PATRIOT PROFESSIONAL SOLUTIONS LLC

Illustrative SharePoint Online Migration Readiness Snapshot

An anonymized example of the findings and recommendations provided during a readiness engagement

ILLUSTRATIVE SAMPLE - NOT BASED ON AN ACTUAL CLIENT

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All organizations, observations, ratings, risks, quantities, and timelines in this document are fictional and illustrative.

Executive Summary

Illustrative scenario and qualitative readiness view

Fictional scenario: Illustrative Organization A is preparing to consolidate approximately 48 legacy SharePoint sites and departmental shared-drive content into SharePoint Online. The environment supports roughly 300 users and contains a mix of active collaboration content, stale records, inherited permissions, and several business-critical workflows. No real organization or client data is represented.

Illustrative Readiness Position

OVERALL READINESS	GOVERNANCE	DEPENDENCIES	RECOMMENDED START
AMBER	MATERIAL GAPS	4 PRIMARY	2-WEEK SPRINT
Conditional readiness	Ownership and permissions	Decisions before pilot	Inventory and owner validation

The qualitative rating above is illustrative and does not disclose a PPS scoring formula.

Primary governance concerns

- Named ownership is missing or outdated for several sites and libraries.
- Broad access groups and direct permissions reduce accountability.
- Retention, record status, and deletion authority are not consistently documented.
- External sharing and naming practices vary by business area.

Major migration dependencies

- Validated inventory and migration disposition for each workload.
- Business-owner decisions for archive, retire, remediate, or migrate.
- Workflow, integration, and unsupported customization review.
- Approved retention and validation criteria before content movement.

Recommended starting actions

- Confirm accountable business and technical owners.
- Create a decision-ready inventory with disposition and risk flags.
- Remediate high-risk permissions and stale sharing links.
- Establish pilot entry and exit criteria before scheduling waves.

Proposed implementation sequence

- 1. Discover and inventory the environment.
- 2. Resolve governance decisions and ownership.
- 3. Remediate content, permissions, and dependencies.
- 4. Pilot, validate, then migrate controlled production waves.

Governance Gap Assessment

Representative observations only - all findings and priorities are illustrative

Assessment area	Current-state observation	Risk or business impact	Priority	Recommended action
Site ownership	Several sites list former staff or generic mailboxes as owners.	Decisions may stall; accountability and validation are unclear.	High	Validate two accountable owners and escalation path per site.
Permissions	Direct grants and broad groups are used alongside inherited access.	Excess access may migrate and remain difficult to audit.	High	Map access, remove obsolete grants, and use governed groups.
Information architecture	Site purposes, navigation, metadata, and authoritative locations vary.	Users may recreate clutter and duplicate content after migration.	Medium	Define target structure, metadata minimums, and source-of-truth rules.
Records and retention	Record status and required retention are not consistently documented.	Premature deletion or over-retention may create business and legal risk.	High	Obtain approved retention and disposition decisions before movement.
External sharing	Historical guest accounts and sharing links have not been fully reviewed.	External access may persist beyond the business need.	High	Review guests and links; document approved sharing patterns.
Naming standards	Sites and libraries use inconsistent titles, abbreviations, and naming patterns.	Search, support, reporting, and ownership become less reliable.	Medium	Approve a practical naming convention and exception process.
Content lifecycle	Inactive, duplicate, and obsolete content is mixed with active material.	Migration cost and user confusion increase; stale content gains new visibility.	Medium	Apply archive, delete, consolidate, or migrate decisions by owner.
Migration accountability	Wave approvals, issue ownership, and validation sign-off are not assigned.	Defects may remain unresolved and go/no-go decisions may be delayed.	High	Assign migration sponsor, workstream owners, and acceptance authority.

Interpretation: Priority indicates the illustrative urgency of a governance decision or remediation action. It is not a legal, compliance, security, or audit conclusion.

