



CHECKLIST

VMware vSphere VM Snapshot Management Checklist

A practical checklist for safely creating, monitoring, and removing VMware vSphere VM snapshots in production environments.

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Use this checklist before, during, and after creating a VM snapshot in vSphere. It is designed for short-term change control, not long-term retention.

1) Confirm a snapshot is the right tool

- ☐ The change has a clear purpose and rollback need.
- ☐ The expected snapshot lifetime is short and explicitly defined.
- ☐ A backup already exists for the VM and workload.
- ☐ The snapshot is not being used as a substitute for backup.
- ☐ The VM owner understands the rollback decision point.
- ☐ The change window is approved and scheduled.

2) Verify environment readiness before creation

- ☐ Datastore free space is sufficient for expected delta growth.



- ☐ The VM is not already carrying an old or forgotten snapshot.
- ☐ Backup jobs are healthy and recent backups are confirmed.
- ☐ The workload is suitable for temporary snapshot use.
- ☐ The VM is not on a datastore already under capacity pressure.
- ☐ The team responsible for cleanup has been assigned.
- ☐ A removal deadline has been documented.

3) Define the snapshot scope

- ☐ Snapshot name clearly identifies the change or maintenance event.
- ☐ Purpose is documented in plain language.
- ☐ Owner and approver are recorded.
- ☐ Start time and planned removal time are documented.
- ☐ Required VM state is minimized to what is necessary.
- ☐ You have confirmed whether memory state or quiescing is needed for the use case.

4) Create the snapshot

- ☐ Snapshot was created only after readiness checks were completed.
- ☐ Snapshot name matches the documented change.
- ☐ Creation was successful and verified in the management interface.
- ☐ The VM remains available and responsive after creation.

5) Monitor while the snapshot is active



- ☐ Delta file growth is being watched.
- ☐ Datastore free space is being checked during the maintenance window.
- ☐ VM performance is being monitored for latency or write impact.
- ☐ Any application warnings are logged and reviewed.
- ☐ No additional snapshots are created unless there is a documented reason.
- ☐ The snapshot is not left active after the change is complete.

6) Validate the change

- ☐ The patch, update, or configuration change was applied successfully.
- ☐ The application or service was tested after the change.
- ☐ Rollback is no longer needed, or the rollback decision has been made.
- ☐ Stakeholders have confirmed whether validation passed.

7) Remove the snapshot promptly

- ☐ Snapshot removal begins as soon as validation is complete.
- ☐ Consolidation impact on storage and I/O has been considered.
- ☐ The team is ready to monitor the VM during deletion.
- ☐ No other maintenance activity is competing for datastore resources.
- ☐ The removal operation completes successfully.

8) Confirm cleanup after deletion

- ☐ The snapshot no longer appears in the snapshot inventory.



- ☐ Consolidation completed without error.
- ☐ No orphaned delta state remains.
- ☐ VM performance has returned to normal.
- ☐ Datastore consumption is within expected range.
- ☐ Any alerts or warnings generated during deletion have been reviewed.
- ☐ The cleanup has been closed out in the change record.

9) Escalation triggers

Escalate immediately if any of the following occur:

- ☐ Snapshot growth is faster than expected.
- ☐ Datastore free space drops below safe operating levels.
- ☐ Deletion or consolidation stalls or fails.
- ☐ The VM becomes unstable during the snapshot window.
- ☐ The snapshot is still present after the approved removal deadline.
- ☐ There is uncertainty about who owns cleanup.

10) Operating rules to keep snapshots safe

- ☐ Use snapshots only for short-term change control.
- ☐ Treat retention time as a risk factor, not just snapshot count.
- ☐ Keep approval, monitoring, and cleanup steps documented.
- ☐ Do not rely on snapshots for long-term protection.
- ☐ Make cleanup a required part of the change workflow.



Quick decision summary

Use a snapshot when:

- The change is specific and time-bound.
- Backup coverage already exists.
- Monitoring and cleanup are assigned.
- Removal will happen immediately after validation.

Avoid a snapshot when:

- You need long-term version retention.
- Datastore headroom is tight.
- The workload is highly write-intensive.
- No one can commit to removal on time.
- The snapshot would replace a proper backup.

Final review

Before closing the change, confirm these three items:

- The snapshot served a clear rollback purpose.
- The snapshot was removed promptly.
- Consolidation completed cleanly and the VM is stable.

If all three are true, the snapshot process was likely handled safely.