



This checklist outlines the essential steps for a law firm migrating its operations from Microsoft 365 to Google Workspace. It covers key phases from initial planning to post-migration activities, with a focus on legal-specific considerations.

PHASE 1: PLANNING AND ASSESSMENT

This initial phase focuses on understanding the scope of the migration, identifying legal and compliance requirements, and preparing the firm for the transition.

- **1.1 Define Migration Scope and Objectives:**
 - **Identify Key Stakeholders:** Assemble a migration team including representatives from IT, legal teams (partners, associates), administrative staff, and firm management. Their input is crucial for a successful transition.
 - **Determine Data and Application Scope:** Clearly define what data and applications will be migrated. This typically includes:
 - **Email:** All historical emails, mailboxes (user, shared, resource), contacts, and calendars from Exchange Online to Gmail, Google Calendar, and Google Contacts.
 - **Documents:** Files from OneDrive for Business and SharePoint Online document libraries to Google Drive (My Drive and Shared Drives).
 - **Communication:** Chat history from Microsoft Teams to Google Chat (if applicable).
 - **Other Applications:** Data from any other Microsoft 365 integrated applications (e.g., Planner, OneNote) that need to be transitioned or replaced with Google Workspace equivalents.
 - **Set Clear Success Criteria:** Define measurable goals for the migration, such as minimal downtime, data integrity, user adoption rates, and specific performance metrics post-migration.
 - **Establish Timelines and Milestones:** Create a realistic project plan with clear phases, deadlines, and assigned responsibilities. Account for potential delays and allocate buffer time.
 - **Assess Current Microsoft 365 Environment:** Conduct a thorough audit of your existing Microsoft 365 setup. This includes:
 - **User Count and License Types:** Document all active users and their assigned Microsoft 365 licenses.
 - **Data Volume and Locations:** Determine the total volume of data in Exchange Online, OneDrive, and SharePoint. Identify any complex SharePoint site structures, public folders, or shared mailboxes.



- **Custom Configurations:** Note any custom scripts, workflows, or integrations within Microsoft 365 that will need to be re-evaluated or re-created in Google Workspace.
- **Network Infrastructure:** Assess current internet bandwidth and network configurations to ensure they can support the data transfer volume and ongoing Google Workspace usage.

- **1.2 Legal and Compliance Review:**

This is a critical step for law firms, as data handling and confidentiality are paramount.

- **Identify Relevant Regulations:** List all applicable data residency, privacy, and compliance regulations that govern your firm's operations and client data (e.g., HIPAA for healthcare clients, GDPR for EU data, state bar ethical rules, GLBA for financial data).
- **Review Existing Policies:** Examine current data retention policies, legal hold procedures, and eDiscovery requirements. Ensure these can be replicated or enhanced within Google Workspace.
- **Assess Google Workspace Compliance:** Obtain and review Google's compliance certifications (e.g., ISO 27001, SOC 2/3, HIPAA BAA). Understand Google's shared responsibility model for cloud security and compliance.
- **Consult Legal Counsel:** Engage with your firm's legal counsel (or external experts) to discuss the ethical duties related to cloud migration, data handling, and the implications of moving data to a new cloud provider. Address concerns regarding attorney-client privilege and data confidentiality.
- **Data Sovereignty:** If your firm operates internationally or handles data subject to specific data sovereignty laws, confirm that Google Workspace offers data region selection options that meet these requirements.

- **1.3 Data Audit and Cleanup:**

Cleaning up data before migration can significantly reduce complexity, time, and cost.

- **Identify ROT Data:** Conduct a thorough audit to identify Redundant, Obsolete, or Trivial (ROT) data in your Microsoft 365 environment. This includes old emails, duplicate files, and irrelevant documents.
- **Archive or Delete Unnecessary Data:** Implement a strategy to archive or defensibly delete data that is no longer needed or legally required. This reduces the volume of data to be migrated and minimizes potential security risks.
- **Identify Complex Data Structures:** Pinpoint large files, deeply nested folder structures, or files with extremely long names that may require special handling or cause issues during migration.
- **Review Permissions:** Clean up any overly permissive or incorrect permissions on files and folders in Microsoft 365.

