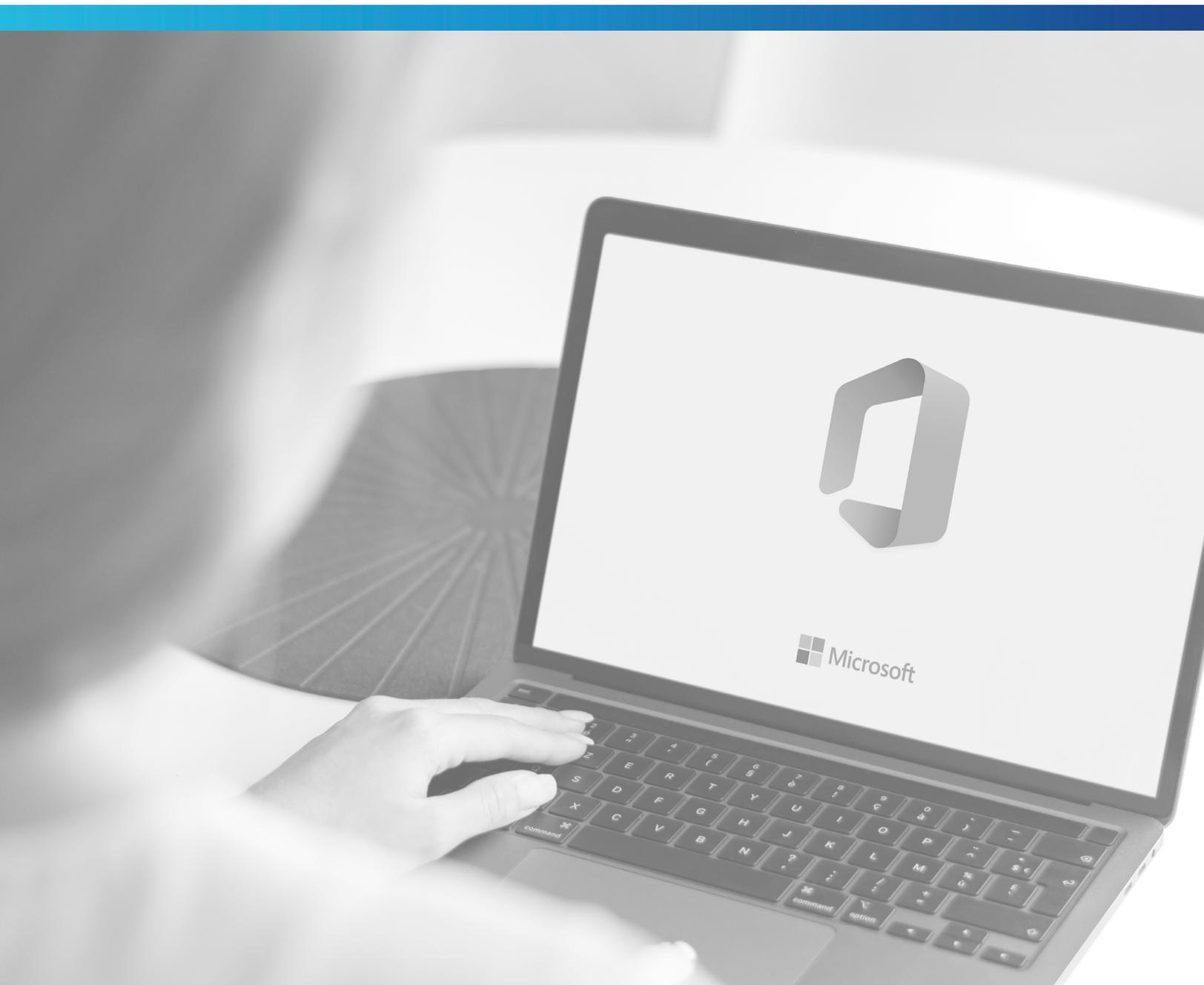




M365 Self Evaluation Questionnaire

Discover Key Microsoft 365 Focus Areas



How to use this guide

If you are new to Microsoft 365:

