

1. Strategy, Urgency & Alignment:

- **Q:** How directly does this initiative support our key company growth objectives mentioned?
 - **Answerable from Docs?** Yes.
 - **Supporting Docs:** Business Case.
 - **Info Available:** The Business Case explicitly links the project to supporting anticipated expansion by addressing scalability failures, onboarding friction, and providing a stable foundation.
 - **Info Needed from User/External:** articulate this link in the context of *specific*, current company growth objectives if they aren't explicitly detailed in the Business Case.
- **Q:** You mention "technical debt" – can you elaborate on the *tangible* consequences if we delay this by a year? What specifically breaks or becomes significantly harder?
 - **Answerable from Docs?** Yes.
 - **Supporting Docs:** Business Case.
 - **Info Available:** The Business Case details the consequences: increased time lost searching, potential use of outdated info, multiplying version control issues, harder onboarding, increased compliance/security risks, and higher future costs for fixing compounding problems.
 - **Info Needed from User/External:** specific anecdotes or recent examples from your experience within the company if appropriate, but the core answer is documented.
- **Q:** Is this the right time to undertake this, given other company priorities?
 - **Answerable from Docs?** Partially.
 - **Supporting Docs:** Business Case.
 - **Info Available:** The Business Case argues *why* now is the right time (proactive investment before major growth, minimizing future disruption).
 - **Info Needed from User/External:** need to answer this based on knowledge of *current, potentially competing company priorities* which are outside the scope of these documents. Use the Business Case arguments to frame your answer.
- **Q:** How does this align with our overall Microsoft 365 strategy? Are we fully leveraging the tools we already pay for?
 - **Answerable from Docs?** Yes.
 - **Supporting Docs:** Business Case, Proposal & Plan.
 - **Info Available:** The documents state the proposal is to utilize the *existing* SharePoint Online platform and leverage its capabilities (beyond basic

storage) to maximize the M365 investment.

- **Info Needed from User/External:** None, the documents address this directly.

2. Solution & Benefits (Conceptual Level):

- **Q:** In simple terms, what's the core difference between this new system and just better organizing our current folders/Teams?
 - **Answerable from Docs?** Yes.
 - **Supporting Docs:** Business Case, Repository Plan (conceptual basis), the Visual Comparison document.
 - **Info Available:** The core difference is shifting from location-based organization (folders) to description-based organization (metadata, content types, search, views) within a planned structure (Hubs/Sites), enabling better findability, consistency, governance, and automation.
 - **Info Needed from User/External:** None, the explanation is based on the plans.
- **Q:** What are the top 2-3 *most impactful benefits* you expect us to see, and *roughly when*?
 - **Answerable from Docs?** Partially.
 - **Supporting Docs:** Business Case, Proposal & Plan.
 - **Info Available:** The documents list key benefits (Scalability, Efficiency, Control, Compliance, Collaboration, Onboarding). Select the top 2-3 based on what resonates most from the Business Case. The Proposal & Plan gives *high-level phase estimates*, suggesting benefits would start accruing post-rollout (Phase 3 completion) and during Phase 4 optimization.
 - **Info Needed from User/External:** need to select which benefits to emphasize. A specific "when" depends on the detailed schedule developed *after* approval. Frame the timing relative to the planned phases.
- **Q:** You listed several benefits (efficiency, compliance, etc.) – which ones are most critical for enabling the planned growth?
 - **Answerable from Docs?** Yes.
 - **Supporting Docs:** Business Case.
 - **Info Available:** The Business Case explicitly links **Scalability, Improved Onboarding**, and potentially **Efficiency/Consistency** as key enablers for handling increased volume and personnel associated with growth.
 - **Info Needed from User/External:** None, the rationale is in the Business Case.

3. Implementation Approach & Resources (High-Level):

- **Q:** What's the overall approach? How long do you anticipate this project taking at a high level (e.g., months vs. years)?

