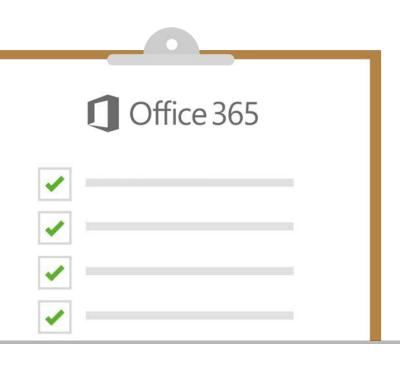


# Microsoft 0365 Migration Checklist



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:

entory 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
<b>Decide your deployment strategy —</b> 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
Step 6
<b>Employees rollout</b> — 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
Stop 7
Step 7
<b>Ensure your email archiving policy meets your business's needs</b> — O365 is a powerful solution, but it does lack certain email archiving features that business's should be aware of:
<ul><li>End users have control over archiving rules</li><li>Limited eDiscovery functionality</li><li>Legal hold notifications</li></ul>

Server bloat and unmanageable storage growth

