



FREE RESOURCE — MIGRATION CHECKLIST

Office 365 Migration Checklist

End-to-end Microsoft 365 migration plan for UK SMEs — pre-migration audit, tenant configuration, mailbox cutover, DNS swing and post-migration validation. Five scored phases, mailbox inventory worksheet, DNS record sheet and batch schedule, with zero target email downtime.

5

MIGRATION
PHASES

39

CHECKPOINT
TASKS

Zero

TARGET EMAIL
DOWNTIME

Fillable

TICK & TYPE
IN ANY VIEWER

PRE-MIGRATION

TENANT & SECURITY

DNS CUTOVER

USER ADOPTION

PREPARED FOR

Cloudswitched Knowledge
Library

PREPARED BY

Cloudswitched Ltd.

VERSION

2026 Edition

FORMAT

Interactive PDF

00

How to use this checklist

This checklist walks you through a full migration from a legacy mail platform — Exchange on-prem, Google Workspace, IMAP/POP host — to **Microsoft 365 (Office 365)** with email, OneDrive, SharePoint and Teams. Work through the five phases **in order**: do not start tenant configuration until pre-migration is complete, do not cut DNS until data has migrated and verified, and do not decommission legacy until users are trained and the 30-day parallel-running window is up.

Tick each checkpoint that is **fully in place** — not partially, not "we're scoping it", but documented and verifiable today. Score each phase out of 10. A score **below 6 in any phase** indicates a migration risk that should be closed before moving to the next phase. This is an **interactive PDF** — tick the boxes, fill the inventory rows, type DNS values and dates, and sign off directly in any modern PDF viewer.

WHAT THIS CHECKLIST IS

A practical, sequential plan covering the five phases of an Office 365 migration: pre-migration planning, tenant configuration and security, data migration, DNS cutover & go-live, and post-migration / user setup. It includes a mailbox inventory worksheet, a DNS record value sheet and a batch schedule for waved cutover.

SCORING GUIDANCE

Award one point per checkpoint where you have evidence the task is complete — an inventory spreadsheet, a tenant screenshot, a verified DNS record, a signed-off training register. Half measures do not score. Round each phase to the nearest whole number out of 10 and carry it forward to the summary at the back.

The five migration phases

- **01 Pre-Migration Planning** — inventory current email environment, licence plan, domain verification, aliases and rules.
- **02 Tenant Configuration & Security** — MFA, Conditional Access, SPF/DKIM/DMARC, anti-phishing, DLP, retention.
- **03 Data Migration** — choose method, pilot, full migration, shared and resource mailboxes, integrity verification.
- **04 DNS Cutover & Go-Live** — lower TTL, update MX/SPF/Autodiscover, verify inbound and outbound flow.
- **05 Post-Migration & User Setup** — Outlook, mobile, OneDrive, SharePoint, Teams, training, decommission, review.

01

Pre-Migration Planning

Assess your current environment, plan the migration approach and prepare your Microsoft 365 tenant. Until you know what you actually have today — mailbox count, total data size, aliases, distribution lists, rules — you cannot pick a licence plan, size a migration window or honestly quote the project.

- Documented the **current email environment** — provider, mailbox count, total data size, shared mailboxes, distribution lists.
- Confirmed the **Microsoft 365 licence plan** — Business Basic, Business Standard or Business Premium based on feature requirements.
- Purchased and assigned **Microsoft 365 licences** for all users (*allow a 10% buffer for growth and contractors*).
- Set up and configured the **Microsoft 365 tenant** — organisation name, region (United Kingdom), admin accounts.
- Added and **verified the domain(s)** in the Microsoft 365 admin centre (*TXT record verification*).
- Did NOT change MX records yet** — only verified domain ownership at this stage; mail still flows to the legacy system.
- Audited all **email aliases, distribution lists, shared mailboxes** and mail-enabled groups for recreation in Microsoft 365.
- Documented all **email rules, forwards and auto-replies** currently configured on the legacy system (*server-side rules do not always migrate*).

