

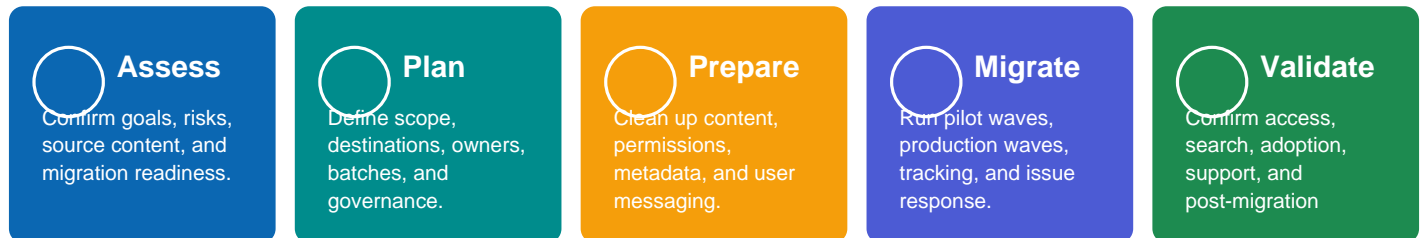
# SharePoint Migration Checklist

A planning worksheet for organizing migration scope, readiness, execution, validation, and adoption.



Use this checklist before a SharePoint migration begins. It helps project teams confirm scope, ownership, architecture, permissions, migration waves, validation steps, and adoption readiness before content is moved into Microsoft 365.

## Migration checklist phases

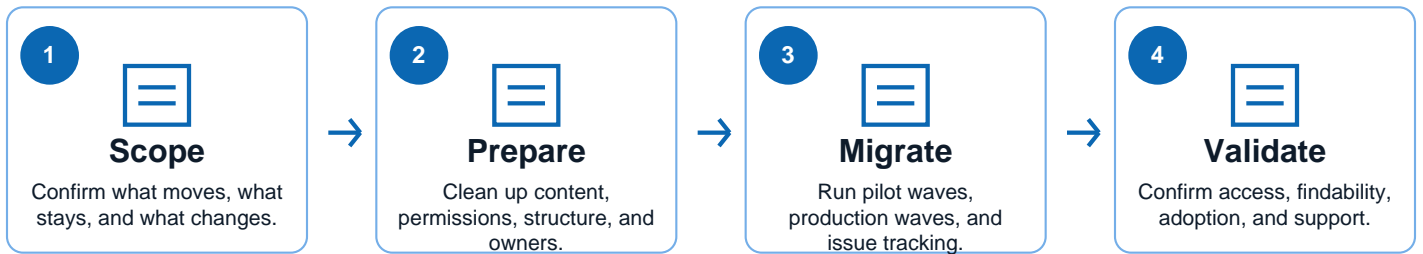


## What this checklist includes

- ✓ A migration readiness checklist
- ✓ A scope, architecture, and governance checklist
- ✓ A migration execution and cutover checklist
- ✓ A validation, adoption, and next-steps plan

# How to Use This Checklist

Use this worksheet with the migration sponsor, SharePoint owner, IT, records or compliance stakeholders, department content owners, and a small group of users. Strong migration plans are based on evidence, not assumptions.



## Checklist Status Scale

Status	Meaning	Use this status when...
<b>Not started</b>	Unassigned or not reviewed	No owner, evidence, or decision exists yet.
<b>In progress</b>	Being prepared	The task is underway, but decisions, cleanup, or validation are still open.
<b>Blocked</b>	Needs escalation	A dependency, risk, approval, or missing owner prevents progress.



### Consulting note

Do not treat migration as a file move. A clean migration plan defines ownership, structure, permissions, metadata, and validation before users are asked to work in the new environment.

## Migration Project Details

Organization / Department	
Migration sponsor	
SharePoint owner	
Primary source environment	
Target launch window	
Primary migration driver	

# Migration Readiness Checklist

Review each readiness area before migration waves are scheduled. Use the status column to show whether the item is ready, in progress, blocked, or complete.

Checklist Area	Status	Owner	Notes / Priority Action
<b>Business goals and success criteria</b> Are outcomes, key audiences, timeline, and constraints documented?			
<b>Source content inventory</b> Are file shares, existing SharePoint sites, Teams, OneDrive, and archive locations known?			
<b>Migration scope decisions</b> Has the team decided what to move, archive, restructure, or exclude?			
<b>Site architecture</b> Are destination sites, hubs, libraries, and ownership mapped?			
<b>Metadata and search</b> Are content types, metadata, naming, and findability requirements defined?			
<b>Permissions and sharing</b> Have unique access, external users, and sensitivity risks been reviewed?			
<b>Governance and lifecycle</b> Are site creation, ownership, retention, review, and support rules defined?			
<b>Compliance and records</b> Are retention, legal hold, records, and regulated content needs accounted for?			
<b>Tooling and migration batches</b> Is the migration tool, batch plan, pilot approach, and throughput model ready?			
<b>User communication and training</b> Do users know what changes, when it changes, and how to work after cutover?			
<b>Validation plan</b> Are acceptance criteria, testers, issue paths, and rollback decisions clear?			
<b>Post-migration support</b> Is hypercare, feedback, cleanup, and optimization planned?			

