



Digital Workplace Audit Checklist

For IT leaders looking to streamline, simplify,
and connect their Microsoft 365 ecosystem

Use this checklist to assess the current state of your digital workplace. Tick off what you've already done, see what's still on the to-do list, and use the scoring system to see how mature your digital estate is.



Platform Inventory:

What Tools Are Actually in Use?

1

Before you can optimise or streamline anything, you need a clear picture of the digital tools your organisation is actually using — and which ones are just gathering dust.

Microsoft 365 tools currently in use

Take stock of all the M365 apps actively being used across the business — not just by IT, but across departments. Think Teams, SharePoint, OneDrive, Forms, Stream, Planner, and Viva Engage. Are people using them to their full potential or just scratching the surface?

Microsoft 365 tools you're licensed for but not using

It's not unusual for organisations to have licenses for tools like Viva, Copilot, Power BI, or Power Automate — but not actually implement them. List these out so you can identify untapped value.

Non-M365 tools being used for similar functionality

Are tools like Dropbox, Trello, Slack, Zoom, or even legacy intranets being used alongside (or instead of) M365 tools? Map out what's in play across different teams or regions.

Functional duplication across tools

Are people storing files in both Dropbox and OneDrive? Managing tasks in Planner and Trello? Booking meetings in Zoom and Teams? Look for overlaps and assess what can be consolidated to reduce cost, complexity, and confusion.

Opportunities for simplification or rationalisation

From a licensing, security, and user experience perspective, fewer tools working smarter together is almost always better than more tools in isolation.

Information Landscape:

Where Is Your Content Living?

2

Your digital workplace is only as good as your ability to find and trust the information within it. This section helps uncover where fragmentation might be hiding.

Key document storage locations are mapped

Is content spread across SharePoint, OneDrive, email attachments, Teams chat, network drives, personal folders, and legacy platforms? Map out the full landscape.

Duplicated or siloed content is identified

It's not uncommon to find multiple versions of the same document living in different places — e.g. separate departmental versions of a policy or form. These silos often go unnoticed until something goes wrong.

You've assessed how easily employees can find what they need

Check recent helpdesk or IT tickets: are people regularly asking "where's the holiday request form?" or "which version of the policy is correct?" A quick survey or listening session can go a long way in surfacing everyday frustrations.

You've tested the search experience

Try a few common queries (e.g. "expenses policy", "wellbeing benefit") and see what comes up. Are the results accurate, consistent, and up to date — or is outdated and irrelevant content showing up first?

Employee Experience: How Are People Navigating the Digital Workplace?

3

A strong digital workplace isn't just technically sound — it's intuitive and useful for the people who rely on it every day.

There is a central entry point for digital tools and content

Whether it's an intranet, employee portal, or web app, employees need one place to access everything — tools, policies, updates, documents, apps, and more.

Employees know where to go and why

If people are asking where to start their day or constantly bookmarking different systems, the experience isn't working. A single front door, integrated with the rest of your Microsoft ecosystem, brings clarity.

Experiences are consistent across teams, departments, and geographies

If one team has access to slick tools and another is still digging through email chains, you've got a gap in digital equity.

Frontline and remote workers aren't an afterthought

Think beyond desk-based roles: how do frontline, mobile, or non-licensed users access what they need?



How to assess this:

Speak to Internal Comms, HR, or department heads — they often have rich insight into pain points and workarounds already in play. Many will have existing data from employee surveys, exit interviews, or pulse checks that surface digital friction. Don't reinvent the wheel — ask to collaborate.

Governance & Security: Is Everything Aligned and Protected?

4

Security and compliance don't have to slow you down — with the right structures, they actually support better collaboration and trust.

Permissions and access rights are centrally managed and regularly reviewed

Who has access to what — and why? Are old SharePoint sites still accessible years after a project ends? Do ex-employees retain access to company files?

Sensitive information is properly classified and protected

Use tools like Microsoft Purview to apply sensitivity labels (e.g. "Confidential", "Internal Only") and control access. If your HR policies and salary spreadsheets live side-by-side, something needs tightening.

Version control and document lifecycle policies are in place

If your naming conventions look like "Final_v3_REALLYfinal_2022", you might not have proper versioning enabled. Document retention policies also prevent clutter and reduce risk.

Clear usage conventions exist for teams, folders, metadata, and naming

Are departments making it up as they go? Without guidance, your beautiful SharePoint structure can quickly turn into a digital junk drawer.



Start small:

Focus first on your most sensitive or most-used areas — HR, finance, leadership sites — then scale your governance framework outwards.

Integration & Automation: Are Your Tools Working Together?

5

A well-connected digital workplace should remove barriers, not add more tools to juggle. This is where your M365 investment can really shine.

Manual, repetitive tasks are being identified for automation

Are leave requests still emailed around for approval? Are onboarding documents manually sent to each new starter? Tools like Power Automate and Power Apps can reduce effort and errors.

Duplicated functionality is being reviewed

If three departments are using three different survey tools, or tracking project progress across spreadsheets, Lists, and Monday.com — there's a chance to consolidate and improve standardisation.

Systems are integrated across the Microsoft stack

Make sure Teams, SharePoint, and Viva are connected — not treated as isolated tools. For example, surface SharePoint content inside Teams or use Viva Connections to bring your intranet into your daily flow.

Power Platform is being used strategically, not just experimentally

Are citizen developers empowered to build and improve processes — or is the platform sitting idle due to lack of governance or awareness?

Strategic Readiness: Are You Set Up to Evolve?

The goal isn't just to fix what's broken — it's to lay the groundwork for what comes next.

You have a clear vision or roadmap for your digital workplace

Even if it's high-level, knowing where you're heading helps you make smarter day-to-day decisions. Is your intranet evolving into a more complete digital HQ? Is Viva or Copilot on the horizon?

Key departments are aligned on goals and priorities

Digital workplace success doesn't sit with IT alone. HR, Comms, Legal, and Operations all play a part in shaping and supporting the experience.

Employee needs are influencing platform choices

Have you properly listened to your people? Is the technology helping them do their jobs better — or just protecting the organisation?

You're ready for what's next (AI, Copilot, Viva, etc.)

These tools are powerful — but only when built on strong foundations. A fragmented digital estate will only lead to more complexity once AI is layered in.

Score Yourself



0–10 boxes ticked

Time for a rethink. You've got digital sprawl and missed potential.

11–20 boxes ticked

Strong foundations, but there's room to streamline, align, and optimise.

21–25 boxes ticked

You're in great shape — now it's time to evolve from tool management to experience design.



Ready to take action?

Silicon Reef helps IT leaders bring order, clarity, and real value to their digital workplaces — with Microsoft 365 tools like SharePoint, Power Platform, Copilot and Viva.

We specialise in creating people-first experiences that are secure, scalable, and aligned to your business goals.

If you know what you need and are ready to get started, **book a consultation** with one of our experts.

BOOK A CONSULTATION

If you need help figuring out what's best, **book an "Art of the Possible" session** for a personalised roadmap.

BOOK AN ART OF THE POSSIBLE SESSION

