

ShareGate:

The essential

Microsoft Teams

migration checklist



If there's one thing we've learned in our 12 years of helping customers succeed in the Microsoft cloud, it's that the only constant is change. In today's fast-paced world, you have to be ready to pivot at the drop of a hat, and your Teams environment needs to be able to keep up.

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Teams has become synonymous with the Microsoft 365 user experience, and a central part of the ecosystem.

The widespread adoption of Microsoft Teams has not only made it easier to communicate and share information, it's actively shaped the way we work together. The ability for users to share and collaborate on documents in real-time enables you to harness all of the talent and brainpower across your organization.

We've created this checklist based on our years of experience helping companies complete migrations of all shapes and sizes, to guide you through your own Teams migration.

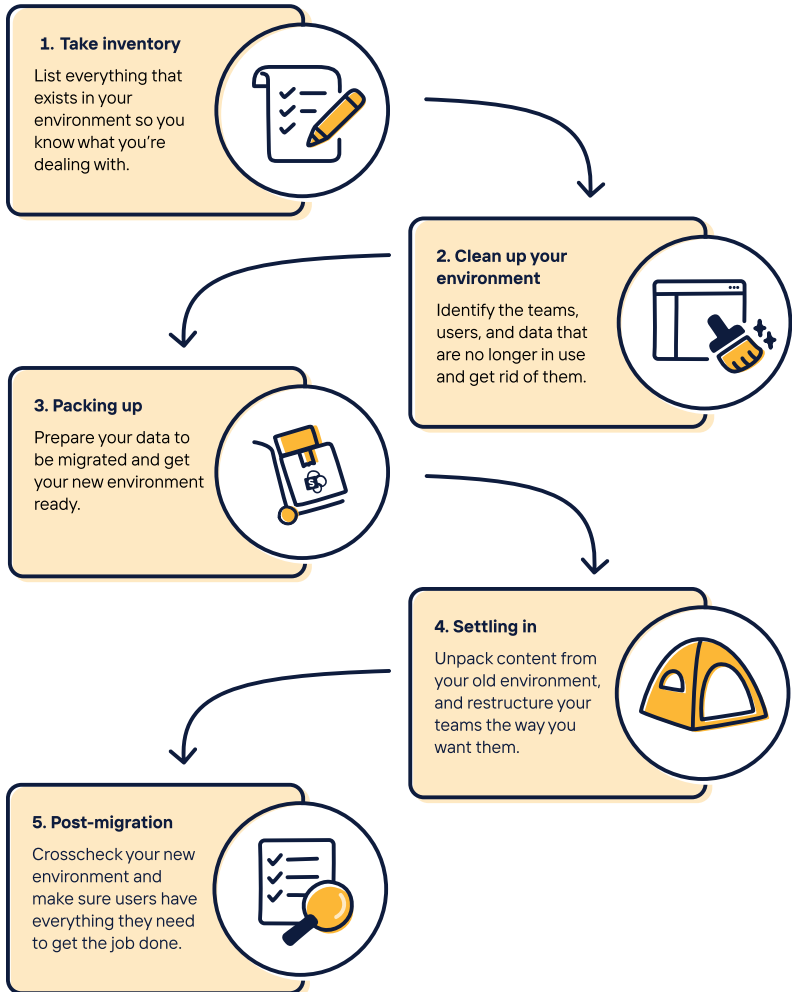
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What's in this checklist

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- Microsoft Teams migration, step-by-step
- Take inventory
- Clean up
- Packing up
- Choose your migration strategy
- Settling in
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The 5 steps to Teams migration



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Choose your migration method carefully

Before you begin your migration, you have one very important decision to make: do you want to complete this migration manually, or enlist the help of a third-party tool?

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The effort would quadruple if we had to do everything manually.... it almost couldn't be done without ShareGate.

– Doug Punchak, Application Development Manager, Avvenire Solutions

When it comes to executing a Teams tenant-to-tenant migration, there is no simple out-of-the-box solution. This leaves you with two options:

- Migrate Microsoft Teams manually
- Use a third-party migration tool

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If you want to avoid investing in a third-party tool, you can accomplish a Teams tenant-to-tenant migration manually, albeit the process is lengthy and convoluted. We'll cover all the steps here, just so you know what you're getting yourself into.

If you're ready to hit the ground running and want to fast-track your migration process, get started today with a trial of **ShareGate's Teams migration tool**.

Microsoft Teams migration, step-by-step

If you're still set on that manual migration, here are the steps you'll want to follow. Keep in mind that with ShareGate, this list would be significantly shorter.