- **1.4 Google Workspace License Selection:**

Choose the Google Workspace edition that best fits your firm's needs.

- **Evaluate Editions:** Compare Google Workspace Business Standard, Business Plus, and Enterprise editions. Consider features like Google Vault (for eDiscovery and retention), advanced DLP, and Client-Side Encryption (CSE) which are crucial for law firms.
- **Feature-to-Feature Comparison:** Map the features currently used in Microsoft 365 to their Google Workspace equivalents to ensure no critical functionality is lost.
- **Budget Considerations:** Balance required features with licensing costs.
- **1.5 Develop Communication Plan:**

Effective communication is key to minimizing user disruption and ensuring a smooth transition.

- **Pre-Migration Announcements:** Inform all firm members about the upcoming migration, its benefits, and the expected timeline.
- **During Migration Updates:** Provide regular updates on migration progress, potential service interruptions, and instructions for accessing services.
- **Post-Migration Support:** Outline how users can get support, access training materials, and provide feedback after the migration.
- **Address Concerns:** Proactively address common user concerns about data access, new interfaces, and potential workflow changes.
- **1.6 Identify Migration Tools and Resources:**

Selecting the right tools and expertise is vital for a successful migration.

- **Research Migration Tools:** Investigate available migration tools. Options include:
 - **Google's Data Migration Service:** Built-in tool for migrating email, calendar, and contacts.
 - **Third-Party Migration Tools:** Specialized tools (e.g., CloudM, BitTitan MigrationWiz, AvePoint) that offer more comprehensive data migration capabilities, including complex SharePoint structures, Teams data, and preserving metadata/permissions.
- **Determine External Assistance:** Decide whether to engage external migration specialists or consultants with experience in legal cloud migrations. Their expertise can be invaluable for complex data, compliance, and minimizing downtime.
- **Internal Resources:** Identify and train internal IT staff or power users who will manage the migration and provide ongoing support.

PHASE 2: PRE-MIGRATION PREPARATION

This phase involves setting up the target Google Workspace environment and preparing the source Microsoft 365 environment for data transfer.

- **2.1 Prepare Google Workspace Environment:**
 - **Verify Firm's Domain:** Complete the domain verification process in the Google Workspace Admin console.



- **Configure Organizational Units (OUs) and Groups:** Create OUs that mirror your firm's departmental or practice area structure. Set up security groups and distribution lists as needed.
- **Initial Security Policies:** Configure foundational security settings, including:
 - Enforce Multi-Factor Authentication (MFA) for all users.
 - Set strong password policies.
 - Configure administrative alerts for critical security events.
 - Implement basic Data Loss Prevention (DLP) rules.
- **Data Region Selection:** If required for compliance, select the geographic region where your firm's primary data will be stored.
- **Google Vault Setup:** Begin configuring Google Vault for eDiscovery and data retention policies, aligning with your firm's legal obligations.
- **2.2 Prepare Microsoft 365 Source Environment:**
 - **Ensure Data Accessibility:** Verify that all data to be migrated is accessible by the migration tool or service account. This may involve adjusting permissions temporarily.
 - **Disable Conflicting Policies:** Temporarily disable any Microsoft 365 policies (e.g., strict DLP rules, retention policies) that might interfere with the migration process.
 - **Communicate Downtime:** Inform users about any planned periods of service interruption or reduced functionality during the migration.
 - **Clean Up Mailboxes/Sites:** Perform a final cleanup of mailboxes and SharePoint sites to remove any last-minute ROT data.
- **2.3 User Account Provisioning:**
 - **Create Google Workspace Accounts:** Provision user accounts in Google Workspace for all firm members. Ensure that primary email addresses and aliases match their Microsoft 365 counterparts for a seamless transition.
 - **Password Management:** Decide on a strategy for initial Google Workspace passwords (e.g., temporary passwords with forced reset, integration with an identity provider).
- **2.4 Data Mapping and Strategy:**
 - **Detailed Mapping:** Create a comprehensive map of where each type of data from Microsoft 365 will reside in Google Workspace:
 - Exchange Mailboxes -> Gmail
 - OneDrive for Business -> My Drive (individual user drives)
 - SharePoint Sites/Document Libraries -> Shared Drives or specific folders within My Drive.
 - Microsoft Teams Chat -> Google Chat (if migrating chat history).
 - **Shared Mailboxes/Public Folders:** Develop a specific plan for migrating shared mailboxes and public folders to Google Groups, shared mailboxes in Gmail, or Shared Drives.