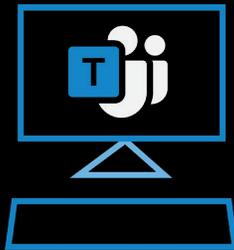
1. Refer to the [Microsoft 365 Guide](#) on page 7. This guide provides step-by-step instructions on how to set up your Microsoft 365 environment to meet best practice guidelines.
2. Planning templates are also included.

If you have existing Microsoft 365 structure in place:

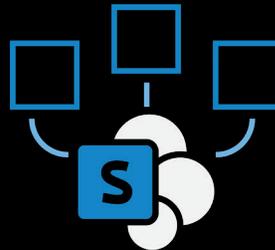
1. Start by filling out the [Microsoft 365 Self-evaluation questions](#) on page 3 to determine which areas in Microsoft 365 to focus on.
2. Use the [Microsoft 365 Guide](#) on page 7 (references provided in the questionnaire) to help guide your Microsoft 365 clean up and structure planning.
3. [Planning templates](#) are also included.



Review/Assessment



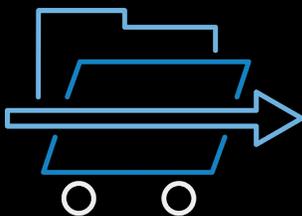
MS Teams Structure



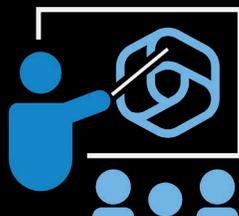
SharePoint Structure



M365 Applications



Migration Planning



M365 & Copilot Training



Maintenance & Governance

Further Resources can be found at:

www.mytech.com/M365

1. Microsoft 365 Self-Evaluation Questionnaire

1.1 Communication & Collaboration

Question	Yes	No
1. Do you find it difficult to locate the right team or channel in Microsoft Teams?		
2. Are there overlapping or redundant teams and channels causing confusion, inefficiency and 'noise'?		
3. Does your current Teams structure make it a challenge to support cross-departmental collaboration?		
Additional Notes/Comments:		
If you answered 'yes' to any of these questions, please refer to the following sections in the 365 Guide: See Microsoft 365 Guide Section 2.1: Review & Assessment See Microsoft 365 Guide Section 2.2: MS Teams Structure – Planning and Build		

1.2 Document Management

Question	Yes	No
1. Do you have trouble finding documents due to a disorganized Teams or SharePoint site structure?		
2. Are multiple versions of documents being saved in different locations, leading to confusion and errors?		
3. Do you often encounter issues with document permissions in Teams or SharePoint?		
4. Are SharePoint sites/documents difficult to locate or underutilized due to poor site design and/or navigation?		
Additional Notes/Comments:		
If you answered 'yes' to any of these questions, please refer to the following sections in the 365 Guide: See Microsoft 365 Guide Section 2.1: Review & Assessment See Microsoft 365 Guide Section 2.2: MS Teams Structure – Planning and Build See Microsoft 365 Guide Section 2.3: MS SharePoint Structure – Planning and Build		

1.3 SharePoint Site Design/User Interface

Question	Yes	No
<p>If you have SharePoint sites:</p> <ol style="list-style-type: none">1. Are your SharePoint sites difficult to locate due to poor design and/or navigation?2. Are your SharePoint sites underutilized?3. Is the content stale and out of date?		
<p>Additional Notes/Comments:</p>		
<p>If you answered 'yes' to any of these questions, please refer to the following sections in the 365 Guide:</p> <p>See Microsoft 365 Guide Section 2.1: Review & Assessment</p> <p>See Microsoft 365 Guide Section 2.3: MS SharePoint Structure – Planning and Build</p>		

