

# Migration Planning Checklist

Whether you're moving from Enterprise Vault to Microsoft 365, consolidating archiving platforms, or migrating to a different cloud environment entirely, planning is the first step.

This checklist gives IT decision-makers a structured way to prepare for a data migration, regardless of source platform or destination. Use it during scoping conversations, vendor evaluations, or internal planning to make sure nothing critical gets missed before migration work begins.



## Scoping + Discovery

- Inventory all data sources involved (archive platforms, mailboxes, file shares, journal data)
- Identify the current total data volume per source
- Estimate growth rate for projected data volume in one month, six months, one year
- Document current folder structures, shortcuts, and any custom user organization
- Confirm which systems hold legal hold or litigation-related data
- Identify dependencies on other IT projects (target environment setup, network upgrades)
- Run a proof-of-concept migration on a sample data set to validate throughput assumptions

## Compliance & Legal Alignment

- Loop in legal and compliance stakeholders before finalizing migration scope
- Confirm current retention policies and how they'll map to the new environment
- Identify and flag any data under active legal hold that requires special handling
- Document chain-of-custody requirements for regulated or sensitive data
- Clarify who signs off on compliance validation once migration is complete

*Note: Retention and compliance requirements vary by industry and jurisdiction. This checklist is a planning aid, not a substitute for guidance from your legal or compliance team.*

## End-User Impact & Communication

- Confirm whether access to legacy systems remains available during migration
- Set expectations for a support window in case users report access issues
- Flag any add-ins, plugins, or integrations that may be affected post-migration
- Identify what, if anything, end users need to do (ex: restart Outlook)
- Draft internal communications outlining all of the above.

## Technical & Infrastructure Readiness

- Decide whether migration infrastructure will run on-premises or in the cloud
- Assess available network bandwidth and potential impact on daily operations
- Confirm migration tooling supports all source data types in scope
- Confirm target environment (e.g., Microsoft 365 tenant) is configured and ready
- Review ingestion or throttling limits imposed by the destination platform
- Evaluate the performance of source storage systems that may affect migration speed

*Work with the internal communications team. Include a timeline, action items for the end-users, FAQ, and any potential interruptions or software unavailability.*

## Shortcut, Metadata & Structure Handling

- Confirm whether folder structures will be preserved or restructured
- Document how orphaned or deleted-source items should be handled
- Define policy for handling shortcuts
- Decide how re-folded or moved items should be treated during migration

*Make shortcut and metadata policy decisions during scoping and migration preparation to avoid scrambling mid-migration.*

## Validation & Reconciliation

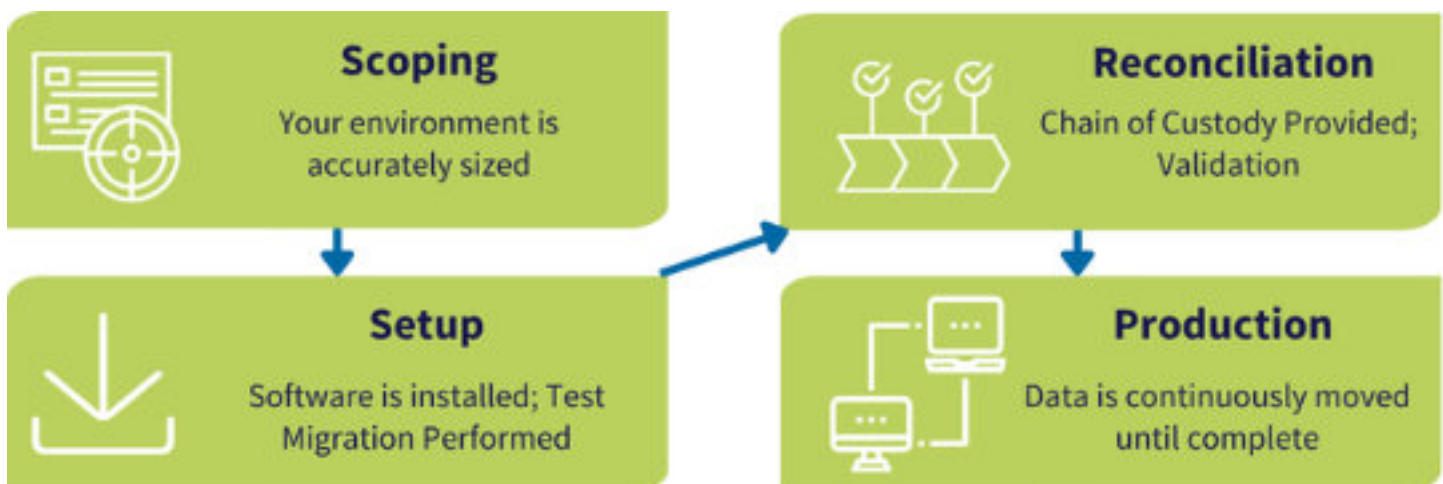
- Define what "complete and successful" looks like before migration begins
- Determine an acceptable failure rate (industry standard is around 2%, Bluesource's is significantly lower)
- Determine how much time and effort will be given to fixing errors before marking the item as a failure
- Plan for item-count and data-integrity reconciliation between source and target
- Confirm a process for spot-checking shortcuts, metadata, and folder placement
- Document chain-of-custody validation for compliance-sensitive data
- Identify who reviews and signs off on final reconciliation reports

**Success Story:**  
Bluesource managed a migration of over 1 billion emails, totaling over 420 terabytes, with ZERO failures.

## Post-Migration Follow-Up

- Confirm legacy system decommissioning timeline and requirements
- Archive migration documentation for future audits or compliance reviews
- Collect end-user feedback on any access or usability issues
- Schedule a post-migration review with stakeholders across IT, legal, and compliance

# Bluesource Migration Process



Every environment is different, and the right approach depends on your data volume, compliance requirements, and destination platform. Talk with the Bluesource team about scoping your migration and getting a realistic timeline for your specific environment.