

The migration checklist to get it right the first time

Five phases. One checklist. No surprises on cutover day. Use this alongside the ShareGate Exchange Online migration guide. Work through it start to finish or jump to the phase you need.

Phase 01 · 13

Phase 02 · 7

Phase 03 · 4

Phase 04 · 15

Phase 05 · 5

PHASE 01**Audit your environment**

13 items

- ☐ List every mailbox type: user, shared, room/equipment, resource calendars, distribution groups, mail-enabled security groups
- ☐ Flag inactive mailboxes—soft-deleted mailboxes under a compliance hold. For cross-tenant migrations, mailboxes on hold are blocked from migration
- ☐ Identify users with in-place archive mailboxes and note their sizes
- ☐ Note any public folders—public folder migration is a separate process
- ☐ Check mailbox sizes and flag anything over 100 GB
- ☐ Document who has Send As, Send on Behalf, or Full Access permissions on shared and user mailboxes
- ☐ Note auto-mapping: Full Access permissions automatically add the mailbox to Outlook via Autodiscover—users will notice if this breaks
- ☐ Check Microsoft Purview for active retention policies, labels, or holds on any mailboxes being migrated
- ☐ Review DLP policies to confirm they'll apply correctly in Exchange Online
- ☐ Confirm migration tooling supports Modern Authentication (OAuth 2.0)—Basic Auth was disabled in October 2022
- ☐ Review DNS records: MX, SPF, DKIM, DMARC, and Autodiscover—all need a plan before migration starts
- ☐ Check network bandwidth—Microsoft throttling can slow large batches
- ☐ Choose your migration tool: EAC (cutover / staged / Google Workspace), PowerShell (cross-tenant), or ShareGate Migrate (tenant-to-tenant / Google Workspace)

PHASE 02**Prepare the destination**

7 items

- ☐ Confirm destination user accounts exist before migration starts
- ☐ For tenant-to-tenant: Entra ID users must exist in the destination before mailbox mapping can work
- ☐ For Google Workspace: create Exchange Online mailboxes for each user before running IMAP migration
- ☐ Confirm Modern Authentication is enabled in Exchange Online (on by default, but verify it hasn't been disabled)
- ☐ Configure SPF record: add include:spf.protection.outlook.com to your domain's SPF record
- ☐ Set up DKIM signing for your domain in Exchange Online
- ☐ Run a pilot migration with IT staff or volunteers—validate mail, calendars, delegate access, Outlook, and mobile

PHASE 03

Migrate

4 items

- ☐ Monitor migration progress in the Exchange admin center or your migration tool's dashboard throughout
- ☐ Watch for failed items: missing permissions, oversized messages (35 MB limit for cutover/staged/IMAP; 150 MB for MRS-based cross-tenant moves), or corrupt data
- ☐ If migration is running slower than expected and includes archive or group mailboxes, submit a service request to Microsoft to temporarily lift EWS throttling limits (30, 60, or 90-day windows available)

`admin.microsoft.com → Support → New service request → search "throttling" → select "Increase EWS Throttling Policy"`
- ☐ If using ShareGate Migrate: a 429 or 503 error means throttling—ShareGate retries automatically. You'll be notified if the delay becomes significant

PHASE 04**Verify after migration**

15 items

- ☐ Check item counts between source and destination
- ☐ Verify calendar events made it across with correct organizer, attendees, and recurrence patterns
- ☐ Confirm delegate access is working—can delegates open shared mailboxes and send on behalf of the right accounts?
- ☐ Make sure contacts carried over correctly
- ☐ Send test messages from external accounts and confirm delivery in Exchange Online
- ☐ Check that out-of-office replies work
- ☐ Verify inbox rules and filters migrated and are running correctly
- ☐ Confirm shared mailboxes are receiving mail as expected
- ☐ For tenant-to-tenant: run a calendar sweep—recurring meetings still point to the old tenant's Teams join URLs. Organizers must reissue invites from the new tenant. Focus on recurring meetings with external attendees and future one-off meetings dated after cutover
- ☐ Confirm all migrated users have active Exchange Online licenses (30-day grace period from migration completion)
- ☐ Confirm retention policies and compliance holds are applying correctly to migrated mailboxes
- ☐ Check archive mailbox status in the destination for users who had archiving enabled
- ☐ Confirm users have set up a new Outlook profile to connect to their migrated mailbox
- ☐ Prepare FAQs and screen recordings before cutover
- ☐ Plan for 50–100% extra help desk capacity for week one (most common tickets: password resets, MFA enrollment, device sign-in issues, users who can't find their data)

PHASE 05**Decommission**

5 items

- ☐ Run a final check for anything missed—Power Platform flows, Planner, Loop, Bookings, and other services in the source tenant
- ☐ Revoke permissions and disable source accounts

- ☐ Update DNS to remove any remaining references to the old mail infrastructure
- ☐ Document what moved, when, and what didn't
- ☐ Keep the source tenant minimally licensed for at least 30 days—longer for complex migrations. Microsoft deletes tenants approximately 90–180 days after all paid subscriptions are canceled

WATCH OUT FOR THESE

Common migration challenges



Delegate permissions

Full Access, Send As, and Send on Behalf live on the mailbox object, not in mail content. They don't migrate automatically. Document and re-grant after migration.



Group mailboxes

Migrate group mailboxes after Teams content, not before. Teams groups can have active shared mailbox content you don't want to lose.



PST files

PSTs need a separate plan. They can't be automated. Options: import to Exchange Online before migration, move to OneDrive, or handle manually after cutover.



Shared mailboxes

Must exist in the destination before migration starts. For cross-tenant: pre-create as MailUser objects. Permissions must be re-granted explicitly after migration.



Public folders

Separate workload, separate process. Don't fold into the mailbox migration plan.



Source subscription

Don't cancel the source subscription too soon. Keep it minimally licensed for at least 30 days.

Ready to migrate?

ShareGate Migrate's mailbox migration gives you visibility into what's moving, control over how it moves, and verification after it's done.

[Get a demo →](#)