1.4 Productivity

Question	Yes	No
<ol style="list-style-type: none">1. Do you feel as though too many different tools (Microsoft and/or 3rd party tools) are currently being used to track team and task management?2. Do you feel confused by the number of applications available in Microsoft 365 (e.g. Planner, Forms, Bookings etc.) and how they work?3. Are you struggling to identify the right application for your day-to-day tasks?4. Do you find it challenging to integrate Microsoft 365 apps with other tools you use e.g. MS Teams?		
<p>Additional Notes/Comments:</p>		
<p>If you answered 'yes' to any of these questions, please refer to the following sections in the 365 Guide:</p> <p>See Microsoft 365 Guide Section 2.5: 365 Productivity Apps</p>		

1.5 Migration Planning

Question	Yes	No
1. Are you planning to migrate your files from a physical server, Azure, Box, Dropbox or Google to Microsoft 365?		
Additional Notes/Comments:		
If you answered 'yes' to any of these questions, please refer to the following sections in the 365 Guide: See Microsoft 365 Guide - ALL SECTIONS		

1.6 Training/User Experience

Question	Yes	No
If you have SharePoint sites: 1. Do users feel that there is adequate training on how to use Microsoft 365 tools / Copilot effectively? 2. Are there specific 365 / Copilot training resources currently available to users, such as in-person training or videos? 3. Do you gather feedback from users about their experience with Microsoft 365 / Copilot regularly? 4. Do you provide ongoing support and resources to help users with Microsoft 365 / Copilot?		
Additional Notes/Comments:		
If you answered 'yes' to any of these questions, please refer to the following sections in the 365 Guide: See Microsoft 365 Guide Section 2.6: Training		

1.7 Maintenance & Governance

Question	Yes	No
<ol style="list-style-type: none"> 1. Do you have a governance plan or policy in place to ensure consistent practices and accountability? 2. Do you have a governance and compliance team in place? 3. Have you documented your 365 tenant setup, for example sharing settings, provisioning decisions etc.? 4. Do you have a process in place to regularly review 365 inventory, including Teams/ channels, SharePoint sites, users, licensing etc. and do maintenance and clean-up where appropriate? 5. Do you have a process in place for guest and external access? 		
Additional Notes/Comments:		
<p>If you answered 'yes' to any of these questions, please refer to the following sections in the 365 Guide: See Microsoft 365 Guide Section 2.7: Maintenance and Governance</p>		

1.8 Security & Compliance

Question	Yes	No
<ol style="list-style-type: none"> 1. Do you follow an access review process to ensure that permissions are managed correctly and consistently to prevent unauthorized access? 2. Are you aware of where your sensitive and confidential data is stored and are you confident that your data is secure? 3. Are you currently leveraging any Microsoft 365 compliance tools such as Data Loss Prevention (DLP), sensitivity labeling, retention policies etc.? 		
Additional Notes/Comments:		
<p>If you answered 'yes' to any of these questions, please refer to the following sections in the 365 Guide: See Microsoft 365 Guide Section 2.7: Maintenance and Governance</p>		

2. Microsoft 365 Guide

2.1 Review & Assessment

Item	Owner(s)	Progress
<p>Review organizational structure. This will be used to plan out Teams and SharePoint structure:</p> <ol style="list-style-type: none"> 1. What are the current Groups / Teams / Business units? (Use org chart) What is each one's Function / role? 2. Do any of these groups handle confidential or sensitive data? 3. How do these teams/groups cross-collaborate with each other (e.g. HR and Finance?) 4. What business problems are you looking to solve? 5. Do you have regulatory or compliance requirements? (e.g. retention policies etc.) 		
<p>Review Existing Teams/SharePoint structure (if applicable)</p> <ol style="list-style-type: none"> 1. Review Teams and Teams usage reports* 2. Review SharePoint active sites* 3. Which Teams/SharePoint sites will you keep? <p>*Reports List of Teams: Admin Center > Manage Team Teams Usage: Teams Admin Center > Analytics & Reports > Teams Usage List of active SharePoint Sites: SharePoint Admin Center > Active Sites</p>		
<p>Review Existing file structure</p> <ol style="list-style-type: none"> 1. What is the current file and folder structure? / Type of files? 2. Is there sensitive data? 3. What do permissions look like for each of these Folders/Groups 		

