

Microsoft 365 migration readiness checklist

Thirty-three things to have in hand before a tenant-to-tenant migration or a consolidation after an acquisition. Each item has a one-line reason, drawn from projects where it was missing. Tick what you have; what is left is your discovery list.

01 – Scope

Decide what does not move

- ☐ A mailbox size report, sorted descending, for every tenant in scope
The top ten rows tell you more about the schedule than the headcount. Personal archives over 100 GB set their own timetable.
- ☐ A named decision on archived mail: migrate, archive elsewhere, or leave behind under a retention policy
The single largest lever on migration time, and it belongs entirely to you.
- ☐ A list of SharePoint sites with an owner against each one
Sites nobody owns become archive by default. Better to decide that now than to discover it in month three.
- ☐ Every shared and resource mailbox, with who uses it
These are recreated, not copied. Missing one is the classic cutover-weekend discovery.
- ☐ Public folders, if any, identified and scoped separately
They rarely behave like the rest of the estate.

02 – Identity

Know how people sign in today

- ☐ Directory model per tenant: cloud-only, Entra Connect, AD FS, or third-party identity provider
Two tenants syncing from two directories is a different cutover from one cloud-only tenant.
- ☐ Every person who exists in more than one tenant, with a decision: merge or keep separate
On our largest consolidations, more than half were deliberately kept separate.
- ☐ Conditional Access policies exported and documented
They do not migrate. They are rebuilt in the target. If nobody mentions them, users find out on Monday morning.
- ☐ Two break-glass accounts created in the target and excluded from Conditional Access
With credentials stored where a locked-out administrator can reach them.
- ☐ Service accounts listed, with an owner and a known password for each
The commonest blocker in on-premises moves: an account nobody owns, used by a process nobody remembers.

03 – Domains and mail flow

The part users notice

- ☐ Every custom domain listed, with which tenant it moves to and when
A domain can be attached to only one tenant at a time. This is a hard sequencing constraint.
- ☐ MX, SPF, DKIM and DMARC records documented for each domain, with who controls DNS
Cutover is a DNS change. Knowing who holds the login saves an hour on a Saturday night.
- ☐ Mail-flow connectors, transport rules and third-party filtering identified
Signature tools, archiving services and security gateways all sit in the path.
- ☐ Devices and applications that send mail via the tenant: scanners, ERP, ticketing, monitoring
They authenticate against the old tenant and fail silently after cutover.
- ☐ A cutover window agreed, with a named person who can approve it
And a rollback position: what happens if the wave fails, decided before it runs.

04 – Files and Teams

A permissions model, not a copy

- ☐ External sharing report: every anonymous link and every guest account
Anonymous links do not migrate. This is usually the first time anyone has seen the list.
- ☐ Libraries with unique permissions at folder or item level identified
A tidy 5 TB moves faster than a tangled 500 GB.
- ☐ Teams listed with their underlying Microsoft 365 groups and owners
A team is four things that can each be in a different state: group, mailbox, site, membership.
- ☐ A decision on Teams chat history: migrate, export, or accept the limit
Private and group chat move with real, documented limits. Decide before, not after.
- ☐ OneDrive redirect plan for every user
Users notice a broken sync client long before a missing file.

05 – Compliance and holds

Nothing under hold moves without sign-off

- ☐ Mailboxes and sites under litigation hold or retention policy listed
Holds are tenant configuration, not data. They are recreated in the target.
- ☐ Compliance or legal sign-off obtained for anything under hold before it moves
Two signatures now are cheaper than one deposition later.
- ☐ For German entities: works council engagement started in parallel with technical design
Under §87(1) No. 6 BetrVG, Intune and Conditional Access require co-determination. It cannot be done at the end.
- ☐ Data residency requirements per entity confirmed
Some data must stay in a specific country. Know which before the target tenant is built.

06 – Licensing

Renewal dates lock decisions in

- ☐ Every subscription across every tenant, with renewal date and commitment term
Duplicate spend surfaces here, before anything moves. Often the first thing that pays for the project.
- ☐ Target licensing model decided: which seats on annual, which on monthly through the transition
Commitment is set per subscription, not per tenant. Use that.
- ☐ Licences for the target tenant provisioned before migration starts
Mailboxes cannot be created into a tenant without them.
- ☐ Third-party contracts tied to the source tenant listed, with cancellation dates
Backup, archiving, security tooling. Decommission is a checklist, not a switch.

07 – People and the date

What actually slips schedules

- ☐ A named decision-maker on each side, empowered to sign the target architecture
The commonest cause of slippage is an unsigned decision, not a technical problem.
- ☐ Deal constraints written down: close date, TSA expiry, lease end
The plan is built backwards from these.
- ☐ Communications drafted for users: what changes, when, and what to do on day one
Before it happens rather than after.
- ☐ Elevated support arranged for the first working week after cutover
Delegate permissions and calendar issues surface here if they are going to.
- ☐ The question asked of every partner: what would make this take twice as long, and how would we know early?
An experienced partner has a short, specific list. An inexperienced one says it will be fine.

What this is not. A guarantee, or legal advice. Two of the items — holds and the works council — should be settled with counsel. Timelines and constraints reflect our projects; yours will differ in the details, and the point of the list is to find out where.

Scoping costs nothing. Send us the ticked list and the mailbox size report: itpartnerhq.com/get-a-quote