

PREPARING FOR MICROSOFT'S PASSKEY TRANSITION

Use this checklist to assess readiness and track progress towards Microsoft's February 2027 retirement of Microsoft-provided SMS and voice authentication.

PHASE 1: DISCOVERY & ASSESSMENT

IDENTITY AND AUTHENTICATION REVIEW:

- ✓ Identify all users currently enabled for SMS MFA.
- ✓ Identify all users currently enabled for voice call MFA.
- ✓ Identify users using SMS for self-service password reset (SSPR).
- ✓ Review Authentication Methods Policies in Entra ID.
- ✓ Identify users without a phishing-resistant authentication method.
- ✓ Review privileged and administrative accounts.
- ✓ Document any business or regulatory requirement for SMS or voice

PLATFORM READINESS

- ✓ Confirm Entra Authentication Methods Policies are modernised.
- ✓ Review Windows Hello for Business adoption levels.
- ✓ Confirm Microsoft Authenticator deployment status.
- ✓ Validate supported operating systems and device versions.
- ✓ Assess BYOD and contractor access scenarios.

PHASE 2: SOLUTION DESIGN

AUTHENTICATION STRATEGY

- ✓ Define your primary phishing-resistant authentication method.
- ✓ Decide where passkeys will be used versus Windows Hello for Business.
- ✓ Define approved passkey providers, (*Microsoft Authenticator, Windows Hello for Business, FIDO2 security keys*) and any permitted synced passkey ecosystems such as *Google Password Manager* or *iCloud Keychain*.
- ✓ Define supported fallback methods.
- ✓ Review Temporary Access Pass (TAP) usage/policies.
- ✓ Define break-glass account authentication standards.
- ✓ Update identity governance documentation.

SECURITY REVIEW

- ✓ Ensure privileged accounts have phishing-resistant MFA.
- ✓ Remove legacy MFA configurations where appropriate.
- ✓ Review Conditional Access policies.
- ✓ Review account recovery processes.
- ✓ Validate emergency access procedures.

Want to know more?

We can take you through security best practice and identify where risk may be creeping in... **Get in touch today.**



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PHASE 3: PILOT & TESTING

TECHNICAL PILOT

- ✓ Enable passkeys for a pilot group.
- ✓ Test Microsoft Authenticator passkeys.
- ✓ Test Windows Hello for Business sign-in journeys.
- ✓ Test cross-device authentication scenarios.
- ✓ Test onboarding of new users.
- ✓ Test offboarding and device replacement processes.
- ✓ Test SSPR and account recovery workflows.

USER EXPERIENCE VALIDATION

- ✓ Gather pilot user feedback.
- ✓ Measure registration success rates.
- ✓ Identify common support issues.
- ✓ Update service desk knowledge articles.

PHASE 4: SOLUTION DESIGN

SERVICE DESK PREPERATION

- ✓ Create passkey registration guides.
- ✓ Create lost device recovery procedures.
- ✓ Create passkey reset procedures.
- ✓ Train first-line and second-line support teams.
- ✓ Create escalation paths for authentication issues.
- ✓ Update joiner, mover, leaver processes.

COMMUNICATIONS

- ✓ Publish awareness communications.
- ✓ Explain why SMS and voice authentication are changing.
- ✓ Provide registration instructions.
- ✓ Publish FAQs.
- ✓ Schedule reminder campaigns before enforcement deadlines.

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PHASE 5: ROLLOUT

REGISTRATION CAMPAIGN

- ✓ Enable Microsoft passkey registration campaigns.
- ✓ Target remaining SMS users.
- ✓ Target remaining voice-authentication users.
- ✓ Monitor registration completion rates.
- ✓ Track adoption by department and user population.
- ✓ Address non-compliant user groups.

GOVERNANCE & REPORTING

- ✓ Produce a weekly migration dashboard.
- ✓ Track SMS users remaining.
- ✓ Track voice users remaining.
- ✓ Track passkey registrations.
- ✓ Report progress to security and leadership teams.

PHASE 6: FEBRUARY 2027 READINESS

FINAL VALIDATION

- ✓ Confirm all privileged accounts use phishing-resistant methods.
- ✓ Confirm all break-glass accounts are tested.
- ✓ Confirm all user onboarding journeys support passkeys.
- ✓ Confirm recovery processes have been tested.
- ✓ Confirm SSPR operates without dependency on Microsoft-provided SMS/voice.
- ✓ Verify there are no business-critical users dependent solely on SMS or voice.

STRATEGIC DECISION

- ✓ Decide whether any SMS or voice authentication is still required.
- ✓ Assess customer-managed telecom provider options if required.
- ✓ Complete migration sign-off before February 2027.

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SUCCESS CRITERIA

- 100% of privileged accounts protected with phishing-resistant authentication
- All users capable of registering and using passkeys
- No business-critical dependency on Microsoft-provided SMS or voice authentication
- Service desk trained and operational processes updated
- Recovery processes tested and documented
- Organisation ready ahead of February 2027 enforcement date

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