Item	Owner(s)	Progress
<p>Clean-up & consolidation opportunities (if applicable)</p> <ol style="list-style-type: none"> 1. Which Teams and SharePoint sites are not currently being used? 2. Identify workspaces that are no longer being used and can be archived or deleted. 		

2.2 MS Teams Structure - Planning and Build

Item	Owner(s)	Status
<p>Decide on internal teams/groups/departments</p> <ol style="list-style-type: none"> 1. Use the information from section 2.1 above to document your planned Teams/groups in MS Teams 2. Plan the appropriate channels & channel types required. 3. Document memberships (Owners, Members, Guests) 4. Do you have any guest access requirements (participants from outside your organization?) 5. Consider locking down channel creation for team members (Team settings > Manage Team > Settings > Member permissions > disable channel creation. 		
<p>Do you have requirements for team/group to collaborate across various teams</p> <ol style="list-style-type: none"> 1. MS Teams (e.g., shared channels) 2. SharePoint sites (e.g., Communication sites etc. 		

2.3 MS SharePoint Structure [Planning and Build

Item	Owner(s)	Status
<p>Decide on the SharePoint Communication Sites you require</p> <ol style="list-style-type: none">1. Communication sites needed2. Permissions (owners, contributors, etc.)3. Guest access / external access requirements		
<p>Hub Site Navigation / Home site:</p> <ol style="list-style-type: none">1. What will your SharePoint navigation look like?2. How will you test navigation (e.g. focus group).		
<p>Additional site features required:</p> <ol style="list-style-type: none">1. News2. Events3. Document repositories (e.g. Policies & Procedures)4. Other		

Additional MS Teams & SharePoint planning questions:

1. Who will be allowed to provision new Teams or SharePoint sites?
2. What are your onboarding and off boarding procedures to add or remove users from Teams?
3. What type of training requirements will there be for Teams and SharePoint owners?
4. [What type of external sharing is allowed in your Microsoft 365 tenant?](#)

2.4 Migration Planning (If Applicable)

Item	Owner(s)	Status
<p>Clean-up & Archiving requirements</p> <ol style="list-style-type: none"> 1. Review your existing file structure 2. Organize your files into 3 categories, namely 1) Current 2) Archive and 3) Delete <p>Current: files moving over to SharePoint</p> <p>Archive: files moving to an Archive library in SharePoint (limited access)</p> <p>Delete: files tagged for clean-up e.g. duplicate files, old files etc.</p>		
<p>Clean-up & Archiving requirements</p> <p>Plan / document how your files will map over to Teams/SharePoint</p> <p>See Annexure C</p> <p><i>(See image below on how to think about mapping)</i></p>  <pre> graph TD A[My Docs/Personal folder] --> B[OneDrive] C[Internal team docs (e.g. HR/Finance)] --> D[MS Teams] E[Company-wide docs (e.g. policies)] --> F[SharePoint communication site] </pre>		
<p>Migration Tool</p> <p>It's recommended that you use a migration tool to help with the lift.</p>		

2.5 365 Productivity Apps

Item	Owner(s)	Status
<p>We recommend conducting interviews with a cross-section of users to:</p> <ol style="list-style-type: none"> 1. Identify communication, collaboration & productivity challenges & opportunities 2. Match with 365 app (e.g. Team Task management = MS Planner, individual task management = To Do, forms = MS Forms etc.) 3. Conduct appropriate training 		

