



Cloud Without Complexity.

SELF-ASSESSMENT TEMPLATE

Cloud Migration Readiness

Work through this yourself to record what you have, what depends on what, and what needs deciding — before anything moves.

ORGANISATION

COMPLETED BY

DATE

BEFORE YOU START

Migrations fail on discovery, not technology.

Almost every cloud project that goes badly went wrong before anything was moved. Something was depended on that nobody knew about, and it surfaced at the worst possible moment.

The technology of moving data and systems to Microsoft 365 and Azure is well understood. What is rarely solved is knowing exactly what you have: the spreadsheet finance closes the month with, the label printer that only talks to one old server, the supplier who connects in overnight and has done for years without anyone asking how.

This template exists to surface those things early, while they are cheap to deal with.

This is yours to complete. You do not need a supplier, a consultant or a technical background to work through it. Print it and write on it, or fill it in on screen. It is designed to be completed by whoever knows the business best — often an owner, operations lead or office manager, with help from whoever looks after your IT.

Work in order and leave gaps. Each section builds on the last. Fill in what you can from memory, then check the rest rather than guessing. An honest “unsure” is more useful than an optimistic yes, because unknowns are what derail migrations. A gap is not a failure — it is a finding, and it tells you where to look next.

By the end you should know what is straightforward, what needs a decision, and what needs investigating before a date or price is committed to — useful whoever you go on to work with.

TWO THINGS TO NOTE

A completed template should let someone who has never seen your business explain what moves, in what order, and what would break if it moved carelessly. If it does not yet do that, the gaps are your next actions. It also refers to Microsoft 365 and Azure capabilities throughout — availability varies depending on your licensing, so confirm what your plan includes before assuming either capability or extra cost.

WHAT THIS TEMPLATE COVERS

01 Current environment

02 Applications & dependencies

03 Data, files & storage

04 Identity & access

05 Connectivity & devices

06 Continuity & compliance

Ready means knowing, not owning less

Readiness is not about how modern your systems are. It is about how well you understand them.

Businesses often assume they are not ready for the cloud because their systems are old. Age is rarely the obstacle. Plenty of businesses have moved successfully from genuinely ageing infrastructure, and plenty with modern systems have had difficult migrations because nobody had mapped how things fitted together.

The four questions below decide how straightforward a migration will be. They are worth answering honestly before any supplier gives you a date or a price.

01 Do you know what you have?

Systems, data, services and the things quietly holding a process together. Everything else in this template flows from this.

02 Do you know what depends on it?

Dependencies are where migrations bite. A system moved in isolation can break three processes nobody connected to it.

03 Do you know what must not break?

Which processes are genuinely business-critical, and at which points in the week or month. Payroll week is not the week to move the file server.

04 Do you know why you are moving?

Cost, resilience, remote working, ageing hardware or a compliance requirement. The reason shapes the destination, so vagueness here produces the wrong design.

WORTH SAYING PLAINLY

Not everything should move. Part of a good readiness exercise is identifying what is better retired, replaced with a service you already pay for, or deliberately left where it is.

SECTION ONE

Your Current Environment

Start with the physical and virtual reality: what runs where, and how old it is.

SERVERS & INFRASTRUCTURE

Name / rolePhysical or virtualAgeOS versionSupport status

CLOUD SERVICES ALREADY IN USE

ServiceWhat it is used forUsersWho owns it

Is there an existing Microsoft 365 tenancy?

If yes, note the domain and whether it was ever properly configured, or simply switched on.

☐ YES ☐ NO ☐ UNSURE

Is any hardware past, or near, end of support?

This often sets the timetable, so it is worth knowing before planning anything else.

☐ YES ☐ NO ☐ UNSURE

Do you have current documentation of the environment?

A network diagram, server list and admin credentials held somewhere other than one person's memory.

☐ YES ☐ NO ☐ UNSURE

Is anything running on a machine under someone's desk?

Unofficial servers are common, and are the systems most often forgotten in a migration plan.

☐ YES ☐ NO ☐ UNSURE

SECTION TWO

Applications & Dependencies

The most important section in this template. This is where migrations succeed or unravel.

List every application the business genuinely relies on, including the awkward ones: the old database only two people use, the tool a supplier installed, the thing nobody is quite sure who owns.

ApplicationWhat it doesWhere it runsUsersCritical?

Does any application require a specific server or local resource?

A mapped drive, a licence dongle, a printer, a fixed IP address, or a database on the same machine.

☐ ☐ ☐
YES NO UNSURE

Do any applications talk to each other automatically?

