

FREE RESOURCE — MIGRATION CHECKLIST

# Azure Migration Assessment Checklist

Infrastructure readiness, workload compatibility and migration wave planning for Microsoft Azure. Assess your environment with five scored sections before committing to the cloud — surface gaps, set priorities and brief the board with the numbers.

**5**

ASSESSMENT  
AREAS

**37**

READINESS  
ITEMS

**/10**

SCORE EACH  
SECTION

**Fillable**

TICK & TYPE  
IN ANY VIEWER

INFRASTRUCTURE

APPS & 6 RS

NETWORK & IDENTITY

COST & WAVES

PREPARED FOR

Cloudswitched Knowledge  
Library

PREPARED BY

Cloudswitched Ltd.

VERSION

2026 Edition

FORMAT

Interactive PDF

# 00

## How to use this checklist

Complete this assessment **before** committing to an Azure migration project. Work through it with your IT team, line-of-business application owners and finance stakeholders — the answers will shape your migration strategy, your wave plan, your data-residency design and the budget you take to the board.

Tick every checkpoint that is **fully in place** — not partially, not "we're scoping it", but documented and verifiable today. Score each section out of 10. A score **below 6 in any section** indicates a migration risk that should be closed before workloads start moving. This is an **interactive PDF** — tick the boxes and type your scores and notes directly in any modern PDF viewer.

### WHAT THIS CHECKLIST IS

A pre-migration readiness baseline for UK SMEs targeting Microsoft Azure — covering infrastructure inventory, application compatibility, the 6 Rs migration strategy, network and identity, UK data residency and security, and cost / wave planning. It is not a Microsoft Azure Migrate report and it does not replace a paid-for cloud adoption framework engagement, but it surfaces the same risks those formal exercises pick up.

### SCORING GUIDANCE

Award one point per checkpoint where you have evidence the control or artefact is in place — a CMDB export, a dependency map, an Azure Pricing Calculator estimate, a signed-off wave plan. Half measures do not score. Round each section to the nearest whole number out of 10 and carry it forward to the summary on page 7.

### The five assessment areas

- **01 Current Infrastructure Assessment** — inventory, utilisation, OS support, dependencies, storage, databases.
- **02 Application Compatibility** — the 6 Rs, SaaS alternatives, licensing, vendor support, GPU/IOPS workloads.
- **03 Network & Identity Readiness** — ExpressRoute/VPN, DNS, Azure AD Connect, VNet design, NSGs, Azure region.
- **04 Security & Compliance** — UK data residency, encryption, GDPR, Azure Backup, Defender for Cloud, RBAC, PIM.
- **05 Cost & Migration Planning** — Pricing Calculator, wave plan, pilot workloads, rollback, training, right-sizing.

# 01

## Current Infrastructure Assessment

Document and assess your existing on-premise estate for cloud readiness. Until you know what you actually run — with utilisation data, OS support status and dependencies — you cannot honestly size an Azure environment or estimate its cost.

- A complete **server inventory** exists with OS, CPU, RAM, storage and workload details (*physical and virtual*).
- Server **utilisation data** has been collected for at least 30 days — CPU, memory, disk and network throughput.
- All **operating systems** are within vendor support lifecycle (*Windows Server 2016+ for full Azure support*).
- Application dependencies** have been mapped — which apps talk to which servers, services and external endpoints.
- Network bandwidth** to the internet has been assessed against cloud workload requirements (*seed sync and steady-state*).
- Current **storage volumes and growth rates** are documented for capacity and tier planning.
- Database platforms** are identified with versions, sizes and compatibility with Azure SQL / Managed Instance / IaaS.
- Any **physical hardware dependencies** are identified (*USB dongles, serial devices, specialist cards, dongled licences*).

### WHAT GOOD LOOKS LIKE

A CMDB export — or at minimum a clean spreadsheet — with every server, its OS, its current right-sized resource footprint, its 95th-percentile utilisation and its upstream/downstream dependencies. If your inventory was built from memory or guesswork, your Azure cost estimate is built from guesswork too.

SECTION 01 SCORE \_\_\_\_\_ / 10

*Aim for 8+. Below 6 = inventory / utilisation gap.*

# 02

## Application Compatibility

Assess each application for cloud compatibility and pick the right migration strategy — the 6 Rs framework. Rehosting everything is rarely the right answer; rebuilding everything is even more rarely the right answer.

