



# Your Complete SharePoint Migration Planning Checklist

Expert SharePoint migration consultant & services in Brisbane. Seamless sharepoint content migration, secure upgrades & optimized solutions.



In today's digital-first workplace, efficient collaboration, secure document management, and streamlined workflows are essential. That's where **Microsoft SharePoint** comes in. Whether you're moving from legacy file systems, on-premise SharePoint, or third-party platforms like Google Workspace or Dropbox, a **SharePoint migration** can unlock productivity, scalability, and stronger data governance.

However, migration is more complicated than just turning a switch. Without a solid plan, businesses risk **data loss, downtime, and employee frustration**. That's why every successful SharePoint migration starts with a clear, strategic plan.

This article provides a **step-by-step [SharePoint migration planning checklist](#)** to guide IT managers, project leads, and decision-makers through a smooth and cost-effective transition, whether you're migrating to [SharePoint Online](#) or upgrading your on-premise environment.

## ✓ Why Plan Your SharePoint Migration?

The way your teams work, exchange content, access files, and more is impacted by a SharePoint move. Poor planning can lead to:

- Broken links and lost metadata
- Downtime and user confusion
- Security risks or compliance failures
- Low user adoption due to poor UX

With the right plan, however, you'll enjoy:

- Seamless data migration
- Improved performance and searchability
- Higher user adoption and satisfaction
- Enhanced security and version control

## Step 1: Define Your Migration Goals

Start with the “why.” Ask key stakeholders what they expect from the migration. Some typical goals include:

- Modernizing legacy systems
- Enabling remote collaboration with Microsoft 365
- Centralizing data in the cloud
- Improving compliance and audit readiness
- Integrating with tools like Teams, Power Automate, and Outlook

**Tip:** Document your goals clearly—this will guide your tool selection, timeline, and testing approach.

## Step 2: Take Inventory of Existing Content

A successful migration starts with a **content audit**. Know exactly what you're moving—and what you can leave behind.

### **Checklist:**

- List all source systems (SharePoint 2013/2016/2019, file shares, Dropbox, etc.)
- Examine the dimensions and organization of your present libraries and websites.
- Identify duplicate, outdated, or unnecessary files (ROT data)
- Note permissions, metadata, version history, and workflows
- Tag content that is sensitive or subject to compliance rules

**Tool Tip:** Use tools like ShareGate, Metalogix, or Microsoft Assessment and Planning Toolkit to automate audits.

## Step 3: Define Governance & Security Requirements

SharePoint offers powerful permission settings, but without planning, your structure may quickly become chaotic.

**Governance planning should cover:**

- Who owns which site or library
- Naming conventions for sites, folders, and documents
- Retention and deletion policies
- User roles and access levels
- External sharing policies
- Compliance and audit requirements

**Security Tip:** Identify any content that requires encryption, access restrictions, or conditional access policies (e.g., financial, HR, legal).

## Step 4: Choose Your SharePoint Environment

Now decide **where** you're migrating to. Your choices include:

### SharePoint Online (Cloud)

- Part of Microsoft 365 migration
- Fully managed by Microsoft
- Scalable, secure, and ideal for remote work

### SharePoint Server (On-Premise)

- Full control over infrastructure
- Useful for businesses with strict data residency or custom compliance needs

**Hybrid environments** are also possible, combining both cloud and on-premise functionality.

**Recommendation:** For most modern businesses, SharePoint Online is the best long-term solution due to lower maintenance, better integration, and future-proof features.

## Step 5: Choose the Right Migration Tools

Manual migration is only suitable for small projects. For large-scale migrations, leverage tools to:

- Preserve metadata, version history, and permissions
- Monitor migration progress
- Detect and fix errors
- Automate repetitive tasks

**Popular tools include:**

- Microsoft SharePoint Migration Tool (SPMT)
- ShareGate
- AvePoint
- Metalogix Content Matrix
- Quest Migration Manager

**Tip:** Choose tools that support your source platform and scale.



## Step 6: Plan for Testing and Pilots

Before deploying your migration over the full company, test it with a pilot group. This step is crucial to catching errors before they affect hundreds of users.

**Pilot group checklist:**

- Select users from different departments
- Migrate a sample set of files
- Validate permissions, structure, and search functionality
- Test workflows and integrations (e.g., Power Automate, Teams)
- Gather feedback on navigation, UX, and performance

**Fix any issues** uncovered during testing before going live.



## Step 7: Create a Communication & Training Plan

Migration is not just a technical move—it's a people process. Make sure your team is ready.

**Pre-launch communication should include:**

- Timeline and rollout plan
- What's changing and why
- What's staying the same
- Who to contact for support

## Training should cover:

- How to navigate the new SharePoint environment
- How to use search, document libraries, and permissions
- How to work with integrations like Teams or OneDrive
- Best practices for content creation and sharing

**Tip:** Use short videos, live webinars, and knowledge base articles to support different learning styles.

## Step 8: Migrate Content in Phases

Rather than move everything at once, divide your migration into manageable waves.

### Phase plan example:

- **Phase 1:** Migrate critical business units (HR, Finance)
- **Phase 2:** Migrate shared teams and operations
- **Phase 3:** Migrate archived content and non-critical data

During each phase:

- Monitor logs and reports
- Verify content integrity
- Track user issues
- Be ready to roll back if needed

## Step 9: Post-Migration Validation

Once migration is complete, it's time to ensure everything works as expected.

### Post-migration checklist:

- Validate data integrity (files, permissions, metadata)
- Ensure workflows and automations still function
- Confirm site performance and page load speed
- Verify that the search returns relevant results
- Confirm mobile responsiveness and compatibility

**Tip:** Run feedback surveys and open support channels to catch user experience issues early.

## Step 10: Measure Success and Optimize

Now that you're live, track how well your migration met the original goals.

## Measure:

- User adoption (logins, file uploads, page views)
- Collaboration improvement (shared docs, Teams integration)
- Reduction in IT support tickets
- Feedback from staff surveys

## Continuous improvement:

- Set up monthly health checks
- Archive outdated sites or libraries
- Monitor usage analytics via Microsoft 365 Admin Center
- Roll out additional SharePoint features like Lists, Forms, or Power BI as needed

## Final Thoughts

Migrating to SharePoint is more than just a data move—it's a digital transformation opportunity. Done right, it improves productivity, collaboration, and data security. But without a plan, it can turn into a mess of broken links and frustrated employees.

By following this SharePoint migration planning checklist, you'll ensure your project is smooth, secure, and successful. From early auditing to training and post-launch support, each step prepares your business to fully leverage the power of Microsoft SharePoint.