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Take inventory

A Teams migration is a great opportunity to take inventory of everything that currently exists in your environment, and a chance to start off your newly-merged Teams environment on the right foot. As you identify existing content, you might find duplicate teams, content that's no longer up-to-date or valid, and channels or teams that can be archived and deleted.

That's why making a detailed inventory is a crucial part of planning any successful migration.

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Take into consideration:

- ☐ Existing teams
- ☐ Team settings and descriptions
- ☐ Channels
- ☐ Membership (owners and members)
- ☐ Content

- ☐ Planner plans
- ☐ Workloads
- ☐ Permissions
- ☐ Conversation history (including sender, threaded messages, links, and timestamps)
- ☐ Lists
- ☐ Files (along with their metadata)
- ☐ Tabs
- ☐ Apps and bots
- ☐ SharePoint site customizations
- ☐ Metadata

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Clean up

Once you've got a handle on everything that exists in your environment, it's time to do some tidying up. Identify the teams, users, and data that are no longer in use and get rid of them. That way, you'll only migrate what you actually need. This lays the foundation for a cleaner and more productive environment.

- ☐ Existing teams
- ☐ Inactive teams
- ☐ Orphaned teams
- ☐ Inactive users
- ☐ Obsolete content

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Packing up

Before you migrate your existing Teams environment, you'll need to spend some time packing up what's left from your old environment and getting your new environment ready. Here are some steps you can take to make your new environment as comfortable as possible for your old teams!

- ☐ Download contents of the associated SharePoint team sites
- ☐ Export Teams group chat history
- ☐ Export Teams channel chat history
- ☐ Prioritize each team's "General" folder
- ☐ Create teams in your new environment so that content has a destination
- ☐ Recreate the structure of these teams, including channels and tabs
- ☐ Prepare a user readiness plan

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Choose your migration strategy

Before you migrate your existing Teams environment, you'll need to spend some time packing up what's left from your old environment and getting your new environment ready. Here are some steps you can take to make your new environment as comfortable as possible for your old teams!

- ❑ **Single-event migration:** A one-and-done migration that allows you to transfer your entire environment quickly, albeit with higher risk. This type of migration is typically limited to environments of less than 15,000 users or 7 TB of content.
- ❑ **Phased migration:** A gradual migration of your teams, users, and content that is lower risk but takes more time to complete. This type of migration is more conducive to keeping users working throughout, with the option to move only what's changed since your last migration

Settling in

Welcome your teams to their new home! It's time to get settled in and unpack all of that content from your old environment, and restructure your teams the way you want them.

- ☐ Upload contents of associated SharePoint team sites at the destination
- ☐ Import Teams group chat history
- ☐ Import Teams channel chat history
- ☐ Ensure all users have been added at the destination Azure Active Directory
- ☐ Invite users to join the same teams they were members of in your old Teams environment
- ☐ Manually promote the correct members to owners within each team

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Post-migration

After your migration, you'll want to make sure everything made it across successfully. Follow these steps to crosscheck your new environment and make sure users have everything they need to get the job done.

- ☐ Test your destination environment
- ☐ Ensure everything migrated successfully Test/run all workflows
- ☐ Check user permissions
- ☐ Create a backup of your new environment
- ☐ Remove access to the old SharePoint
- ☐ Run a full crawl
- ☐ Check in with end users to see how they are adjusting to their new environment

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Something to take into consideration

A manual Teams migration is not for the faint of heart. It may seem simple from the outside, but once you get into it you may realize you're in over your head--like how you totally thought you could undertake that simple plumbing project with the help of your trusty YouTube tutorial, only to have to call in a professional at the last minute.

Fortunately, there's another way.

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With the use of a third-party tool like **ShareGate's Teams Migration solution**, you can complete your migration in just a few clicks. Migrate teams to another tenant—or copy teams within the same tenant—without the need to script. We also automatically map users at the destination. That way, you're sure the right people have access to the right teams with the right set of permissions.

ShareGate:



The Microsoft Teams migration tool built for IT admins

Tour ShareGate's Microsoft Teams Migration features and learn how you can:

- Plan and execute your Teams migration
- Easily restructure your Teams environment as much as you want
- Customize your migration to ensure your users can continue to work seamlessly in their new environment
- When your migration is done, identify and troubleshoot any migration issues directly from the ShareGate Migration Tool Interface
- All with award winning ShareGate support

Try it for free

[Learn more](#)

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