

# Will Your Email Migration Succeed Without Loss?

One wrong step can lead to lost messages, team downtime, or compliance issues.

Email is the backbone of modern business, but migrating it can be a complex and challenging process. Use this expert-verified checklist to see if your migration plan is airtight.

Each step helps you reduce risk, improve efficiency, and align with business continuity goals.

## 1. Assess Your Current Email Environment

### What to do:

- List all current email users
- Identify the current provider (e.g., G Suite, Zoho, Outlook)
- Estimate data volume (total mailbox size, attachments, folders)
- Note any aliases, forwarding rules, or shared mailboxes
- Check third-party tools or connectors in use

### Why it matters:

A proper assessment ensures you don't overlook critical configurations or users.

### Score (out of 10):

- ☐ Full user list (2 pts)
- ☐ Data volume documented (2 pts)
- ☐ Alias/shared mailboxes identified (3 pts)
- ☐ Dependencies recorded (3 pts)

## 2. Choose the Right Migration Tool

### What to do:

- Compare top tools (like BitTitan, Transend, CodeTwo)

- Match the tool features with your current and target email platforms
- Consider scalability, compliance, and ease of use

**Why it matters:**

The wrong tool can cause downtime or incomplete migrations.

**Score (out of 10):**

- ☐ Compatibility confirmed (3 pts)
- ☐ Cost and licensing aligned (2 pts)
- ☐ Tool reviewed and tested (3 pts)
- ☐ Backup/rollback supported (2 pts)

### **3. Backup Existing Emails**

**What to do:**

- Use native export (e.g., PST for Outlook, MBOX for Gmail)
- Store backups securely, ideally encrypted
- Keep at least one offline copy

**Why it matters:**

Provides peace of mind in case of migration failure or data corruption.

**Score (out of 5):**

- ☐ Backup performed (3 pts)
- ☐ Backup securely stored (2 pts)

### **4. Test with a Pilot User**

**What to do:**

- Migrate 1–2 non-critical users first
- Validate mailbox structure, attachments, and permissions
- Record time taken and errors (if any)

**Why it matters:**

Testing helps catch issues early without affecting your entire team.

**Score (out of 5):**

- ☐ Pilot completed (3 pts)
- ☐ Validation documented (2 pts)

## 5. Schedule the Migration

**What to do:**

- Choose a time with the least user activity (weekends, holidays)
- Allocate a downtime buffer if needed
- Notify IT and key users

**Why it matters:**

Reduces the risk of interrupting work or productivity.

**Score (out of 5):**

- ☐ Downtime window defined (3 pts)
- ☐ Stakeholders notified (2 pts)

## 6. Notify and Prepare Your Team

**What to do:**

- Send a migration email with the FAQ
- Share login details (if credentials change)
- Provide how-to guides or training if necessary

**Why it matters:**

Prepared users = fewer support tickets = faster adoption.

**Score (out of 5):**

- ☐ Communication sent (2 pts)
- ☐ Training/help guides shared (3 pts)

## 7. Execute the Migration

### What to do:

- Use the selected tool to migrate emails, folders, and contacts
- Monitor logs in real-time for errors
- Migrate in phases if dealing with large orgs

### Why it matters:

Successful execution avoids mail loss or duplication.

### Score (out of 10):

- ☐ All accounts migrated (4 pts)
- ☐ Logs monitored (3 pts)
- ☐ Error resolution performed (3 pts)

## 8. Verify and Audit the Results

### What to do:

- Spot-check 10–20% of accounts
- Validate folder structures, timestamps, attachments, and filters
- Run a final validation report (if tool allows)

### Why it matters:

Even 1% data loss can lead to compliance or legal trouble.

### Score (out of 10):

- ☐ Spot-check completed (3 pts)
- ☐ Filters/folders intact (3 pts)
- ☐ Final audit passed (4 pts)

## 9. Update DNS & MX Records

**What to do:**

- Update MX records to point to your new email provider
- Set SPF, DKIM, and DMARC policies
- Allow time for DNS propagation (up to 48 hours)

**Why it matters:**

This is what tells the world where to send your email now.

**Score (out of 5):**

- ☐ MX records updated (2 pts)
- ☐ SPF/DKIM/DMARC validated (3 pts)

**10. Provide Post-Migration Support****What to do:**

- Make the IT/helpdesk available during the first 2–3 days
- Share common fixes (e.g., how to reconnect Outlook or mobile apps)
- Survey team for issues

**Why it matters:**

Smooth onboarding ensures better adoption and fewer complaints.

**Score (out of 5):**




- ☐ Support available (2 pts)
- ☐ Feedback loop set up (3 pts)

**Migration Readiness Scorecard (Total: 70 points)**

| Category               | Score |
|------------------------|-------|
| Environment Assessment | /10   |
| Tool Selection         | /10   |

|                        |            |
|------------------------|------------|
| Email Backup           | /5         |
| Pilot Migration        | /5         |
| Migration Scheduling   | /5         |
| User Communication     | /5         |
| Migration Execution    | /10        |
| Post-Migration Audit   | /10        |
| DNS & MX Configuration | /5         |
| Support & Feedback     | /5         |
| <b>Total Score</b>     | <b>/70</b> |

#### Grading:

- **60–70:**  Excellent – You’re fully migration-ready
- **45–59:**  Good – Some optimizations needed
- **Below 45:**  Risky – High potential for disruption

## Ready to Migrate with Confidence?

Let our certified email experts help you plan, test, and execute your migration.

[Contact our experts now](#)