



Kentico



Ebook

Your comprehensive migration checklist.

Navigating migration pitfalls and ensuring success

kentico.com

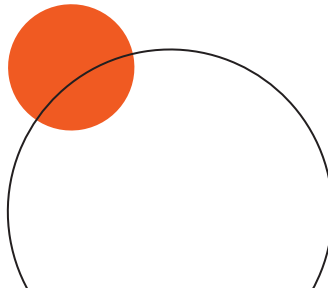


Table of contents.

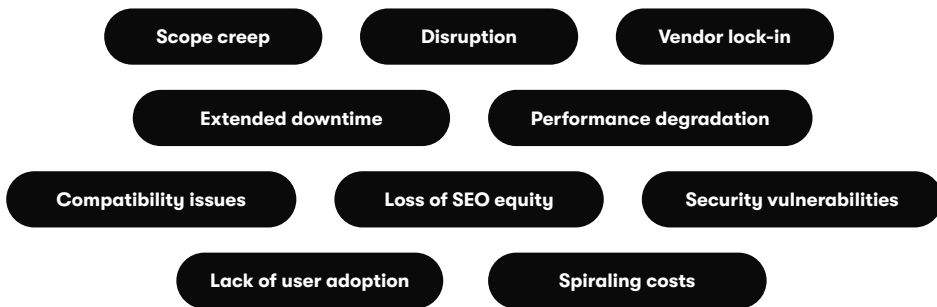
The 13 steps to migration success	4
Step 1: Identify your goals and objectives :	5
Step 2: Determine the migration's scope :	7
Step 3: Choose the right CMS/DXP for your organization :	9
Step 4: Set realistic timelines and milestones :	10
Step 5: Allocate appropriate budget :	11
Step 6: Asses your current content and assets :	12
Step 7: Review your current website structure :	14
Step 8: Strategize data migration	16
Step 9: Seize the opportunity	18
Step 10: Execution best practices	20
Step 11: Test for success	22
Step 12: Provide user training	25
Step 13: Monitor and evaluate	27
About Kentico	30

Platforms like Content Management Systems (CMS) and Digital Experience Platforms (DXP) are the backbone of a company's digital strategy, helping them create content and deliver great user experiences. But despite their importance, many organizations are hesitant to migrate to a new platform even when there are [many reasons to do so](#).

Outdated systems often struggle to keep pace with the demands of modern digital operations, resulting in missed opportunities for cost savings, revenue generation, and enhanced user experiences. The inability to consolidate disparate systems contributes to operational inefficiencies, inflating costs while obstructing the realization of a favorable return on investment. Legacy platforms also hamper organizational agility and innovation. They lack the flexibility needed to support new functionalities and swiftly adapt to evolving market conditions, reducing an organization's ability to stay relevant and competitive.

So, what's holding them back?
Migration.

Despite the benefits of moving to a newer, more advanced platform and away from outdated systems, many organizations are hesitant to migrate due to a myriad of potential pitfalls:



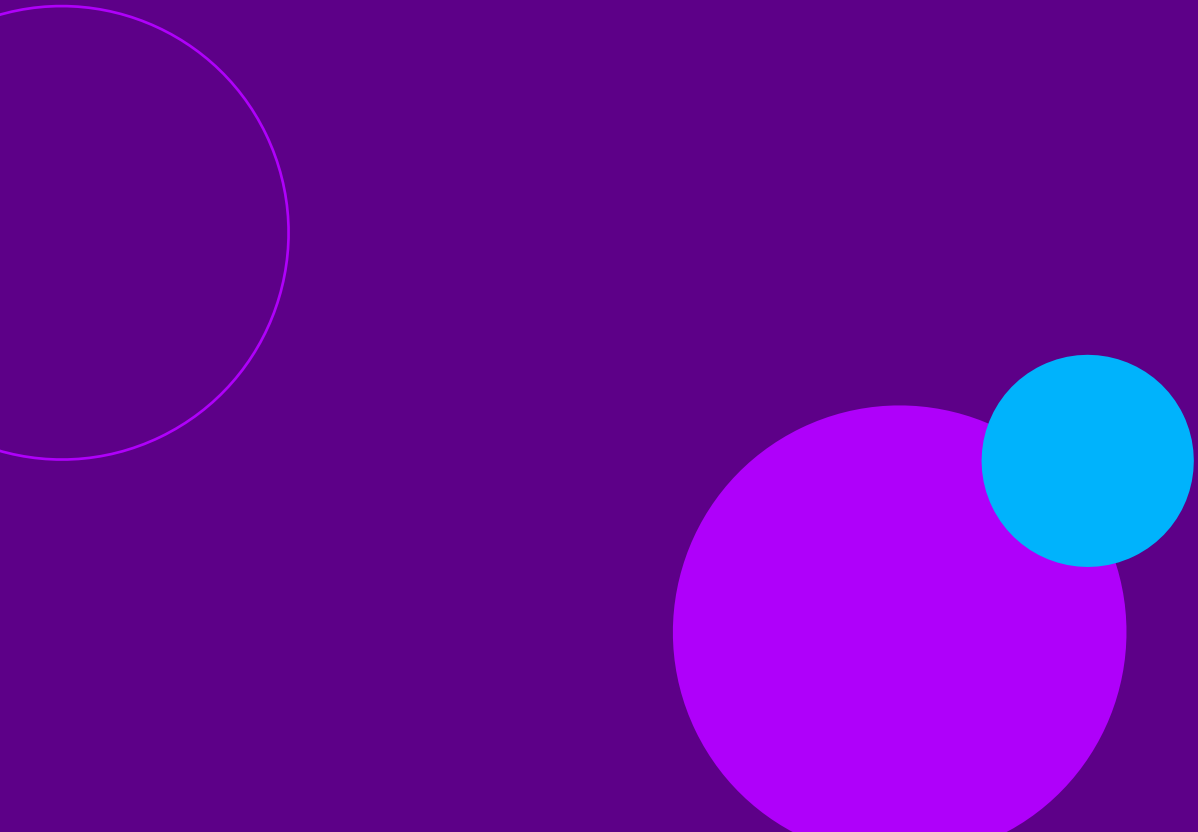
Acknowledging and addressing these potential pitfalls is essential for organizations considering migration. By understanding the challenges ahead, organizations can better prepare and implement strategies to overcome them. With this proactive approach, coupled with a clear roadmap and comprehensive plan, organizations can navigate the migration process successfully and reap the benefits of a modernized digital platform. Now, let's delve into the 13 steps for migration success:





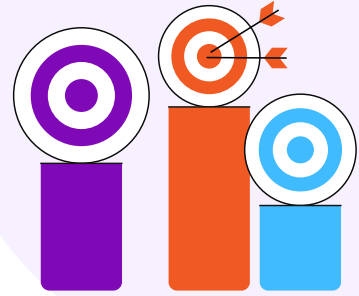
The 13 steps to migration success.

Successful migration requires meticulous planning, execution, and ongoing evaluation. Follow this step-by-step checklist to ensure a seamless transition to a new CMS or DXP aligned with your organizational goals.



Step 1:

Identify your goals and objectives:



Defining the goals and objectives of a migration provides clarity on what the organization aims to achieve, guides decision-making and resource allocation, enables measurement of success, aligns stakeholders' expectations, and prioritizes tasks effectively.

- Identify pain points, limitations, and areas where the current CMS/ DXP may be falling short. Consider aspects such as usability, performance, scalability, security, and integrations with other systems.
- Clearly define the specific goals and objectives you aim to achieve through the migration process (enhancing website performance, improving user experience, reducing maintenance costs, [consolidating the tech stack](#), or aligning with strategic business objectives).
- Ensure that your goals are measurable, achievable, relevant, and time-bound (SMART criteria).



“

Marketing professionals are looking for quantitative results from the redesign/replatform but don't always have the comparative data for their current site. Make sure both sites are tracking for effective before/after comparison.”



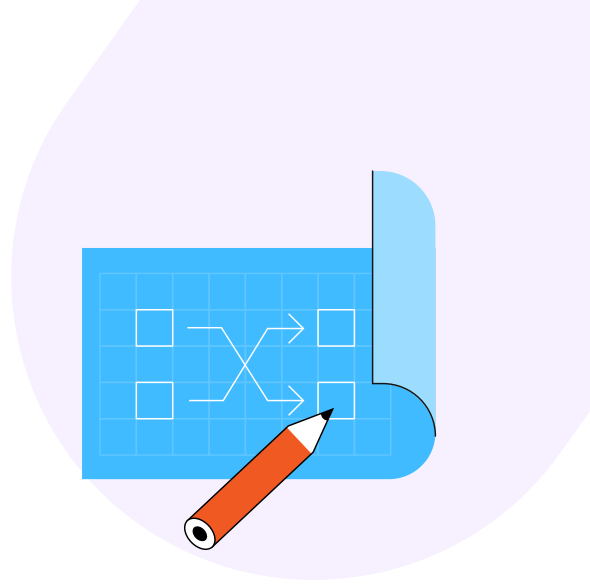
Michelle Brown.

