

Cloud + M365 Readiness Checklist



A practical readiness checklist for cloud work and Microsoft 365 hygiene, with quick wins and prioritisation.

Last updated: 2026-02-20 · **Region:** Taranaki focus, NZ-wide scope

Use this checklist to find the top risks and fix the easy wins first.

1) Identity & access

- ✓ MFA enforced for all users and admins.
- ✓ Break-glass accounts documented and tested.
- ✓ Conditional Access baselines: risky sign-ins blocked, legacy auth disabled.
- ✓ Admin roles reviewed; least privilege applied.

2) Device readiness

- ✓ Standard build baseline exists (Windows/macOS), patching enabled and monitored.
- ✓ Device encryption enabled on laptops.
- ✓ Endpoint protection/EDR in place where licensed.
- ✓ Local admin rights controlled.

3) Email & collaboration security

- ✓ SPF/DKIM/DMARC configured and monitored.
- ✓ External sender tagging enabled.
- ✓ Sharing defaults reviewed (SharePoint/OneDrive/Teams).
- ✓ Guest access policies reviewed (who can invite, what they can see).

4) Data governance

- ✓ Critical data locations identified (file shares, email, SaaS, line-of-business apps).
- ✓ Retention expectations documented (what must be kept and for how long).
- ✓ Access reviews performed for sensitive data stores.

5) Backup & recovery

- ✓ Business-critical systems identified and prioritised.
- ✓ Backups monitored daily; failures actioned.
- ✓ Restore testing occurs at least quarterly and is recorded.
- ✓ Cloud data protection approach decided (native plus third-party where required).

6) Migration readiness (if moving to cloud)

- ✓ Application dependencies mapped (what connects to what).

- ✓ Network readiness checked (latency, bandwidth, Wi-Fi stability).
- ✓ Cutover plan and rollback plan written.
- ✓ User comms plan prepared (what changes, when, how to get help).

7) What to fix first (quick prioritisation)

Fix first	Why it matters	Typical effort
MFA + block legacy auth	Stops the majority of account takeover paths.	Fast
DMARC + external tagging	Reduces email spoofing and invoice fraud risk.	Fast
Restore test	Proves you can recover (not just have backups).	Medium
Least privilege review	Reduces blast radius if an account is compromised.	Medium

Score yourself: tick what is already true. If fewer than 70% are ticked, start with the Fix first items and work forward.

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