WHAT GOOD LOOKS LIKE

An inventory spreadsheet with every mailbox, its size, its aliases, its delegates and whether it is a user, shared or resource mailbox. Use the **mailbox inventory worksheet** on the next page to capture it. If your inventory was built from memory, your migration window is built from guesswork.

PHASE 01 SCORE _____ / 10

Aim for 9+. Below 6 = inventory/licensing gap.

01 • Wks

Mailbox inventory worksheet

List every mailbox to be migrated. Mark the type **User**, **Shared**, **Resource** or **Distribution** list, capture its current size, primary email and any aliases, then group rows into migration waves on the schedule sheet. Add rows in the digital fill if you run out.

#	DISPLAY NAME	PRIMARY EMAIL	TYPE	SIZE (GB)	ALIASES / DELEGATES
01	_____	_____	___	_____	_____
02	_____	_____	___	_____	_____
03	_____	_____	___	_____	_____
04	_____	_____	___	_____	_____
05	_____	_____	___	_____	_____
06	_____	_____	___	_____	_____
07	_____	_____	___	_____	_____
08	_____	_____	___	_____	_____
09	_____	_____	___	_____	_____
10	_____	_____	___	_____	_____
11	_____	_____	___	_____	_____
12	_____	_____	___	_____	_____

MAILBOX-SIZE DRIVES THE CUTOVER

Total data size, not user count, sets your migration window. A 30-user tenant at 50 GB per mailbox is a 1.5 TB seed — that is several days over a typical UK SME internet link. Sum the size column, divide by your usable upload throughput, and plan the migration weekend with the answer, not with a guess.

TOTAL MAILBOXES

TOTAL DATA (GB)

INVENTORY COMPLETED BY

02

Tenant Configuration & Security

Configure Microsoft 365 security, compliance and organisational settings **before** any mailbox data lands. Identity and email-flow controls are the single highest-impact decisions of the project — they protect every user from day one and they are painful to retrofit after go-live.

- Enabled **Multi-Factor Authentication (MFA)** for all admin accounts immediately, then planned MFA roll-out for all users.

- Configured **Conditional Access policies** for device compliance, location-based access and legacy-protocol block.

- Set up the **SPF record** for your domain, including Microsoft 365 servers (*v=spf1 include:spf.protection.outlook.com -all*).

- Configured **DKIM signing** for outbound email authentication on every sending domain.

- Set up a **DMARC policy** — start with p=none for monitoring, then move to p=quarantine post-migration.

- Configured **anti-phishing and anti-malware** policies in Microsoft Defender for Office 365 (*Safe Links, Safe Attachments*).

- Set up **Data Loss Prevention (DLP)** policies for sensitive data — financial, personal, regulated content.

- Configured **email retention policies** in compliance with your data governance and statutory retention requirements.

LOCK IDENTITY FIRST

MFA + Conditional Access + legacy-protocol block (no Basic Auth, no POP/IMAP from the public internet) closes the most common Microsoft 365 compromise path before a single mailbox is migrated. Cyber Essentials v3.3 expects MFA for all cloud admins as a binary control — capture the screenshot at this step for the evidence pack.

PHASE 02 SCORE / 10

Aim for 9+. Below 6 = serious security gap.

03

Data Migration

Migrate mailbox data from the legacy system to Microsoft 365 in a controlled, walled cutover. Always pilot first — the runbook you exercise on 5–10 test users is the runbook you trust on the rest of the company.

- Chosen the **migration method**: IMAP migration, cutover migration, hybrid (staged or full) or a third-party tool.
- Run a **pilot migration** with 5–10 test users to identify issues before the full migration (*treat as a dress rehearsal*).
- Verified pilot mailboxes have **complete data** — all folders, sent items, contacts and calendar entries.
- Scheduled the **full migration** for a low-activity period (*Friday evening or a long weekend*).
- Migrated **shared mailboxes and resource mailboxes** (*meeting rooms, equipment, departmental inboxes*).
- Recreated **distribution lists and mail-enabled security groups** in Microsoft 365 with the same membership and addresses.
- Configured **mail forwarding** from the legacy system during the transition period to catch in-flight mail.
- Verified **data integrity** — spot-check 10% of migrated mailboxes against source for folder counts, item counts and recent items.

