UEM migration checklist for IT admins

Step 1	Pre-migration actions
Step 2	Data management
Step 3	Initial setup
Step 4	Portal setup
Step 5	Third-part integrations
Step 6	User management
Step 7	Post-migration actions
Step 8	Follow up actions

Pre-migration Actions	☐
Have you created a list of users in the organization?	☐
Have you compiled a list of the work devices?	☐
Have you surveyed end-users to determine how mobile devices contribute to their job functions?	☐
Have you identified the device management features (such as kiosk lockdown, Wi-Fi configuration, and so on) that your company requires?	☐
Have you tested the new tool for every platform that is used in the organization?	☐
Have you set up a plan for the device onboarding?	☐
Have you informed end users of the migration process and given them step-by-step instructions?	☐

Data management	☐
Have you set up a plan to back up data on devices?	☐
Have you wiped and unenrolled all the devices from the previous UEM?	☐

Initial setup	☐
Have you signed up for the new UEM?	☐
Have you reviewed the pricing plans and chosen one that meets your requirements?	☐

Portal setup	☐
Have you added all the technicians and assigned them roles so that they could access the portal?	☐
Have you configured all the admin settings (like email and SMS settings)?	☐
Have you configured all the enrollment settings?	☐

Third-party integrations	☐
Have you integrated all your directory services (Google Workspace, Azure AD, Microsoft AD, Okta) into the new UEM?	☐
Have you transferred all the necessary tokens (like Apple DEP and VPP) into the new UEM?	☐
Have you synced the new UEM with all the required accounts (such as Samsung KME and Android Enterprise)?	☐

User Management	☑
Have you imported all the users to the new UEM portal?	☐
Have you sent enrollment requests to all the users in the organization?	☐
Have you made sure that all the devices are enrolled?	☐

Post-migration actions	☑
Have you set up scheduled reports to keep track of the device inventory?	☐
Have you verified that no users are still utilizing the old UEM provider's services?	☐
Have you double-checked that you've unsubscribed from all of the old UEM's services?	☐
Have you applied device management policies to the end-user devices?	☐
Have you conducted surveys to collect end-user feedback on the UEM migration?	☐
Have you communicated the related problems to the UEM technical support?	☐

Follow up actions	☑
Have you verified that the user list from the previous UEM matches the user list in the new UEM?	☐
Have you checked the compliance status of every device in the organization?	☐