- **Complex SharePoint Structures:** Outline how complex SharePoint site collections, subsites, and custom lists will be handled in Google Workspace, potentially requiring restructuring or alternative solutions.
- **2.5 Network and Bandwidth Assessment:**
 - **Bandwidth Check:** Confirm that your firm's internet connection has sufficient upload and download bandwidth to handle the volume of data transfer during migration without impacting daily operations.
 - **Optimize Network Settings:** Adjust firewall rules, proxy settings, or DNS configurations as recommended by Google or your migration tool provider to ensure optimal connectivity.
- **2.6 Pilot Migration:**
 - **Select Pilot Group:** Choose a small, representative group of users (e.g., IT staff, a small practice group, or early adopters) for a pilot migration.
 - **Test Migration Process:** Execute the migration process for the pilot group, carefully monitoring for errors, data integrity issues, and performance bottlenecks.
 - **Gather Feedback:** Collect detailed feedback from the pilot users on their experience, data accessibility, application functionality, and any workflow disruptions.
 - **Refine Plan:** Use insights from the pilot to refine the overall migration plan, adjust timelines, and address any identified issues before the full firm-wide migration.

PHASE 3: DATA MIGRATION EXECUTION

This is the core phase where data is actively moved from Microsoft 365 to Google Workspace. It often involves multiple passes and careful monitoring.

- **3.1 Email Migration:**
 - **Pre-stage Migration:** Perform an initial migration of historical email data (e.g., emails older than 30-60 days) to Gmail to reduce the volume for the final cutover.
 - **Delta Syncs:** Conduct incremental syncs to migrate new emails that arrived after the pre-stage migration.
 - **Cutover:** At a scheduled time, perform the final sync and switch mail routing (by updating MX records) from Microsoft 365 to Google Workspace. This ensures all new emails are delivered to Gmail.
 - **Configure Aliases and Forwarding:** Recreate any necessary email aliases or forwarding rules in Google Workspace.
- **3.2 Document Migration (OneDrive & SharePoint to Google Drive):**
 - **OneDrive Migration:** Migrate individual user data from OneDrive for Business to their respective My Drives in Google Workspace. Ensure personal folder structures and file versions are preserved.
 - **SharePoint to Shared Drives/My Drive:** Migrate SharePoint document libraries and team site content to Google Shared Drives or designated folders within My Drive.



This is often the most complex part of the migration due to varying structures, permissions, and metadata. Prioritize critical documents first.

- **Preserve Metadata and Version History:** Utilize migration tools that can preserve file metadata (creation dates, last modified by) and version history, which is crucial for legal documents.
- **Handle Large Files/Complex Permissions:** Address any identified large files or intricate permission structures that require manual intervention or specific tool configurations.
- **3.3 Calendar and Contacts Migration:**
 - Migrate user calendars (appointments, meetings, recurring events) from Outlook/Exchange to Google Calendar.
 - Migrate user contacts from Outlook/Exchange to Google Contacts.
 - Ensure shared calendars and contact lists are also migrated and configured correctly.
- **3.4 Teams Data Migration:**
 - If migrating Microsoft Teams chat history, use specialized tools to transfer conversations to Google Chat. Note that direct, seamless migration of all Teams features (e.g., channels, tabs, apps) to Google Workspace equivalents can be challenging and may require a fresh start for some functionalities.
 - Ensure files shared within Teams (which are stored in SharePoint) are included in the document migration plan.
- **3.5 Application Data Migration:**
 - Migrate data from any other Microsoft 365 integrated applications (e.g., Planner tasks, OneNote notebooks) to their Google Workspace equivalents or alternative solutions. This may involve manual export/import or using specific connectors.