DATA LOSS RISK

Always maintain access to the legacy email system for **at least 30 days** after migration. Some data — custom rules, server-side signatures, archived folders, sent-item retention — may not migrate automatically. Having rollback access is essential. Decommissioning the source platform on cutover weekend is the single fastest way to lose data permanently.

PHASE 03 SCORE _____ / 10

Aim for 9+. Below 6 = pilot / integrity gap.

03 • Wks

Migration batch schedule

Group your inventory rows into migration waves. Wave 1 is the pilot — 5–10 low-risk users. Subsequent waves batch by team or by mailbox-size cluster. Tick the status column as each wave moves through the runbook.

WAVE	WINDOW (START □ END)	GROUP / DEPARTMENT	MAILBOX COUNT	TOTAL GB	WAVE OWNER	DONE
1 Pilot	_____	_____	_____	_____	_____	<input type="checkbox"/>
2	_____	_____	_____	_____	_____	<input type="checkbox"/>
3	_____	_____	_____	_____	_____	<input type="checkbox"/>
4	_____	_____	_____	_____	_____	<input type="checkbox"/>
5	_____	_____	_____	_____	_____	<input type="checkbox"/>
6 Cutover	_____	_____	_____	_____	_____	<input type="checkbox"/>

Cutover-weekend timeline (record dates)

LOWER MX TTL (T-48H)

FINAL DELTA SYNC (T-12H)

DNS CUTOVER (T-0)

MAIL-FLOW VERIFICATION

LEGACY DECOMMISSION DATE

POST-MIGRATION REVIEW

WAVE THE CUTOVER — DON'T BIG-BANG IT

For tenants of more than 20 users, prefer a staged or hybrid migration over a single cutover weekend. Each wave gives you one more opportunity to refine the runbook before the next, and one fewer angry user if something breaks.

04

DNS Cutover & Go-Live

Switch email routing to Microsoft 365 and verify all mail flow. This is the most public-facing step of the project — if it goes wrong, every sender in the world sees it. Lower TTLs in advance, change records in the correct order, then verify in both directions before declaring go-live.

- Reduced **MX record TTL** to 300 seconds (5 minutes) at least **48 hours before** cutover.
- Updated **MX records** to point to Microsoft 365 (*<tenant>.mail.protection.outlook.com*).
- Updated **SPF record** to include only Microsoft 365 sending hosts — remove the legacy provider include.
- Updated **Autodiscover CNAME** record to autodiscover.outlook.com for automatic Outlook profile configuration.
- Verified **inbound email** is arriving in Microsoft 365 mailboxes (*test emails from external accounts — Gmail, Yahoo, partner domains*).
- Verified **outbound email** is sending correctly and passing SPF / DKIM / DMARC checks (*mxttoolbox or equivalent*).
- Tested **email flow to and from** major email providers — Gmail, Yahoo, other Microsoft 365 tenants, on-prem Exchange.
- Checked **spam filtering** is not incorrectly blocking legitimate email (*message trace + quarantine review*).

DNS CHANGE ORDER MATTERS

Lower TTL first. Change MX, then SPF, then Autodiscover — in that order. Do not delete the legacy SPF include until inbound flow is fully verified on Microsoft 365 and any forward-flow back through the legacy host has been retired.

PHASE 04 SCORE _____ / 10

Aim for 9+. Below 6 = mail-flow risk on cutover day.

04 • Wks

DNS record worksheet

Record the **current** production value and the **target** Microsoft 365 value for every record you will change on cutover day. Fill the target column from the Microsoft 365 admin centre — Settings □ Domains □ DNS records — before the cutover window opens.