Readiness Roadmap

Illustrative phased sequence - actual timing depends on environment size, complexity, access, and decision speed

1. Discovery & inventory	2. Governance decisions	3. Content remediation	4. Pilot migration	5. Production & validation

Detailed illustrative roadmap

Phase	Estimated sequence	Primary owner(s)	Key dependencies	Exit criteria
Phase 1: Discovery and inventory	Weeks 1-2	Migration lead + site administrators	Access to inventories, usage data, and owner lists	Validated workload inventory; initial dispositions and dependency flags recorded.
Phase 2: Governance decisions	Weeks 2-3	Business owners + governance lead	Owner participation; policy, retention, sharing, and naming decisions	Required governance decisions approved; unresolved items assigned and dated.
Phase 3: Content remediation	Weeks 3-6	Site owners + technical team	Approved dispositions; access to content and permissions	High-risk permissions addressed; stale content dispositioned; blocking customizations resolved.
Phase 4: Pilot migration	Weeks 6-8	Migration team + pilot owner	Representative pilot; test plan; support and rollback approach	Pilot meets acceptance criteria; issues documented; wave plan updated.
Phase 5: Production migration and validation	Weeks 8-12+	Migration manager + business validators	Approved waves, communications, support coverage, and go/no-go authority	Content and access validated; exceptions accepted or remediated; closure recorded.

Implementation controls

Decision cadence	**Evidence standard**	**Go/no-go authority**
Weekly governance and migration decisions with named approvers.	Inventory, approvals, test results, and exceptions retained in a controlled repository.	A named sponsor records readiness, accepted risk, and authorization for each wave.

Risk Register

Representative migration-readiness risks - ratings and owners are illustrative

Risk ID	Risk description	Probability	Impact	Overall rating	Mitigation action	Proposed owner
R-01	Unidentified or inactive site owners prevent timely disposition and validation decisions.	High	High	**High**	Require two accountable owners or sponsor disposition before wave assignment.	Business sponsor
R-02	Excessive, direct, or poorly documented permissions are carried into the target environment.	High	High	**High**	Review access, remove obsolete grants, and migrate through governed groups.	M365 / security lead
R-03	Unsupported customizations, workflows, or integrations fail or behave differently after migration.	Medium	High	**High**	Inventory dependencies; redesign, retire, replace, or test before production.	Technical lead
R-04	Stale, duplicate, or low-value content increases migration effort and degrades the target experience.	High	Medium	**Medium**	Owner-led disposition; archive or delete with approved retention considerations.	Site owners
R-05	Retention and record requirements remain unclear when content is moved or deleted.	Medium	High	**High**	Obtain documented records, legal, privacy, or compliance direction as applicable.	Records / governance owner
R-06	Pilot or business validation is insufficient to detect access, content, or usability defects.	Medium	High	**High**	Assign representative validators and document acceptance tests before each wave.	Migration manager

Illustrative risk-response rules

HIGH	MEDIUM	ACCEPTED RISK
Assign an owner and mitigation date before the affected migration wave.	Track in the readiness plan and resolve or formally accept before cutover.	Record decision authority, rationale, expiration/review date, and compensating controls.

Important: This sample is not a security assessment, legal opinion, compliance certification, or audit. Actual risk treatment must be tailored to the organization and reviewed by appropriate stakeholders.

Acceptance Checklist and Next Steps

Illustrative readiness gates for pilot or production authorization

Illustrative acceptance checklist

[ ] Inventory completed and reviewed [ ] Business and technical owners identified [ ] Governance decisions approved [ ] Migration scope and dispositions confirmed	[ ] Pilot users and validators assigned [ ] Validation criteria documented [ ] Risks accepted or mitigated [ ] Go/no-go decision recorded

Recommended next steps for the illustrative scenario

1	Confirm accountable owners and the authority to approve migration disposition.
2	Complete the decision-ready inventory and isolate blocking permissions, retention, and dependency issues.
3	Select a representative, low-complexity pilot and document acceptance criteria before movement.
4	Use pilot evidence to approve production waves, support coverage, communications, and validation responsibilities.

Engagement closeout evidence

Approved inventory and disposition record, including unresolved exceptions.
Governance decision log and risk register with owners and target dates.
Pilot validation results, issue resolution status, and recorded go/no-go decision.

Need a readiness assessment tailored to your environment?

Schedule a 20-minute Fit Review or request a SharePoint Online Migration Readiness & Governance Review.

Visit the SharePoint readiness service page | **Contact PPS**

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