VP of Sales & Marketing at [ZAG Interactive](#)



Step 2:

Determine the migration's scope:



Determining the scope of a migration project is crucial for clarity, resource allocation, risk management, and preventing scope creep. It provides clear boundaries for what will be included in the project, ensuring everyone understands objectives and stays focused. By setting expectations upfront, organizations can manage stakeholders' expectations and maintain control over the project's direction.

- Identify key stakeholders (department heads, IT, content creators, etc.), gather insights and ensure alignment with their needs and objectives.
- Define the scope of the migration project by outlining what will be included and excluded from the migration process. Clearly communicate the scope to avoid creep.
- Consider factors such as the number of websites or applications to be migrated, the complexity of content and data, any custom functionalities or integrations, and the extent of design or branding changes.
- Conduct an assessment of your organization's readiness for migration (technical infrastructure, staff skills, and change management capabilities). Evaluate the need for [external expertise and support from a digital agency](#) (strategic guidance, technical implementations, UX design) based on internal capabilities and resources.



“

Clients often underestimate the effort involved in migrating content from one platform to another. While there are tools to help migrate content, there will always be manual content migration or updating needed. Choose a partner that has expertise in accessibility. It starts at the UX/wireframe stage and touches every phase of the website development process. Neglecting it will leave you with a website that gives the disability community a poor experience with your brand and website.”



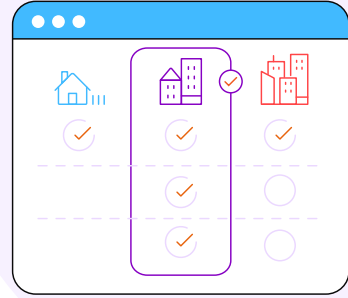
Candice Wyatt.

Sr. Director, Web & Platform Solutions
at [Red Door](#)

RED DOOR
INTERACTIVE

Step 3:

Choose the right CMS/ DXP for your organization:



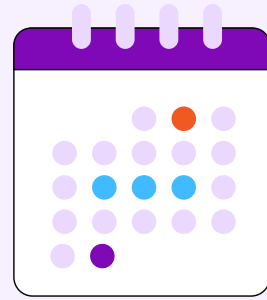
Choosing the right CMS or DXP is crucial for your organization's digital success. By actively involving stakeholders, evaluating digital maturity, assessing compatibility, and prioritizing user-friendly features, you can ensure a smooth transition and future scalability.

- Actively involve stakeholders in the decision-making process to ensure their needs and objectives are taken into account.
- Evaluate your marketing team's [digital maturity](#) level to ensure the new platform aligns with their actual needs and ability to leverage the tools.
- Assess compatibility and integration requirements between the new platform and existing systems or third-party applications within your ecosystem.
- Consider the platform's user interface, administrative features, and ability to support future growth and expansion.
- Prioritize platforms that offer intuitive workflows, robust customization capabilities, and scalability to accommodate your organization's requirements.



Step 4:

Set realistic timelines and milestones:



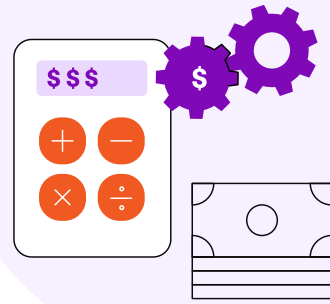
Setting realistic timelines and milestones is essential for the success of any migration project, providing a structured roadmap to guide the transition process. By ensuring that timelines are realistic and achievable, organizations can effectively manage expectations and mitigate the risk of project overruns or setbacks.

- Establish a timeline for the migration project, including key milestones and deliverables.
- Break down the migration process into manageable phases or stages, each with its own timeline and set of tasks.
- Consider factors such as the complexity of the migration, availability of resources, dependencies on other projects or teams, and potential risks or delays.
- Ensure that timelines are realistic and achievable, taking into account any constraints or limitations.



Step 5:

Allocate appropriate budget:



Allocating an appropriate budget is a pivotal aspect of any migration project, ensuring that sufficient financial resources are available to support the transition to the new platform.

