



Is Your Data Ready for Digital Transformation?

Data Readiness Checklist

The next digital revolution isn't about technology — it's about the data that feeds it. Unwieldy legacy ECM systems, unstructured SharePoint sites, and inconsistent data quality hinder innovation. And without fixing the root of the problem, you're bound to see history repeat itself.

This data readiness checklist helps you assess your organization's data maturity across three key use cases:

- migrating from a legacy ECM
- integrating critical data from external task-specific applications
- optimizing SharePoint for Copilot and AI-readiness

Data Readiness Maturity Model

As with anything in life, the first step toward improvement is understanding where you stand today. How ready is your organization for true digital transformation? Use this quick-scan to see where you stand — and what to tackle next.

Spoiler alert: Most organizations score between Level 2 and Level 3.

Level	State of Your Data	Typical Symptoms	Next Step
1. Unstructured	Data is scattered across legacy ECMs, file shares, and outdated SharePoint sites.	No single source of truth. Duplicates everywhere. Compliance at risk.	Start with discovery and ROT analysis to identify what's worth keeping.
2. Connected	Core repositories are centralized in Microsoft 365, but structure and metadata remain inconsistent.	Users struggle to find documents. Permissions are unclear.	Standardize metadata and align governance across departments.
3. Controlled	Governance and retention policies are in place. Key systems and external apps are integrated.	Migration projects succeed, but user adoption or AI results lag behind.	Focus on enrichment and user engagement to drive value from data.
4. AI-Ready	Data is clean, classified, and connected across the digital workplace.	Copilot delivers reliable insights. Compliance is automated.	Maintain continuous improvement — your data now fuels innovation.

The checklist above helps you pinpoint gaps and plan your move toward Level 4 through several use cases — one focused on migration, one on integration, and one on AI readiness.

Use Case 1: Migrating from Legacy ECM

Many organizations are still tied to legacy document management systems like OpenText, FileNet, Alfresco. These platforms often hold years — sometimes decades — of critical business data that's hard to access, slow to search, and expensive to maintain.

Migrating your enterprise data seems like the logical step forward — but without insight into data quality, you risk replicating old issues in a new environment. The result? Higher costs, poor user adoption, and limited business value from your modernization effort.

Important points to consider before migrating from a legacy ECM:

- ❑ **Inventory completeness** — Do you have full visibility of what's stored, including hidden or outdated sites?
- ❑ **Metadata accuracy** — Are key fields consistent across repositories?
- ❑ **ROT analysis** — Do you know how much of your data is redundant, obsolete, or trivial?
- ❑ **Compliance continuity** — Are retention and archive policies preserved?
- ❑ **User adoption readiness** — Have key users validated the new structure and test migrations?

The biggest risks involved in enterprise data migration are continuity, compliance, and scalability. Standardized migration models help to maintain knowledge and efficiency across departments.

Use Case 2: Integrating Business-Critical Data from External Applications

Critical information often sits locked inside siloed systems — CRM, ERP, HR, or asset management platforms — each with its own logic, permissions, and data formats. This fragmentation leads to duplicate processes, incomplete reporting, and delayed decision-making. Even worse, when departments export or copy data manually, security and compliance risks multiply.

Without integration, your digital workplace remains incomplete. By connecting external data to your Microsoft 365 environment, you enable a single, reliable source of truth that supports both daily operations and long-term analytics.

Important points to consider before migrating from a legacy ECM:

- ❑ **API availability** — Can your source systems connect securely via Graph API or a similar interface?
- ❑ **Security & ACL mapping** — Will permissions remain intact throughout integration?
- ❑ **Data relevance** — Are only relevant datasets exposed (no data overload)?
- ❑ **Monitoring & versioning** — Is there transparency in updates and synchronization frequency?
- ❑ **Governance alignment** — Do naming conventions, metadata fields, and lifecycle policies match your Microsoft 365 setup?

If executed correctly, data integration not only boosts efficiency but also strengthens compliance. When external data is connected and managed properly, your organization gains end-to-end visibility and can finally break down those long-standing information silos.

Use Case 3: Optimizing for Copilot – Making Your Data AI-Ready

AI tools like Microsoft Copilot are only as smart as the data they access. Many organizations activate Copilot expecting instant productivity gains — only to find the insights unreliable or incomplete. The root cause is rarely the AI itself, but the data feeding it: unstructured files, outdated documents, and missing context.

When Copilot retrieves irrelevant or duplicate information, users lose trust and adoption suffers. Ensuring your data is AI-ready means giving your digital assistant the right inputs: clean, classified, and compliant information that reflects your organizational knowledge.

Important points to consider before jumping onto the AI bandwagon:

- ❑ **Metadata enrichment** — Is data tagged with meaningful labels such as project, department, or confidentiality?
- ❑ **Data hygiene** — Have duplicates and obsolete documents been removed?
- ❑ **Information architecture** — Can AI understand your SharePoint structure and taxonomy?
- ❑ **Data privacy** — Are sensitive documents properly restricted according to governance rules?
- ❑ **Feedback & refinement loop** — Is there a process to evaluate and improve AI results?

AI-ready data accelerates innovation and reduces risk. A clean, well-structured environment enables Copilot to deliver reliable insights — from faster decision-making to accurate reporting.

Turn Insight into Action

Data readiness isn't just a technical checkpoint — it's the foundation of agility, compliance, and innovation. Whether you're migrating, integrating, or optimizing data for AI, the journey begins with understanding your current state.

Are you ready to uncover where your organization stands?

Get in touch with our experts today to discuss your data readiness strategy and design your roadmap to building a digital workplace ready for transformation.



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