Department	
Date	
Primary file share location	
Migration sponsor	
Content owner group	
Target migration window	

# File Share Readiness Scorecard

Score each area from 1 to 5. Then capture evidence and the priority action needed before content is moved, archived, restructured, or excluded.

Readiness Area	Score 1-5	Evidence / Notes	Priority Action
<b>1. Ownership and business owner clarity</b> Can someone approve what stays, moves, archives, or retires?			
<b>2. Business value and current use</b> Is the content actively used for work, decisions, or operations?			
<b>3. Age and activity profile</b> Are recent updates, views, or business activity visible?			
<b>4. Folder structure and content grouping</b> Can the structure translate into sites, libraries, or metadata?			
<b>5. Duplicate, stale, and orphaned content</b> Are duplicates, old versions, personal files, and abandoned folders identified?			
<b>6. Permissions and access complexity</b> Are permissions understandable, least-privilege, and supportable in SharePoint?			
<b>7. External sharing and guest access risk</b> Are external users, shared links, or vendor folders identified?			
<b>8. Sensitivity, records, and retention needs</b> Does content require labels, retention, legal hold, or compliance review?			
<b>9. Metadata, naming, and search readiness</b> Can users find content without relying only on deep folders?			
<b>10. Migration complexity and technical constraints</b> Are path length, large files, sync issues, or app dependencies known?			
<b>11. Total Score</b> Add all 10 category scores. Maximum score: 50.			

**Tip:** A low score in ownership, permissions, or content quality usually means a simple lift-and-shift migration will move the problem into SharePoint.

# Decision Guide: Move, Archive, Restructure, or Exclude

Use the total score as a starting point, then check the disposition signals. The right decision depends on business value, current use, ownership, risk, and the SharePoint destination model.

## Total Score

Total Score	Likely Path	What it usually means
10-24	Exclude or rebuild source first	Content condition, ownership, or risk is too unclear to migrate safely.
25-34	Restructure likely	Business value exists, but ownership, folders, metadata, or permissions need cleanup.
35-44	Move with targeted cleanup	The content can migrate after focused decisions and validation.
45-50	Move ready	The content is owned, current, supportable, and aligned to a SharePoint destination.

## Disposition Signals

Area	Move if...	Archive if...	Restructure if...	Exclude if...
<b>Current use</b>	Active and needed in the new workspace.	Historical reference or retention need.	Valuable but mixed with stale content.	No current business use.
<b>Ownership</b>	Clear owner can approve the move.	Records or business owner confirms retention.	Owner exists but decisions need cleanup.	No accountable owner.
<b>Structure</b>	Maps cleanly to site, library, or metadata.	Can be packaged as read-only archive.	Folder depth, duplicates, or names block a clean move.	Personal, obsolete, or abandoned.
<b>Permissions</b>	Access can be simplified and governed.	Limited access is enough.	Complex access needs review first.	Risk cannot be resolved.
<b>Compliance</b>	Label or retention approach is understood.	Retention is the primary purpose.	Sensitivity needs classification first.	Legal or security issue blocks migration.
<b>Change impact</b>	Users can adapt quickly.	Users rarely need access.	New information architecture is needed.	Migration creates more confusion than value.

### Decision note

Archive is not a fallback for unclear decisions. Archive content only when the business, records, or compliance reason is clear and the access model can be supported.

# Source Inventory and Evidence Log

Use this page to document the source locations, owners, business use, and evidence behind each migration decision. This prevents the project from relying on assumptions or folder names alone.

Source Location / Folder Group	Current Owner	Business Use	Issues Found	Recommended Path	Priority

## Top Three Migration Decisions

1	Move decision:	
	Reason / evidence:	
2	Archive decision:	
	Reason / evidence:	
3	Restructure or exclude decision:	
	Reason / evidence:	

# Action Plan and Next Steps

Use this final page to turn the matrix into a migration plan the project team can act on. A clear disposition plan reduces rework and keeps SharePoint from becoming a new version of the old file share.

## Recommended Path

<input type="checkbox"/> Move	<input type="checkbox"/> Archive	<input type="checkbox"/> Restructure	<input type="checkbox"/> Exclude
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## Why this path is the right decision:

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## Scope Boundaries

In Scope	Out of Scope	Needs Decision
Dependencies / Risks		

## 30 / 60 / 90-Day Migration Planning Roadmap

Timeframe	Focus	Actions	Owner
First 30 days	Confirm inventory, owners, success criteria, and risk constraints		
Days 31-60	Design SharePoint structure, metadata, permissions, and cleanup plan		
Days 61-90	Pilot migration, validate content, train owners, and finalize cutover		

## Stakeholders to Include

<input type="checkbox"/> Executive sponsor	<input type="checkbox"/> Department content owners
<input type="checkbox"/> IT / SharePoint	<input type="checkbox"/> Records / compliance
<input type="checkbox"/> Security	<input type="checkbox"/> Communications / training

### Need help interpreting the matrix?

dataBridge helps organizations plan file share-to-SharePoint migrations that do not recreate folder sprawl, permission drift, or stale content in Microsoft 365.

[Contact dataBridge](#)