Office 365 Migration Checklist

End-to-end migration from legacy email to Microsoft 365. Covers pre-migration planning, user preparation, data migration, DNS cutover, and post-migration validation.

6 MIGRATION PHASES	**50+** TASKS TO COMPLETE	**Zero** TARGET EMAIL DOWNTIME	**Free** MIGRATION GUIDE

How to Use This Checklist

Work through each phase sequentially. Do not proceed to the next phase until all items in the current phase are complete. Assign an owner to each task and track progress weekly in the lead-up to migration.

1 Pre-Migration Planning

Assess your current environment, plan the migration approach, and prepare your Microsoft 365 tenant.

- [ ] Document **current email environment** — provider, mailbox count, total data size, shared mailboxes, distribution lists
- [ ] Confirm **Microsoft 365 licence plan** — Business Basic, Standard, or Premium based on feature requirements
- [ ] Purchase and assign **Microsoft 365 licences** for all users (allow 10% buffer for growth)
- [ ] Set up and configure the **Microsoft 365 tenant** — organisation name, region (UK), admin accounts
- [ ] Add and **verify your domain(s)** in the Microsoft 365 admin centre (TXT record verification)
- [ ] **Do NOT change MX records yet** — only verify domain ownership at this stage
- [ ] Audit all **email aliases, distribution lists, shared mailboxes**, and mail-enabled groups for recreation in M365
- [ ] Document all **email rules, forwards, and auto-replies** currently configured on the legacy system

Section Score: [   ] /10

2 Tenant Configuration & Security

Configure Microsoft 365 security, compliance, and organisational settings before migration.

- [ ] Enable **Multi-Factor Authentication (MFA)** for all admin accounts immediately
- [ ] Configure **Conditional Access policies** for device compliance and location-based access
- [ ] Set up **SPF record** for your domain including Microsoft 365 servers
- [ ] Configure **DKIM** signing for outbound email authentication
- [ ] Set up **DMARC policy** (start with p=none for monitoring, move to p=quarantine post-migration)
- [ ] Configure **anti-phishing and anti-malware** policies in Microsoft Defender for Office 365
- [ ] Set up **Data Loss Prevention (DLP)** policies for sensitive data (financial, personal data)
- [ ] Configure **email retention policies** in compliance with your data governance requirements

Section Score: [   ] /10

3 Data Migration

Migrate mailbox data from the legacy system to Microsoft 365.

- ☐ Choose **migration method**: IMAP migration, cutover migration, hybrid, or third-party tool
- ☐ Run a **pilot migration** with 5–10 test users to identify issues before full migration
- ☐ Verify pilot mailboxes have **complete data** — all folders, sent items, contacts, and calendar entries
- ☐ Schedule **full migration** for a low-activity period (Friday evening or weekend)
- ☐ Migrate **shared mailboxes and resource mailboxes** (meeting rooms, equipment)
- ☐ Recreate **distribution lists and mail-enabled security groups** in Microsoft 365
- ☐ Configure **mail forwarding** from legacy system during the transition period
- ☐ Verify **data integrity** — spot-check 10% of migrated mailboxes for complete data

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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) may not migrate automatically. Having rollback access is essential.

4 DNS Cutover & Go-Live

Switch email routing to Microsoft 365 and verify all mail flow.

- ☐ Reduce **MX record TTL** to 300 seconds (5 minutes) at least 48 hours before cutover
- ☐ Update **MX records** to point to Microsoft 365 (tenant.mail.protection.outlook.com)
- ☐ Update **SPF record** to include only Microsoft 365 (remove legacy provider)
- ☐ Update **Autodiscover CNAME** record for automatic Outlook configuration
- ☐ Verify **inbound email** is arriving in Microsoft 365 mailboxes (send test emails from external)
- ☐ Verify **outbound email** is sending correctly and passing SPF/DKIM checks
- ☐ Test **email flow to and from** major email providers (Gmail, Yahoo, other M365 tenants)
- ☐ Check **spam filtering** is not incorrectly blocking legitimate email

Section Score: _____ /10

5 Post-Migration & User Setup

Configure user devices, verify access, and complete the migration project.

- ☐ Deploy **Outlook** on all user devices and configure with Microsoft 365 accounts
- ☐ Configure **mobile email** on smartphones using Outlook app or native client with Intune
- ☐ Set up **OneDrive** and migrate any user files from local drives or legacy file shares
- ☐ Configure **SharePoint Online** for departmental document libraries
- ☐ Deploy **Microsoft Teams** and configure channels, policies, and guest access
- ☐ Provide **user training** on Outlook, Teams, OneDrive, and SharePoint
- ☐ Disable or **decommission legacy email** system after 30-day parallel running period
- ☐ Conduct **post-migration review** — document lessons learned and resolve any outstanding issues

Section Score: _____ /10

Notes

Prepared by: _____ Date: _____ Approved by: _____