



WINDOWS 365

Lifecycle readiness checklist

A practical worksheet for migration, deployment, and day-two Cloud PC management.



01

MIGRATION

Source estate, cohorts, apps, data, cutover

02

DEPLOYMENT

Identity, network, policy, image, pilot

03

DAY TWO

Health, support, security, cost, lifecycle

CHECKED AGAINST MICROSOFT LEARN | 22 AUGUST 2026

Use this as a working record, not a guarantee. Microsoft licensing, service features, and supported migration paths change. Confirm the linked first-party sources before each rollout wave.

How to use this checklist

Name an owner for every phase. Mark an item complete only when evidence exists and another person can find it.

Decision rule

Classify each gap as required, strongly recommended, risk accepted, or not applicable. A pilot can proceed with managed exceptions. A broad rollout should not proceed with an unowned technical, security, or support blocker.

Programme record

ORGANISATION / CUSTOMER TENANT

PROGRAMME OWNER

TECHNICAL LEAD

SERVICE OWNER

PILOT COHORT

TARGET CUTOVER / GO-LIVE DATE

Three-phase outcome

PHASE	GREEN	AMBER	RED	OWNER / EVIDENCE
1. Migration	☐	☐	☐	
2. Deployment	☐	☐	☐	
3. Day-two management	☐	☐	☐	

Notes, owners, and evidence references

Migration and source readiness

Define who is moving, what must follow them, which path is supported, and how each wave can be reversed safely.

Scope check

Microsoft's Migration API currently documents snapshot-based migration from eligible Azure VMs to Windows 365 Enterprise in the commercial cloud. Do not present it as a universal migration path for every AVD or legacy VDI estate.

Scope, route, and cohorts

- ☐ Inventory users, source desktops, regions, applications, profiles, data, peripherals, and critical dependencies.
- ☐ Group users by workload, location, security need, support need, and target Cloud PC size.
- ☐ Choose a supported route for each source: eligible Azure VM snapshot import, fresh Cloud PC with app and data move, or a designed alternative.
- ☐ Confirm service and licence model, identity join, network, region, data residency, success measures, and rollback criteria.

Application, data, and cutover

- ☐ Assess application compatibility, packaging, dependencies, licensing, drivers, and update ownership.
- ☐ Define profile and data movement, OneDrive behaviour, browser state, certificates, and local-data exceptions.
- ☐ Pilot representative users, applications, networks, accessibility needs, peripherals, and privileged roles.
- ☐ Document cutover, communications, support cover, validation, rollback, source retention, and final cleanup approval.

Evidence to retain

Source inventory, cohort map, application assessment, route decision, pilot result, cutover and rollback plans, acceptance evidence, and cleanup approval.

Deployment and pilot readiness

Prove the tenant, policy, image, network, applications, and user journey before a wide assignment.

Tenant and policy foundations

- ☐ Verify current Windows 365, Intune, Microsoft Entra, Windows, licensing, and administrator-role prerequisites.
- ☐ Confirm enrolment restrictions, least-privilege roles, and the chosen Microsoft Entra or hybrid join model.
- ☐ Choose Microsoft-hosted networking or an Azure Network Connection and pass the relevant health checks.
- ☐ Validate provisioning assignments, image support, OS lifecycle, language, naming, local admin, SSO, and update settings.

Pilot, security, and user experience

- ☐ Deploy required apps and configuration through Intune with dependencies, detection, timeouts, and failure ownership recorded.
- ☐ Test compliance, Conditional Access, Defender, security baseline, redirection, and data-protection policies.
- ☐ Pilot provisioning, first sign-in, Windows app and browser access, Teams, printing, peripherals, accessibility, and network quality.
- ☐ Publish user and support guidance, then approve, adjust, or stop the next wave using the pilot evidence.

Evidence to retain

Licence and role checks, network health, provisioning policy export, assignments, image and app results, security evidence, pilot report, support brief, and go-live decision.

