Checklist: How to Prepare for a Server Migration

This checklist is designed to help organisations prepare for a server migration, whether moving between on-premises environments, cloud platforms, or a combination of both. It is suitable for both technical and non-technical stakeholders and follows industry best-practice thinking, including service continuity, risk management, and change planning.

⚠ Disclaimer: This checklist is provided as a general guide only. It does not constitute a complete solution or professional advice. Infrastructure, applications, security requirements, and business risks vary between organisations. Always assess your own environment and seek specialist support where required.

Phase 1: Discovery & Planning

☐ Identify the purpose of the migration (cost, performance, security, end-of-life hardware, scalability).
☐ Define the scope: servers, applications, databases, integrations, and dependencies.
☐ Identify business owners, technical owners, and decision makers.
☐ Document current server specifications (CPU, RAM, storage, OS, network configuration).
☐ Identify critical applications and services hosted on the server.
☐ Assess business impact if services are unavailable.
☐ Determine acceptable downtime windows with stakeholders.
☐ For larger organisations, define high-level RTO (Recovery Time Objective) and RPO (Recovery Point Objective).
☐ Create a high-level migration plan and timeline.

Phase 2: Risk, Backup & Disaster Recovery Readiness

☐ Identify key risks (data loss, downtime, compatibility issues, security gaps).
☐ Confirm backup coverage for all systems involved in the migration.
☐ Verify backup integrity by performing test restores where possible.
☐ Ensure backups are stored independently of the source server.
☐ Review existing disaster recovery and business continuity considerations.
☐ Confirm rollback options if the migration fails.
☐ Document escalation paths and support contacts during migration.

Phase 3: Target Environment Preparation

☐ Provision the target server or environment.
☐ Apply operating system updates and security patches.
☐ Harden the server according to security best practices.
☐ Confirm network configuration (IP addresses, DNS, firewall rules, routing).
☐ Ensure sufficient storage capacity and performance.
☐ Install required software, runtimes, and dependencies.
☐ Validate access controls and administrative permissions.

Phase 4: Application & Data Readiness

☐ Inventory all applications and services to be migrated.
☐ Check application compatibility with the target environment.
☐ Document configuration files, environment variables, and service accounts.
☐ Identify data sources and data volumes.
☐ Plan data migration method (sync, snapshot, replication, manual copy).
☐ Define data freeze or change control periods if required.

Phase 5: Testing & Validation

☐ Perform test migrations in a non-production environment where possible.
☐ Validate application functionality on the target server.
☐ Test integrations, APIs, and external dependencies.
☐ Validate user access and authentication.
☐ Conduct performance and load checks as appropriate.
☐ Confirm monitoring, logging, and alerting are operational.

Phase 6: Change & Communication

☐ Schedule the migration within an approved change window.
☐ Notify stakeholders of expected impact and downtime.
☐ Confirm roles and responsibilities for migration day.
☐ Ensure support resources are available during and after the migration.
☐ Prepare user-facing communications if services will be impacted.

Phase 7: Migration Execution

☐ Perform a final backup before starting the migration.
☐ Migrate data, applications, and configurations according to plan.
☐ Update DNS, load balancers, or routing as required.
☐ Validate services immediately after cutover.
☐ Monitor systems closely for errors or performance issues.

Phase 8: Post-Migration Review & Stabilisation

☐ Confirm all services are operating as expected.
☐ Validate backups on the new environment.
☐ Monitor performance and logs during the stabilisation period.
☐ Address any post-migration issues or optimisation needs.
☐ Decommission or isolate the old server once approved.
☐ Update documentation to reflect the new environment.
☐ Conduct a post-migration review and capture lessons learned.

Need Expert Support?

Server migrations can vary significantly depending on infrastructure, applications, and business risk. If you need support planning or executing a migration, Obseq are here to help, with infrastructure and migration experts on hand and ready to help your business, helping to reduce risk and downtime.

Talk to a member of our team today on **+44 (0) 121 630 6880** and see how we can help you and your business.