2.6 Training

Item	Owner(s)	Status
<p>Champions Training</p> <p>We recommend a training program for your 365 Champions that includes:</p> <ul style="list-style-type: none"> • MS Teams Training • SharePoint Training • Advanced document management • App training (as identified in section 5) e.g. MS Planner, MS Forms etc. • Copilot Training (if required) 		
<p>Identify Team</p> <p>Identify Champion Team</p>		
<p>Scheduling</p> <p>How will training be scheduled? (e.g. over lunch hours, dedicated hours/days?)</p>		
<p>Training Plan & Resources:</p> <p>What will your training plan cover?</p>		
<p>Other Training</p> <p>Teams and SharePoint Owner training</p> <ul style="list-style-type: none"> • What training will be provided for these users in order to understand their roles and responsibilities? <p>All staff training</p> <ul style="list-style-type: none"> • Basic understanding of Teams, document management and how to use the SharePoint intranet. <p>Training Resources</p> <ul style="list-style-type: none"> • What additional resources will be provided e.g. YouTube content, training content on your SharePoint site etc. 		

2.7 Maintenance & Governance

Item	Owner(s)	Status
<p>Governance</p> <ul style="list-style-type: none"> Identify your governance team Decide on a governance cadence Create a governance policy which includes information on your tenant setup, decisions like provisioning, access review processes etc. <p>See governance checklist Annexure D</p>		
Adoption Resources		

3. Planning Templates

3.1 Annexure A - MS Teams Structure Planning

Future Teams Structure			O = Owner M = Member						
Team	Channel	Channel Type	Team Member 1	Team Member 2	Team Member 3	Team Member 4	Team Member 5	Team Member 6	Team Member 7
Leadership	General	Standard	O		M		M		
	Training	Standard							
All Staff	General	Standard	O	M	M	M	M	M	M
	Social	Standard							
HR	General	Standard			O		M	M	M
	Recruitment	Standard							
	Payroll	Private			O		M		
Marketing	General	Standard		O			M	M	M
	Marketing Shared Channel	Shared Channel		O			M	M	M
Sales	General	Standard			O				
	Marketing Shared Channel	Shared Channel			O				

3.2 Annexure B - SharePoint Structure Planning

Sharepoint Site	Site Type	Site Permission Type (Read only, etc.)	Notes (if applicable)	Document Library Name	Folder Structure (if applicable)	Document Library Permissions	Metadata (if applicable)
Home	Communication	Owner: Joe Bloggs / Sam Smith Member: Sara Crous / Nestor Wilke Visitor: All staff	News	Default Library: Interviews	N/A - Using Metadata	Same as Parent site	Document Type: (Resume, Interview recording, Offer letter) Hiring Department: (e.g. Marketing, Finance, Operations etc.)
HR	Communication	Owner: Joe Bloggs / Sam Smith Member: Marian Foster Visitor: All staff	Policies & Procedures Onboarding Resources	Library 1: Policies & Procedures Library 2: Onboarding Documents	N/A - Using Metadata	Same as Parent site	Library 1: Policy Type (e.g Hiring Policy, Job Descriptions etc.) Library 2: Year
Marketing	Communication	Owner: Joe Bloggs / Sam Smith Member: Jody Wilken Visitor: All staff		Default Library: Marketing Resources	N/A - Using Metadata	Same as Parent site	Resource Type: (Presentation, Brochure, Blog, Video)

3.3 Annexure C – File server to SharePoint Mapping

File Server to SharePoint Mapping

File Server	
Root	Folder
H:\ HR	Interviews
	Policies
	Payroll

Teams/SharePoint		
SharePoint Site	Channel/Document Library	Folder
HR Team Site	General	Root Folder
HR Team Site	General	Root Folder
HR Team Site	Payroll	Root Folder

H:\ HR	Audits
	Taxes
	Policies & Procedures

Finance Team Site	Audit Documentation	Root Folder
Finance Team Site	Taxes	Root Folder
Finance Communication Site	Default Library	Root Folder

