

FREE RESOURCE FOR IT & SHAREPOINT ADMINS

MICROSOFT SHAREPOINT · AI READINESS

SharePoint AI Readiness Audit Checklist

60 check items across 5 governance pillars, with a scoring template and remediation matrix — before you connect a single AI agent.

60

Check items

5

Governance pillars

120

Max score

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Free resource for IT & compliance leaders

How to use this checklist

Built for IT architects, SharePoint administrators and project leads preparing a Microsoft 365 environment for AI agent deployment. Work through each pillar **before** enabling any Microsoft 365 Copilot seat, Copilot Studio agent or Azure AI Foundry connection. Involve both IT and business stakeholders — governance is a shared responsibility.

COMPLETE = 2
pts
fully in place

PARTIAL = 1 pt
in progress

NOT DONE = 0
pts
not started

SCORING

Pillar max: **24 pts** · Total max: **120 pts** · Minimum to proceed to AI enablement: **90 pts**. Score each pillar independently before connecting any AI agent to broad content scopes.

Copilot and AI agents don't create new permissions — they expose the ones you already have, at machine speed. A tenant with years of broad sharing links, ownerless sites and unlabelled content will surface all of it the day agents go live. These five pillars take you from 'we hope it's fine' to a defensible, auditable foundation.

01 Access Governance & Permissions Hygiene

- 01 ☐ Identify all SharePoint sites shared with 'Everyone' or 'Everyone except external users'
- 02 ☐ Remove broad 'Everyone' access from sites with confidential, HR, legal or financial content
- 03 ☐ Enumerate all sharing links — identify links with no expiry date
- 04 ☐ Enable access expiry (90-day default) on all new sharing links tenant-wide
- 05 ☐ Identify all sites with no confirmed site owner (orphaned sites)
- 06 ☐ Assign a business owner to every active SharePoint site
- 07 ☐ Run a stale-permissions report — flag access grants older than 24 months
- 08 ☐ Audit and remove over-shared OneDrive content accessible organisation-wide
- 09 ☐ Verify access-review cycles are in place (quarterly recommended)
- 10 ☐ Review and clean up broken permission inheritance at the item level
- 11 ☐ Identify sites with external guest access — confirm business justification
- 12 ☐ Assess whether Information Barriers are needed for sensitive units (HR, Legal, Finance, M&A)

Pillar score: ____ / 24 pts

02 Information Architecture & Metadata

- 01 ☐ Document the naming-convention policy for SharePoint sites and libraries
- 02 ☐ Identify sites with no structured naming convention — plan remediation
- 03 ☐ Define mandatory metadata columns for all AI-connected libraries (department, status, type, audience)
- 04 ☐ Create content-type templates for key categories (Policy, Procedure, Report, Reference)
- 05 ☐ Apply content types and metadata to all priority AI-connected libraries
- 06 ☐ Verify document titles are descriptive (not 'Document1', 'Final', 'Meeting Notes')
- 07 ☐ Create a site inventory: name, owner, purpose, last activity, sensitivity
- 08 ☐ Identify libraries with mixed content types that should be separated
- 09 ☐ Define and document the 'Review Date' metadata field for AI-connected content
- 10 ☐ Establish a naming convention for AI-ready document libraries within each site
- 11 ☐ Map business taxonomy (departments, projects, processes) to the SharePoint site hierarchy
- 12 ☐ Document which sites and libraries are explicitly in scope for AI agent indexing

Pillar score: ____ / 24 pts

03 Sensitivity Labels & Compliance Classification

- 01 ☐ Confirm Microsoft Purview is configured and active in the tenant
- 02 ☐ Review the sensitivity-label taxonomy — ensure at least 4 tiers (Public / Internal / Confidential / Highly Confidential)
- 03 ☐ Pull a sensitivity-label coverage report — identify % of files with no label
- 04 ☐ Set a coverage target: minimum 80% of AI-connected content labelled before AI enablement
- 05 ☐ Deploy auto-labelling policies for PII, financial data and legal-clause detection
- 06 ☐ Identify all 'Highly Confidential' documents — decide whether to exclude from AI indexing
- 07 ☐ Verify encryption is correctly applied to Confidential and Highly Confidential files
- 08 ☐ Review Information Protection policies — ensure they cover SharePoint, OneDrive and Teams
- 09 ☐ Confirm DLP policies are active and tested for your most sensitive content types
- 10 ☐ Check that sensitivity labels are enforced at document creation (default label policy)
- 11 ☐ Train site owners on how to apply sensitivity labels correctly
- 12 ☐ Schedule a quarterly label-coverage review as part of the governance cycle