Phase notes and actions

Day-two management

Operate Cloud PCs as a live endpoint service with measurable health, security, support, lifecycle, and commercial controls.

Health, support, and recovery

- ☐ Monitor service health, provisioning, connection quality, compliance, policy, applications, updates, and security signals.
- ☐ Give the service desk a triage flow for identity, licence, device, connection, policy, app, profile, and service status.
- ☐ Define when to restart, diagnose, restore, reprovision, resize, review, or escalate a Cloud PC.
- ☐ Test recovery runbooks and record approvals, user communication, data impact, validation, and recurring problems.

Security, lifecycle, and cost

- ☐ Review compliance, Conditional Access, Defender, baseline, audit, and redirection controls on an agreed cadence.
- ☐ Maintain app, image, driver, and Windows update ownership, exceptions, maintenance windows, and support dates.
- ☐ Use performance and usage evidence to resize poor-fit Cloud PCs and reclaim inactive assignments.
- ☐ Connect Flex capacity and joiner, mover, and leaver controls to licences, access, retention, and deprovisioning.

Evidence to retain

Health and connectivity reports, tickets, diagnostics, recovery logs, security evidence, update status, resize and licence actions, leaver records, known errors, and service reviews.

Phase notes and actions

Operating cadence and ownership

Turn the rollout into a service with named responsibilities, review rhythms, and tested runbooks.

Suggested evidence cadence

Daily	Service health, provisioning failures, high-impact incidents, security alerts, and blocked users.
Weekly	Connectivity trends, failed policies and apps, support backlog, recurring fixes, and open migration exceptions.
Monthly	Usage, rightsizing, licence position, image and update health, restore posture, capacity, and supplier changes.
Quarterly	Security baseline, access model, runbook test, service outcomes, recovery decisions, and roadmap changes.

Ownership map

SERVICE OWNER	Outcomes, budget, risk acceptance, supplier and review cadence
ENDPOINT / EUC	Provisioning, Intune policy, images, apps, updates, device actions
SECURITY	Conditional Access, compliance, Defender, data controls, investigation
SERVICE DESK	Triage, user communications, escalation, known errors, runbooks
COMMERCIAL / FINOPS	Licence position, size mix, utilisation, cost and reclaim actions

Service transition gate

- ☐ The service desk can identify the user, Cloud PC, policy, region, recent changes, and current health without project-team help.
- ☐ Restore, reprovision, resize, incident, security review, and user leaver runbooks have owners and have been tested.
- ☐ Known limitations, accepted risks, vendor dependencies, and the next review date are recorded in the live service register.

Final decision and source links

Record the decision, conditions, and next review. Keep the first-party links with the evidence pack.

DECISION – GO / ADJUST / STOP

DECISION OWNER

CONDITIONS AND ACCEPTED RISKS

NEXT REVIEW DATE

First-party Microsoft sources

1. Requirements for Windows 365

learn.microsoft.com/windows-365/enterprise/requirements

2. Migration to Windows 365

learn.microsoft.com/windows-365/enterprise/migration-to-windows365

3. Create provisioning policies

learn.microsoft.com/windows-365/enterprise/create-provisioning-policy

4. Azure Network Connection health checks

learn.microsoft.com/windows-365/enterprise/health-checks

5. Cloud PC lifecycle

learn.microsoft.com/windows-365/enterprise/lifecycle

6. Remotely manage Windows 365 devices

learn.microsoft.com/windows-365/enterprise/remotely-manage-cloud-pc

7. Cloud PC monitoring overview

learn.microsoft.com/windows-365/enterprise/cloud-pc-monitoring-overview

8. Customer and Microsoft responsibilities

learn.microsoft.com/windows-365/customer-microsoft-responsibilities

MOVE FROM CHECKLIST TO LIVE CLOUD PC EVIDENCE

EtherInsights supports Windows 365 planning, migration, deployment, monitoring, and day-two operations in one Cloud PC view.

efficientether.co.uk/solutions/windows-365-and-cloud-pc

Try it free: app.etherinsights.ai