PHASE 4: POST-MIGRATION AND OPTIMIZATION

This final phase focuses on verifying the migration, training users, optimizing the new environment, and decommissioning the old platform.

- **4.1 Data Verification and Integrity Check:**
 - **Accessibility and Integrity:** Conduct thorough checks to ensure all migrated data is accessible, intact, and correctly placed in Google Workspace. Verify file counts, sizes, and folder structures.
 - **User-Led Validation:** Have users actively verify their own data (emails, documents, calendars) to confirm everything is present and functional.
 - **Spot Checks:** Perform random spot checks on critical client files and historical data to ensure accuracy and completeness.
- **4.2 User Training and Adoption:**
 - **Comprehensive Training:** Provide mandatory training sessions for all firm members on how to effectively use Google Workspace applications (Gmail, Drive, Docs, Meet, Calendar, Chat).



- **Workflow-Specific Training:** Focus on how the new tools integrate into existing legal workflows (e.g., document collaboration, case management, eDiscovery processes).
- **Support Resources:** Establish an internal support system (e.g., dedicated IT support, internal Google Sites knowledge base, FAQs) and provide quick reference guides.
- **Change Management:** Continue to reinforce the benefits of the new platform and address any lingering user resistance or challenges.
- **4.3 Security and Compliance Configuration:**
 - **Advanced Security Settings:** Implement and fine-tune advanced security settings in Google Workspace, including:
 - Data Loss Prevention (DLP) policies for sensitive client data.
 - Google Vault retention policies and legal holds for all relevant data sources.
 - Granular access controls and permissions for Shared Drives and individual files.
 - Advanced audit logging and monitoring configurations.
 - Client-Side Encryption (CSE) if applicable for highly sensitive data.
 - **Ethical Compliance:** Ensure all configurations align with ABA Model Rules and state bar ethical guidelines regarding data confidentiality and technology competence.
- **4.4 Decommissioning of Microsoft 365:**
 - **Final Data Verification:** Before decommissioning, perform a final, comprehensive verification that all necessary data has been successfully migrated and is fully functional in Google Workspace.
 - **Export Audit Logs:** Export any necessary audit logs or historical data from Microsoft 365 that may be required for future compliance or legal purposes.
 - **Safely Decommission Services:** Carefully cancel Microsoft 365 subscriptions and decommission services to avoid unnecessary costs and potential security vulnerabilities.
 - **Retain Archives:** If certain data was archived in Microsoft 365 and not migrated, ensure those archives are securely retained and accessible if needed.
- **4.5 Performance Monitoring and Optimization:**
 - **Monitor Performance:** Continuously monitor Google Workspace performance, including application responsiveness, sync speeds, and overall user experience.
 - **Gather User Feedback:** Actively solicit feedback from users to identify areas for improvement or optimization.
 - **Optimize Configurations:** Adjust Google Workspace settings, network configurations, or user training based on performance data and feedback.
 - **Explore Advanced Features:** Begin exploring and implementing advanced Google Workspace features and integrations (e.g., Gemini for AI assistance, third-party legal tech integrations) to further enhance firm efficiency.

- **4.6 Ongoing Governance and Maintenance:**
 - **Establish Governance Policies:** Develop clear, ongoing governance policies for data management, security, user access, and application usage within the Google Workspace environment.
 - **Regular Security Audits:** Schedule periodic security audits and compliance reviews to ensure continued adherence to internal policies and external regulations.
 - **Continuous User Education:** Plan for ongoing user education and training to keep firm members updated on new Google Workspace features, security best practices, and evolving firm policies.
 - **Stay Informed:** Monitor Google Workspace updates and new features to leverage the platform's full potential. Maintain a strong relationship with Google Workspace support or your chosen managed service provider.



Law Firm Cloud Platform Migration Checklist: Google Workspace to Microsoft 365

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Phase 1: Planning and Assessment

This initial phase focuses on understanding the scope of the migration, identifying legal and compliance requirements, and preparing the firm for the transition.