Pillar score: ____ / 24 pts

04 Content Quality & Document Standards

- 01 ☐ Conduct a content audit on all AI-connected priority libraries
- 02 ☐ Flag all documents not modified in the past 18 months for owner review
- 03 ☐ Archive or delete documents confirmed as outdated by their owners
- 04 ☐ Identify and resolve duplicate documents — establish a single authoritative version
- 05 ☐ Remove document stubs, empty templates and placeholder files from AI-indexed libraries
- 06 ☐ Verify referenced external documents/links within key documents are still live
- 07 ☐ Confirm draft documents are stored in a separate library excluded from AI indexing
- 08 ☐ Review project-archive sites — ensure completed content is archived, not AI-indexed
- 09 ☐ Create dedicated 'AI-Ready' document libraries with curated, reviewed content
- 10 ☐ Verify AI-Ready libraries contain only approved, up-to-date content
- 11 ☐ Establish a content-review SLA: AI-Ready documents reviewed every 12 months
- 12 ☐ Document which libraries are AI-indexed vs excluded — communicate to business owners

Pillar score: ____ / 24 pts

05 Microsoft Search & Graph Configuration

- 01 ☐ Verify all AI-connected SharePoint sites are included in the Microsoft Search index
- 02 ☐ Confirm no AI-connected sites are excluded via crawl configuration or no-index settings
- 03 ☐ Review the Search schema — identify custom columns to map to managed properties
- 04 ☐ Map priority metadata fields (department, status, content type) to searchable managed properties
- 05 ☐ Configure Search verticals for your most important content categories
- 06 ☐ Test Microsoft Search retrieval for 10 representative business queries — review relevance
- 07 ☐ Verify sensitivity labels surface correctly in search results as compliance metadata
- 08 ☐ Review Microsoft Graph connector configuration if using third-party content sources
- 09 ☐ Build a test Copilot Studio agent connected to AI-Ready libraries — run 20 validation queries
- 10 ☐ Run adversarial test queries designed to surface content that should not be visible
- 11 ☐ Fix any inappropriate disclosure found in test before proceeding to production
- 12 ☐ Document the approved AI knowledge sources (sites, libraries, scopes) for each planned agent

Pillar score: ____ / 24 pts

AI readiness scoring template

Score each pillar independently. Minimum to proceed to AI enablement: 90 / 120 pts.

Pillar	Complete	Partial	Not done	Score /24
01 — Access Governance				
02 — Information Architecture				
03 — Sensitivity Labels				
04 — Content Quality				
05 — Search & Graph Config				
TOTAL				/ 120

Score interpretation

Score	Status	Recommended action
100–120	Excellent	Proceed with full rollout. Schedule quarterly governance review.
90–99	Ready	Proceed with phased rollout. Monitor closely in Month 1.
75–89	Caution	Address all priority gaps before expanding AI scope. No broad rollout yet.
60–74	At risk	Stop. Fix Pillars 1 and 3 before any AI agent connection.
< 60	Not ready	Do not enable AI. Launch a 30-day remediation sprint first.

Remediation priority matrix

Fix in this order. Critical findings block AI enablement entirely.

Finding	Pillar	Risk	Effort	Priority
'Everyone' access on sensitive sites	01	CRITICAL	Medium	Immediate
No sensitivity labels on 60%+ of content	03	CRITICAL	Medium-High	Immediate
No DLP policies active	03	CRITICAL	Medium	Immediate
Sites with no owner (orphaned)	01	HIGH	Low	Week 1
No sharing-link expiry configured	01	HIGH	Low	Week 1
No mandatory metadata on AI libraries	02	HIGH	Medium	Week 2
Outdated content in AI-indexed libraries	04	HIGH	Medium	Week 2-3
Custom metadata not indexed in Graph	05	MEDIUM	Low	Week 3
No adversarial testing before go-live	05	HIGH	Low	Week 4
No content-review SLA defined	04	MEDIUM	Low	Post-launch

DON'T AUDIT ALONE

You've scored your tenant. Now close the gaps before agents go live.

The hard part isn't the checklist — it's the remediation sequence: which over-shared sites to fix first, how to roll out labels without breaking collaboration, and how to prove readiness to your leadership.

- The editable scoring spreadsheet (auto-totals all 5 pillars)
- The remediation priority matrix as a working tracker
- The companion Microsoft AI Governance Playbook

Get the full SharePoint AI-Readiness Toolkit — free

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