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WINDOWS UPGRADE READINESS GUIDE

Practical Steps for a Secure and Efficient Transition



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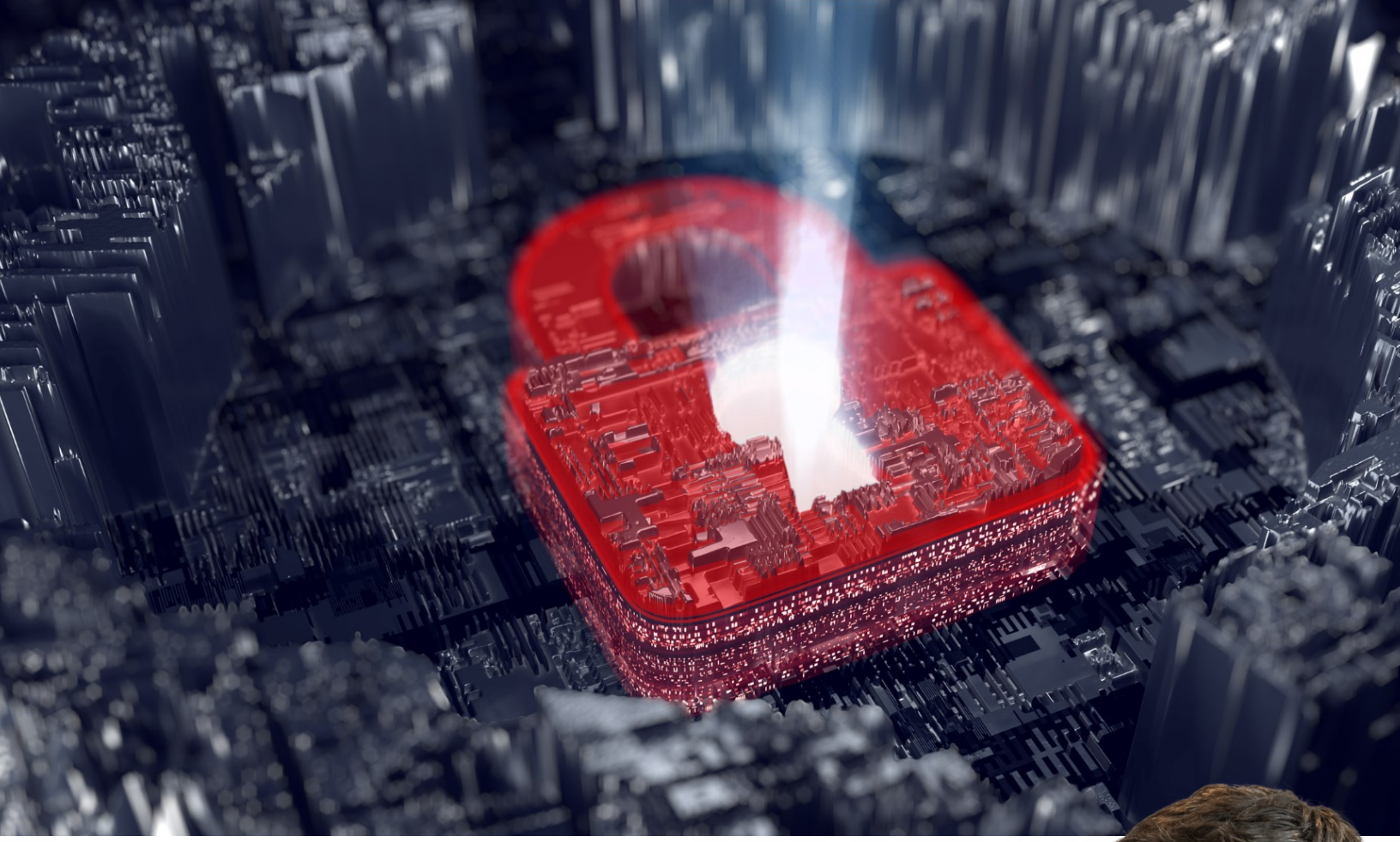
INTRODUCTION

The upcoming Windows end-of-life deadline means businesses must upgrade their systems to maintain security, compliance, and operational efficiency.

This guide outlines the steps to prepare for and execute a smooth transition to Windows 11.





Why This Matters

Ignoring this upgrade can result in:

- **Security Risks:** No more patches or security updates from Microsoft.
- **Compliance Violations:** Regulatory penalties (HIPAA, PCI, GDPR, etc.).
- **Operational Disruptions:** Unreliable systems, software incompatibility, and productivity loss.
- **Increased Costs:** Emergency IT interventions, data breaches, and lost business opportunities.



STEP-BY-STEP UPGRADE READINESS CHECKLIST

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1 Conduct an IT Inventory

- Identify all devices running Windows Current Version (e.g., Windows 11 or later).
- Categorize devices by age, performance, and upgrade eligibility.
- Document software dependencies and licensing requirements.

2 Check System Compatibility

- Use Microsoft's PC Health Check Tool to determine upgrade readiness.
- Verify hardware meets Windows 11 minimum system requirements:
  - Processor: 1 GHz or faster with 2 or more cores
  - RAM: 4 GB minimum
  - Storage: 64 GB or larger
  - TPM 2.0 support

3 Address Hardware & Software Gaps

- Plan for hardware replacements if systems fail compatibility tests.
- Test critical business applications on Windows 11 before deployment.
- Update outdated software to avoid compatibility issues.

4 Develop a Migration Plan

- Prioritize systems for upgrade based on risk level.
- Establish a phased upgrade schedule to minimize disruptions.
- Allocate IT resources and budget for new hardware if necessary.

5 Backup Critical Data

- Perform full system backups before upgrading.
- Verify backup integrity and accessibility.
- Establish a rollback plan in case of upgrade failures.

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6 Communicate & Train Employees

- Inform staff about upcoming changes and upgrade timelines.
- Provide training on Windows 11 features and UI changes.
- Assign IT support contacts for troubleshooting post-upgrade issues.

7 Execute the Upgrade

- Deploy upgrades in waves, starting with non-critical systems.
- Monitor performance and address compatibility issues promptly.
- Document any issues and solutions for future reference.

8 Post-Upgrade Testing & Security Enhancements

- Verify system stability and application functionality.
- Apply security configurations and update endpoint protection.
- Conduct post-upgrade cybersecurity audits.



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BUSINESS IMPACT & COST ANALYSIS

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Factor	Risk Without Upgrade	Benefit of Upgrading
Security	High risk of breaches & ransomware	Improved protection & compliance
Compliance	Non-compliance fines & legal risks	Avoid regulatory penalties
Productivity	Software crashes & IT disruptions	Stable and efficient performance
Cost	Expensive emergency fixes & downtime	Lower long-term IT costs



NEXT STEP

Recommended Deadline for Completion: October 14th, 2025

Options for Implementation:

- **DIY Approach** – Use this guide and have internal IT handle the upgrade.
- **Partner with an MSP** – Get expert guidance, risk mitigation, and a stress-free upgrade.



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Need help? Contact Valley Expetec today for a seamless upgrade experience!



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