

# Microsoft O365 Migration Checklist



## Office 365

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It's time to release yourself from the grasp of Office 2003/2007 and step into the 21st century. The following checklist will help you do just that.

Successful deployment of Office 365 in your work environment requires not only a **laser-like focus, but a strict adherence to the implementation process**. Commit to staying on task and your migration will have little to no hiccups and business will carry on as usual.

The below information is a framework to begin your pre-deployment planning to ensure nothing is missed.

### Step 1

**Define your goals** - Achieving minimal disruption to your employees' workday is, and should be, goal #1 of your migration. The second most important goal of your O365 migration involves sticking to timelines and delivery dates. What else do you want to achieve?

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## Step 2

**Examine O365's email archiving and eDiscovery tools** – O365 has limitations when it comes to archiving. If your business is regulated, you may need a third-party email archiving solution to ensure you're compliant.

## Step 3

**Prepare your company/organization** – Let everyone within your organization know about the upcoming changes as a result of the migration process.

## Step 4

**Collect everything** – Microsoft suggests taking inventory of pretty much everything within your current environment. The list of things to inventory includes:

- User accounts (login names, email addresses of current and recently departed employees)
- All mailboxes (quantity and size)
- Client versions, specifications and configurations (i.e. browsers, operating systems, applications, etc.)
- Network settings (i.e. DNS hosts, proxy and/or firewall settings, etc.)
- File storage details (location of file shares)
- Online communication platforms (i.e. messaging systems)
- Details of any and all integrated applications (i.e. CRM, mail enabled apps, etc.)



## Additional Resources

Check out **Microsoft FastTrack** for tools and resources for your O365 migration.

## Step 5

**Decide your deployment strategy** — The following are what Microsoft considers to be the most common tasks associated with deployment:

- Create/synchronize accounts (i.e. add employees to O365)
- Authenticate accounts (setup and manage O365 account)
- Migrate any and all data (transfer emails, files, folders, etc.)
- Consider storing excess data (emails and files) in third-party archiver for later use
- Troubleshoot potential issues using Microsoft guidance and tools

## Step 6

**Employees rollout** — Employee rollout is essential in completion of the prior account setup and authentication process. It includes:

- Add users and domains
- Assign appropriate licenses
- Configure application settings

## Step 7

**Ensure your email archiving policy meets your business's needs** — O365 is a powerful solution, but it does lack certain email archiving features that business's should be aware of:

- End users have control over archiving rules
- Limited eDiscovery functionality
- Legal hold notifications
- Server bloat and unmanageable storage growth