



10 Data Points to Validate **Before** **Migrating Your** **VM Infrastructure**

A complete guide for CTO's
and CFO's, to explore and
understand your IT estate
before migrating your virtual
infrastructure



Quick Navigation

Rising costs, vendor consolidation, and the demand for agility have CTOs and CFOs reassessing their virtual infrastructure strategies. A successful VM migration hinges on accurately assessing and clearly understanding your existing IT estate.

This concise guide provides 10 essential data points to verify before migration. Use this checklist to support strategic discussions, confirm readiness, and drive informed decisions.

1. VM Utilisation Patterns



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3. Total Cost of Ownership (TCO)



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5. Backup and Recovery



10. Skills and Operating Model Fit



1. VM Utilisation Patterns

Why it Matters:

Poor visibility into VM usage leads to unnecessary costs and migration inefficiencies.

Key Checks:



Identify underutilised or idle VMs for consolidation or retirement.



Recognise VMs nearing capacity for rightsizing.



Spot VMs with erratic usage needing detailed analysis.

Actionable Insights – 3 Step Approach:

Collect historical utilisation data: Review CPU, memory, and network metrics over the last 30–90 days.

Highlight inefficiencies: Flag VMs for immediate optimisation, consolidation, or decommissioning.

Inform capacity planning: Use validated insights to plan future resource requirements, avoiding overspending and overprovisioning accurately.

Role-Based Questions to Ask at This Stage



CFO

- ? Are we currently funding unused or inefficient infrastructure?
- ? What savings could we achieve through pre-migration optimisation?
- ? Have we set clear financial goals for consolidating VMs?



CTO

- ? Which workloads can we confidently retire or consolidate?
- ? Do we have sufficient data to justify resizing resources?
- ? What immediate efficiency improvements can we achieve before migrating?



2. Software and Licensing Agreements

Why it Matters:

Licensing terms can significantly restrict migration flexibility and unexpectedly increase costs.

Key Checks:



List all active software licenses with renewal dates and terms.



Identify licenses that may restrict flexibility or cause duplication.



Determine opportunities to reduce licensing costs through consolidation or renegotiation.

Actionable Insights – 3 Step Approach:

Catalogue licenses: Compile a comprehensive inventory of software licenses and their renewal timelines.

Assess constraints: Identify licenses that could limit migration or introduce unnecessary costs.

Plan strategically: Align your migration timing with license renewals to avoid redundant expenses and optimise contract negotiations.

Role-Based Questions to Ask at This Stage



- ? Do our current licensing agreements restrict our migration strategy?
- ? What potential cost savings could we realise by reviewing and adjusting our licensing commitments?
- ? Are we accurately tracking license utilisation to avoid unnecessary spend?



- ? Are there unused or redundant licenses we can remove immediately?
- ? What licensing challenges must we address before migration?
- ? Can we streamline licensing to reduce complexity and cost post-migration?



3. Total Cost of Ownership (TCO)

Why it Matters:

Misjudging migration costs can lead to unforeseen expenses and undermine the expected benefits.

Key Checks:



Current operational costs (licenses, infrastructure, support).



Future platform and cloud costs (compute, storage, networking).



Hidden costs (refactoring, new tooling, training, external services).

Actionable Insights – 3 Step Approach:

Assess current spend: Clearly document all current IT operational costs.

Model future costs: Estimate detailed migration and ongoing costs for each scenario under consideration.

Compare accurately: Conduct a comparative TCO analysis across potential scenarios to identify true cost savings and inform budgeting.

Role-Based Questions to Ask at This Stage



- ? Have we accounted for all hidden and indirect costs of migrating?
- ? What will our total IT spend look like over the next 3–5 years?
- ? Are our business case assumptions validated by thorough cost analysis?



- ? Have we included costs for training, support, and tooling in the new environment?
- ? What costs will we incur to maintain critical workloads during transition?
- ? Are we genuinely achieving cost-efficiency or simply shifting costs?



4. Dependencies Mapping

Why it Matters:

Hidden dependencies risk migration failures and operational disruption.

Key Checks:



Identify internal application dependencies.



Document shared services and integrations.



Clarify network configurations and legacy system connections.

Actionable Insights – 3 Step Approach:

Map dependencies: Clearly document all system and application connections.

Sequence migration: Group workloads by dependency levels.

Address gaps: Proactively plan mitigations for high-risk dependencies.

Role-Based Questions to Ask at This Stage



CFO

- ? Are financial risks from dependency disruptions fully budgeted?
- ? Have dependency-related downtime impacts been quantified?
- ? Are contingency plans costed and documented?



CTO

- ? Which systems must migrate together due to dependencies?
- ? Do we have full visibility into integrations?
- ? Are legacy dependency issues addressed pre-migration?



5. Backup and Recovery

Why it Matters:

Ensuring data protection and continuity throughout the migration.

Key Checks:



Document current backup frequencies, locations, and retention.



Confirm recovery time objectives (RTO) and recovery point objectives (RPO).



Validate compliance with data resilience and regulatory standards.

Actionable Insights – 3 Step Approach:

Review existing standards:
Document all backup and recovery practices.

Identify potential gaps:
Assess and highlight weaknesses.

Align new environment:
Update processes to meet new platform standards..

Role-Based Questions to Ask at This Stage



CFO

- ? Have financial implications of downtime or data loss been fully assessed?
- ? Is additional investment needed for continuity?
- ? Do current resilience levels match business needs?



CTO

- ? Are RTO/RPO targets clearly defined and realistic?
- ? Will the new platform meet these standards?
- ? Are backup procedures ready for migration?



