BRISKDATA ENGINEERING TEMPLATE | DOC ID: BD-IT-M365-009 | ADAPTABLE TEMPLATE

Microsoft 365 Migration Scope of Work (SOW) Template

Source Inventory, Included Workstreams, DNS and Mail Cutover Gates, Exclusions, and Acceptance

SCOPING PRINCIPLE

A mailbox move does not automatically include shared drives, chat history, third-party SMTP relays, or client-side Outlook settings. Record exact quantities, included vs excluded workloads, and items requiring manual recreation before scheduling DNS cutover.

1. Project Identification and Tenant Summary

Project Field	Engagement Specification
Client Organization	[Client Legal Name]
Source Mail / File Platform	[e.g., Google Workspace / Hosted Exchange / IMAP / Source M365 Tenant]
Destination Microsoft 365 Tenant	[tenant.onmicrosoft.com | Licensing Tier: e.g., Business Premium / E3]
Domains in Scope	[example.com, subsidiary.example.com]
Target Cutover Window	[Agreed Weekend / Evening Maintenance Window and Timezone]
Authorized Contacts	Client Sponsor: [Name] | Technical Lead: [Name]

2. Quantified Source Inventory and Inclusion Matrix

Workload / Object Type	Included?	Est. Qty	Migration Approach	Notes & Known Platform Limits
User Mailboxes (< 50 GB)	[ ] Yes [ ] No	[Qty]	Pre-stage bulk sync + delta pass	Mail, calendar, contacts; client rules/signatures noted below
Archive / Hold Mailboxes (> 50 GB)	[ ] Yes [ ] No	[Qty]	Exchange Online Archive pre-stage	Requires archive-enabled destination license
Shared & Room Mailboxes	[ ] Yes [ ] No	[Qty]	Mailbox move + delegate ACL mapping	Recreate booking policies and send-as permissions
Distribution Lists & Aliases	[ ] Yes [ ] No	[Qty]	PowerShell / Graph group recreation	Verify external-sender settings before cutover
Personal Files (Drive / OneDrive)	[ ] Yes [ ] No	[TB / Users]	Pre-stage + post-cutover delta	Sharing links may require re-sharing post-cutover
Shared Drives / SharePoint Sites	[ ] Yes [ ] No	[Sites / TB]	Mapped folder & permission migration	Scope separately if permission redesign is needed
Scanners, Copiers & App SMTP	[ ] Yes [ ] No	[Devices]	Authenticated SMTP / SES / Postmark	Inventory all senders before updating SPF/DMARC

3. Phased Delivery Milestones and Acceptance Gates

Milestone	Target Schedule	Key Deliverables	Acceptance Criterion
M1: Discovery & Tenant Prep	[Dates / Phase 1]	Recipient/relay inventory, Entra ID baseline, MFA/Conditional Access, domain verification, DKIM/SPF prep.	Written inventory & tenant baseline approved.
M2: Pre-Stage & Pilot Test	[Dates / Phase 2]	Background pre-stage sync; pilot group tested across desktop, web, and mobile clients.	Pilot users confirm mail, calendar, and mail flow.
M3: DNS Cutover & Delta Sync	[Agreed Window]	Lower TTL in advance, switch MX/Autodiscover/SPF/DKIM/DMARC, run final delta sync, assist user profile setup.	Inbound/outbound mail flow and authentication verified.
M4: Post-Cutover Support & Close	[Dates / Phase 4]	Staff support window, final delta catch-up, legacy tenant archival/decommission authorization.	Open migration tickets resolved; sign-off executed.

4. Items Recreated Manually and Explicit Exclusions

- **Client-Side Settings:** Local Outlook signatures, autocomplete caches, custom view layouts, and certain client-only inbox rules may need to be recreated on user devices.
- **Unsupported Endpoints:** Operating system or Office upgrades on end-of-life workstations/phones are excluded unless added by written change order.
- **Custom Scripts and Third-Party Integrations:** Rewriting custom Google Apps Script automations, legacy COM/VBA macros, or third-party CRM OAuth connectors is scoped separately unless listed in Section 2.
- **Uncollected Local Archives:** Local PST/MBOX files stored on individual laptops or external drives are excluded unless uploaded to the agreed staging path prior to Milestone 2.

5. Acceptance and Legacy Decommission Authorization

Legacy source mailboxes and billing are not canceled until the Client Sponsor signs Milestone 4 acceptance and confirms legal-hold/archival exports are complete.

Role	Printed Name & Title	Signature	Date
Client Authorized Signer	[Name / Title]	_____	YYYY-MM-DD
Migration Delivery Lead	[Name / Title]	_____	YYYY-MM-DD

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