

MOVING EXCHANGE TO MICROSOFT 365?

Plan the server, identities, email, applications, security and cutover

DISCOVER

DESIGN

REMEDiate

SECURE

PILOT

MIGRATE

CUT OVER

VALIDATE

DECOMMISSION

Business

- ☐ Define why the business is moving — end of support, hardware, remote work or other
- ☐ Identify the project owner and executive sponsor
- ☐ Confirm acceptable disruption level and blackout periods
- ☐ Identify critical business dates — month-end, payroll, annual events

Tenant

- ☐ Confirm the business controls the Microsoft 365 tenant
- ☐ Confirm Global Administrator access under business control
- ☐ Confirm cloud-only emergency administrator account
- ☐ Confirm domain and DNS access
- ☐ Confirm licences are selected and confirmed

Source server

- ☐ Record Exchange version and cumulative update level
- ☐ Review database health and storage
- ☐ Review certificates — expiry dates and namespaces
- ☐ Review backup configuration and test a restore
- ☐ Document mail flow: send and receive connectors, transport rules, journalling
- ☐ Check Autodiscover, MRS Proxy and internet publishing

Identity

- ☐ Review Active Directory health and domain controllers
- ☐ Review user principal names and primary SMTP addresses
- ☐ Review aliases and proxyAddresses
- ☐ Review groups, service accounts and disabled users
- ☐ Review Microsoft Entra Connect configuration and synchronisation scope
- ☐ Agree the future identity model before migration begins

Mailboxes

- ☐ Measure mailbox sizes and item counts
- ☐ Identify archive mailboxes and their sizes
- ☐ Identify shared mailboxes — document owners, delegates and permissions
- ☐ Record Full Access, Send As and Send on Behalf permissions
- ☐ Review legal holds, litigation holds and eDiscovery requirements
- ☐ Identify inactive, disconnected and former-employee mailboxes

Public folders

- ☐ Inventory public folders — hierarchy, size and item count
- ☐ Record permissions and mail-enabled public folders
- ☐ Identify owners and business purpose for each folder
- ☐ Decide destination: Exchange Online, shared mailboxes, SharePoint or archive

Applications

- ☐ Inventory multifunction printers and scanners — SMTP configuration
- ☐ Inventory website contact forms and SMTP relay
- ☐ Inventory CRM, ERP and line-of-business applications using Exchange
- ☐ Document SMTP relay connectors and receive connectors
- ☐ Identify scripts and scheduled tasks sending through Exchange
- ☐ Agree reconfiguration path for each: Microsoft 365 SMTP, relay connector or third party

Security



Configure MFA for all accounts before migration begins



Configure Conditional Access where licensed — do not disable during migration



Configure Defender for Office 365 where licensed

Review delegated provider access and Global Administrator accounts

Establish Microsoft 365 backup before data arrives

Email authentication

- ☐ Document all existing DNS records before any changes
- ☐ Plan SPF update — include Microsoft 365; remove Exchange after validation
- ☐ Enable and verify DKIM for Microsoft 365
- ☐ Maintain or improve DMARC — do not weaken during migration
- ☐ Plan Autodiscover cutover — guide clients to Exchange Online

Pilot

- ☐ Select representative users: management, finance, remote, large mailboxes, delegates
- ☐ Test mailboxes, calendars, contacts and historical data
- ☐ Test shared-mailbox access and archive access
- ☐ Test mobile devices and Outlook on all required platforms
- ☐ Test SMTP applications — printers, scanners, website forms
- ☐ Confirm support process and issue reporting

Cutover

- ☐ Complete all planned migration passes before DNS changes
- ☐ Resolve failed migration items before cutover
- ☐ Retest applications, printers and scanners
- ☐ Update MX record and monitor mail queues
- ☐ Update Autodiscover and verify Outlook profile reconfiguration
- ☐ Confirm SPF, DKIM and DMARC describe the current environment
- ☐ Update mobile devices and confirm shared-mailbox access

Validation

- ☐ Validate mail flow — inbound and outbound
- ☐ Validate historical email, calendars and contacts
- ☐ Validate shared-mailbox and archive access
- ☐ Validate permissions — delegates, Full Access, Send As
- ☐ Complete a backup restore test on Microsoft 365 data
- ☐ Confirm SMTP applications are sending successfully

Decommission

- ☐ Confirm recipient management method — verify current Microsoft guidance
- ☐ Confirm source data retention period — written agreement
- ☐ Remove or document unused connectors and transport rules
- ☐ Obtain written business sign-off before any Exchange retirement
- ☐ Do not retire Exchange solely because the last mailbox has moved

DO NOT REMOVE THE EXCHANGE SERVER UNTIL IDENTITY, APPLICATIONS, MAIL FLOW AND RECOVERY HAVE BEEN VERIFIED

The last mailbox moving to Microsoft 365 does not automatically make the Exchange Server safe to remove.