

FREE RESOURCE • EDITABLE TEMPLATE

Cloud Migration Runbook **Template.**

An editable, fill-in runbook for moving workloads with zero downtime: discovery, dependency mapping, wave sequencing, cutover, rollback, and validation.

Replace the [bracketed] tokens with your own, keep the example rows as a guide, and walk into cutover night with a plan, not a hope.

PHASES

7

discovery through post-migration

FILL-IN TABLES

3

inventory, dependencies, waves

ROLLBACK PLAN

1

the page most plans skip

DOWNTIME TARGET

0

what the sequencing is built for

Know what you're moving.

Zero-downtime migration is a sequencing problem, not a luck problem. Everything that goes wrong on cutover night traces back to something not discovered or not mapped beforehand. Fill these tables first; the move itself becomes the easy part.

1 • Migration overview PROJECT METADATA

PROJECT NAME [PROJECT NAME]	MIGRATION LEAD [NAME]	EXECUTIVE SPONSOR [NAME]
TARGET CUTOVER DATE [DATE]	MAINTENANCE WINDOW [START - END]	RTO / RPO TARGETS [HH:MM / HH:MM]

2 • Discovery & inventory ONE ROW PER WORKLOAD

WORKLOAD	OWNER	CRITICALITY	CURRENT HOST	TARGET	WAVE
e.g. ERP application	J. Smith	Critical	esxi-prod-01	Cloud cluster A	2

Map it, then sequence it.

3 • Dependency mapping NOTHING MOVES ALONE

WORKLOAD	DEPENDS ON	MUST MIGRATE WITH / BEFORE	NOTES
e.g. ERP application	SQL database, AD / DNS	After DB, with AD/DNS	Same maintenance window

4 • Sequencing & waves GROUP BY DEPENDENCY, MOVE BY RISK

WAVE	SCOPE	ENTRY CRITERIA
e.g. 1 • Pilot	Low-risk, low-dependency workloads	Tolerant of brief downtime; proves the runbook
[Wave 1]	[workloads]	[criteria]
[Wave 2]	[dependency clusters]	[criteria]
[Wave 3]	[critical / customer-facing]	[after pilot waves succeed]

Rule of thumb: **migrate by dependency cluster, sequence by risk**. Move tightly-coupled workloads in the same wave so nothing is left calling a service that isn't there yet, and put your riskiest, most visible systems last, after the pilot waves have proven your runbook.

The night itself, and the way back.

5 • Cutover plan WINDOW: [START] TO [END]

- 1 Freeze changes at [T-24h] and notify [stakeholders].
- 2 Take a final replication / sync checkpoint at [T-2h]; confirm it is clean.
- 3 Stop services on the source at [T-0] and record the timestamp.
- 4 Cut DNS and networking over to [target].
- 5 Start services on the target and confirm they come up clean.
- 6 Smoke-test critical paths and confirm with [app owner].
- 7 Open to users and monitor closely for [N hours].

6 • Rollback plan DECIDE THIS BEFORE YOU NEED IT

ROLL BACK IF

Triggers: validation fails, the [RTO] window is exceeded, or any data-integrity issue is found.

Steps: 1) Halt the cutover. 2) Re-point DNS and networking to the source. 3) Restart source services. 4) Confirm the source is healthy and current. 5) Notify [stakeholders] and reschedule.

Decision owner: [Migration Lead] • **Rollback deadline:** [T+N] (past this point, roll forward and fix in place).

Prove it landed **clean.**

7 • Validation & post-migration BEFORE YOU CALL IT DONE

- | | |
|---|--|
| ☐ Application loads and authentication works | ☐ Integrations and APIs reconnected |
| ☐ Data is current and integrity verified | ☐ Performance is at or above baseline |
| ☐ Backups are running on the target | ☐ Monitoring and alerting are green |
| ☐ Source decommissioned after [N] days | ☐ CMDB / documentation updated |
| ☐ Right-size and cost review completed | ☐ Sign-off by [SPONSOR] |

A migration isn't done when the workload boots on the target. It's done when it's validated, backed up, monitored, documented, and signed off. That last column is where we help most. Here's where each phase of this runbook gets executed for you.

Cloud Migration

theitvortex.com/cloud-migration/

Discovery, dependency mapping, and wave-based cutover run by engineers who do it weekly.

Cloud Hosting (IaaS)

theitvortex.com/cloud-hosting-iaas/

The VMware-powered destination, sized to your workloads before the first wave moves.

Disaster Recovery (DRaaS)

theitvortex.com/disaster-recovery-as-a-service/

Tested failover stood up on the target, so resilience ships with the migration.

Managed IT Services

theitvortex.com/managed-it-services/

Monitoring, patching, and support on day one, so post-migration checks stay green.

Plan your migration with us: (201) 225-8670 • www.theitvortex.com

WALK IN WITH A PLAN

Bring this runbook to a planning session. We'll fill the tables against your real environment, build the wave sequence, and own the rollback plan so cutover night is uneventful.

BOOK A MIGRATION SESSION