

How To Prepare for a CMS Migration

Moving CMS platforms is like moving homes — preparation is key to making sure the move goes smoothly.

Before you bring in the movers — or, in our case, a development team — it's important to help ensure your content is unpacked where it belongs and in the expected condition by making sure your team is prepared.

STEP 1: PACK



Take Inventory of Your Content

Are there pieces you no longer need? Maybe content that no longer fits your strategies, outdated press releases, or campaign material that is now irrelevant? Which pieces are converting for you over and over? Determine what can be purged and what you need to keep before the moving truck pulls into your driveway.

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Solidify Your Style

Take note of any internal hurdles that may pull you from the project or affect your overall timeline. Look ahead at events that may cause disruption for your team, like conferences and holiday breaks. Additionally, note any significant changes, such as major campaign initiatives or implementation of a new CRM. It helps to identify early on the elements that pose a risk to your project timeline.

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Plan for Your Move

Review, solidify, and document your brand standards ahead of time. Your development team will want a source of truth to ensure all content pieces match the approved branding elements in the new CMS. This is also a great time to note those content items that don't meet performance or accessibility standards.

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STEP 2: MOVE



Gather the Team

Most likely, your movers will need input from your team as they move — especially around manual content creation and user acceptance testing. Decide ahead of time who will own this portion of the move.

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Plan to Get the Lay of the Land

Just like a family needs to adjust routes from their new home to their frequently visited locations, your internal processes may change with a new platform. Additionally, the editor experience will most likely be different. Plan for time to learn and adjust.

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Review Best Practices

If it's been a while since you brushed up on industry expectations for content management, use this time as an opportunity to refresh. Review accessibility best practices regarding images, assess how your content affects page load time, and audit your redirects. Refreshing your memory about these things now will allow you to feel like you're starting your experience with your new CMS off on the right foot.

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STEP 3: UNPACK



Out with the Old

In all the excitement of moving to a new platform, don't forget to let go of the past, aka your old CMS. Ensure your license won't automatically renew, that your security measures are relevant to your new platform and that the extended team all have access to the new CMS.

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Connect

As you make yourself at home in the new CMS, make sure your connections are in place. Think of this as updating your mailing address: is your CRM integrated with the right CMS? Are your new forms synced to your mailing list? Ensure your connections know where to interact with your content.

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Get to Know the Neighborhood

Now that you're moving to a new CMS, do your due diligence. Understand the capabilities and how they differ from what you're used to and take note of the new opportunities for growth and new ideas.

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