

# Microsoft Estate Readiness Checklist



Use this checklist before migration, hardening, Copilot rollout, or a broader Microsoft platform uplift

## 1. BUSINESS SCOPE AND OWNERSHIP

- Define the primary business outcomes for the next 12 months.
- Name one accountable sponsor for Microsoft delivery decisions.
- Confirm which teams approve identity, security, and data policy changes.
- Document in-scope and out-of-scope workloads.

## 3. SECURITY AND DATA PROTECTION

- Validate baseline controls for endpoint, email, and collaboration services.
- Confirm sensitivity labels and data handling responsibilities.
- Check privileged access pathways and emergency access accounts.
- Map incident response roles across internal and external teams.

## 5. BACKUP, RECOVERY, AND RESILIENCE

- Confirm backup scope for Microsoft 365 and Azure workloads.
- Validate retention settings against operational and compliance needs.
- Test restore workflows and record evidence for key systems.
- Document named restore owners and escalation pathways.

## 7. ENGAGEMENT SNAPSHOT

Capture and share this summary before kickoff:

- Current Microsoft footprint
- Highest-priority outcomes
- Delivery timeline
- Governance constraints
- Current risk and recovery concerns

If you want this checklist translated into a scoped recommendation, use: - /contact/?service=microsoft-solutions&intent=fit-call

## 2. TENANT AND IDENTITY BASELINE

- Confirm tenant inventory across Microsoft 365, Azure, and Entra ID.
- Review conditional access policy coverage and legacy exceptions.
- Validate MFA posture for workforce, admin, and guest identities.
- Check device enrollment and compliance controls (Intune or equivalent).

## 4. PLATFORM AND WORKLOAD READINESS

- Record current workloads, integrations, and critical dependencies.
- Define migration wave groups and cutover windows.
- Confirm rollback criteria and fallback communications.
- Capture user-impact risks for frontline and business-critical teams.

## 6. GOVERNANCE, PROCUREMENT, AND RUN-STATE

- Align licensing, cost controls, and tagging standards to owners.
- Confirm reporting cadence for operations, security, and leadership.
- Define managed support ownership post go-live.
- Finalise acceptance criteria for transition to steady state.