**Tenant-to-Tenant Migration Discovery Meeting Questionnaire**

**Project and Client Overview**

1. **Project Name:**
2. **Date of Discovery Meeting:**
3. **Client Name:**
4. **Primary Point of Contact (POC) Name and Title:**
5. **POC Contact Information (Email and Phone):**
6. **IT Department Supervisor or Key Contact Name and Contact Information:**
7. **Expected Project Timeline and Key Deadlines:**

**Environment Details**

1. **Is the Environment Government Cloud Computing or Commercial?**
   * Government Cloud Computing
   * Commercial
2. **Required Licensing for the Environment:**
   * Which Microsoft 365 licenses are currently used?
   * Are there additional licenses required for migration?
   * Will there be any upgrades or changes to post-migration licenses?

**Technical Specifications**

1. **Client’s DNS Host Provider:**  
   (e.g., Town of Newport Telephone Co., Cloudflare, etc.)
2. **Current Email and Authentication Providers:**
   * Primary email service provider (if other than Microsoft 365).
   * Authentication methods (e.g., SSO, MFA).

**User Migration Information**

1. **User Details:**
   * Total number of users to be migrated:
   * **Naming Convention for Users:**  
     (e.g., first.last@domain.com, first initial + last name, etc.)
2. **Account Information for Migration:**
   * List of usernames:
   * Password requirements:
   * Naming convention for new accounts (if different from current naming):
3. **Special User Groups:**
   * Are there shared mailboxes, resource mailboxes, or group mailboxes to migrate?
   * Are there specific user permissions or roles that need replication in the new tenant?

**Security & Compliance**

1. **Are There Any Data Protection Requirements or Compliance Standards?**  
   (e.g., HIPAA, PII, GDPR, CJIS)
2. **Security and Access Control Preferences:**
   * Do users require MFA?
   * Any specific conditional access policies to apply?

**Applications and Integrations**

1. **List Any Applications Integrated with Microsoft 365:**  
   (e.g., Teams apps, third-party tools)
2. **Are There Any Integrations or Automations that Need Migration?**
   * APIs, connectors, or automation scripts in use?
3. **Documentation of Critical Configuration Settings and Customizations:**
   * Are there any unique configurations (e.g., email routing rules, compliance settings)?

**Additional Notes**

1. **Backup or Data Archiving Needs:**  
   (e.g., email or file storage backup requirements)
2. **Testing and Validation Requirements:**
   * Specific tests required post-migration?
   * Who will be responsible for validation of testing?
3. **Other Relevant Information:**
4. **Additional Questions or Concerns from Client:**