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 - **Review Permissions:** Clean up any overly permissive or incorrect permissions on files and folders in Google Workspace.
- **1.4 Microsoft 365 License Selection:**

Choose the Microsoft 365 edition that best fits your firm's needs.

 - **Evaluate Editions:** Compare Microsoft 365 Business Standard, Business Premium, and Enterprise (E3/E5) editions. Consider features like Microsoft Purview (for eDiscovery and retention), Data Loss Prevention (DLP), and Azure Information Protection (AIP) which are crucial for law firms.
 - **Feature-to-Feature Comparison:** Map the features currently used in Google Workspace to their Microsoft 365 equivalents to ensure no critical functionality is lost.
 - **Budget Considerations:** Balance required features with licensing costs.
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- **Third-Party Migration Tools:** Specialized tools (e.g., BitTitan MigrationWiz, CloudFuze, AvePoint) that offer more comprehensive data migration capabilities, including complex Shared Drive structures, Google Chat data, and preserving metadata/permissions.
- **Determine External Assistance:** Decide whether to engage external migration specialists or consultants with experience in legal cloud migrations. Their expertise can be invaluable for complex data, compliance, and minimizing downtime.
- **Internal Resources:** Identify and train internal IT staff or power users who will manage the migration and provide ongoing support.

Phase 2: Pre-Migration Preparation

This phase involves setting up the target Microsoft 365 environment and preparing the source Google Workspace environment for data transfer.

- **2.1 Prepare Microsoft 365 Environment:**
 - **Verify Firm's Domain:** Complete the domain verification process in the Microsoft 365 admin center.
 - **Configure Azure Active Directory (AAD) Organizational Units (OUs) and Groups:** Create OUs that mirror your firm's departmental or practice area structure. Set up security groups and distribution lists as needed.
 - **Initial Security Policies:** Configure foundational security settings, including:
 - Enforce Multi-Factor Authentication (MFA) for all users.
 - Set strong password policies.
 - Configure administrative roles with least privilege.
 - Implement basic Data Loss Prevention (DLP) rules.
 - **Data Region Selection:** If required for compliance, select the geographic region where your firm's primary data will be stored.
 - **Microsoft Purview Setup:** Begin configuring Microsoft Purview for eDiscovery and data retention policies, aligning with your firm's legal obligations.
- **2.2 Prepare Google Workspace Source Environment:**
 - **Ensure Data Accessibility:** Verify that all data to be migrated is accessible by the migration tool or service account. This may involve adjusting permissions temporarily.
 - **Disable Conflicting Policies:** Temporarily disable any Google Workspace policies (e.g., strict DLP rules, retention policies) that might interfere with the migration process.
 - **Communicate Downtime:** Inform users about any planned periods of service interruption or reduced functionality during the migration.
 - **Clean Up Mailboxes/Drives:** Perform a final cleanup of mailboxes and Google Drives to remove any last-minute ROT data.
- **2.3 User Account Provisioning:**

