

Plan for people: colleagues

1. **Person:** List people to add as a colleague to people not in the work group.
2. **Colleagues:** For each person, list all people to add as colleagues.
3. **Policy setting:** Enter the policy setting for colleagues.
4. **Default access:** Enter the default access policy for colleagues.

Person	Colleagues	Policy setting
		Default access policy

Plan policies (additional people features)

1. **Feature:** For the other people features, list your policy recommendations.
2. **Policy setting:** Enter the policy setting.
3. **Default access:** Enter the default access policy.

Feature	Policy setting	Default access policy
My Links		
My Personalization Links		

Plan audiences and content targeting

1. **Audience:** The descriptive name for the audience.
2. **Audience rules:** List all rules that define the audience. Use groups, distribution lists, and properties planned earlier in this worksheet. If the desired groups or properties don't exist, add them to your earlier plans.
3. **Personalization site links:** List all personalization site links targeted to this audience.
4. **Office client links:** List all libraries and sites links targeted to this audience.
5. **List Items:** Record all lists or list items targeted.
6. **Web Parts:** Record all Web Parts targeting this audience and the URLs of the pages using the Web Parts.

Audience	Audience rules	Personalization site links	Office client links	List Items	Web Parts

