SharePoint Online Migration Project Checklist

Phase 1: Pre-Migration Planning & Assessment

- **Define Project Scope & Goals**
  - Identify key stakeholders and project team.
  - Define clear business objectives for the migration (e.g., cost savings, improved collaboration).
  - Establish a realistic budget and timeline.
- **Conduct Content Inventory & Audit**
  - Scan all source data (file shares, on-prem SharePoint).
  - Identify Redundant, Obsolete, and Trivial (ROT) data.
  - Locate large, unused, and orphaned files.
  - Document all customizations, workflows, and permissions.
- **Perform Data Cleanup**
  - Archive data that must be kept but not migrated.
  - Securely delete all identified ROT data.
  - Remediate file issues (e.g., long file paths, invalid characters, blocked file types).
- **Plan New Information Architecture**
  - Design the target SharePoint Online site structure (Hub sites, Team sites, Communication sites).
  - Map existing content to the new structure.
  - Plan metadata, content types, and security/permission models.
- **Select Migration Tool**
  - Evaluate Microsoft vs. third-party tools based on migration complexity.
  - Procure licenses and install/configure the chosen tool.

Phase 2: Migration Execution & Testing

- **Conduct a Pilot Migration**
  - Select a representative small dataset and user group for the pilot.
  - Execute the migration to a test environment.
  - Validate migrated data, metadata, and permissions.
  - Gather feedback from pilot users and refine the process.
- **Develop Communication & Training Plan**
  - Draft announcements for key project milestones.

- Create user training materials (guides, videos, FAQ).
    - Schedule and conduct user training sessions.
- **Perform the Main Migration**
    - Schedule the migration cutover during off-peak hours.
    - Perform an initial bulk data copy.
    - Make the source system read-only to prevent changes.
    - Run a final incremental sync to catch any last-minute changes.

Phase 3: Post-Migration & Go-Live

- **Execute Cutover**
    - Point users to the new SharePoint Online environment.
    - Implement redirects from old URLs if possible.
- **Validate the Migration**
    - Perform spot-checks on critical data.
    - Run post-migration reports to check for errors or failed items.
    - Address any high-priority issues immediately.
- **Post-Migration Cleanup**
    - Decommission or archive the old source environment according to policy.
    - Provide dedicated support for users for the first few weeks.
- **Monitor & Optimize**
    - Monitor SharePoint Online performance and usage.
    - Gather user feedback for future improvements.
    - Review and refine permissions and governance policies.