Overnight jobs, exports, integrations and scheduled tasks. These break silently and are noticed late.

☐ ☐ ☐
YES NO UNSURE

Does any supplier or third party connect into your systems?

Remote support tools, VPN access, data feeds. Each one needs a plan and, often, a conversation.

☐ ☐ ☐
YES NO UNSURE

Is any application unsupported by its vendor in the cloud?

Some vendors will not support their software when hosted elsewhere. Worth checking before, not after.

☐ ☐ ☐
YES NO UNSURE

Is there a process that only one person knows how to run?

A monthly report, a reconciliation, an export. Undocumented knowledge is a dependency too.

☐ ☐ ☐
YES NO UNSURE

SECTION THREE

Data, Files & Storage

How much there is, where it lives, and how much of it anybody still needs.

Location / share Rough size Who uses it Still needed?

Do you know roughly how much data there is in total?

Volume drives how long a migration takes and how it must be sequenced.

☐ YES ☐ NO ☐ UNSURE

Is there data nobody has opened in years?

Archiving before moving is almost always cheaper and faster than moving everything.

☐ YES ☐ NO ☐ UNSURE

Are folder permissions well understood?

Years of ad-hoc permissions rarely survive a move intact. Better to redesign than replicate the mess.

☐ YES ☐ NO ☐ UNSURE

Is any data subject to retention or regulatory rules?

Records you must keep for a defined period, or data that must remain in a particular jurisdiction.

☐ YES ☐ NO ☐ UNSURE

Are staff storing work files in personal locations?

Local desktops, personal cloud storage or USB drives. If so, that data is invisible to any migration plan.

☐ YES ☐ NO ☐ UNSURE

A COMMON SAVING

Most businesses find a significant share of their file storage is duplicates, superseded versions and data belonging to projects long closed. Deciding what not to move is usually the quickest win available.

SECTION FOUR

Identity & Access

In the cloud, identity replaces the network as your boundary. Getting this right at the outset is far easier than retrofitting it.

HOW USERS SIGN IN TODAY (DOMAIN, LOCAL ACCOUNTS, MICROSOFT 365, MIXED)

WHO ADMINISTERS ACCOUNTS, AND WHO ELSE HOLDS ADMIN RIGHTS

Is there an on-premise domain controller?

This shapes the identity approach — whether accounts are synchronised, migrated, or created fresh.

☐ YES ☐ NO ☐ UNSURE

How do users authenticate today?

If it is passwords alone, migration is the natural moment to introduce stronger sign-in rather than running a separate project later.

☐ PWD ONLY ☐ MFA ☐ PASSKEYS

Are there shared or generic accounts?

Reception logins, a “scanner” user, mailboxes used as accounts. Each needs a decision before moving.

☐ YES ☐ NO ☐ UNSURE

Is the account list accurate and current?

Leavers still enabled, duplicates and test accounts should be resolved before, not carried across.

☐ YES ☐ NO ☐ UNSURE

Do external people need access after the move?

Contractors, auditors, clients. Guest access is straightforward in Microsoft 365 if planned deliberately.

☐ YES ☐ NO ☐ UNSURE

WHERE THIS LEADS

Identity in Microsoft 365 is handled through **Entra ID**, with access rules applied via **Conditional Access**. Designing this at migration time costs very little; unpicking a poor identity model afterwards costs a great deal. **Availability depends on your Microsoft 365 licence.**

SECTION FIVE

Connectivity & Devices

Cloud services are only as available as your route to them. Once systems are in the cloud, your internet connection becomes business-critical infrastructure rather than a convenience.

BROADBAND TYPE & SPEED

BACKUP CONNECTION?

SITES

DEVICES IN USE

TypeQuantityTypical ageManaged centrally? DesktopsLaptopsPhones / tabletsOther (printers, scanners, tills)

Would your connection cope if everything ran over it?

Upload speed matters more than download once files and systems live in the cloud.

☐ ☐ ☐
YES NO UNSURE

Do staff work remotely, and how?

VPN, remote desktop, or cloud services directly. Remote working is often the reason for moving.

☐ ☐ ☐
YES NO UNSURE

Are devices old enough to need replacing anyway?

If so, sequencing replacement alongside migration avoids doing the same work twice.

☐ ☐ ☐
YES NO UNSURE

Is there equipment that only works on the local network?

Label printers, plotters, door systems, machinery controllers. These are frequently overlooked.

☐ ☐ ☐
YES NO UNSURE

SECTION SIX

Continuity & Compliance

What must keep working, what you are obliged to protect, and how quickly you would need to recover.

