



FREE CHECKLIST

Cloud Migration Planning Checklist

A phase-by-phase checklist for planning a move to the cloud, from the first business case to the months after go-live.

INSIDE

7 planning phases · an application inventory sheet · a cutover-day checklist

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2026 edition



HOW TO USE THIS CHECKLIST

Most cloud migrations that go wrong were decided too quickly. The servers move, but nobody mapped what depended on them, who owns the new bill, or how to roll back if cutover day goes badly.

Work through the seven phases in order. Each one ends with a decision you should be able to write down before you move on. Tick items as you settle them, and keep the finished checklist with your project plan. The questions apply whether you're moving to AWS, Microsoft Azure, another cloud platform or a set of SaaS applications.

Tip: name one person who owns the migration from start to finish. They don't have to do the technical work. They do have to make the calls when the business and the technical plan pull in different directions.

1. Decide why, and what's in scope

- ☐ We've written down the business reasons for moving, in plain language.
For example: hardware is due for replacement, staff need secure remote access, a growing site needs more capacity.
- ☐ We've agreed what success looks like six months after go-live, and how we'll measure it.
- ☐ We know which systems are in scope for this project and which are deliberately left out.
- ☐ We've identified any contract, insurance or regulatory requirements that affect where data can live.
- ☐ We've set a budget range for the project and for monthly running costs afterward.
- ☐ A business owner and a technical lead are named and have time set aside for the project.

Decision to write down: why we're moving, what's in scope, and what success looks like.

2. Take inventory and map dependencies

- ☐ We have a list of every server, application, database and file share in scope, with its owner.
- ☐ For each application, we know who uses it, how often, and what happens to the business if it's down for a day.
- ☐ We've mapped what each system talks to: other applications, printers, scanners, phone systems, outside partners.
Hidden connections cause most cutover-day surprises.

- ☐ We know where licenses come from and whether they can move to the cloud on the same terms.
- ☐ We've identified anything that must stay on site (lab equipment, shop-floor systems, very large local files).
- ☐ We've flagged systems that are past end of support or no longer needed, so we don't move them.

Use the inventory sheet at the end of this checklist to capture each application in one place.

Decision to write down: the final list of what moves, what stays and what retires.

3. Choose the target and the approach

Each application needs its own decision. Most businesses end up using more than one approach.

Approach	What it means	Usually fits when
Rehost	Move the system largely as is onto cloud servers.	You need to move quickly and the application works well today.
Replatform	Move it with targeted changes, such as a managed database in place of a self-run one.	A few changes would cut upkeep or cost without a rebuild.
Replace with SaaS	Retire the system and use a subscription application instead.	A mature SaaS product covers the need and your customizations are small.
Retain or retire	Keep it where it is for now, or switch it off.	It has a hard local dependency, or nobody really uses it.

- ☐ We've chosen an approach for every application on the inventory, with a reason.
- ☐ We've compared at least two platforms or vendors on cost, fit with our current tools, support and exit terms.
- ☐ We've estimated monthly running costs for each approach: storage, backup, licenses and data transfer, including the cost of moving data out later.
- ☐ We've decided the order of moves, starting with a lower-risk system so the team can learn.
- ☐ We know who will handle monitoring, patching, backup checks and user support after go-live, in writing.

Decision to write down: target platform, approach per application, and the move order.

4. Plan security and identity

- ☐ We've decided how people will sign in, ideally with one identity across cloud and on-site systems.
- ☐ Multi-factor authentication will be required for every user. Administrators use separate admin accounts.
- ☐ We've defined who can create, change or delete cloud resources, and who approves spending.
- ☐ Data will be encrypted in transit and at rest, and we know who controls the keys.
- ☐ Logging is turned on for sign-ins and administrative changes, and someone is assigned to review it.
- ☐ We understand which security tasks the cloud provider handles and which stay with us.
Providers publish a shared responsibility model. Read the one for your platform.
- ☐ Our security provider or IT team has reviewed the design before anything goes live.

5. Move the data and plan cutover

- ☐ We've cleaned up data before moving it: duplicates, stale files, departed users' folders.
- ☐ We've chosen a transfer method for each data set and tested how long it takes.
- ☐ We've agreed a cutover window with the business and told staff and outside partners what to expect.
- ☐ We have a full, tested backup of every system taken just before cutover.
- ☐ DNS changes, firewall rules, certificates and integrations are listed with the person responsible for each.
- ☐ We've written the go/no-go criteria for cutover day, and who makes the call.

6. Test, and keep a way back

- ☐ Each application has a short test script written by the people who use it every day.
- ☐ We've tested performance from every location and from home connections, not just the office.
- ☐ We've tested backups by restoring something, not just by checking that the job ran.
- ☐ Each move has a written rollback plan: the trigger, the steps, and how long it takes.
If you can't describe how to go back, you're not ready to go forward.
- ☐ We've decided how long the old environment stays available, read-only, before it's switched off.

7. After go-live: cost, backup and ownership

The migration isn't finished on cutover day. Most of the long-term value, and most of the cost surprises, come in the months after.

Track the cost

Set budget alerts on day one. Review the bill monthly against your cost estimate. Tag resources by department or project so you can see who's spending what. Shut down test systems and unused storage.

Protect the data

Confirm that backups cover cloud systems and SaaS data, not just servers. Keep at least one copy separate from the main account. Schedule restore tests and write down the results.

Name the owners

Every cloud system needs a business owner and a technical owner. Write down who approves changes, who receives alerts, who users call with problems, and who manages the vendor relationship.

Review and improve

At 30, 90 and 180 days, compare results with the success measures you set at the start. Decide what to resize, what to modernize next, and what to retire.

- ☐ Documentation is updated: diagrams, accounts, settings, vendor contacts and renewal dates. Old hardware is wiped and retired properly.
- ☐ Our technology roadmap reflects the new environment and the next steps.

Cutover-day checklist

Done	Step	Owner
☐	Final backup confirmed and restorable	
☐	Final data sync completed and record counts checked	
☐	DNS, firewall and integration changes applied	
☐	Smoke tests passed (sign-in, key screens, printing, email)	
☐	Go/no-go decision made and recorded	
☐	Users told the system is live, with a contact for problems	

Application inventory sheet

One row per application or system. Copy this sheet as many times as you need.

Application / system	Business owner	Depends on	Impact if down	Approach	Move order

Impact if down: High (business stops), Medium (work slows), Low (inconvenient). Approach: Rehost, Replatform, SaaS, Retain or Retire.

Want help planning your move?

A cloud migration touches security, software, costs and every provider you use. As your Managed Technology Provider, Balancelogic plans the move around your business goals and coordinates the people doing the work. Balancelogic is an AWS Select Tier Partner. Our cloud team holds AWS, Microsoft Azure and CompTIA Cloud+ certifications.

Book a free IT Strategy Session. Bring this checklist, filled in as far as you can.

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