

CLOUD PLANNING CHECKLIST

Cloud Migration Readiness Checklist

Work out what should move, what should stay, and what a migration will genuinely cost you before you commit to a platform.

01	Which workloads actually save money in the cloud
02	The licensing traps that inflate month-two invoices
03	A cutover plan that avoids downtime for your team

Use this guide to assess where you are, identify the evidence you need, and turn the biggest gaps into a practical action plan.

Prepared by Brotherly Technology

Owner-led IT, security, and compliance support.

15-MINUTE ASSESSMENT

Start with the current state

Mark each item Yes, Partial, or No. A written policy only counts as Yes when the process is operating and you can show evidence.

☐ Every workload has an owner, business purpose, user group, and support contact.	☐ Yes ☐ Partial ☐ No
☐ Dependencies include identity, databases, file paths, devices, integrations, and scheduled jobs.	☐ Yes ☐ Partial ☐ No
☐ Current costs include hardware, power, warranties, labor, backups, licenses, and downtime.	☐ Yes ☐ Partial ☐ No
☐ Performance baselines capture utilization, latency, storage growth, and busy periods.	☐ Yes ☐ Partial ☐ No
☐ Data classification and residency requirements are documented.	☐ Yes ☐ Partial ☐ No
☐ The target licensing model has been reviewed by workload and user role.	☐ Yes ☐ Partial ☐ No
☐ Backup, retention, recovery, and legal-hold needs are designed separately from availability.	☐ Yes ☐ Partial ☐ No
☐ Identity uses MFA, least privilege, conditional access, and emergency accounts.	☐ Yes ☐ Partial ☐ No
☐ Logging, alerting, patching, and cost ownership are assigned before migration.	☐ Yes ☐ Partial ☐ No
☐ A pilot workload can validate network, identity, support, and billing assumptions.	☐ Yes ☐ Partial ☐ No
☐ Cutover has a freeze window, communication plan, validation script, and rollback trigger.	☐ Yes ☐ Partial ☐ No
☐ A 30-day post-migration review is scheduled for cost, security, and performance.	☐ Yes ☐ Partial ☐ No

Quick score: Yes = 2, Partial = 1, No = 0. Start with any No that could stop work, expose sensitive data, or create an avoidable contract cost.

WORKLOAD PLACEMENT

Move workloads for a reason

Score each workload against the business outcome. Cloud is valuable when it improves resilience, reach, speed, or operating leverage - not simply because it is newer.

Workload pattern	Often a good fit	Check before moving
Variable demand	Elastic compute or seasonal services	Scaling rules, minimum cost, and performance tests
Remote collaboration	Modern productivity and file services	Permissions, sync limits, retention, and internet dependence
Aging server	Supported cloud replacement or SaaS	Application support, data migration, and user experience
Low-latency plant app	Hybrid or remain onsite	Network path, offline mode, and recovery
Legacy licensed app	Case-by-case	Vendor support, cores, CALs, virtualization rights
Archive / backup	Object storage with lifecycle controls	Retrieval charges, immutability, restore time

Write the expected benefit beside every migration candidate. If the benefit cannot be measured, pause before approving the move.

Catch licensing traps before the second invoice

Estimate normal use, peak use, data movement, support, and add-ons. Then prove the cutover with a pilot and rollback rehearsal.

1	Inventory base licenses plus identity, security, backup, retention, phone, analytics, and support add-ons.
2	Model storage transactions, snapshots, log ingestion, outbound data, reserved capacity, and minimum commitments.
3	Pilot representative users and measure performance, support volume, and actual daily cost.
4	Create a minute-by-minute cutover plan with owners, validation checks, communications, and a go/no-go point.
5	Keep the rollback path usable until business owners sign off and backups are independently verified.

What to watch for

WATCH: The quote shows compute but omits backup, security, logs, or outbound data.

WATCH: Licenses are counted by employee instead of actual role and feature need.

WATCH: A migration is scheduled without an application dependency map.

WATCH: Rollback depends on restoring a backup that has never been tested.

WATCH: No one owns cost alerts or the post-migration rightsizing review.

MAKE IT ACTIONABLE

Turn the worksheet into a 30-day plan

Do not try to solve everything at once. Assign one owner, one next action, and one date for each priority.

NOW	Name the owner and confirm the current state.	_____
NEXT 7 DAYS	Fix the highest-risk gap or gather the missing evidence.	_____
NEXT 30 DAYS	Complete the remaining quick wins and set review dates.	_____
NEXT QUARTER	Test the process, document results, and assign improvements.	_____

Notes / decisions / questions for your provider

Want a second set of eyes? Book a free consultation at brotherlytechnology.com/contact/ or call 404-907-1005.

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