- Determine the financial resources required for the migration project, including costs for software licenses, third-party services, internal resources, and potential contingencies.
- Consider both one-time expenses (e.g., software acquisition, development costs) and ongoing costs (e.g., maintenance, support, training) to [calculate Total Cost of Ownership \(TCO\)](#).
- Conduct a cost-benefit analysis to justify the investment in the migration project and ensure alignment with organizational priorities and budget constraints.
- Allocate budget resources strategically to prioritize critical aspects of the migration process and mitigate potential risks or overruns.



Step 6:

Asses your current content and assets:



Before embarking on a migration journey, it's crucial to gain a comprehensive understanding of where your current content and assets are housed within your existing CMS. By conducting a thorough examination of various components and elements, you can identify key content assets and prioritize them accordingly.

- Do a thorough examination of the various components and elements within your existing CMS to gain a clear understanding of what needs to be migrated to the new platform.
- Begin by identifying all content assets stored within your current CMS (web pages, blog posts, articles, images, videos, documents, and any other digital assets).
- Create an inventory or catalog of these content items, categorizing them based on type, relevance, and importance. Pay special attention to critical elements that are essential for maintaining the integrity and functionality of your website.



“

Content, content, content. There is rarely enough energy focused on the migration of content. Take time to consider what should be migrated and what should be left to rest in the old site, how long migration takes, and whether automated migration is available.”



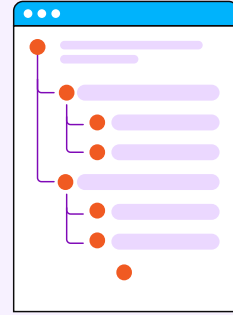
Julian Reiter.

CEO at [Positive](#)

POSITIVE.

Step 7:

Review your current website structure:



By conducting a thorough assessment of your current CMS inventory, you can gain valuable insights into the scope and complexity of the migration process. This information will help you plan effectively and ensure a smooth transition to the new platform while minimizing disruptions and preserving the integrity of your digital assets.

- Evaluate the structure and organization of your current website within the CMS framework. Examine the hierarchy of pages, navigation menus, and site architecture to understand how content is organized and accessed by users.
- Identify any complex or nested structures, as well as any redundant or obsolete pages that may need to be streamlined or consolidated.
- Take note of any custom templates, themes, or layouts that have been implemented to customize the appearance and functionality of your website.
- Identify any third-party integrations or extensions that have been implemented to enhance the functionality of your website, such as e-commerce plugins, analytics tools, or CRM systems.
- Evaluate the compatibility of these customizations and integrations with the new CMS platform. Determine whether they can be replicated or migrated seamlessly or if adjustments will be required.



“

Without a thorough analysis of data structure and relevance, the migration will not be seamless. There will be risks such as importing the wrong content or neglecting the right content, leading to challenges, such as sudden drops in SEO rankings.”



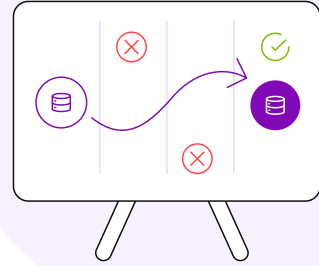
Ivan Adriel.

Strategy Lead at [Granite](#)

GRANITE

Step 8:

Strategize data migration



Data migration encompasses the seamless transfer of all content and data from the current solution to the new one. Data migration strategy is essential to mitigate risks, ensure data integrity, and facilitate a seamless transition to the new platform.

- Begin by outlining a detailed plan for data migration, with steps, timelines, and resources required for the process.
- Allocate sufficient time, human resources, and technical resources to execute the migration effectively, considering the volume and complexity of the data involved.
- Establish clear roles and responsibilities for team members involved in the migration process, ensuring coordination and accountability throughout.
- Prioritize data accuracy and integrity by implementing robust validation and verification processes during migration.
- Conduct thorough checks and audits to identify any discrepancies, errors, or inconsistencies in the migrated data.

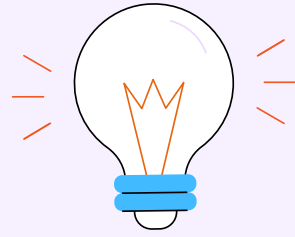


- Employ data validation tools and techniques to validate data completeness, accuracy, and consistency.
- Maintain compliance with data privacy regulations and compliance standards throughout the migration process, particularly when handling sensitive information.
- Ensure adherence to GDPR, CCPA, HIPAA, or other relevant data protection laws and regulations, safeguarding the privacy and security of personal and confidential data.
- Implement encryption, anonymization, or pseudonymization techniques as necessary to protect sensitive data during transit and storage, mitigating the risk of data breaches or unauthorized access.