- **Answerable from Docs?** Yes (Approach), Partially (Timeline).
- **Supporting Docs:** Proposal & Plan.
- **Info Available:** The documents describe a structured, **phased approach** (Planning, Config/Pilot, Migration/Rollout, Support). High-level timeline estimates suggest **months** for the core migration/rollout, heavily dependent on volume/complexity.
- **Info Needed from User/External:** A more precise timeline requires detailed planning post-approval. Convey the order of magnitude (months).
- **Q:** What *types* of resources are needed? Will this require significant new hires or external consultants, or can existing staff handle it?
 - **Answerable from Docs?** Yes (Types), Partially (Internal/External).
 - **Supporting Docs:** Proposal & Plan.
 - **Info Available:** The Proposal & Plan lists the *types* of roles needed (Project Lead, Tech Expertise, SMEs, IT Support, Training). It notes internal *and/or* external resources may be needed for technical expertise depending on capacity/skills.
 - **Info Needed from User/External:** The final decision on using internal vs. external resources depends on current team capacity and specific skill assessments, which likely haven't been finalized. State the roles needed and the potential need for external help based on the document.
- **Q:** Who would own this project and be accountable for its success?
 - **Answerable from Docs?** Partially.
 - **Supporting Docs:** Proposal & Plan.
 - **Info Available:** The documents mention the need for a "Project Lead/Manager".
 - **Info Needed from User/External:** A specific person has likely not been formally assigned yet. Need to answer based on who is anticipated to fill that role.
- **Q:** What level of involvement is needed from department leaders or SMEs during the *next* (planning) phase?
 - **Answerable from Docs?** Yes (Conceptually).
 - **Supporting Docs:** Proposal & Plan.
 - **Info Available:** The documents state that "Crucial input" and "focused workshops" with SMEs are required in the next phase to finalize the Information Architecture (content types, metadata specific to their areas).
 - **Info Needed from User/External:** Describe the *type* of input needed based on the docs, but the exact time commitment requires detailed scheduling.

4. Risks & User Impact (High-Level):

- **Q:** What are the 1-2 biggest risks you see with this project at this stage?
 - **Answerable from Docs?** Yes (Basis).
 - **Supporting Docs:** Proposal & Plan.
 - **Info Available:** The Proposal & Plan lists key risk categories (User Adoption, Migration Complexity, Scope Creep, Resourcing, Governance).
 - **Info Needed from User/External:** Need to *select* which 1-2 seem most pertinent based on judgment and knowledge of context.
- **Q:** How significant is the change for end-users? What's the plan to manage that change and ensure they use the system correctly?
 - **Answerable from Docs?** Yes.
 - **Supporting Docs:** Proposal & Plan.
 - **Info Available:** The documents acknowledge it's a shift (metadata focus). The Proposal & Plan outlines the change management approach (Communication, Training, Champions, Support).
 - **Info Needed from User/External:** None, the approach is documented.
- **Q:** Will this disrupt ongoing work during the transition?
 - **Answerable from Docs?** Yes (Conceptually).
 - **Supporting Docs:** Migration Plan.
 - **Info Available:** The Migration Plan mentions communicating schedules, potentially having read-only periods on source data during active migration waves, and providing clear instructions/support to minimize disruption.
 - **Info Needed from User/External:** The *extent* of disruption depends on the final migration schedule and approach decided in detailed planning.

5. Next Steps & Decision:

- **Q:** What specific decision are you asking for today?
 - **Answerable from Docs?** Yes.
 - **Supporting Docs:** Proposal & Plan.
 - **Info Available:** The Proposal & Plan explicitly requests management approval to "proceed with the detailed planning and initial resource allocation".
 - **Info Needed from User/External:** None, the ask is documented.
- **Q:** If approved, what is the very first tangible action that happens next week?
 - **Answerable from Docs?** Yes.
 - **Supporting Docs:** Proposal & Plan.
 - **Info Available:** The Proposal & Plan states the immediate next step upon approval is the "Formal Project Kick-off" (charter, confirm lead, establish core team).
 - **Info Needed from User/External:** None, the first step is documented.