3.4 Annexure D - Governance Checklist

Guiding Questions - General

Question	Answer	Resources
What are your key business goals and how can MS 365 support this? Example: <ol style="list-style-type: none"> 1. Work with external partners/ vendors 2. Need space for internal project collaboration 3. Team task management 		What is collaboration governance? Create your collaboration governance plan
Governance Team - who are they?		
Frequency - how often will you meet?		
Meeting Topics / who should attend?		
Which reporting mechanisms will you use? <ul style="list-style-type: none"> • Admin centers • 3rd party tool 		
How will M365 updates be handled and communicated? <ul style="list-style-type: none"> • Message Center • Planner 		Track your message center tasks in Planner

Content Governance Summary

Solution Area	Ownership/ Accountability	Who Can Create?	External Access Allowed?	Frequency/Type of Review?
Intranet Home Site				
Communication Sites				
Team Collaboration Workspaces (Microsoft Teams and Team Sites)				
Personal Libraries in OneDrive for Business				
Viva Engage Communities				

Tenant/Global Settings - Guiding Questions

Question	Answer	Resources
<p>Is MFA enabled? Is conditional access enabled? Copilot?</p>		<p>Set up multi factor authentication for Microsoft 365</p>
<p>Who can create M365 Groups? This affects the creation of Teams, shared Planners, group-connected team sites etc.</p>		<p>Manage who can create Microsoft 365 Groups</p>
<p>Who can create SharePoint sites?</p>		<p>Manage site creation in SharePoint</p>
<p>Onboarding / off boarding procedures: What process is in place for onboarding and off boarding new employees?</p>		<p>Remove a former employee and secure data</p>
<p>Sharing settings (tenant level): What are the sharing settings at the tenant level?</p>		<p>Manage sharing settings for SharePoint and OneDrive in Microsoft 365</p>
<p>Guest / external access: Is guest or external access allowed?</p>		<p>Manage guest access in Microsoft 365 groups</p>
<p>Retention?: Do you have a retention policy?</p>		<p>Create and configure retention policies</p>

Microsoft Teams - Guiding Questions

Question	Answer	Resources
<p>Provisioning – Who can create</p> <ol style="list-style-type: none"> Teams? Channels? <p>If provisioning is limited, what is the change management process for users to request Teams?</p>	<p>(E.g. Desk ticket / team owner approval?)</p>	<p>Manage who can create Microsoft 365 Groups</p>
<p>Naming Conventions</p> <p>Does your organization require a specific naming convention for teams?</p>		<p>Microsoft 365 Groups and Microsoft Teams naming policy</p>
<p>Guest / External access</p> <p>Are guests allowed in your Teams? Can users invite them?</p>		<p>Turn guest access in Microsoft Teams on or off</p> <p>Collaborate with guests in a team (IT Admins)</p>
<p>Lifecycle management</p> <p>How are inactive workspaces identified? Are they deleted/archived?</p>		<p>Microsoft 365 Reports in the admin center – Microsoft Teams usage activity</p>
<p>Membership management</p> <ol style="list-style-type: none"> How is this managed (Assigned / Dynamic memberships)? What are on and off boarding procedures? 		<p>Types of groups in Microsoft 365</p> <p>Create/update a dynamic group</p>
<p>Permissions / access reviews</p> <ol style="list-style-type: none"> How frequently are access reviews conducted to confirm that the right people have access? What reporting mechanism is used? 		
<p>Owner training</p> <p>What minimum training is required for Teams Owners? Where is this training housed (e.g. SharePoint intranet training portal)</p>		<p>Owner training</p>
<p>Teams meeting policies</p> <p>What are your organizational meeting policies?</p>		<p>Teams meeting policies</p>