RECORD	HOST / NAME	TYPE	CURRENT VALUE	TARGET VALUE (MICROSOFT 365)
Domain verify	@	TXT	_____	MS=ms_____
MX (primary)	@	MX	_____	_____.mail.protection.outlook.com
SPF	@	TXT	_____	v=spf1 include:spf.protection.outlook.com -all
Autodiscover	autodiscover	CNAME	_____	autodiscover.outlook.com
DKIM 1	selector1._domainkey	CNAME	_____	selector1-_____.domainkey.____.onmicrosoft.com
DKIM 2	selector2._domainkey	CNAME	_____	selector2-_____.domainkey.____.onmicrosoft.com
DMARC	_dmarc	TXT	_____	v=DMARC1; p=none; rua=mailto:_____
SIP (Teams)	sip	CNAME	_____	sipdir.online.lync.com
Lyncdiscover	lyncdiscover	CNAME	_____	webdir.online.lync.com

TTL DROP, THEN CUTOVER

Lower the MX TTL to 300 seconds **48 hours** before cutover so the change propagates fast on the day. Once the new MX is live and mail flow is verified end-to-end, raise the TTL back to 3600 (1 hour) for steady state.

DNS PROVIDER

DNS CHANGE WINDOW

DNS CHANGE MADE BY

05

Post-Migration & User Setup

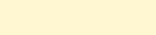
Configure user devices, verify access and complete the migration project. The technical migration is only half the work — the other half is users finding the new mailbox where they expect it, on every device they use, with training on the wider Microsoft 365 stack they have just bought a licence for.

- Deployed **Outlook** on all user devices and configured profiles with Microsoft 365 accounts (*via Autodiscover*).
- Configured **mobile email** on smartphones using the Outlook app or native client with Intune enrolment.
- Set up **OneDrive** and migrated user files from local drives or legacy file shares (*known folder move where appropriate*).
- Configured **SharePoint Online** for departmental document libraries and team sites with permissions and retention.
- Deployed **Microsoft Teams** and configured channels, meeting policies, external/guest access and recording retention.
- Provided **user training** on Outlook, Teams, OneDrive and SharePoint — live sessions, recorded videos or vendor courseware.
- Disabled or **decommissioned legacy email** system after a 30-day parallel running period (*once message trace shows zero hits*).
- Conducted a **post-migration review** — documented lessons learned and resolved any outstanding issues with users.

TRAIN BEFORE YOU DECOMMISSION

Users who do not know where Teams chat lives will keep emailing each other in Outlook. Users who do not know about OneDrive Known Folder Move will keep saving to the desktop. A 60-minute live induction per team in the first fortnight after cutover is the single highest-ROI training spend of the entire project.

PHASE 05 SCORE



/ 10

Aim for 8+. Below 6 = adoption / decommission risk.



Migration readiness score

Transfer the score for each phase 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 — do not move forward to the next phase until those gaps are closed.

#	MIGRATION PHASE	SCORE / 10	PRIORITY
01	Pre-Migration Planning	_____ / 10	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L
02	Tenant Configuration & Security	_____ / 10	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L
03	Data Migration	_____ / 10	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L
04	DNS Cutover & Go-Live	_____ / 10	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L
05	Post-Migration & User Setup	_____ / 10	<input type="checkbox"/> H <input type="checkbox"/> M <input type="checkbox"/> L
Σ	TOTAL MIGRATION READINESS	_____ / 50	—

Readiness interpretation

40–50 **Migration-ready.** Strong foundations across the board. Proceed to scheduled cutover with confidence and pre-book the post-migration review.

25–39 **Gaps to close before cutover.** Prioritise any phase below 6 with owners and deadlines. Do NOT swing DNS until the gaps are closed.

Below 25 **Not ready.** Pause the migration and run a proper Microsoft 365 readiness engagement — data loss, mail-flow outage or compliance gap is likely.



Priority actions & sign-off

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 — then sign off the readiness assessment so cutover can be scheduled.

Top 3 priority actions

01	
02	
03	

Additional notes

Sign-off

ASSESSMENT COMPLETED BY	DATE	APPROVED BY
MIGRATION SPONSOR	CUTOVER WINDOW	POST-MIGRATION REVIEW DATE

Need Microsoft 365 migration support?

Cloudswitched manages complete Microsoft 365 migrations for UK SMEs — inventory, tenant build, mailbox cutover, DNS swing, training and 30-day hypercare with zero email downtime and full data integrity.

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