

DO I HAVE TO MIGRATE?

A SharePoint Migration decision guide for 2026 readiness



Are you ready to make the leap to SharePoint Online? Use this self-assessment to evaluate whether your current SharePoint environment meets the dynamic operational, regulatory, and user expectations of today's modern workplace.

How It Works: Mark a check next to each question and respond honestly. Encourage other team members to complete the assessment too. If you find yourself checking "Yes" more than a few times, it strongly suggests it may be time to embrace modernization. At the end, refer to the scoring key to help you make your final decision.

Compliance

- Are any of your sites still using Classic pages, custom master pages, or custom script?
- Do you need traceable, full-fidelity audit logs for all user activity?
- Are you obligated to meet standards such as ISO 27001, SOC 2, HIPAA, GDPR, CMMC, or FedRAMP?

Security

- Do you rely on Script Editor Web Parts, embedded JavaScript, or other ungoverned customizations?
- Do you need advanced security features like Conditional Access, sensitivity labels, DLP, or Insider Risk?
- Do your current sites show inconsistent permission structures or unique permissions?

User Experience

- Have employees expressed that sites look outdated, cluttered, or hard to navigate?
- Do you need mobile-friendly or responsive intranet pages?
- Do you rely on web parts or layouts that are no longer supported?

Site Performance

- Do your Classic pages load slowly or inconsistently?
- Are you using workflows (2010/2013) or InfoPath forms?
- Do site collections rely on legacy features like classic search or farm-style structures?

Accessibility

- Do your pages struggle to meet WCAG or AODA accessibility requirements?

- Are important resources locked behind images, fixed-width layouts, or custom HTML?
- Do you lack consistent colour contrast, keyboard navigation, or support for screen readers?

Governance

- Do you have inconsistent site templates, navigation, or branding across your tenant?
- Are site owners creating custom solutions to compensate for old limitations?
- Do you lack visibility into who owns which sites or what content lifecycle policies apply?

Content Lifecycle & Information Architecture

- Is outdated content or an inconsistent structure making navigation difficult?
- Do you lack tagging, metadata, or consistent content types?

Integration & Automation

- Do critical processes depend on legacy workflows or on-prem integrations that don't align with Microsoft 365?
- Are users relying on custom or third-party add-ons because SharePoint can't meet current needs?

Search & Findability

- Is it difficult for staff to find content quickly using your current search?
- Do users rely on bookmarks or outdated links because search results are inconsistent?

Collaboration & Sharing

- Are employees frequently downloading files to work offline because online collaboration feels slow or unreliable?
- Do you see over-sharing or sensitive content stored in the wrong places?

Adoption & Change Management

- Is the adoption of your current SharePoint low or stagnant?
- Do users create workarounds or shadow IT because SharePoint feels outdated?

Future-Proofing & Roadmap Alignment

- Is your current model limiting your ability to use new Microsoft 365 and Copilot features?
- Are you concerned about the viability of classic components as Microsoft continues to deprecate them?

Capacity, Storage & Cost Efficiency

- Are you hitting storage limits, dealing with duplication, or carrying inefficient file structures?
- Are you maintaining legacy or hybrid setups that increase support costs?

Scoring & Next Steps

How to evaluate your score:

- ✓ **10+ “Yes.”** Modernization is urgent. You’re carrying structural risk across multiple pillars that affect security, compliance, and productivity.
- ✓ **6–9 “Yes.”** Plan migration soon. You’ve outgrown classic; maintenance costs and risks are rising. Build a phased roadmap.
- ✓ **3–5 “Yes.”** Modernization will deliver clear value. Prioritize by business impact (compliance/security first, then UX/performance).
- ✓ **0–2 “Yes.”** You’re aligned mainly with 2026 expectations. Continue incremental improvements and governance tuning.

Move Forward with Confidence

Have you completed the readiness checklist? Fantastic! You now have a comprehensive understanding of your SharePoint environment and can pinpoint the next steps that need your focus.

If you are ready to make the switch to Modern SharePoint, Envision IT is here to assist you. We provide services including information architecture, readiness assessments, migration implementation, and adoption strategies to ensure a seamless and secure modernization journey.

[Discover more about Envision IT's Migration Strategy services](#) and begin developing your SharePoint 2026 modernization roadmap today, or [contact us to book your SharePoint Migration discovery call](#).