

The SharePoint Governance Checklist

28 checks that keep a SharePoint clean for years - the same list we run in client audits. Tick what's true today; every unticked box is where the chaos gets back in.

1. Sites & structure

- ☐ Site creation is restricted or reviewed - not open to everyone
- ☐ A written naming convention exists for sites, libraries and Teams
- ☐ Sites hang off hubs that mirror how the business actually works
- ☐ There is one place to see every active site and who owns it
- ☐ Test/'sandbox' sites are separated from production content

2. Permissions & sharing

- ☐ Access is granted to groups, never to individuals one by one
- ☐ Item-level permission breaks are the rare exception, not the norm
- ☐ External sharing is set per site, not tenant-wide open
- ☐ Anonymous 'Anyone' links are disabled or expire automatically
- ☐ Someone reviews access to sensitive sites at least quarterly
- ☐ A leaver process removes access and reassigns owned content

3. Documents & libraries

- ☐ Versioning is on in every library (it is the default - keep it)
- ☐ Structure favors metadata and views over deep folder trees
- ☐ One 'source of truth' rule: no parallel copies on desktops or email
- ☐ File naming rules exist for the documents that matter (contracts, SOPs)
- ☐ Templates live in one governed location, not in inboxes

4. Retention & lifecycle

- ☐ Retention labels are applied to records that must be kept
- ☐ A policy defines when project/client sites get archived
- ☐ Orphaned sites (no owner) are detected and re-assigned
- ☐ Deleted-content recovery windows are understood by IT and staff

5. Ownership & accountability

- ☐ Every site has a named owner - and a deputy
- ☐ Every intranet section has a content owner responsible for accuracy
- ☐ Policies and key pages carry a review date, and reviews happen
- ☐ Governance rules fit on one page and are written in plain language

6. Adoption & training

- ☐ New starters learn where files go during onboarding, not by osmosis
- ☐ Short how-to guides exist for the five most common tasks
- ☐ A champions group feeds back what is and isn't working
- ☐ Usage is reviewed: dead sections get fixed or retired

More unticked boxes than you'd like?

Book a free 30-minute audit - we'll tell you which three to fix first: buildwithsharepoint.com/contact