MAXIMUS IT
Engineering-First IT · Ottawa · Toronto

FIELD GUIDE · v1.0

Cloud Migration Checklist

A printable, engineer-approved checklist for moving SMB workloads to the cloud without surprises.

What this document is

A condensed reference covering the four phases of a successful cloud migration: Discovery, Planning, Migration, and Post-Migration. Use it as a working checklist during planning sessions, wave reviews, and cutover days. It is intentionally vendor-neutral; the same controls apply whether you are targeting Azure, AWS, or Google Cloud.

Discovery
Inventory, dependencies, baselines

Planning
Strategy, landing zone, cost model

Migration
Pilot, waves, cutover, rollback

Post-Migration
Right-size, secure, validate, document

Last updated: July 14, 2026
Prepared by Maximus IT · https://www.maximusit.ca

The Checklist

Tick each item as you complete it. Skip nothing without a written reason.

1. Discovery

Understand what you have before you move anything.

- [ ] Inventory all servers, VMs, databases, and storage volumes
- [ ] Catalog SaaS and line-of-business applications with owners
- [ ] Map application dependencies and integration points
- [ ] Document current network topology, VPNs, and firewall rules
- [ ] Measure baseline performance: latency, throughput, IOPS
- [ ] Identify compliance scope (PIPEDA, PHIPA, SOC 2, HIPAA, PCI)
- [ ] Record current monthly infrastructure and licensing spend
- [ ] Confirm data residency requirements (Canadian regions)

2. Planning

Translate discovery into a defensible migration plan.

- [ ] Select target cloud(s): Azure, AWS, GCP, or hybrid
- [ ] Choose a strategy per workload: rehost, replatform, refactor, retire
- [ ] Define landing zone: subscriptions, accounts, VPCs, IAM, tagging
- [ ] Establish identity model (Entra ID / SSO) and conditional access
- [ ] Design network: hub-and-spoke, ExpressRoute / Direct Connect, DNS
- [ ] Set RPO and RTO targets per workload tier
- [ ] Build cost model and budget alerts; estimate 12-month TCO
- [ ] Define rollback criteria and cutover windows per wave
- [ ] Draft a communications plan for staff and customers

3. Migration

Execute in small waves with verifiable checkpoints.

- [ ] Provision landing zone via IaC (Terraform / Bicep)
- [ ] Configure baseline security: MFA, logging, key vault, backups
- [ ] Run pilot migration on a non-critical workload
- [ ] Validate identity, DNS, and connectivity end-to-end
- [ ] Replicate data and verify integrity (checksums, row counts)
- [ ] Perform application smoke tests against the migrated stack
- [ ] Cut over in scheduled waves; keep source available for rollback
- [ ] Update monitoring, alerting, and runbooks for the new environment
- [ ] Decommission source systems only after sign-off

4. Post-Migration

Operate, optimize, and prove the business case.

- [ ] Right-size compute and storage based on 30 days of telemetry
- [ ] Enable reserved instances or savings plans where steady-state
- [ ] Review and tighten IAM roles and network exposure
- [ ] Validate backup and disaster recovery with a restore test
- [ ] Document the new architecture and operating runbooks
- [ ] Train internal staff on day-2 operations and escalation paths
- [ ] Measure outcomes against original RPO / RTO / cost targets
- [ ] Schedule a 90-day architecture and cost review

Notes

Need a second set of engineering eyes?

Maximus IT runs migrations for Ottawa and Toronto businesses every quarter. If you would like an experienced team to validate your plan, run the cutover, or take over day-2 operations, we are happy to help.

Cloud Migration Services

End-to-end migrations from discovery through post-cutover optimization. Vendor-neutral, fixed-scope, and engineer-led.

www.maximusit.ca/services/cloud-migration

Free IT Assessment

A no-cost review of your current environment, risk posture, and migration readiness. Delivered as a written report you keep.

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Last updated: July 14, 2026 ·