TOLERABLE DATA LOSS

TOLERABLE DOWNTIME

BUSIEST PERIOD TO AVOID

BUSINESS-CRITICAL PROCESSES

ProcessSystems it relies onWhen it must not be interrupted

Is everything currently backed up, and has a restore been tested?

Migration is the worst possible time to discover a backup does not work.

☐ ☐ ☐
YES NO UNSURE

Do you hold personal or sensitive data?

Customer, employee or health-related records. This affects design, not just paperwork.

☐ ☐ ☐
YES NO UNSURE

Are there contractual or regulatory obligations to consider?

Client contracts, insurer requirements, sector rules or data-location commitments.

☐ ☐ ☐
YES NO UNSURE

Is there a written plan for a serious outage?

Who is called, who decides, and what happens first.

☐ ☐ ☐
YES NO UNSURE

FREQUENTLY MISUNDERSTOOD

Moving to Microsoft 365 or Azure does not, by itself, give you a backup. Cloud platforms protect against their own infrastructure failures, not against deletion, corruption or ransomware within your own tenancy.

CHOOSING AN APPROACH

Four ways to move

Most migrations use a mixture. The right choice differs system by system, so note against each application in Section Two which of these applies.

Replace with a service you already own

File shares become SharePoint Online; a homegrown form becomes a Power App. Often the best outcome where it fits, because it removes a system rather than relocating it — and frequently uses licensing you already pay for.

Move as-is to Azure

Sometimes called lift and shift: the server moves largely unchanged. Fast, low-risk, and the honest choice for software that must stay as it is — though it carries existing inefficiencies with it, so it works best as a step rather than a destination.

Move to the vendor's cloud version

Many line-of-business applications now have a hosted equivalent. Often the cleanest route, but check the migration path, the annual cost, and whether the features you depend on exist in the new version.

Retire it

Some systems are kept only because nobody has questioned them. Every application not moved is one less thing to license, patch, secure and pay for. This is the option most often overlooked.

DECISIONS TO RECORD

System	Chosen approach	Why / open question

MAKING SENSE OF IT

Where you stand

Count your “unsure” answers. That number, not the state of your hardware, is the best indicator of how much groundwork is left.

0 – 3 unsure

You understand your environment well. A migration can be scoped and priced properly, and phasing is a planning exercise rather than an investigation.

4 – 8 unsure

Normal for a business without dedicated IT. Close the gaps in Sections Two and Six first – dependencies and continuity carry the most risk.

9 or more unsure

Do not commit to a date yet. A short discovery exercise will cost far less than a migration planned on assumptions.

Mostly “no”

Knowing that something is absent is still knowledge. A clear list of what is missing is a workable starting point.

OUTLINE PHASING

PhaseWhat movesRough timingDepends on **010203040506**

YOUR THREE BIGGEST UNKNOWNNS

THE SHAPE OF A MIGRATION

What happens, and in what order

A well-run migration follows a recognisable sequence. Knowing it helps you judge whether a proposal you are given is complete – and where the work you have just done fits in.

01

Discovery

Understand the business, why it is moving, and what success looks like. Everything downstream depends on getting this right.

02

Dependency mapping

Establish what relies on what – the work you began in Section Two. This is where surprises are found cheaply.

03

Identity design

Decide how people will sign in and what they can reach. Designed once, at the start, rather than retrofitted.

04

Pilot users

A small group moves first. Real use surfaces the practical problems no plan predicts, while the impact is contained.

05

Data migration

Files and data move in phases, usually largest and least active first, with the business still working throughout.

06

Application migration

Systems move according to the approach chosen for each – replaced, rehosted, moved to a cloud version, or retired.

07

User cutover

Everyone moves across, with support on hand for the first days. The point at which the new environment becomes the real one.

08

Decommission legacy

Old systems are switched off, licences cancelled and hardware retired. Skipping this step is how businesses end up paying twice.

ON COST

Moving to the cloud does not automatically reduce what you spend. The real savings usually come from retiring systems, simplifying how things are managed and reducing operational overhead – not from the move itself. A migration that relocates everything unchanged tends to cost more, not less.

NEXT STEPS

You now know more than most suppliers will ask you.

However you proceed, a completed version of this template makes you a better-informed buyer. It lets any provider scope accurately, and it makes vague quotes easy to spot.

If you would like a second opinion on what you have written, or help closing the gaps you found, we are happy to talk it through — no commitment, and no obligation to use us for the migration itself.

And if this exercise has shown that moving is not the right priority just now, we will tell you that too.

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