

# MDM Migration Checklist

Few processes impact business and security operations as critically as Mac management workflows. Because MDM touches every device, migrating to a new solution requires planning, coordination and a clear focus on minimizing disruption while maintaining security and productivity.

The following sections break down Mac MDM migrations into three practical phases that IT teams can use to plan, execute and review their migration project.



## Planning

(Pre-Migration)

Gather key information such as risk assessments and your latest inventory to set clear migration goals. Define a small set of KPIs to track progress and keep the project focused and on track.

### Pre-Migration

- 1 Inventory MDM infrastructure
- 2 Perform risk assessment
- 3 Determine compliance needs
- 4 Set goals and KPIs
- 5 Design data backup strategies
- 6 Develop migration workflows
- 7 Conduct thorough testing
- 8 Documentation and iterative improvement
- 9 Develop a contingency plan
- 10 Manage user communications and training



## Execution

(Migration)

Data gathered during planning is put into practice by moving from your existing MDM to the new solution. This phase brings together workflows and tooling to re-enroll devices while monitoring progress and minimizing disruption.

### Migration

- 1 Set up new MDM solution for production
- 2 Verify migration via pilot program
- 3 Execute data backup (if necessary)
- 4 Prepare managed devices for migration
- 5 Unenroll managed devices from source
- 6 Enroll device within destination MDM
- 7 Monitor project progress
- 8 Gather and review device inventory
- 9 Ensure device compliance
- 10 Restore backup data



## Review

(Post-Migration)

Reviewing the migration project helps confirm what worked well and where improvements are needed. Comparing progress, performance and compliance against your KPIs ensures the migration met both technical and business expectations.

### Post-Migration

- 1 Validate migrated device enrollment
- 2 Ongoing performance monitoring
- 3 Update compliance policies (if necessary)
- 4 Obtain stakeholder feedback
- 5 Resolve outstanding issues/concerns
- 6 Clean-up source MDM and tools
- 7 Decommission source MDM solution
- 8 Measure ROI/TCO metrics
- 9 Document lessons learned
- 10 Iteratively update processes

## Key considerations for a successful MDM migration

Data protection and minimal disruption are two core drivers of a successful MDM migration. Across the three phases, organizations may be exposed to risk, from devices falling out of compliance to impacts on user productivity. These risks can be minimized by following these key principles:



Plan and test migrations to **reduce risk** and limit downtime



**Communicate** regularly with stakeholders and end users to ensure a **smooth transition**



Prioritize **security** in each phase to maintain compliance



Document key decisions and outcomes to **support data-driven improvements**



**Improve processes** over time using lessons learned and stakeholder feedback

## Conclusion

A successful MDM migration relies on clear planning, smooth execution and focused review to improve security, increase efficiency and support long-term operations. More than a technical change, it's an opportunity to simplify management, strengthen compliance and keep teams productive.

Avoid common challenges that derail MDM migrations by building a practical strategy around the three phases and keeping the focus on security, simplicity and continuity.