

# MDM Migration Checklist

The changing needs of your business may demand a change from your current MDM provider to a more robust solution like Hexnode UEM. Although there are no general rules for migration, there are a few things that you must take into consideration while switching to a new MDM provider. The following is a list of tasks you must follow during the pre-migration, migration and post-migration phases.

## Pre-migration checklist – Actions to complete before MDM migration

The first step towards migration is reviewing the mobile device management needs of your organization. It would be helpful if you could re-evaluate the existing MDM platform and identify the areas that need improvement to plan your migration, and clearly define a migration strategy.

Action	Description
Create the list of devices	<ul style="list-style-type: none"><li>• Which all OS platforms do you need to support?</li><li>• Are the devices corporate-owned or personal?</li></ul> <b>Note:</b> If possible, export the device details from your previous MDM console.
Create the list of users	<ul style="list-style-type: none"><li>• No. of individual devices and users along with users using shared devices.</li><li>• Group users based on their departments or any other criteria.</li><li>• Type of users, for example, Technical users</li></ul> <b>Note:</b> If possible, export the user details and user groups created in your previous MDM console.

Action	Description
Survey users for evaluating requirements	<ul style="list-style-type: none"> <li>• What are the features users want to access on the managed devices?</li> <li>• What are the requirements that were not met by the previous MDM?</li> </ul> <p>At this phase, determine the list of permissions that are to be granted to the users.</p>
Define your device management policy	<ul style="list-style-type: none"> <li>• Evaluate whether your current policies meet the device and data security requirements of the organization.</li> <li>• Update your existing policies based on the results from the surveys.</li> <li>• List out the features you look forward to using in the new MDM.</li> </ul>
Define your enrollment strategy	<ul style="list-style-type: none"> <li>• Who is going to carry out the enrollment process – employees or in-house IT team?</li> <li>• Does employees require technical assistance for enrollment?</li> </ul>
Create a logically achievable timeline	<ul style="list-style-type: none"> <li>• Identify the right time for migration.</li> <li>• Study about the entire process and prepare the migration schedule.</li> </ul>
Prepare the end users for the transition	<ul style="list-style-type: none"> <li>• Inform the users about the switching, so that they can plan accordingly.</li> <li>• Train the users for the enrollment process.</li> <li>• Provide them with the MDM support documentations to get acquainted with the new vendor.</li> </ul>
Back up device data to your preferred cloud service	Store the required data from your devices on to a cloud storage service before wiping them.
Prepare your devices for migration.	Wipe and unenroll devices from the current MDM.

## Migration checklist – Best practices for a successful MDM migration

It's at this phase that you formally start migrating your devices to Hexnode UEM. Learn

about the enrollment process and plan the migration using the best possible method. Before starting the migrations, please make sure that you are on the most suited MDM pricing plan.

Action	Description
Sign up for Hexnode UEM and set up the portal	<ul style="list-style-type: none"> <li>• Use the trial period to explore all the features.</li> <li>• Learn about the pricing plans and the set of features available with each plan.</li> <li>• Choose the plan that's best suited for your organization.</li> </ul>
Create technicians and assign roles	If you have multiple technicians to manage your MDM portal, create additional technicians and assign them roles.
Configure MDM settings	Prior to enrollment, configure the admin settings like email settings, SMS settings, etc.
Integrate directory services	Integrate AD and Azure AD to import users and groups for easy enrollment and policy assignment.
Migrate tokens and sync your accounts with the MDM	<ul style="list-style-type: none"> <li>• Migrate DEP and VPP tokens.</li> <li>• Configure G Suite, Android Enterprise, Samsung KME, and Android ZTE.</li> </ul>
Send enrollment requests to users (if enrollment is done by users)	<ul style="list-style-type: none"> <li>• Send enrollment instructions to users in bulk via email by uploading the user details as a CSV file.</li> <li>• Give a deadline for completing the enrollment process.</li> </ul>
Enroll devices	Choose automatic enrollment options or any other enrollment methods to get the devices enrolled.
Track device enrollment	<ul style="list-style-type: none"> <li>• Check your Hexnode UEM portal to see the list of enrolled devices.</li> <li>• Schedule reports for receiving the list of users enrolled with Hexnode UEM via email.</li> </ul> <p>Helps in finding out the users who have been invited but not enrolled.</p>

## Post-migration checklist – Tasks to be performed after the MDM migration

It is crucial to ensure that all devices are migrated from your previous MDM solution to

Hexnode UEM. Conduct a survey after the migration to get user feedback on the new MDM vendor. Your MDM migration can be marked successful only after completing these post-migration tasks.

Action	Description
Check device inventory	Review and compare the reports with the device details exported from the previous MDM console to find out if there are any pending device enrollments.
Unsubscribe the services of the old MDM	<ul style="list-style-type: none"><li>• Exit the previous MDM provider.</li><li>• Notify users about the deactivation so that any users who continue using the services can migrate to Hexnode UEM.</li></ul>
Configure devices	Apply management policies to the devices.
Conduct surveys to collect user feedback	<ul style="list-style-type: none"><li>• Collect feedback from users to identify issues and new requirements.</li><li>• Troubleshoot issues with assistance from the Hexnode UEM support team.</li></ul>