Microsoft SharePoint - Guiding Questions

Question	Answer	Resources
<p>Provisioning Who can create SharePoint sites? If this setting is disabled, what is the process for requesting the creation of a SharePoint site (e.g. Help desk ticket?)</p>	<p>(E.g. Help desk ticket / team owner approval?)</p>	<p>Manage site creation in SharePoint</p>
<p>Naming Conventions Does your organization require a specific naming convention for sites?</p>		<p>SharePoint naming guidelines</p>
<p>Guest / External access Is external access allowed? For which sites?</p> <p>Shared Settings What are the sharing settings (see tenant/global settings)</p>		<p>Manage sharing settings for SharePoint and OneDrive in Microsoft 365</p>
<p>Lifecycle management How are inactive workspaces identified? Are they deleted on a regular basis?</p>		<p>View usage data for your SharePoint site</p>
<p>Site Permissions / access reviews</p> <ol style="list-style-type: none"> Who is accountable for determining and assigning permissions to access the site? How frequently are access reviews conducted to confirm that the right people have access to sites? What reporting mechanism is used? 		<p>Understand groups and permissions on a SharePoint site</p>
<p>Owner training What minimum training is required for Site Owners? Where is this training housed (e.g. SharePoint intranet training portal)</p>		<p>Mytech SharePoint training: Train the trainer</p> <p>Part 7, Part 8</p>
<p>SharePoint Design / Theme colors / Branding Are there company guidelines in this regard?</p>		
<p>Who is accountable for ensuring that the content on the site follows governance policies and guidelines?</p>		

Simple Teams Checklist

Description	Check Y/N	Checked by
Do you have a process in place in order to lock down Teams & channel creation?	Y N	
<p>365 Teams admin report – Analytics & Reports > Usage Reports</p> <p>Teams Usage report – 90 days</p> <ul style="list-style-type: none"> • Review post, reply, and channel messages. • Low activity could either indicate further training opportunities or • Clean-up / consolidation required 	<p>Y N</p> <p>Y N</p> <p>Y N</p>	
<p>Teams > Manage Teams</p> <ul style="list-style-type: none"> • Review teams, channels, and members • Are these teams and channels appropriate for your organization? • Is there team or channel sprawl? • Is there opportunity for clean-up? • Review owners/members. • Review guest access / disable access where required. 	<p>Y N</p> <p>Y N</p> <p>Y N</p> <p>Y N</p> <p>Y N</p> <p>Y N</p>	
<p>Review channels</p> <ul style="list-style-type: none"> • Are these appropriate? • Is there channel sprawl? • Opportunity for clean-up or consolidation? 	<p>Y N</p> <p>Y N</p> <p>Y N</p>	

Simple SharePoint Checklist

Description	Check Y/N	Checked by
<p>SharePoint documentation up to date?</p> <ul style="list-style-type: none"> • Sites / Site types / Permissions (See supporting documentation) • Document libraries / user permissions 	<p>Y N</p> <p>Y N</p>	
<p>External sharing / Guest access</p> <ul style="list-style-type: none"> • Review external sharing and guest access • Conduct clean-up where appropriate 	<p>Y N</p> <p>Y N</p>	
<p>365 SharePoint admin report (SharePoint Admin Center > 'Active sites')</p> <p>Sites not accessed for > 180 days</p> <ul style="list-style-type: none"> • Determine why site/s have not been accessed. • Is this a potential clean-up opportunity? • Potential training / adoption opportunity? 	<p>Y N</p> <p>Y N</p> <p>Y N</p>	
<p>Page views / Page visits < 10</p> <ul style="list-style-type: none"> • Determine reason. • Potential clean-up opportunity? • Potential training / adoption opportunity? 	<p>Y N</p> <p>Y N</p> <p>Y N</p>	
<p>Process in place for change requests?</p> <ul style="list-style-type: none"> • (I.e., how do users submit requests for SharePoint sites / navigation / feature requests?) 	<p>Y N</p>	

