EXCHANGE ONLINE MIGRATION CHECKLIST

Moving from an onpremises Exchange Server to Exchange Online can feel daunting. But with the right preparation it doesn't have to be. Use this stepbystep checklist to make sure nothing is missed — from early planning and preparation through to postmigration optimisation.

If you'd like expert help, our consultants can review your environment and guide you through the process.

1. ASSESS & PLAN

- Audit your current environment
    - List all mailboxes, public folders, shared resources and distribution groups.
    - Document mailbox sizes and retention policies.

- Check versions and licensing
    - Confirm Exchange Server versions (2016/2019) and current licensing.
    - Review Microsoft 365/Exchange Online subscription options.

- Evaluate integrations
    - Identify thirdparty applications, security tools and workflows that connect to Exchange.
    - Note dependencies such as archiving tools, CRM systems or ticketing platforms.

- Assess compliance requirements
    - Consider GDPR, PCI DSS, or internal governance policies.
    - Plan how to meet retention and auditing needs in Exchange Online.

- Build a migration timetable
    - Set a cutover or staged migration date.
    - Allow time for user training and testing.

2. PREPARE YOUR ENVIRONMENT

- Update and patch your existing Exchange servers
    - Ensure the environment is stable before migrating.

- Synchronise identities
    - Set up Azure Active Directory Connect (if using a hybrid identity).
    - Validate domain ownership in Microsoft 365.

- Provision your Microsoft 365 tenant
    - Create user accounts and assign appropriate licences.

- Clean up your data
    - Remove unused mailboxes, groups and legacy permissions.
    - Archive or export any data no longer required.

- Check bandwidth and network readiness
    - Ensure your network can handle the migration traffic.
    - Review firewall rules, proxy settings and DNS records.

3. MIGRATE!

- Choose your migration method
    - Cutover, staged, hybrid or IMAP depending on size and complexity.

- Pilot migration
    - Test with a small group of mailboxes first.
    - Validate mail flow, permissions and access on different devices.

- Full migration
    - Move the remaining mailboxes, public folders and shared data.
    - Monitor migration batches for errors or throttling.

4. POSTMIGRATION TASKS

- Update DNS records (MX, Autodiscover, SPF, DKIM, DMARC)
  - Ensure mail flow goes directly to Exchange Online.

- Verify mail flow and client access
  - Test Outlook, mobile devices and web access.

- Decommission legacy servers (after verification)
  - Remove old Exchange servers from your environment.

- Recheck compliance configurations
  - Enable retention policies, litigation hold or DLP as needed.

- Train users
  - Share guidance on new features and security best practice.

- Optimise your new environment
  - Explore advanced Exchange Online features (Threat Protection, Sensitivity Labels, eDiscovery).