

Microsoft 365 Migration Checklist

The 30-point list our team runs before, during, and after every M365 cutover.

Use this checklist to plan your move to Microsoft 365. It captures the steps Directive's engineers walk through with every client so nothing slips between source platform and the new tenant.

Before the cutover

- Inventory every mailbox, distribution list, shared mailbox, and resource calendar.
- Confirm domain ownership in the Microsoft 365 admin center.
- Map source-platform license tiers to the right M365 SKUs (Business Basic, Standard, Premium).
- Decide on identity model: cloud-only, synced from on-prem AD, or federated.
- Communicate the cutover plan and expected downtime windows to all users.
- Capture a baseline mail-flow report so you can verify parity post-move.

During the cutover

- Provision pilot users and validate mailbox access, calendar sharing, and OneDrive sync.
- Run the bulk mailbox migration outside business hours; monitor batch completion in real time.
- Update DNS (MX, SPF, DKIM, DMARC, autodiscover) once mailboxes have moved.
- Reconfigure mobile devices and desktop Outlook profiles, prioritizing executives first.
- Move shared and team files to OneDrive and SharePoint; preserve folder structure and permissions.

After the cutover

- Decommission or archive the source platform on a defined schedule.
- Enable multi-factor authentication and conditional access for every user.
- Configure retention, eDiscovery, and audit logging to meet your compliance requirements.
- Schedule a 30-day check-in to address adoption questions and tune security policies.
- Document tenant configuration and admin-recovery procedures.

Need help putting any of this in motion? Call Directive Technology at (607) 433-2200 or visit directive.com to schedule a free consultation.