

# Microsoft 365 Digital Workplace Checklist

This checklist will provide you with the key indicators of a successful digital workplace. Assess yourself to know where to put in time and effort.

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## Strategic Alignment & Clarity

- We have a clearly defined objectives for our digital workplace.**  
Examples: consolidate duplicate tools, improve content findability, modernise employee experience, deliver personalised experiences.
- Comms & IT share a joint roadmap.**  
There is clarity on who owns which aspects of the platform, what's coming next and how it will be managed.

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## Information Architecture & Findability

- Navigation matches how tasks are completed, not how the org chart looks.**  
Key tasks are identified and mapped to the information architecture and page layouts.
- Tasks are audience targeted for relevance and personalisation.**  
The needs of key roles are understood and met.
- AI and search results are returning relevant results.**  
Common search requests are tested for accuracy across Copilot and Microsoft Search.

### 3

## Content Governance & Quality

### Every page has a named owner and review cycle.

Review cycle should vary depending on business criticality and reflect any compliance requirements.

### Outdated content will be easily identified and removed.

You have a mechanism to identify and update content e.g. Knowledge Agent is set up.

### Mandatory content is flagged and version controlled.

Example: Policies, compliance documents, safety information can all be attested in an auditable way.

### We have clear rules for what content belongs where and a way to communicate that to content creators.

Example:

- SharePoint = authoritative content
- Viva Engage = conversation via communities
- Teams = collaboration
- Email = urgent or personalised comms

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# Channel Strategy & Communications Model

- We have defined the “role” of each Microsoft 365 channel and people follow it.**  
Employees should never wonder “Where should I post this?”
- News is targeted to relevant groups wherever possible.**  
“All Company” and other channels are used appropriately.
- Leaders communicate consistently and visibly, not just top-down.**  
Leadership shows up on Viva Engage monthly and engages with employees.
- Mobile experience has been validated.**  
We are assessing the mobile experience and know what and why our employees access via mobile. We optimise the content for mobile.

## 5

# Content Creation & Editorial Standards

- We follow a clear tone-of-voice guideline.**  
Our tone reflects brand values and reduces ambiguity.
- Content is concise and scannable.**  
We avoid lengthy paragraphs and large blocks of text.
- AI-assisted drafting (e.g., Copilot, Researcher) is used responsibly.**
  - We draft with AI
  - We validate with experts
  - We edit for clarity
  - We publish confidently

**All content meets a minimum quality bar.**

All content is:

- Useful
- Clear
- Necessary

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## Personalisation & Relevance

**We deliver relevant information to everyone.**

Employees receive content tailored to their role, location, or team.

**Quick links and dashboards reflect what employees do most often.**

We measure for validation.

**We have a clear approach for surfacing content at the right moment.**

We have onboarding journeys, seasonal content, policy updates.

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## Analytics & Continuous Improvement

**Engagement is measured.**

We assess content consumption, understanding and sentiment.

**Search analytics are reviewed regularly to identify gaps.**

We look for “zero-result queries,” to tell us exactly what content is missing.

**Employee feedback mechanisms are embedded.**

We assess page rating, thumb-up/down, quick surveys to know where we can improve.

## Technical Readiness & M365 Governance

- Permissions and roles are assigned correctly.**  
No surprise site owners, no unclear admin privileges.
- Templates and components are deployed consistently.**  
Avoid creating sites without proper regulation.
- Integrations between SharePoint, Teams, Viva, and OneDrive work seamlessly.**  
Test common flows (share a file, update a page, post news).
- Change control is in place for new M365 features.**  
M365 evolves fast, proper governance prevents chaos.

## Adoption, Change & Capability Building

- Page editors, news publishers & community managers receive regular training.**  
Could be bite-sized videos or drop-in workshops.
- Leaders model the behaviours expected from everyone.**  
Example: a monthly “What I’m learning” post on Viva Engage.
- There is a plan for promoting the new or improved digital workplace.**  
Basics: launch sequence, spotlight features, success stories.
- New starters are shown where and how to use the digital workplace.**  
If onboarding doesn’t include it, adoption will always be patchy.

# Can we help with a free half day consultation?

Planning a digital workplace refresh in 2026 but need expert guidance? We're offering a complimentary half-day consultation with one of our experienced consultants. This session will help you confidently map out the next steps for refreshing your SharePoint intranet and Microsoft 365 digital workplace.

## How It Works:

- Our consultant will discuss your project goals, challenges, and opportunities.
- We will provide expert recommendations tailored to your specific objectives and actionable next steps.
- You will also enjoy a plan to move your digital workplace project forward.

## Do You Qualify?

- This free consultation is ideal for businesses that:
- Are in the early planning stages of a digital workplace project.
- Need expert advice to overcome challenges.
- Are serious about taking their project to the next level.

## Get in Touch

Contact us and we'll be in touch to discuss your eligibility and schedule your consultation.

[Book now](#)

