

Map the move and protect your data

Use one copy per migration. Tick only after the check is completed and evidence is recorded.

Organisation / domain:

Migration lead / date:

Scope: ☐ Website only ☐ DNS change ☐ Email move ☐ Domain change

Source / destination providers:

01 Find every dependency | Owner: IT lead + departments

- ☐ Record registrar, DNS, web host, email provider and account recovery owners.
- ☐ List employee mailboxes, shared inboxes, aliases, forwarding and delegated access.
- ☐ Identify website forms, CRM alerts, password resets and devices that send email.

02 Protect data and record the setup | Owner: IT / service provider

- ☐ Export the DNS zone; confirm backups, recovery access and retention requirements.
- ☐ Check destination licences, storage and any data the chosen method cannot transfer.
- ☐ Keep the old service active; document recovery actions and approval responsibilities.

Evidence / open issues:

Choose, test and prepare the switch

Do not change live mail routing until destination readiness and the pilot have been reviewed.

03 Choose a method and run a pilot | Owner: Migration administrator

- ☐ Confirm whether mailboxes need to move; assess native and third-party options.
- ☐ Verify source/destination support, data coverage, permissions, reporting and total cost.
- ☐ Pilot representative mailboxes; check folders, attachments and required shared access.
- ☐ Review failed/skipped items and plan supported follow-up synchronisation.

04 Prepare DNS and authentication | Owner: DNS + email administrators

- ☐ Review MX routing, SPF senders, DKIM signing and DMARC alignment/policy.
- ☐ Preserve valid mail records for website-only moves; follow provider-specific instructions.
- ☐ Plan TTL changes in advance where appropriate; review against the saved configuration.

05 Prepare employees and support | Owner: Communications + HR + IT

- ☐ Publish the migration window, time zones, expected impact and any employee actions.
- ☐ Share verified support contacts and explain how to check unexpected access requests.
- ☐ Test access to instructions without email; prepare an independent fallback channel.

Ready to switch? ☐ Pilot passed ☐ DNS reviewed ☐ Employees informed ☐ Recovery plan ready

Verify delivery and approve closure

A completed mailbox copy is not proof that mail delivery, employee access or business workflows work.

06 Test real work | Owner: IT lead + business testers

- ☐ Test external and internal sending/receiving, replies, attachments and shared inboxes.
- ☐ Check browser, desktop and mobile access; inspect headers and delivery logs.
- ☐ Submit website forms and test recruitment, support and application notifications.
- ☐ Record test evidence; obtain confirmation from each critical workflow owner.

07 Reconcile and retire safely | Owner: IT lead + business sponsor

- ☐ Resolve failed/skipped items; complete supported follow-up transfers and reconcile both systems.
- ☐ Confirm retention/recovery arrangements; resolve or formally accept outstanding issues.
- ☐ Remove temporary access only when no longer needed; cancel old services after sign-off.

Workflow tests passed / total: _____ Unresolved items: _____ Review date: _____

Open issues / evidence required before approval:

Decision: [] Approve closure [] Keep old service active [] Further testing required

IT owner: _____ Business sponsor: _____ Date: _____

Recovery note: Reverting DNS does not reconcile messages received by separate email systems.