**Tip:** If several readiness areas are blocked, pause wave scheduling until scope, ownership, permissions, and validation responsibilities are clear.

# Scope, Architecture, and Governance Checklist

Use this page to confirm that migration decisions support long-term SharePoint structure, search, security, and ownership. The goal is to avoid recreating legacy sprawl in Microsoft 365.

## Scope and Content Decisions

- Create an inventory of source locations and content owners.
- Identify active, stale, duplicate, archived, and excluded content.
- Separate personal, team-owned, departmental, and enterprise content.
- Confirm what moves as-is, what gets restructured, and what stays behind.
- Document high-risk libraries, large files, exceptions, and dependencies.
- Set migration scope boundaries before production waves begin.

## Architecture and Findability

- Map destination hubs, sites, libraries, and Teams-connected workspaces.
- Define naming standards for sites, libraries, channels, and key folders.
- Replace deep folder structures with practical libraries and metadata where needed.
- Confirm page, document, and knowledge ownership after migration.
- Plan search, navigation, promoted results, and high-value landing pages.
- Validate that target architecture supports future growth and governance.

## Security, Compliance, and Governance

- Review sensitive content, external sharing, and unique permissions.
- Define site owners, content owners, and support paths before launch.
- Confirm retention, records, legal hold, and compliance requirements.
- Decide which permissions can be simplified before or after migration.
- Document governance standards for new sites, archives, and lifecycle reviews.
- Confirm the post-migration support and cleanup cadence.

## Communication and Adoption

- Create a user communication plan for each migration wave.
- Tell users what changes, what stays the same, and when cutover happens.
- Prepare quick-start guidance for common file and collaboration scenarios.
- Identify early adopters, department leads, and issue escalation contacts.
- Schedule launch support, office hours, and feedback collection.
- Capture adoption risks before the migration date is final.

### Decision note

A successful migration is easier when scope decisions are made before content moves. Use unclear items as workshop topics, not assumptions.

# Migration Execution Checklist

Use this page to prepare migration waves, pilot results, cutover timing, and issue response. Execution works best when each wave has an owner and a validation plan.

Execution Step	Owner	Status	Notes
Confirm migration tool settings, permissions, and test environment access.			
Run a pilot migration with a representative content set.			
Validate pilot results with content owners and selected users.			
Finalize migration wave schedule, freeze windows, and communications.			
Confirm source-to-destination mapping for each wave.			
Run pre-checks for path length, file types, size limits, and failed items.			
Track migration results, exceptions, failed items, and remediation owners.			
Communicate cutover timing and where users should work after migration.			
Confirm rollback or contingency steps for critical content areas.			
Complete final wave validation before announcing migration completion.			

## Migration Wave Tracker

Wave	Source Area	Destination	Planned Date	Status
Pilot				
Wave 1				
Wave 2				
<b>Migration reminder</b> Do not call a wave complete until content, permissions, links, search, and owner acceptance are validated.				
Final Cleanup				

# Post-Migration Validation and Adoption

Use this page after each migration wave and again after final cutover. The migration is not finished until users can find, access, and trust the new SharePoint environment.

## Post-Migration Validation Checklist

Validation Item	Owner	Complete	Notes
Core content appears in the correct sites, libraries, and folders.			
Permissions match the intended access model and no obvious overexposure remains.			
Metadata, labels, views, and naming standards work as expected.			
Search returns expected content for common user scenarios.			
High-value links, pages, documents, and templates are tested.			
Content owners accept migrated content and know their responsibilities.			
Users receive launch guidance, training, and support instructions.			
Open issues are logged with priority, owner, due date, and resolution path.			

## Adoption and Support Checklist

Adoption / Support Item	Owner	Status	Notes
Launch communications explain what changed and where users should work.			
Quick-start guidance covers documents, Teams, sharing, and search.			
Department content owners know how to review and maintain their areas.			
Support contacts, office hours, and escalation paths are communicated.			
Feedback is collected during the first weeks after cutover.			
Post-migration cleanup items are prioritized and assigned.			

### Validation note

A migration wave is not complete until content owners accept the result and users know how to work in the new location.

# Action Plan and Next Steps

Use this final page to turn checklist findings into a migration plan the project team can act on. A clear path reduces rework and keeps the migration tied to business value.

## Recommended Migration Path

<input type="checkbox"/> Move as planned	<input type="checkbox"/> Restructure first	<input type="checkbox"/> Archive first	<input type="checkbox"/> Revise scope
------------------------------------------	--------------------------------------------	----------------------------------------	---------------------------------------

### Why this path is the right decision:

---



---



---

## Scope Boundaries

In Scope	Out of Scope	Watch Items
Dependencies / Risks		

## 30 / 60 / 90-Day Migration Roadmap

Timeframe	Focus	Actions	Owner
First 30 days	Confirm scope, owners, inventory, pilot criteria, and communication plan		
Days 31-60	Run pilot and priority waves, resolve exceptions, and validate user experience		
Days 61-90	Complete migration waves, adoption support, cleanup, and governance handoff		



### Need help interpreting the checklist?

dataBridge helps organizations plan, migrate, validate, govern, and support SharePoint environments built for long-term adoption.  
[Contact dataBridge](#)