

# 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.

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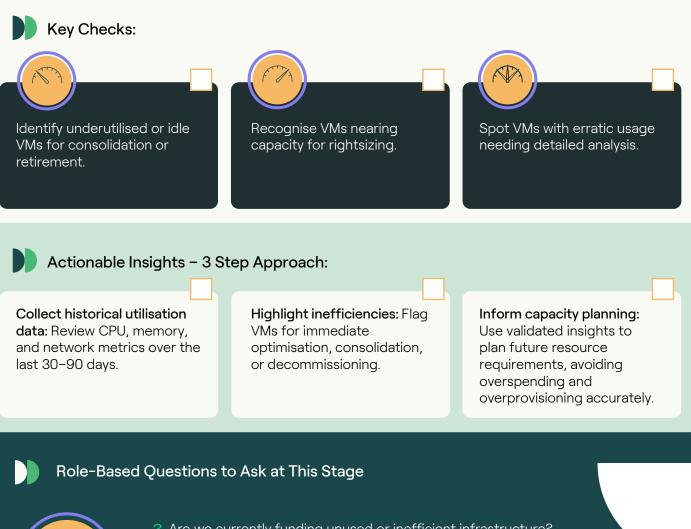


# **1**. VM Utilisation Patterns



#### Why it Matters:

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





- ? 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?



- ? 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 postmigration?



# 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?

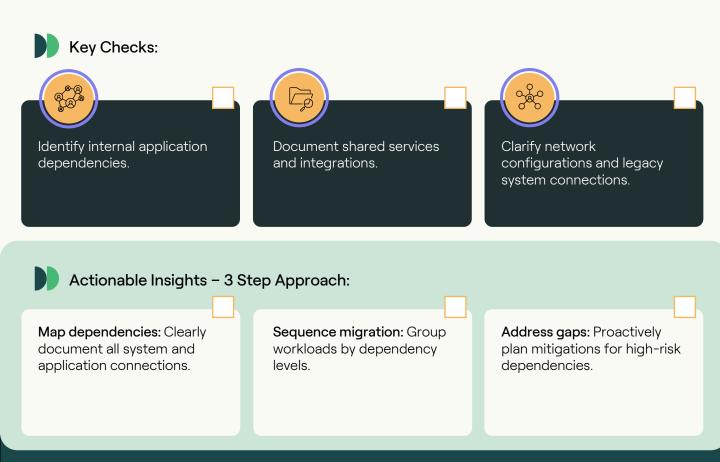


# 4. DependenciesMapping



#### Why it Matters:

Hidden dependencies risk migration failures and operational disruption.



#### Role-Based Questions to Ask at This Stage



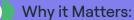
- ? Are financial risks from dependency disruptions fully budgeted?
- ? Have dependency-related downtime impacts been quantified?
- ? Are contingency plans costed and documented?



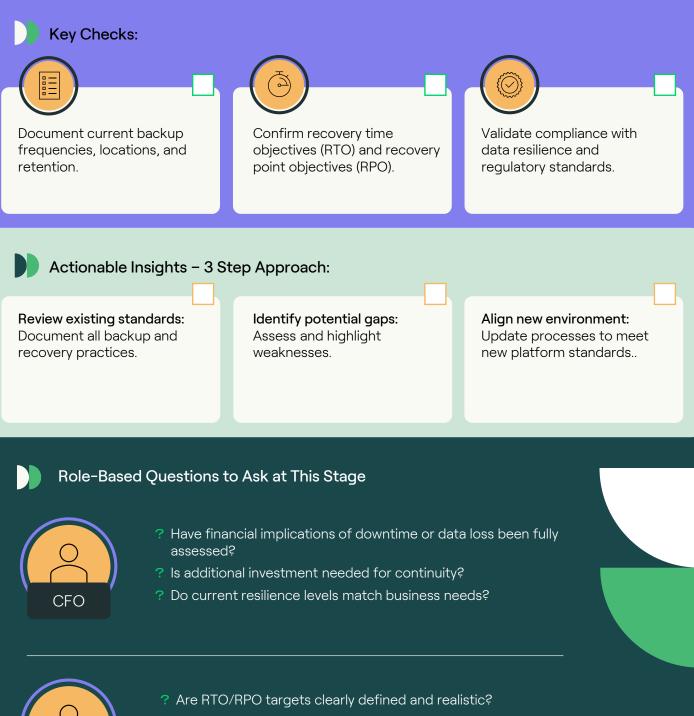
- ? Which systems must migrate together due to dependencies?
- ? Do we have full visibility into integrations?
- ? Are legacy dependency issues addressed pre-migration?



# 5. Backup and Recovery



Ensuring data protection and continuity throughout the migration.



- ? Will the new platform meet these standards?
- ? Are backup procedures ready for migration?



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#### Why it Matters:

Unexpected data transfer costs can significantly inflate your migration budget.

## 6. Data Egress Costs and Volumes

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



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



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



#### Why it Matters:

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

## 7. Security and Compliance Requirements

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 postmigration?
- ? 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: Image: Construction of the second structure Document existing support SLAs and escalation paths. Image: Constructure Image: Constretee

#### 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



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



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

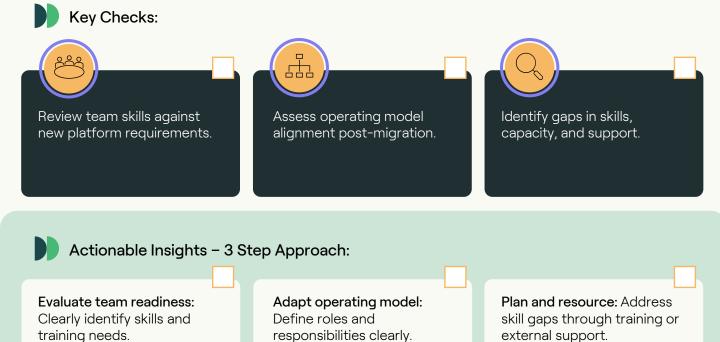


# **10**. Skills and Operating Model Fit



#### Why it Matters:

Migration success depends heavily on team readiness and operational alignment.



#### 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?

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.

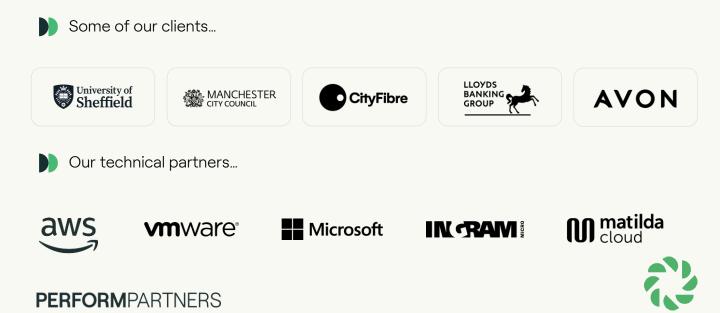
Our approach is practical, personalised, and resultsdriven. Choosing us means gaining a partner who is as committed to your success as you are, ready to roll up their sleeves and deliver real impact.

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

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.



# 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.