- Each application has been categorised using the **6 Rs**: Rehost, Refactor, Rearchitect, Rebuild, Replace, Retain.
- SaaS alternatives** have been evaluated for legacy on-premise applications (*email, CRM, ERP, ticketing*).
- Applications with **hardcoded IP addresses** or local dependencies have been identified for remediation.
- Licensing implications** have been assessed (*Windows Server, SQL Server, Oracle — AHB, BYOL, per-core*).
- Applications requiring **GPU, high-IOPS or ultra-low latency** are identified for the correct VM SKU and storage tier.
- Vendor support** has been confirmed for running each application in Azure (*supported, supported with caveats, unsupported*).
- Applications that **cannot migrate** are documented with justification for remaining on-premise or for replacement.

### PICK A STRATEGY PER WORKLOAD

Tag every application with one of the **6 Rs** — Rehost, Refactor, Rearchitect, Rebuild, Replace, Retain. See the strategy reference on the next page for when to pick which, and use the tags to drive your wave plan.

SECTION 02 SCORE \_\_\_\_\_ / 10

*Aim for 8+. Below 6 = compatibility / 6 Rs gap.*

## 02 • Ref

### Migration strategy reference — the 6 Rs

Microsoft's Cloud Adoption Framework groups every workload into one of six migration strategies. Tag each application with one strategy, then group same-tag workloads into the same wave — rehosts batch fast, rebuilds run as separate projects, retains do not move.

STRATEGY	WHAT IT MEANS	WHEN TO USE
<b>Rehost</b>	Move to an Azure VM with minimal changes ( <i>lift &amp; shift</i> ). Azure Migrate replicates the VM as-is.	Quick migration, legacy apps, data-centre exit deadline, predictable cost during the move.
<b>Refactor</b>	Move to PaaS — App Service, Azure SQL, Azure Functions — with minimal code change.	Modern apps that already separate compute from data; reduce management overhead and ops cost.
<b>Rearchitect</b>	Redesign for cloud-native — containers, microservices, event-driven queues.	Scalability, resilience or performance requirements the current monolith cannot meet.
<b>Rebuild</b>	Rewrite from scratch on Azure-native services.	Outdated apps, new functional requirements, end-of-life codebase or unsupported framework.
<b>Replace</b>	Switch to a SaaS alternative — stop running the app yourself.	Commodity apps — email, CRM, ERP, helpdesk, file sharing, payroll.
<b>Retain</b>	Keep on-premise for now ( <i>document why</i> ).	Hardware dependency, compliance restriction, depreciation tail, app retiring within 12 months.

#### DON'T DEFAULT EVERYTHING TO REHOST

The fastest path is also the most expensive in steady state — a lift-and-shift VM keeps its on-prem sizing, its Windows licence cost and its operational overhead. Use Rehost for workloads with a hard deadline; aim Refactor at anything modern enough to run as PaaS; Replace any commodity app you would not build today. A balanced 6 Rs mix is the signal of a mature migration plan.

#### HOW THIS DRIVES THE WAVE PLAN

**Wave 1 (pilot)** — 3-5 low-risk *Rehost* workloads to exercise the runbook and cutover. **Waves 2-N** — batch *Rehosts* and *Refactors* by dependency cluster and licence renewal date. *Rearchitect* and *Rebuild* run as parallel projects with their own delivery plans; *Replace* is treated as procurement; *Retain* items are documented with a review date.

# 03

## Network & Identity Readiness

Assess network connectivity and identity management readiness. Get the address space, the DNS strategy and the identity bridge right before the first workload lands — reworking these later is painful and tenant-wide.

- Azure ExpressRoute or site-to-site VPN** options have been evaluated for secure on-prem to Azure connectivity.
- A **DNS strategy** has been planned for hybrid (*on-prem + Azure*) or cloud-only resolution.
- Azure AD Connect** or a cloud-only identity model has been decided, tested and signed off.
- Network address space** for Azure VNets is planned with no overlap against on-premise or partner ranges.
- Firewall and NSG rules** have been designed for Azure network security groups and Azure Firewall.
- Internet bandwidth** is sufficient for initial seed migration and ongoing cloud operations (*steady-state egress*).
- Latency requirements** have been assessed to pick the best Azure region (*UK South vs UK West*).

### ADDRESS-SPACE DISCIPLINE

The single most common Azure rework we see is overlapping CIDR ranges between on-prem and the new VNet, discovered the day VPN gateways are stood up. Plan a clean, non-overlapping address plan up front — including space for future regions, peering and partner networks.

