



Power BI Migration Readiness Assessment for M&A IT Teams

Use this assessment to evaluate readiness for a Power BI migration M&A project before cutover. It is designed to help teams identify technical dependencies, business critical reporting, and timing risks tied to tenant consolidation Power BI planning.

How To Use This Assessment

Review each checkpoint with the relevant owner and mark the current status as Yes, No, or In Progress. Add notes, owners, and due dates so the assessment becomes a working action tracker.

- Yes = 2 points
- In Progress = 1 point
- No = 0 points

Assessment Scale

Score Range	Readiness Level	Meaning
85 to 100	High	Core migration controls are in place and the team is close to execution
60 to 84	Medium	Key planning exists, but material gaps still need resolution
Below 60	Low	Migration risk is elevated and cutover planning needs more work

Project And TSA Readiness

- Is there a confirmed TSA end date or source tenant access deadline?
- Is Power BI included in the main M&A; IT integration Power BI roadmap?
- Are migration waves aligned with Exchange, SharePoint, and Teams timelines?
- Have critical reporting periods such as month-end, board reporting, or close cycles been identified?
- Is there a rollback or contingency plan if reporting breaks after cutover?

Inventory And Dependency Readiness

- Is there a complete inventory of workspaces, reports, datasets, and dataflows?
- Have personal workspaces and department-owned content been identified?
- Have embedded Power BI reports in apps, portals, or SharePoint pages been cataloged?
- Have SharePoint and OneDrive dependencies been mapped before URL changes?
- Have all on premises gateways been identified for rebinding in the target tenant?

Security And Validation Readiness

- Have user and group mappings been confirmed for the target tenant?
- Has row level security been reviewed for tenant consolidation Power BI scenarios?
- Have GUID dependent report links and embedded objects been identified?
- Are UAT steps defined for report rendering, access, refresh, and embedded behavior?
- Is there a named business owner to validate each high-priority report after migration?

Notes And Action Tracker

#	Area	Gap Found	Owner	Due Date	Status
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

Prepared for M&A; IT teams planning Power BI migration after acquisition, with focus on TSA timing, dependency mapping, and validation controls.