6. Data Egress Costs and Volumes

Why it Matters:

Unexpected data transfer costs can significantly inflate your migration budget.

Key Checks:



Measure outbound data volumes per workload.



Identify high-frequency data transfers.



Review current network design for cost impacts.

Actionable Insights – 3 Step Approach:

Assess current egress: Quantify existing data outflows.

Forecast new costs: Model data transfer expenses in the target environment.

Optimise data flows: Adjust architecture to minimise unnecessary transfers.

Role-Based Questions to Ask at This Stage



CFO

- ? Are data egress costs clearly forecasted?
- ? How might these impact budgets long-term?
- ? Have we accounted for potential spikes in data transfer?



CTO

- ? Which workloads drive high egress volumes?
- ? Can we optimise data movement pre-migration?
- ? Are provider and region choices aligned with our usage patterns?



7. Security and Compliance Requirements

Why it Matters:

Compliance gaps or security oversights can expose the organisation to critical risks.

Key Checks:



Document current security controls (encryption, access, monitoring).



Validate compliance with industry regulations (GDPR, ISO 27001).



Review data residency and governance standards.

Actionable Insights – 3 Step Approach:

Audit security posture: Clearly document current compliance levels.

Identify gaps: Highlight compliance or security risks.

Align future state: Ensure target platform meets or exceeds current standards.

Role-Based Questions to Ask at This Stage



- ? Are security and compliance gaps budgeted and planned for?
- ? Do we understand financial penalties of non-compliance?
- ? Are investments in security improvements clearly justified?



- ? Will current security standards be maintained or improved post-migration?
- ? Have compliance risks been identified and mitigated?
- ? Are regulatory standards clearly aligned to our new platform?



8. Cloud Readiness of Workloads

Why it Matters:

Migrating unsuitable workloads leads to wasted effort and increased complexity.

Key Checks:



Evaluate technical compatibility of applications with cloud.



Review support status and business relevance of workloads.



Identify systems for retirement or refactoring.

Actionable Insights – 3 Step Approach:

Assess readiness: Clearly categorise workloads (ready, rework, retire).

Plan strategically: Prioritise migration waves based on complexity.

Communicate outcomes: Align migration plans with business value and goals.

Role-Based Questions to Ask at This Stage



- ? Are financial benefits clearly linked to workload migration decisions?
- ? Have we considered the savings from retiring outdated workloads?
- ? Are all migrations cost-justified?



- ? Which workloads need significant refactoring or redevelopment?
- ? Are legacy applications clearly flagged for replacement or retirement?
- ? Do we have a structured migration priority list?



9. Support and Escalation Paths

Why it Matters:

Clear support structures prevent prolonged outages during migration.

Key Checks:



Document existing support SLAs and escalation paths.



Clarify post-migration support responsibilities.



Identify gaps requiring new support arrangements.

Actionable Insights – 3 Step Approach:

Map current support:

Document existing support arrangements clearly.

Define future support:

Establish responsibilities and SLAs post-migration.

Communicate clearly:

Ensure stakeholders know support routes and escalation points.

Role-Based Questions to Ask at This Stage



CFO

- ? Have we budgeted adequately for new support requirements?
- ? Are the financial impacts of potential downtime understood?
- ? Is external support required and cost-effective?



CTO

- ? Are support roles clearly defined post-migration?
- ? Is internal training adequate for new support demands?
- ? Have escalation paths been tested and documented?



10. Skills and Operating Model Fit

Why it Matters:

Migration success depends heavily on team readiness and operational alignment.

Key Checks:



Review team skills against new platform requirements.



Assess operating model alignment post-migration.



Identify gaps in skills, capacity, and support.

Actionable Insights – 3 Step Approach:

Evaluate team readiness:
Clearly identify skills and training needs.

Adapt operating model:
Define roles and responsibilities clearly.

Plan and resource: Address skill gaps through training or external support.

Role-Based Questions to Ask at This Stage



- ? Are training and recruitment budgets clearly outlined?
- ? Is external expertise necessary and budgeted?
- ? Is organisational readiness aligned with financial goals?



- ? Do teams have the skills to manage the new environment?
- ? Are roles and responsibilities clearly defined post-transition?
- ? Is the support model aligned with technical expectations?



About Us

Why work with Perform Partners?

We formed Perform Partners with a clear mission; **to improve how businesses achieve change.**

Migrating your VM infrastructure involves more than technology, it demands clarity across cost, risk, and operational readiness. By validating these 10 essential data points, your migration will be informed, controlled, and strategically aligned with your business goals.

To truly succeed, you need more than just insight, you need a trusted partner.

Our approach is practical, personalised, and results-driven. Choosing us means gaining a partner who is as committed to your success as you are, ready to roll up their sleeves and deliver real impact.

Our difference lies in our team, a dynamic group of enthusiastic problem-solvers who thrive on innovation, united by our passion for helping clients succeed. Flexibility, creativity, and a bit of fun underpin everything we do.

Ready to start your **migration journey with confidence?**

Join the many organisations already trusting Perform Partners to deliver real, meaningful change.

Some of our clients...



Our technical partners...



Thank you!

Ready to Take the Next Step?

Turn your insights into action. Here's how we can help:

Request a Discovery Session

Understand exactly where your VM estate stands today, and confidently plan your next move.

Contact us

Join Our Live Events

Gain clarity and connect your migration strategy to wider business goals.

Register today

Still not sure what you need?

Not sure where to begin? Let's talk...no pressure, just practical advice tailored to you.

Let's chat

