

RMM Migration Checklist

A successful RMM migration depends on structure, sequencing, and clarity of purpose. Use these steps as a roadmap for a smooth transition.

① PRE-MIGRATION

Assess Your Current Environment

Inventory your current environment:

- Tenants or sites
- Device counts by OS
- Monitoring rules
- Patch rings
- Scripts
- Roles
- Key integrations such as PSA, backup, and security

Segment clients by complexity and risk so you can start with low-risk groups

Set blackout windows and change freezes for cutover periods

Define pilot groups and KPIs

Define success criteria for:

- Day 1 (monitoring, ticketing, and patching functions)
- Day 30 (reduced alert noise, increased patch compliance, and standardized automation)

Establish a Baseline Configuration

Create standard policies by service tier, including:

- Monitoring policies
- Patch policies
- Automation policies

Configure ticket creation settings

Configure escalation paths

Document your "golden configuration"

Document how exceptions will be handled

② PILOT PHASE

Validate Before Scaling

Deploy the RMM agent to a small pilot group and validate:

Monitoring accuracy

Ticket routing

Patch automation

Remote access performance

Before moving forward:

Tune alert noise before expanding deployment

③ ROLLOUT PHASE

Deploy in Controlled Waves

Roll out by client or capability

After each wave, perform health checks:

- Device coverage
- Alert volume
- Patch results
- Ticket flow

Scale Gradually as Confidence Increases

Freeze changes in the legacy RMM when ready for cutover

Confirm that monitoring, patching, and reporting are fully operational in the new RMM

④ POST-MIGRATION OPTIMIZATION

Assess Your Current Environment

Confirm endpoint coverage

Remove the legacy agent

Consolidate scripts into a governed library

Refine patch policies and exceptions based on real-world results

Build reporting around:

- Noise reduction
- Patch compliance
- Resolution time

Update SOPs and technician training

Standardize the new RMM as the default operating model



Common Risks to Avoid

Recreating Every Legacy Rule 1:1

Use the migration as a reset opportunity. Build a baseline by service tier and document exceptions instead of rebuilding years of one-off policies.

Scaling Before Tuning Alert Noise

Tune during the pilot phase. Decide what should be grouped by alert, auto-remediated, or report-only before expanding.

Migrating Scripts Without Governance

Establish script ownership, versioning, and testing before broad deployment.

Skipping the Success-Metrics Gate

Define measurable success checks and do not expand rollout until they pass.



Next Steps

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