Tenant-to-tenant migration checklist

CoreView

A tenant migration project is a multi-step process with implications for business operations, IT resources and user experience. Whether you're migrating a single Microsoft 365 tenant or consolidating multiple tenants, this comprehensive checklist is designed to ensure your upcoming migration project delivers the desired outcomes: enhanced data management, streamlined IT operations, and improved user productivity.

Suited specifically for IT professionals, project managers and organizational leaders entrusted leading or supporting a tenant-to-tenant data migration, this checklist is designed for a variety of scenarios. Whether the migration project is due to a recent merger, the need for increased data security and compliance, or a drive to standardize IT policies and processes, use this guide as your tenant migration roadmap.

- [ ] **Assess source tenant:**
  - [ ] Conduct a thorough inventory of data, applications, licenses, and users in the source tenant.
  - [ ] Identify critical data and resources that need to be migrated and determine what can be removed or archived.
  - [ ] Analyze protocols and configurations in use within the source tenant.
- [ ] **Select and implement third-party migration tools (if applicable):**
  - [ ] Evaluate available third-party migration tools to determine the best fit for your organization's requirements.
  - [ ] Test the selected migration tool in a controlled environment to ensure compatibility and functionality.
- [ ] **Evaluate security and compliance:**
  - [ ] Review security settings and governance policies in the source tenant.
  - [ ] Ensure that sensitive data is protected during the migration process and that compliance requirements are met.
- [ ] **Plan user communication and support:**
  - [ ] Create a communication plan to inform users and stakeholders about the migration process, timelines, and potential impacts.
  - [ ] Prepare concise reference materials and an information site to provide users with necessary information and updates.
  - [ ] Train additional IT support staff to assist users during the migration and address any issues that may arise.
- [ ] **Prepare target tenant:**
  - [ ] Verify that there are sufficient licenses in the target tenant for the data from the source tenant.
  - [ ] Set up administrator accounts in the target tenant and, if using third-party tools, create any required admin accounts.

- [ ] Provision user accounts (Note: Usually a migration tool will create user mailboxes, resource mailboxes, and distribution groups in the target tenant to align with the source tenant.)
- [ ] **Conduct pilot testing:**
  - [ ] Test the migration plan in a controlled environment to identify any issues or exceptions.
  - [ ] Create a rapid rollback plan to address any unforeseen challenges.
- [ ] **Schedule migration:**
  - [ ] Determine the best migration approach (e.g., Big Bang, staged, phased, or rapid switch) based on the number of users and data volume.
  - [ ] Prepare a list of user mailboxes and other resources or eventual ingestion into the target tenant.
- [ ] **Domain transfer:**
  - [ ] Release the domain from the source tenant and verify it in the target tenant.
  - [ ] Update user UPNs (User Principal Names) to match the target domain to facilitate a smooth login experience
- [ ] **Migrate data:**
  - [ ] Use the chosen migration tool to migrate mailboxes, calendars, contacts, and other data based on the selected migration strategy.
  - [ ] Verify the data integrity in the target tenant to ensure all information is accurately transferred.
- [ ] **Reconfigure applications and integrations:**
  - [ ] Update any third-party applications or integrations to work seamlessly with the new target tenant's settings.
  - [ ] Provide user training and support:
  - [ ] Inform users about the migration process, potential changes, and any required actions on their part.
  - [ ] Offer training or assistance on using the new Office 365 environment.
- [ ] **Conduct post-migration testing:**
  - [ ] Perform post-migration testing to ensure that all systems, applications, and services are functioning as expected.
- [ ] **Finalize migration:**
  - [ ] Once migration is confirmed successful, decommission the old tenant or perform any necessary cleanup tasks.
- [ ] **Ongoing support and monitoring:**
  - [ ] Provide ongoing support to users in the new tenant and monitor the system for any issues.
  - [ ] For more information on facilitating a successful tenant migration project, watch "Mission 365: five strategies to guide your Microsoft 365 tenant migration project."