

Workspace Migration Checklist

Systems & People Operations — Sample Template

How to Use This Checklist

Work through the four phases in order and assign a named owner and target date to each before starting. The goal is a system the team can run without me — adoption isn't done until the legacy tools are actually retired, not just until the new one exists.

Phase Tracker

Phase	Owner	Target Date	Status
Audit			Complete
Structure			Complete
Migrate			In Progress
Adopt			Not Started

Phase 1 — Audit

- Inventory all existing drives, inboxes, and tools currently in use
- Identify a document owner for each major content area
- Flag duplicate or conflicting versions of key documents

Phase 2 — Structure

- Design the target information architecture (top-level sections)
- Define access tiers (Company-wide / Department / Leadership-only)
- Set naming conventions for pages and files

Phase 3 — Migrate

- Move and re-tag content by category, owner, and freshness
- Archive deprecated content rather than deleting it outright
- Spot-check migrated content for broken links or references

Phase 4 — Adopt

- Train the team on the new system
- Set a review cadence for stale content, with a named internal owner for the review
- Retire legacy tools once adoption is confirmed