

Microsoft 365 and email checklist

Whether you are moving email to Microsoft 365 or cleaning up licenses you already have, these answers size the work and spot savings.

01 What email platform do you use today, and about how many mailboxes?

Include shared mailboxes such as info@ or support@.

02 Which Microsoft 365 licenses do you have, and how many of each?

For example Business Basic, Standard, Premium, E3 or E5. Your admin portal lists them.

03 Where do your files live?

A file server, OneDrive, SharePoint, Dropbox, Google Drive or a mix.

04 Do you need old email or files moved over?

Roughly how much, if you know.

05 How is email protected today?

Spam filtering, multi-factor sign-in, backup or archiving.

06 Do you have compliance requirements?

For example HIPAA, FINRA, PCI or a customer contract.

07 Who supports Microsoft 365 for you today?

An employee, an IT provider or nobody.

Rough answers are fine, and "not sure" is a useful answer. Please don't send account numbers, passwords or full bills; if we need to look at a contract, we'll arrange a safe way to share it.