Checklist: 10 Steps to a Successful Cloud Migration

Moving applications and workloads to the cloud is a complex, resource-intensive undertaking. Planning, prioritizing, and making informed decisions every step of the way are critical to a successful transition. Here are the essential steps to achieving a successful cloud migration:

1. Establish Your Business Case

To get a clear picture of the ROI of migrating to the cloud, ask these two vital questions: Why should you move to the cloud? Must you move everything to the cloud?

2. Choose Your Migration Partner

Save time, money, and effort by selecting your migration partner before you do anything else, because your migration partner will help you plan the remaining steps.

3. Assess Your Environment

A complete audit of the current environment will help set priorities, including what applications and infrastructure need to be migrated, what are the costs, and what resources are available to support the migration.

4. Prioritize Your Applications

Applications that can be re-platformed and noncritical applications should be the first priority. Email, SharePoint, and Microsoft Office are easy targets, but be sure to account for dependencies and don't leave other applications and services behind on your premises.

5. Determine Your Migration Approach

The top three options are to either rehost ("lift and shift"), rebuild/refactor, or redesign.

6. Choose Your Cloud Service Model

There are five common cloud service models to choose from: Software as a Service (SaaS), Platform as a Service (PaaS), Infrastructure as a Service (IaaS), or Private Cloud/Colocation.

7. Select Your Cloud Provider

Most small businesses will look to public cloud providers like AWS, Microsoft, or Google to host their cloud migration. However, you should consider security and compliance requirements, service levels, and cost to help make your decision.

8. Document Your Migration Plan

Your cloud migration partner should be able to help craft a detailed migration plan. This should include how you will communicate with your users, backup plans, installing the cloud infrastructure, testing, monitoring, and having a contingency plan.

9. Execute Your Migration Plan

The key steps necessary to execute a successful migration are: Back up all servers and data, set up the cloud environment, migrate data and applications, validate and test, and lastly, communicate openly and often!

10. Post-Cutover — The Final Steps

Once applications have been moved to the cloud, you should employ monitoring tools to identify and remediate technical or performance issues, and create a post-cutover dashboard to track essential metrics.

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