

SharePoint Information Architecture & Metadata Planning Worksheet

WORKSHEET

Plan SharePoint libraries, metadata, content types, views, ownership, and search requirements before building or restructuring sites.



How To Use This Worksheet

- 1 Identify the content areas and business processes involved.
- 2 Document current pain points, structure, and findability issues.
- 3 Define the metadata, content types, and search needs that matter most.
- 4 Prioritize actions for governance, lifecycle, and rollout.



What This Worksheet Covers

- Business Areas And Content Groups
- Current Libraries And Document Types
- Metadata Fields And Content Types
- Search And Findability Requirements
- Ownership, Permissions, And Lifecycle
- Priority Actions And Next Steps

Organization

Date

Prepared By

Primary SharePoint Area



Why This Matters

- ✓ **Better Findability:** Well-structured information is easier to find, use, and trust.
- ✓ **Stronger Governance:** Clear ownership, lifecycle, and permissions reduce risk and sprawl.
- ✓ **Better Copilot Readiness:** High-quality structure and metadata unlock the full value of Copilot.

Section 1: Current-State Content & Site Structure

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Capture the SharePoint areas, libraries, and content patterns that exist today.

	Business Area	Site Or Library	Main Content Types	Current Structure	Pain Points	Priority
1						
2						
3						
4						
5						
6						



Questions To Answer

- ✓ Where is content duplicated?
- ✓ Where do users rely on folders too heavily?
- ✓ Which libraries are hard to navigate?
- ✓ Where is content missing ownership?
- ✓ What information is difficult to find?

Section 2: Business Goals & Use Cases

Key Business Goals

High-Value Use Cases

Main User Groups

Success Criteria

Section 3: Metadata & Content Type Planning

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Define the metadata and content structures that will make SharePoint easier to manage and search.

Document Category	Content Type	Key Metadata Fields	Required Or Optional	Notes
1				
2				
3				
4				
5				
6				
7				

Section 4: Findability & Search Requirements

🔍
Common Search Tasks

🔽
Important Filters And Views

AI
Naming Standards

🕒
Search Or Navigation Gaps

Keep It Practical

- ✔ Use fields that support real business decisions.
- ✔ Avoid overcomplicating metadata.
- ✔ Align naming and structure with how users search.

Section 5: Ownership, Governance & Action Plan

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Clarify accountability, lifecycle controls, and the actions needed to improve structure.

	Area Or Library	Business Owner	Support Owner	Permissions Notes	Review Cadence	Lifecycle Or Retention Notes
1						
2						
3						
4						
5						
6						

Section 6: Priority Actions

 **Do Now**

 **Do Next**


 **Do Later**

30 / 60 / 90 Day Plan

30 Days

60 Days

90 Days



Outcome

- ✓ Clearer structure and ownership
- ✓ Better search and findability
- ✓ Stronger governance and Copilot readiness