- **Create Microsoft 365 Accounts:** Provision user accounts in Microsoft 365 for all firm members. Ensure that primary email addresses and aliases match their Google Workspace counterparts for a seamless transition.
- **Password Management:** Decide on a strategy for initial Microsoft 365 passwords (e.g., temporary passwords with forced reset, integration with an identity provider).
- **2.4 Data Mapping and Strategy:**
 - **Detailed Mapping:** Create a comprehensive map of where each type of data from Google Workspace will reside in Microsoft 365:
 - Gmail -> Exchange Online (Outlook)
 - My Drive (individual user drives) -> OneDrive for Business
 - Shared Drives -> SharePoint Sites/Document Libraries.
 - Google Chat -> Microsoft Teams Chat (if migrating chat history).
 - **Shared Mailboxes/Google Groups:** Develop a specific plan for migrating shared mailboxes and Google Groups to Exchange Online shared mailboxes or Microsoft 365 Groups.
 - **Complex Shared Drive Structures:** Outline how complex Shared Drive structures and custom lists will be handled in Microsoft 365, potentially requiring restructuring or alternative solutions.
- **2.5 Network and Bandwidth Assessment:**
 - **Bandwidth Check:** Confirm that your firm's internet connection has sufficient upload and download bandwidth to handle the volume of data transfer during migration without impacting daily operations.
 - **Optimize Network Settings:** Adjust firewall rules, proxy settings, or DNS configurations as recommended by Microsoft or your migration tool provider to ensure optimal connectivity.
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 - **Select Pilot Group:** Choose a small, representative group of users (e.g., IT staff, a small practice group, or early adopters) for a pilot migration.
 - **Test Migration Process:** Execute the migration process for the pilot group, carefully monitoring for errors, data integrity issues, and performance bottlenecks.
 - **Gather Feedback:** Collect detailed feedback from the pilot users on their experience, data accessibility, application functionality, and any workflow disruptions.
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- **Cutover:** At a scheduled time, perform the final sync and switch mail routing (by updating MX records) from Google Workspace to Microsoft 365. This ensures all new emails are delivered to Exchange Online.
- **Configure Aliases and Forwarding:** Recreate any necessary email aliases or forwarding rules in Exchange Online.
- **3.2 Document Migration (Google Drive to OneDrive & SharePoint):**
 - **My Drive Migration:** Migrate individual user data from My Drive to their respective OneDrive for Business accounts. Ensure personal folder structures and file versions are preserved.
 - **Shared Drives to SharePoint/OneDrive:** Migrate Google Shared Drives content to SharePoint document libraries and team sites, or designated folders within OneDrive. This is often the most complex part of the migration due to varying structures, permissions, and metadata. Prioritize critical documents first.
 - **Preserve Metadata and Version History:** Utilize migration tools that can preserve file metadata (creation dates, last modified by) and version history, which is crucial for legal documents.
 - **Handle Large Files/Complex Permissions:** Address any identified large files or intricate permission structures that require manual intervention or specific tool configurations.
- **3.3 Calendar and Contacts Migration:**
 - Migrate user calendars (appointments, meetings, recurring events) from Google Calendar to Outlook Calendar.
 - Migrate user contacts from Google Contacts to Outlook Contacts.
 - Ensure shared calendars and contact lists are also migrated and configured correctly.
- **3.4 Google Chat Data Migration:**
 - If migrating Google Chat history, use specialized tools to transfer conversations to Microsoft Teams. Note that direct, seamless migration of all Google Chat features (e.g., spaces, bots) to Microsoft Teams equivalents can be challenging and may require a fresh start for some functionalities.
 - Ensure files shared within Google Chat (which are stored in Google Drive) are included in the document migration plan.
- **3.5 Application Data Migration:**
 - Migrate data from any other Google Workspace integrated applications (e.g., Google Sites content, Google Keep notes) to their Microsoft 365 equivalents or alternative solutions. This may involve manual export/import or using specific connectors.



Phase 4: Post-Migration and Optimization

This final phase focuses on verifying the migration, training users, optimizing the new environment, and decommissioning the old platform.

- **4.1 Data Verification and Integrity Check:**
 - **Accessibility and Integrity:** Conduct thorough checks to ensure all migrated data is accessible, intact, and correctly placed in Microsoft 365. Verify file counts, sizes, and folder structures.
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 - **Workflow-Specific Training:** Focus on how the new tools integrate into existing legal workflows (e.g., document collaboration, case management, eDiscovery processes).
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 - **Advanced Security Settings:** Implement and fine-tune advanced security settings in Microsoft 365, including:
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 - Microsoft Purview retention policies and legal holds for all relevant data sources.
 - Granular access controls and permissions for SharePoint sites and individual files.
 - Azure Information Protection (AIP) for document classification and encryption.
 - Advanced audit logging and monitoring configurations.
 - **Ethical Compliance:** Ensure all configurations align with ABA Model Rules and state bar ethical guidelines regarding data confidentiality and technology competence.
- **4.4 Decommissioning of Google Workspace:**
 - **Final Data Verification:** Before decommissioning, perform a final, comprehensive verification that all necessary data has been successfully migrated and is fully functional in Microsoft 365.

- **Export Audit Logs:** Export any necessary audit logs or historical data from Google Workspace that may be required for future compliance or legal purposes.
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