

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.

1 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.

2 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- Outdated content will be easily identified and removed.**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

4

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

6

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.

7

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.

8 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.

9 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](#)