**SECTION 03 SCORE** \_\_\_\_\_ / **10**

*Aim for 8+. Below 6 = network / identity gap.*

# 04

## Security & Compliance

Bake UK data residency, encryption, GDPR mapping and least-privilege access in from day one. Azure gives you the controls; you have to turn them on, document them and align them to UK regulatory obligations.

- Data residency requirements** are understood — Azure UK South and UK West keep data in the UK.
- Encryption requirements** are defined — Azure encrypts at rest by default with AES-256 (*plus customer-managed keys where required*).
- Compliance requirements** (GDPR, ISO 27001, Cyber Essentials) have been mapped to specific Azure controls.
- Backup and DR strategy** is designed using Azure Backup and Azure Site Recovery, with RPO/RTO targets per workload.
- Microsoft Defender for Cloud** (formerly Azure Security Centre) is planned for security posture management.
- RBAC (Role-Based Access Control)** is designed for Azure resource access — built-in roles preferred over custom.
- Privileged Identity Management (PIM)** is planned for just-in-time, time-bound admin access with MFA.

### UK DATA RESIDENCY IN AZURE

Pinning every workload to **UK South** with paired DR to **UK West** keeps customer data inside the UK boundary for GDPR purposes. Document the region choice on every resource group, set policy to enforce it, and capture the decision in your Record of Processing Activities (RoPA).

**SECTION 04 SCORE** \_\_\_\_\_ / **10** *Aim for 9+. Below 6 = serious security / compliance risk.*

# 05

## Cost & Migration Planning

Cost surprises and broken wave plans kill cloud business cases. Get a defensible estimate, group workloads into waves with a pilot first, and budget time for the optimisation phase after go-live — that is where the real savings come from.

- The **Azure Pricing Calculator** has been used to estimate monthly cloud cost for target workloads.
- Cost estimates include **all components**: compute, storage, networking egress, licensing, backup, monitoring.
- A **migration timeline** has been created with workloads grouped into clear migration waves.
- Pilot workloads** are identified for the first wave (*low-risk, non-critical, exercise the runbook*).
- A **rollback plan** exists for each migration wave in case of critical issues — tested, not assumed.
- Staff training** needs for Azure administration are identified and budgeted (*AZ-104, AZ-305, internal upskilling*).
- A **post-migration optimisation** phase is planned to right-size VMs, apply Reserved Instances and tune storage.

### RIGHT-SIZING AFTER GO-LIVE

On-prem sizing is almost always over-provisioned. Plan the first 60–90 days post-migration as a right-sizing window — review actual utilisation, move oversized VMs down a SKU, and shift steady-state workloads onto 1-year or 3-year Reserved Instances. Savings of 30–50% versus the initial pay-as-you-go bill are routine.

SECTION 05 SCORE  / 10

*Aim for 8+. Below 6 = cost / wave plan gap.*



## Readiness score summary

Transfer the score for each section into the table. Set a priority (H/M/L) based on the gap to target. Anything below 6 is a candidate for the top-three actions on the next page.

#	ASSESSMENT AREA	SCORE / 10	PRIORITY
01	Current Infrastructure Assessment	_____ / 10	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L
02	Application Compatibility	_____ / 10	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L
03	Network & Identity Readiness	_____ / 10	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L
04	Security & Compliance	_____ / 10	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L
05	Cost & Migration Planning	_____ / 10	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L
<b>Σ</b>	<b>TOTAL READINESS SCORE</b>	_____ / 50	—

### Readiness interpretation

**40-50** **Migration-ready.** Strong foundations across the board. Proceed to detailed wave planning and pilot.

**25-39** **Gaps to close before go-live.** Prioritise any section below 6 with owners and deadlines before the first wave.

**Below 25** **Not ready.** Run a proper Azure readiness engagement before any production workload moves. Migrating now will create incidents.



## Priority actions & next steps

Translate the scores on the previous page into a small number of next steps. The goal is one page of decisions, not a wish list — three actions, three owners, three deadlines.

### Top 3 priority actions

01	
02	
03	

### Additional notes

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### Sign-off

<b>ASSESSMENT COMPLETED BY</b>	<b>DATE</b>	<b>APPROVED BY</b>
<b>MIGRATION SPONSOR</b>	<b>NEXT REVIEW DUE</b>	<b>TARGET MIGRATION WINDOW</b>

### Ready to move to Azure?

Cloudswitched runs full Azure migration assessments for UK SMEs — inventory, 6 Rs categorisation, landing-zone design, wave planning and fixed-price migration delivery into UK South.

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