GUIDE · 01

CHECKLIST

Microsoft 365 migration checklist

The steps Advantt follows to move companies off on-premise email without disruption.

ADVANTT

A free guide from Advantt Solutions Sdn. Bhd. · advantt.com · sales@advantt.com · +603 3310 0092

How to use this checklist

Work through the six stages in order. Each stage ends with a short “Ready to move on?” check. Most delays in a migration come from skipping the early planning stages, not from the move itself.

THE SIX STAGES

01	02	03	04	05	06
Licensing and plan choice	Mailbox and data inventory	Identity with Microsoft Entra ID	DNS and mail-flow cutover	Teams and SharePoint rollout	Post-migration support

How the pages work

- ☐ Tick each item as it is done. Boxes are left empty on purpose.
- ■ A filled box at the end of a stage marks the “Ready to move on?” check.

01

STAGE 1 OF 6

Licensing and plan choice

Pick the right Microsoft 365 plan before anything moves.

- [ ] Count every user, shared mailbox and room or equipment mailbox that needs to move
- [ ] Match plans to how people work: frontline staff, office staff and admins often need different plans
- [ ] Check user limits: Microsoft 365 Business plans cover up to 300 users; larger organizations need Enterprise plans
- [ ] Decide which security features you need, such as multifactor authentication, Conditional Access and device management, and confirm your plan includes them
- [ ] Budget for archiving, backup and email filtering on top of the base license
- [ ] Assign at least two global administrators, each with a dedicated admin account

Ready to move on? Every user has a planned license, and the security features you need are covered.

02

STAGE 2 OF 6

Mailbox and data inventory

Know exactly what you are moving.

- [ ] List every mailbox with its size, including archives and old PST files
- [ ] List shared mailboxes, distribution groups, contacts and resource mailboxes
- [ ] Find public folders and decide whether they move, become shared mailboxes or retire
- [ ] Map file shares and decide which content moves to SharePoint, OneDrive or Teams
- [ ] Note mailbox permissions and delegates, such as assistants with access to a manager's calendar
- [ ] Identify applications and devices that send email, such as scanners, ERP systems and alerts
- [ ] Clean up first: remove leavers, stale data and duplicate groups

> **Ready to move on?** You have a complete inventory and nothing will be moved that should be deleted.

03

STAGE 3 OF 6

Identity with Microsoft Entra ID

Give every user one secure identity before mailboxes move.

- [ ] Decide between cloud-only accounts or syncing from your on-premise Active Directory
- [ ] If syncing, plan Microsoft Entra Connect and clean up Active Directory attributes first
- [ ] Make sure every user's sign-in name matches their email address
- [ ] Turn on multifactor authentication for all users, starting with administrators
- [ ] Set password, sign-in and Conditional Access policies your plan supports
- [ ] Test sign-in with a pilot group before the wider rollout

Ready to move on? Pilot users sign in once and reach their apps securely.

04

STAGE 4 OF 6

DNS and mail-flow cutover

Move email without losing a message.

- [ ] Verify your domain in the Microsoft 365 admin center
- [ ] Lower DNS record TTLs a few days before cutover so changes take effect quickly
- [ ] Choose the migration method: cutover for a single move, or hybrid when mailboxes move in waves
- [ ] Decide whether inbound email passes through a filtering service, such as SpamExperts, before reaching Microsoft 365
- [ ] Run the migration and a final sync outside working hours
- [ ] Switch MX and autodiscover records, and update SPF for Microsoft 365
- [ ] Turn on DKIM signing and publish a DMARC record
- [ ] Repoint applications and devices that send email
- [ ] Reconnect Outlook and mobile devices, and confirm calendars and shared mailboxes

Ready to move on? Mail flows in and out, and users have every message, contact and calendar entry.

05

STAGE 5 OF 6

Teams and SharePoint rollout

Turn the new platform into a better way to work.

- [ ] Agree a simple structure: one team per department or project, with clear owners
- [ ] Move file shares into SharePoint sites and OneDrive with permissions mapped
- [ ] Set guest access and external sharing rules
- [ ] Train champions in each department first, then everyone else
- [ ] Publish short how-to guides for meetings, chat and file sharing

> **Ready to move on?** Teams are working in shared spaces, not emailing attachments.

06

STAGE 6 OF 6

Post-migration support

Finish cleanly and keep it running well.

- [ ] Run a support period after cutover for quick fixes and questions
- [ ] Check mailbox sizes, licenses and sign-in reports for anything missed
- [ ] Set up backup for Microsoft 365 data and retention policies
- [ ] Review security alerts and secure score regularly
- [ ] Retire on-premise Exchange only after confirming nothing still depends on it
- [ ] Schedule a review after 30 days to fine-tune policies and training

> **Ready to move on?** Users are settled, data is protected, and the old servers can be retired safely.

Need a hand?

500+ Advantt has moved 500+ users from on-premise Exchange to Microsoft 365, including email, calendars, SharePoint, Teams and Entra ID. Talk to us about your migration.

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Request a quote

Tell us how many users and where email lives today. Sales replies with a scope and a quote within one business day.

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