

Windows 11 Upgrade

Planning Guide for Businesses

Microsoft will end mainstream support for Windows 10 on October 14, 2025, making the transition to Windows 11 a critical priority for businesses.

While Extended Security Updates (ESU) are available for organizations needing additional time, the most secure and cost-effective path forward is migrating to Windows 11 by the end of October 2025.

Windows 11 offers significant advantages including enhanced security features like hardware-based isolation, improved performance optimizations, better collaboration tools, and streamlined device management. However, the upgrade requires careful planning due to stricter hardware requirements.

This guide provides a structured 6-month timeline to help your organization successfully transition from Windows 10 to Windows 11, minimizing disruption while ensuring compliance and security.

Implementation Timeline: May to October 2025

Month	Focus Area	Key Milestone
May	Awareness & Inventory	Identify all PCs and software in use
June	Compatibility Checks	Assess hardware and software compatibility
July	Budgeting & Planning	Finalize upgrade plan and budget
August	Procurement & Testing	Order new hardware/software, test upgrades
September	Deployment & Training	Begin phased rollout and train staff
October	Finalization & Decommissioning	Complete upgrades and retire Windows 10 systems



Discovery & Assessment

Hardware & Software Inventory

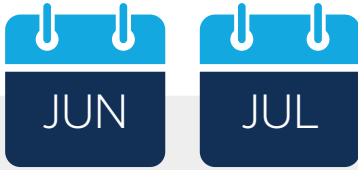
- ☐ Create a comprehensive inventory of all PCs, laptops, servers, and mobile devices
- ☐ Document current Windows versions, service pack levels, and patch status
- ☐ List all critical software applications, including version numbers and licensing details
- ☐ Identify cloud services, SaaS applications, and web-based tools in use
- ☐ Catalog peripheral devices (printers, scanners, specialized equipment)

Compatibility Assessment

- ☐ Run Microsoft's PC Health Check app or Windows 11 Compatibility Checker on all devices
- ☐ Test hardware requirements: TPM 2.0, Secure Boot, UEFI firmware, CPU compatibility
- ☐ Verify minimum specifications: 4GB RAM, 64GB storage, DirectX 12 graphics
- ☐ Check BIOS/UEFI firmware versions and update capabilities
- ☐ Identify legacy software that may require compatibility mode or replacement
- ☐ Test critical line-of-business applications in Windows 11 environment
- ☐ Assess driver availability for specialized hardware and equipment

Risk & Impact Analysis

- ☐ Identify mission-critical systems that cannot afford downtime
- ☐ Document dependencies between systems and applications
- ☐ Assess cybersecurity risks of remaining on Windows 10 past support end
- ☐ Calculate potential costs of security breaches vs. upgrade investment



Planning & Budgeting

Strategic Decision Making

- ☐ Determine upgrade vs. replacement strategy for each device category
- ☐ Prioritize systems based on business importance and security risk
- ☐ Choose deployment approach: big bang, phased by department, or pilot program
- ☐ Select Windows 11 edition (Pro, Enterprise, Education) based on feature needs

Compatibility Assessment

- ☐ Estimate hardware costs for incompatible devices requiring replacement
- ☐ Budget for component upgrades (RAM, storage, TPM modules where possible)
- ☐ Factor in Windows 11 licensing costs and volume licensing considerations
- ☐ Include IT labor costs for deployment, testing, and support
- ☐ Plan for training expenses and temporary productivity impacts
- ☐ Consider Extended Security Updates (ESU) costs as contingency for delayed systems

Project Planning

- ☐ Create detailed project timeline with dependencies and milestones
- ☐ Assign project roles and responsibilities across IT and business teams
- ☐ Develop communication plan for stakeholders and end users
- ☐ Establish testing protocols and rollback procedures
- ☐ Plan for backup and data migration strategies



Procurement & Testing

Hardware & Software Acquisition

- ☐ Purchase replacement PCs meeting Windows 11 requirements with future-proofing considerations
- ☐ Order necessary component upgrades (TPM 2.0 modules, additional RAM, SSDs)
- ☐ Secure Windows 11 licenses through appropriate licensing programs
- ☐ Validate software compatibility and purchase updated versions if needed
- ☐ Ensure adequate backup storage and recovery solutions

