

Office 365 Exchange Online Project Plan Template

| Deployment Tasks /Events | Start Date | Finish Date | Resources | Dependencies / Notes | Status |
|---|------------|-------------|-----------|----------------------|--------|
| A. PLAN PHASE | | | | | |
| 1. Hold project kickoff meeting and review client questionnaire | | | | | |
| 2. Clarify end user migration experience expectation | | | | | |
| 3. Build risk and issue tracking system | | | | | |
| 4. Develop migration strategy | | | | | |
| 5. Obtain Process for Access to current Environment (VPN, etc.) | | | | | |
| 6. Identify Tennant Name | | | | | |
| 7. Identify estimated mailbox size and item counts | | | | | |
| 8. Plan for mail-enabled applications | | | | | |
| 9. Identify options for user identity and account provisioning | | | | | |
| 10. Identify All Domains that will be affected | | | | | |
| 11. Identify Active Directory preparation and remediation requirements | | | | | |
| 12. Identify email coexistence strategy | | | | | |
| 13. Identify current network links, user concentration, and current utilization | | | | | |
| 14. Identify on-premises infrastructure server requirements | | | | | |
| 15. Identify the operating systems and client applications | | | | | |
| 16. Identify the mobile platform(s) that your organization will use | | | | | |
| 17. Identify end user configuration changes required for Outlook | | | | | |

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| 18. Develop an end user and administrator training schedule and delivery mechanism | | | | | |
| 19. Identify scenarios for CLIENT User Acceptance Testing for workstations | | | | | |
| 20. Identify scenarios for CLIENT User Acceptance Testing for ActiveSync clients | | | | | |
| 21. Identify scenarios for CLIENT User Acceptance Testing for Mail-enabled devices | | | | | |
| 22. Identify scenarios for CLIENT User Acceptance Testing for Mail-enabled applications | | | | | |
| 23. Identify candidates and sites for User Acceptance Testing | | | | | |
| B. BUILD & CONFIGURE PHASE | | | | | |
| 1. Register Tennant | | | | | |
| 2. Add and verify your domain name(s) with Office 365 | | | | | |
| 3. Obtain Credentials for Remote Support | | | | | |
| 4. Obtain License Details from Client | | | | | |
| 5. Obtain data from Exchange Environment | | | | | |
| 6. Prepare on-premises Active Directory for directory synchronization | | | | | |
| 7. Populate Domains in Office365 Tenant | | | | | |
| 8. Add DNS TXT records | | | | | |
| 9. Perform Synchronization Test | | | | | |
| 10. Assign email license to users | | | | | |
| 11. Enable single sign-on | | | | | |
| 12. Establish SMTP Relay Connection | | | | | |
| 13. Test onsite device with SMTP | | | | | |
| 14. Perform mailbox size reduction | | | | | |
| 15. Document desktop Outlook reconfiguration requirements | | | | | |
| 16. Document Mobile Device Configuration Changes | | | | | |

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| 17. Migrate Pilot Users | | | | | |
| 18. Have Pilot Users perform UAT | | | | | |
| 19. Identify and resolve any issues | | | | | |
| 20. Prepare customer service desk | | | | | |
| 21. Complete Validation of email migration | | | | | |
| 22. Complete the migration groups and migration schedule | | | | | |
| 23. C. MIGRATION PHASE | | | | | |
| 24. Assign licenses to users | | | | | |
| C. MIGRATE PHASE | | | | | |
| 1. Issue final communications to end users | | | | | |
| 2. Migrate/Synchronize mailbox data | | | | | |
| 3. Migrate existing collaboration documents | | | | | |
| 4. Change DNS records | | | | | |
| 5. Configure mobile phones and devices for Office 365 | | | | | |
| 6. Perform post-migration service testing | | | | | |
| 7. Signoff from Client | | | | | |