



CHECKLIST

VMware Virtual Machine Snapshot Management Checklist

A practical checklist for controlling VMware VM snapshots in production: set ownership, time-box retention, monitor growth, and validate safe removal or consolidation.

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Use this checklist to manage VMware VM snapshots as short-lived operational tools, not as long-term protection.

1) Before Creating a Snapshot

- ☐ Confirm the business reason for the snapshot.
- ☐ Verify the snapshot is for a short-lived rollback or troubleshooting window.
- ☐ Record the owner responsible for removal.
- ☐ Set an expiration time or deletion target before creation.
- ☐ Confirm the expected rollback window is measured in hours, not days or weeks.
- ☐ Check datastore free space and ensure there is enough headroom for delta growth and later consolidation.
- ☐ Review current VM write activity and workload criticality.
- ☐ Avoid using snapshots as a backup substitute.
- ☐ Confirm the VM is suitable for snapshot use during the planned activity.
- ☐ If the VM is already near storage limits, pause and reassess before taking the snapshot.



2) When Creating the Snapshot

- ☐ Name the snapshot clearly so the purpose is obvious.
- ☐ Include the change ticket, owner, and creation timestamp in the name or notes if your process allows it.
- ☐ Keep the snapshot configuration as simple as the use case allows.
- ☐ Capture memory state only if it is required for the rollback objective.
- ☐ Document what state is being protected and what will be validated before removal.
- ☐ Notify affected teams that the snapshot exists and when it should be removed.

3) While the Snapshot Exists

- ☐ Monitor snapshot age daily or more frequently for production systems.
- ☐ Track delta file growth and datastore consumption.
- ☐ Watch for signs of application slowdown, storage contention, or write latency.
- ☐ Confirm the change or troubleshooting activity is still active and owned.
- ☐ Reassess the need for the snapshot if the work is delayed or paused.
- ☐ Escalate if the snapshot exceeds the approved retention window.
- ☐ Keep the snapshot visible in operational tracking, not only in the virtualization console.
- ☐ Do not allow the snapshot to become an informal standing safeguard.

4) Before Removing or Consolidating



- ☐ Confirm the change outcome is acceptable.
- ☐ Verify the VM is stable and functioning as expected.
- ☐ Confirm the rollback point is no longer needed.
- ☐ Check that datastore free space is sufficient for merge activity.
- ☐ Review any known performance constraints that could make consolidation risky.
- ☐ Schedule removal during a controlled maintenance window if possible.
- ☐ Ensure the responsible owner is available if issues arise.
- ☐ Identify a fallback plan if consolidation takes longer than expected.
- ☐ Avoid removing snapshots during unrelated incidents unless necessary.

5) During Removal or Consolidation

- ☐ Confirm the correct snapshot is selected for deletion.
- ☐ Start consolidation through the approved administrative process.
- ☐ Monitor storage I/O and job progress.
- ☐ Watch for free space pressure during the merge.
- ☐ Keep an eye on VM responsiveness and application health.
- ☐ Escalate if consolidation stalls, fails, or creates unexpected load.
- ☐ Do not assume deletion is complete until consolidation has fully finished.

6) After Removal

- ☐ Verify the snapshot chain is gone.
- ☐ Confirm datastore usage has normalized as expected.
- ☐ Check VM performance and application health after consolidation.
- ☐ Validate that the change result remains acceptable without the snapshot.



- ☐ Update the ticket or change record with the removal time.
- ☐ Record any issues, delays, or capacity impacts for future reference.
- ☐ Review whether the snapshot lifecycle could be improved next time.

7) Decision Check: Keep or Remove?

Use this quick decision guide:

- ☐ Keep it only if the rollback window is still active and clearly owned.
- ☐ Remove it if the change is complete and validated.
- ☐ Remove it if the snapshot has no clear expiry or owner.
- ☐ Remove it if the datastore is under pressure and the snapshot is no longer essential.
- ☐ Reevaluate immediately if the snapshot has aged beyond the approved window.
- ☐ Do not keep it just because it is convenient.

8) Red Flags That Require Immediate Review

- ☐ Snapshot age is longer than expected.
- ☐ Delta files are growing rapidly.
- ☐ Datastore free space is shrinking faster than planned.
- ☐ The owner of the snapshot is unclear.
- ☐ The change has been delayed, but the snapshot remains.
- ☐ The VM is production-critical and write-heavy.
- ☐ Consolidation has already failed or appears stuck.
- ☐ The snapshot has become a de facto backup.



9) Minimal Snapshot Record Template

Copy and fill this out for each snapshot:

- VM name:
- Environment:
- Snapshot purpose:
- Change ticket / incident ID:
- Owner:
- Created at:
- Planned removal at:
- Datastore:
- Expected risk if kept too long:
- Validation required before removal:
- Removal approver:
- Actual removal time:
- Post-removal notes:

10) Final Rule

If you cannot answer these three questions, do not leave the snapshot in place:

- Why does it exist?
- Who owns it?
- When will it be removed?

If any answer is unclear, treat the snapshot as a risk and resolve it immediately.