SharePoint Server 2019 End-of-Life Transition Checklist

Objective: Ensure business continuity, data integrity, compliance, and future scalability while minimizing disruption.

HIGH PRIORITY (Immediate Action — Start Now)

1. Strategic Planning

Assess Current SharePoint Usage

- Inventory all existing SharePoint 2019 sites and subsites.
- Identify site templates and customizations in use.
- Catalog lists, libraries, workflows (for example, SharePoint Designer and Nintex), and InfoPath forms.
- Map content ownership, metadata, and permission structures.

Link and Reference Validation

- Test all document links and embedded references
- Validate cross-site collection links
- Ensure external links remain functional
- Plan for broken link remediation

Define Business Goals & Future Needs

- Identify whether business direction favors cloud-first or hybrid/on-premises.
- Involve business units to document functional requirements.
- Choose between:
  - o Migration to Microsoft 365 (SharePoint Online)
  - o Upgrade to SharePoint Server Subscription Edition (SPSE)

Evaluate Security & Compliance Risks

- Map out existing compliance obligations (such as GDPR or HIPAA).
- Identify sensitive data that must be secured during transition.
- Review audit, retention, and classification policies.

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Develop a Migration Roadmap

    Establish migration phases (for example, pilot > phased rollout > full migration).

    Define key milestones and review checkpoints.

    Assign responsibilities and timelines.

2. Risk Mitigation & Cost Assessment

Estimate Migration Costs

    Microsoft 365 licensing (such as E3/E5, add-ons).

    Infrastructure upgrades or cloud provisioning.

    Consultant, tooling, and partner services.

    Post-migration optimization and training.

Assess IT Resource Availability

    Evaluate internal capacity (skills and time).

    Identify training needs or external partner involvement.

Establish Interim Security Measures

    Patch and harden SharePoint 2019.

    Disable unused services and web parts.

    Monitor access logs and suspicious activity.

Plan for Data Backup & Disaster Recovery

    Backup all content before migration.

    Validate restore processes.

    Document failback plan in case of migration failure.

MEDIUM PRIORITY (Preparation Phase – 6-12 Months Before Migration)

1. Migration Path Selection

Choose Migration Strategy

    Microsoft 365 Benefits:

    o Automatic updates

    o Built-in compliance & security

    o Integration with Teams, OneDrive, Viva

    SharePoint Server Edition Benefits:

    o Retains existing infrastructure investment

    o Supports hybrid cloud

    o Maintains feature compatibility with SharePoint Online
      (with some limitations)

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Clean & Optimize Content

Archive or delete obsolete content.

Flatten folder structures.

Consolidate or retire unused lists and libraries.

Normalize metadata.

Assess Third-Party Integrations

Document and test third-party tools or add-ons.

Replace unsupported solutions with Microsoft-native alternatives.

Coordinate with vendors for compatibility updates.

2. Technical Readiness

Validate Infrastructure Compatibility

Confirm current hardware/software prerequisites.

Ensure domain, Active Directory, and DNS alignment.

Enable Hybrid Identity if moving to Microsoft 365.

Run a Pilot Migration Test

Select representative sites (such as HR, IT, Finance).

Test data integrity, permissions, and workflow functionality.

Document errors and refine migration scripts.

Optimize Workflows & Permissions

Replace legacy SharePoint Designer workflows with Power Automate.

Migrate InfoPath forms to Power Apps where applicable.

Ensure permission inheritance is streamlined.

Prepare Training Documentation

Develop user-friendly guides and quick-starts.

Document changes in UI/UX and functionality.

Establish feedback and issue reporting channels.

LOW PRIORITY (Post-Migration Enhancements – Stabilization & Growth)

1. Execution & Performance Monitoring

Execute Full Migration

Use tools such as ShareGate, AvePoint, or Microsoft Migration Manager.

Validate migration logs for errors and omissions.

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Ensure version history and metadata retention.

Monitor Usage Analytics & Activity Reports

Enable Microsoft 365 usage analytics.

Track user adoption trends, content access, and engagement levels.

Adjust adoption strategy accordingly.

Resolve Post-Migration Issues

Conduct QA audits with site owners.

Address broken links, missing content, or misconfigured permissions.

Deploy hotfixes or reconfigure integrations.

2. User Training & Future Scalability

Communicate Changes to Stakeholders

Deliver pre-migration briefings to leadership and users.

Share a go-live calendar and expected impact.

Conduct Training & Support Sessions

Offer role-based training (Admins, Contributors, Readers).

Provide support office hours or drop-in clinics.

Create FAQs and internal wikis.

Optimize Page Engagement & Conversion

Use SharePoint Online's modern web parts and layouts.

Improve performance with fewer custom scripts.

Personalize landing pages by role/team.

Plan Long-Term Scalability

Establish an evergreen strategy for future upgrades.

Define governance policies for site sprawl, content ownership, and lifecycle.

Incorporate AI tools and Microsoft Copilot for productivity gains.

Supporting Deliverables (Templates You May Need)

Migration Readiness Assessment Template

Content Inventory Workbook

Risk Register

Training Plan & Calendar

Communication Plan

Change Management Strategy