**Pre-Planning and Evaluation**

Identify goals, problems, and objectives.

Support: Get executive support and stakeholder buy-in

Team: Determine what you need in-house and what you may need to out-source

Documentation: current infrastructure, business requirements, previous migration planning

**Discovery**

Digital estate: identify infrastructure, applications, dependencies.

Data Management: Create/update/review data dictionaries, business glossary, data catalogs, and data classification requirements/planning/implementation.

Data Lineage: Know how you can get data lineage from your data estate.

Pilot Project: Create a one or review one you have already executed.

**Assess**

Scope: identify what needs to move

Readiness: Identify migration blockers and/or compatibility issues

Business Requirements: Review your business requirements for things like HA/DR, uptime, security, compliance, backups, and storage so you can apply them to your infrastructure.

Workloads: Capture workloads during peak/non-peak/seasonal periods according to your business needs

Baselines: Capture and review metrics that are important to your organization

Risks: Identify your risks and determine the best ways to lower them

**Architecture**

Cloud or Hybrid? Determine if your infrastructure is going to be all in the cloud or hybrid. (Including dependencies)

Azure SQL: Determine which Azure SQL offerings are correct for your data estate.

Changes: The 5 Rs from the Cloud Adoption Framework. Determine how they apply to your infrastructure and include them in your migration plan.

Additional Considerations: know what additional infrastructure items you need to plan for. Common additional considerations include storage, security, and networking.

**Costs**

Creating Estimates: plan for known costs ahead and throughout the entire process

Tools: Know what tools you can use to build as accurate of a cost estimate as possible.

Things that can cost you money: some costs are not easily obtained from the various pricing tools. Things like choosing the wrong region, the wrong Azure SQL offering, the wrong size, not knowing your thresholds, not knowing when scaling can cost you more or cost you less, egress, and various network costs. Find out how in advance about how this make affect your organization so you can adjust your budgeting, infrastructure, and migrations plans.

Ways to save: There are a lot of way you can implement additional savings, know these in advance. See slides for several examples.

**Migrate**

Planning: Make sure you create a migration plan, review scope and its business impact, and make sure everyone is on board. Plan your migration as a series of iterations and plan around major business events. Use a tool like Microsoft’s SMART.

Tools: Choose the correct tool for your migration

Deployment Methods: know the different methods available and which one(s) you are using.

**Testing**

Does Apples = Apples: run your workloads on source and target environments to check for errors, compare baselines, and check for connection / status.

Data Validation: Compare row counts, calculatable columns, data dictionary differences, [sample] reports, and stored procedures.

**Post Migration**

Tasks: Check status of your database(s)/instance(s), review logs for failures or Issues, confirm connection, decommission your on-prem infrastructure, document all your work and findings.

Measure, Plan, and Monitor: Monitor and cross-check with KPIs, continuously check performance, create an ongoing monitoring plan, and assess/plan for modernization.