

Microsoft 365 Migration Checklist

A step-by-step checklist covering everything from pre-migration planning through cutover and post-go-live cleanup.

Updated September 2026 · 10+ yrs Microsoft partner experience
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Before You Start

- ☐ Inventory current mailboxes, shared mailboxes, and distribution lists
- ☐ Document current file server / shared drive structure
- ☐ Confirm domain ownership and DNS access
- ☐ Identify any line-of-business apps that integrate with email or files
- ☐ Set a target migration window and communicate it to staff in advance

Tenant Setup

- ☐ Verify your domain in the new Microsoft 365 tenant
- ☐ Configure identity: MFA, Conditional Access baseline
- ☐ Set up mail flow rules and anti-spam/anti-malware policies
- ☐ Create groups and distribution lists matching your org structure
- ☐ Configure SharePoint/OneDrive structure before migrating files, not after

Data Migration

- ☐ Migrate mailboxes in batches, not all at once
- ☐ Validate a sample of migrated mailboxes before proceeding to the next batch
- ☐ Migrate files/SharePoint content in parallel or immediately after mail
- ☐ Preserve folder structure and permissions during file migration
- ☐ Keep the source system accessible (read-only) for a grace period after cutover

Cutover

- ☐ Update MX records to point to the new mail system
- ☐ Monitor mail flow closely for the first 24–48 hours
- ☐ Update Outlook profiles / mobile device email setup for all users
- ☐ Communicate the cutover completion and any user action needed

Timing tip: Stage the cutover in the sequence mail → DNS → files, so there's no single hour where everyone loses access at once.

After Go-Live

- ☐ Decommission the old system only after confirming all data landed correctly
- ☐ Watch for user-reported issues closely for the first two weeks
- ☐ Review licensing 30 days post-migration to catch any mismatches
- ☐ Document the new environment for future reference

Want help with this, not just the guide?

Rua Technologies is an authorized Microsoft partner delivering licensing, migration, security, and support to businesses across India.

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