

Microsoft Teams Governance Checklist

Assess team structure, ownership, communication practices, file storage, guest access, meetings, and lifecycle management.

A practical governance standard

- ✓ Every team has a clear business purpose and at least two owners.
- ✓ Shared work belongs in channels; temporary coordination belongs in chat.
- ✓ Membership, guests, files, and inactive teams are reviewed regularly.

Assessment details

Organization

Reviewer

Assessment date

Next review date



Build Teams With Clear Accountability

Complete this review for a new team or an existing workspace. Check each item that meets your standard and record an owner or note for anything unresolved.

TEAM OR WORKSPACE BEING REVIEWED

STRUCTURE AND OWNERSHIP REVIEW

The team has a documented department, project, client, committee, or business purpose.	OWNER / NOTE
The team name follows a clear and consistent organizational naming standard.	OWNER / NOTE
At least two current owners are assigned and understand their responsibilities.	OWNER / NOTE
The privacy level - public, private, or limited - matches the sensitivity of the work.	OWNER / NOTE
Existing teams were checked to avoid creating a duplicate workspace.	OWNER / NOTE
Channels represent clear, ongoing subjects rather than individual people or temporary questions.	OWNER / NOTE
Private or shared channels have a documented need and accountable owner.	OWNER / NOTE
Members can easily understand where to post common questions, files, and updates.	OWNER / NOTE
The team has an expected review date, project end date, or lifecycle schedule.	OWNER / NOTE
Team owners know how to add, remove, and periodically review members and guests.	OWNER / NOTE

Minimum standard: every team should have a clear business purpose, at least two owners, intentional membership, and a scheduled review.



Reduce Clutter and Protect Shared Work

Review communication habits, file ownership, and external access. These standards help employees find work later and reduce unnecessary exposure.

COMMUNICATION, FILE, AND ACCESS REVIEW

Employees use channels for shared work that must remain visible, searchable, or available over time.	OWNER / NOTE
Employees reserve chat for quick coordination and limited, short-lived conversations.	OWNER / NOTE
Important decisions and action items are summarized in the appropriate shared workspace.	OWNER / NOTE
@mentions are used only when a specific person or group needs to act or respond.	OWNER / NOTE
Employees follow important conversations and customize notifications instead of enabling every alert.	OWNER / NOTE
Official team files are stored in the appropriate Teams channel or SharePoint location.	OWNER / NOTE
Employees understand that files shared in chat are associated with the sender's OneDrive.	OWNER / NOTE
Authoritative files are shared by link instead of creating unnecessary duplicate copies.	OWNER / NOTE
Guest access has a business justification, internal owner, limited scope, and review date.	OWNER / NOTE
Sensitive information is not placed in a workspace with broader access than the content permits.	OWNER / NOTE
Guest and external access settings are reviewed whenever the business relationship changes.	OWNER / NOTE

Storage reminder: standard channel files are stored in SharePoint; files shared through chat are associated with the sender's OneDrive.



Turn the Review Into an Action Plan

Confirm meeting and lifecycle practices, then assign priorities, owners, and deadlines for the most important improvements.

MEETING AND LIFECYCLE REVIEW

Meetings include a clear purpose, agenda, required participants, and supporting files.	OWNER / NOTE
Recording and transcription are used only when appropriate and permissions are reviewed.	OWNER / NOTE
Decisions, action items, owners, and due dates are documented after important meetings.	OWNER / NOTE
Team membership, owners, guests, channels, and file permissions are reviewed on schedule.	OWNER / NOTE
Completed or inactive teams are evaluated for cleanup, archiving, retention, or removal.	OWNER / NOTE
Retention and deletion decisions follow legal, regulatory, contractual, and records requirements.	OWNER / NOTE

PRIORITY ACTION PLAN

ACTION	OWNER	DUE DATE	STATUS / NOTES
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Next governance review	Accountable owner	Overall status
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