

File migration readiness checklist

The checks that decide whether a file migration is ready to be scheduled. Work through them before dates are promised to anyone; every unticked box is preparation work, not a risk to accept.

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This checklist operationalises one idea: understand the estate before it is scheduled. It is written to be worked through with the people who own the content and the risk, not filled in alone at a desk.

Treat every unticked box as discovery work still to do. If a box cannot be ticked honestly, that is useful information about the migration date, not a formality to wave through.

INVENTORY

05 checks

A storage report is not an inventory. These checks establish what actually exists.

- ☐ **A read-only inventory of the estate exists.**
Content age, size, duplication, ownership, access and usage, captured without changing anything.
- ☐ **The inventory covers every source in scope, including mailboxes, personal areas and forgotten shares.**
- ☐ **Volume is broken down by business area, not just totals.**
Totals hide the messy corners where migrations fail.
- ☐ **Backups, archives and shadow copies are identified so scope is not double-counted.**
- ☐ **The inventory has a date and will be refreshed if planning drags on.**

- ☐ Every in-scope area has a named owner who has confirmed what it is for.
- ☐ Areas whose owners have left are flagged for a decision, not silently inherited.
- ☐ Shared and cross-team areas have an agreed decision-maker.
- ☐ Owners have seen the inventory of their own areas and agreed it is right.
Ownership on paper is not ownership until the owner has looked.

CLASSIFICATION

04 checks

- ☐ Content is classified into plain categories: current, stale, duplicate, sensitive, unknown.
Plain categories beat elaborate taxonomies. Five is usually enough.
- ☐ Stale and duplicate material is marked for archive or disposal with the owner's agreement.
- ☐ Sensitive and regulated content is identified, with retention requirements recorded.
- ☐ The unknown category is small enough to review by hand.
If unknown is the biggest category, discovery is not finished.

DEPENDENCIES

04 checks

The estate is load-bearing for more than documents.

- ☐ Load-bearing folders are identified: paths referenced by shortcuts, links, scripts and scheduled jobs.
- ☐ Applications that read from or write into the estate are known, with owners.
- ☐ Deliberate permissions are separated from historical accidents.
- ☐ Anything that breaks when a path changes has a plan, an owner and a test.

- ☐ The target structure is agreed and written down, not implied.
Designed around how the organisation works today, not the old tree's accidents.
- ☐ Source to target mapping is explicit for every in-scope area.
- ☐ The exclusion list exists, with a reason recorded against every entry.
The decision not to move something is still a decision. Record it.
- ☐ Naming, permission and sharing standards for the target are agreed before content lands.

- ☐ Sign-off points are booked with the people who own the risk.
- ☐ A pilot group is agreed, with success criteria that would be embarrassing to fudge.
- ☐ Each migration group has a rollback plan and a communication plan.
- ☐ Evidence is captured at every stage: what moved, what did not, and why.
The evidence pack is what makes the migration defensible afterwards.

The checklist produces a picture, not a score. An unticked box is not a penalty point; where the gaps cluster tells you what kind of work remains.

Inventory

Gaps here mean the estate is not yet known. That is discovery work still to do, not migration risk to accept.

Ownership

Gaps here mean decisions have no accountable owners yet, and every later stage will stall waiting for them.

Classification

Gaps here mean scope is not controlled: nobody can yet say what moves, what archives and what goes.

Dependencies

Gaps here mean the move can break systems outside the file estate, and nobody has agreed to that.

Target and mapping

Gaps here mean tooling selection is premature. There is nothing agreed for a tool to execute yet.

Sign-off and delivery

Gaps here mean there is a proposed date but not yet an agreed decision.

A checklist with unresolved gates is not a failed migration. It is an honest description of the preparation still required.