

EXECUTIVE CHECKLIST: INTUNE MIGRATION DURING MERGERS & ACQUISITIONS

Phase 1 — Discovery & Planning



- **Conduct device inventory:** Hybrid Entra Joined vs. Entra Joined, Windows, iOS, Android, macOS
- **Assess Intune policies:** compliance, configuration, app protection, conditional access
- **Review licensing alignment** across tenants (M365, Intune, EMS, Defender).
- Identify application dependencies (LOB apps, VPN, certificates).
- Document user groups & security baselines in source tenant.

Phase 2 — Identity & Access



- **Define user account** migration strategy (soft vs. hard match).
- **Map groups**, role-based access control (RBAC), and device assignments.
- **Pre-stage identities** in target tenant with appropriate licensing.
- **Align conditional access** policies to avoid lockouts during transition.

Phase 3 — Device Strategy



- Decide between clean Autopilot reset vs. in-place profile preservation using Opsole Migrate.
- Build device enrollment automation (PowerShell/Graph/API) or Using Opsole Migrate
- Configure target tenant policies (compliance, configuration, update rings).
- Validate endpoint security baselines in the new tenant.

Phase 4 — End User Experience



- Create clear communication packs: migration FAQs, timelines, expected re-login prompts.
- Ensure data backup (OneDrive, Teams, SharePoint) before re-enrollment.
- Configure self-service Company Portal for app reinstallation.
- Test profile migration tools to preserve local settings and minimize disruption.

Phase 5 — Pilot & Rollout



- Run pilot migration across regions, user types, and device platforms.
- Validate application re-deployment, OneDrive sync, Outlook cache, and MFA experience.
- Collect feedback & telemetry from Endpoint Analytics/Helpdesk tickets.
- Roll out to remaining waves with standardized automation scripts.

Phase 6 — Post-Migration Validation



- Audit device compliance and remediate policy drift.
- Monitor conditional access sign-ins for anomalies.
- Verify certificates, VPN, and Wi-Fi profiles re-applied successfully.
- Export and archive Intune reporting data from source tenant for compliance.
- Decommission unused Intune policies and apps from source tenant.

✓ SUCCESS CRITERIA

- Users re-enrolled with minimal downtime.
- Applications and data accessible on Day 1 post migration.
- Security baselines match corporate compliance.
- Endpoint analytics confirm performance and adoption.

M&A MIGRATION STRATEGY ANALYSIS CHECKLIST