Pilot Testing Program

- ☐ Set up isolated test environment with representative hardware configurations
- ☐ Install Windows 11 on pilot devices across different user profiles
- ☐ Conduct comprehensive application testing including:
 - ☐ Core productivity software (Office, browsers, email)
 - ☐ Line-of-business applications and databases
 - ☐ Security software and endpoint protection
 - ☐ Specialized industry-specific tools
- ☐ Test printing, scanning, and peripheral device functionality
- ☐ Validate network connectivity, VPN access, and domain integration
- ☐ Document any issues, workarounds, or required configuration changes

Security & Compliance Validation

- ☐ Configure Windows 11 security features (BitLocker, Windows Hello, Defender)
- ☐ Test compliance with industry regulations and internal security policies
- ☐ Validate backup and recovery procedures on Windows 11 systems
- ☐ Ensure integration with existing security infrastructure and monitoring tools



Deployment & Training

Phased Rollout Execution

- ☐ Begin with IT department and power users as initial deployment wave
- ☐ Roll out to non-critical departments before mission-critical systems
- ☐ Implement staged deployment with monitoring and feedback collection
- ☐ Maintain detailed logs of installations, issues, and resolutions
- ☐ Ensure robust backup procedures before each system upgrade

User Training & Support

- ☐ Develop training materials highlighting Windows 11 interface changes
- ☐ Conduct hands-on training sessions for key user interface updates
- ☐ Create quick reference guides and video tutorials
- ☐ Establish help desk procedures for Windows 11-specific issues
- ☐ Set up user feedback channels and issue tracking systems

Change Management

- ☐ Communicate timeline and expectations clearly across the organization
- ☐ Provide regular progress updates to leadership and stakeholders
- ☐ Address user concerns and resistance through targeted support
- ☐ Celebrate milestones and recognize successful adoption

Quality Assurance & Monitoring

- ☐ Monitor system performance and stability post-deployment
- ☐ Track user productivity metrics and support ticket volumes
- ☐ Conduct regular check-ins with department heads and key users
- ☐ Document lessons learned and adjust remaining deployment phases



Finalization & Decommissioning

Project Completion

- ☐ Verify all planned systems have been successfully upgraded to Windows 11
- ☐ Confirm all business-critical applications are functioning properly
- ☐ Validate that security policies and compliance requirements are met
- ☐ Complete final testing of backup and disaster recovery procedures

Legacy System Management

- ☐ Securely wipe all decommissioned Windows 10 machines using DoD standards
- ☐ Properly dispose of or repurpose old hardware in compliance with environmental regulations
- ☐ Transfer valid software licenses to new systems where applicable
- ☐ Update asset management systems to reflect new hardware and software inventory

Documentation & Knowledge Transfer

- ☐ Create comprehensive documentation of the new Windows 11 environment
- ☐ Update IT support procedures and troubleshooting guides
- ☐ Document configuration standards and security baselines
- ☐ Prepare handover materials for ongoing maintenance and support
- ☐ Conduct post-implementation review and capture lessons learned

Ongoing Support Preparation

- ☐ Establish Windows 11 patch management and update procedures
- ☐ Update monitoring and management tools for the new environment
- ☐ Train support staff on Windows 11-specific troubleshooting
- ☐ Plan for future Windows feature updates and security patches
- ☐ Set up metrics and reporting for ongoing system health monitoring

Additional Considerations

Extended Security Updates (ESU)

If your organization cannot complete the migration by October 2025, Microsoft offers ESU for Windows 10 through October 2028. However, this comes with significant costs and should be viewed as a temporary measure rather than a long-term strategy.

Cloud and Hybrid Considerations

Organizations using Microsoft 365 or Azure services should leverage cloud-based management tools like Microsoft Intune and Windows Autopilot to streamline the deployment process and ongoing management of Windows 11 devices.

Industry-Specific Requirements

Businesses in regulated industries (healthcare, finance, government) should pay particular attention to compliance requirements and may need additional time for testing and validation of specialized applications and security configurations.

Expert Support for Your Windows 11 Transition

Planning and executing a Windows 11 migration across your organization can be complex and time-consuming, especially while maintaining day-to-day operations. Lume Strategies specializes in helping businesses navigate technology transitions smoothly and efficiently. Our experienced team can assist with every phase of your Windows 11 upgrade project, from initial assessment and compatibility testing to full deployment and staff training. Whether you need comprehensive project management, technical expertise for complex environments, or simply want to ensure your migration stays on schedule and within budget, Lume Strategies provides the strategic guidance and hands-on support to make your transition successful.

Contact us today to discuss how we can customize this roadmap to fit your organization's specific needs and timeline.

Tom Gilmore, Business Development Specialist
716.559.1413 | gilmoret@lumestrategies.com



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