Step 9:

Seize the opportunity



Transitioning to a new DXP or CMS isn't just about technical upgrades; it's an opportunity to revitalize your digital presence, strengthen your brand identity, and deliver exceptional user experiences.

- Assess and enhance your content strategy. Engage content creators, strategists, and stakeholders in collaborative discussions to ensure alignment with organizational goals and user needs. Identify content-related gaps or challenges in the current CMS and develop strategies to address them effectively.
- Refresh your website's design and user interface. Develop a comprehensive design plan that aligns with your brand identity, target audience preferences, and industry trends.



“

During initial migration, the emphasis is typically on transferring existing data and configuring the new tool to mirror current workflows. This approach misses the chance to cleanse data and revamp marketing tactics before migration. Consequently, once teams adapt to the new yet familiar setup, they seldom find the opportunity to re-evaluate and update their strategies.”



Sean Kozey.

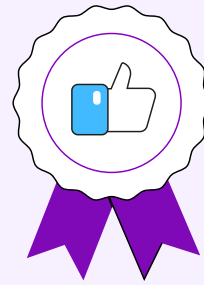
President, Head of Business
Development at [Reason One](#)



reason one®

Step 10:

Execution best practices



Executing the migration requires careful planning and adherence to best practices to ensure a seamless transition.

- Adopt a phased approach to migration, starting with smaller, less critical components before tackling larger segments of the website or application.
- Break down the migration into manageable stages or iterations, allowing for incremental progress and mitigating the risk of overwhelming complexity.
- Conduct thorough testing of migration processes and workflows in a controlled environment to identify and address potential issues early on.
- Test data migration, content formatting, metadata preservation, and any custom functionalities to ensure accuracy and integrity throughout the migration process.
- To preserve website search engine rankings, implement redirects from old URLs to new ones. This ensures continued access to content for both users and search engines, preventing broken links and preserving SEO equity.
- Adhere to [SEO best practices for the new platform](#), optimizing meta tags, URLs, and other on-page elements to maintain or enhance search engine rankings post-migration.
- Prioritize accessibility and compliance considerations throughout the migration process, ensuring that the new CMS meets relevant accessibility standards (e.g., WCAG) and regulatory requirements (e.g., GDPR, ADA).



“

I often see a loss of SEO value because of improper planning and lack of awareness. In the rush to migrate, marketing teams sometimes fail to preserve SEO aspects like URLs, meta tags, and redirect links. This can lead to a drop in search rankings, and that's why it should be a major aspect of planning when it comes to migrating sites and platforms.”



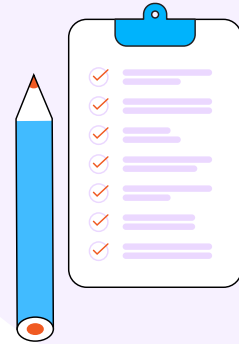
Brian McKeiver.

co-owner at [Bizstream](#)



Step 11:

Test for success



Thorough testing is essential to ensure the successful implementation of the new CMS or DXP and to guarantee a seamless user experience across all devices and browsers. Taking a proactive approach minimizes the risk of post-launch issues, enhances user satisfaction, and ensures a successful transition to the new platform.

- Evaluate the functionality of the website by testing interactive elements, forms, navigation menus, and any custom features or functionalities implemented in the new solution.
- Test the website's compatibility across various devices (desktops, laptops, tablets, and smartphones) to ensure consistent performance and display on different screen sizes and resolutions.
- Validate the website's compatibility with different web browsers to ensure consistent rendering and functionality across platforms.
- Assess the user experience as both a visitor and an administrator, ensuring intuitive navigation, clear calls-to-action, and an overall smooth browsing experience.
- Review the design elements (layout, typography, colors, imagery, and branding consistency) to ensure alignment with your organization's brand identity.



- Leverage automated testing tools such as Selenium, TestComplete, or Cypress to streamline the testing process, automate repetitive tasks, perform regression testing and identify potential issues or bugs efficiently.
- Set up automated test scripts to simulate user actions, input data, and verify expected outcomes, allowing for faster and more reliable testing results.
- Supplement automated testing with manual testing procedures to assess aspects that require human judgment and subjective evaluation.
- Conduct exploratory testing sessions to uncover usability issues, inconsistencies, or edge cases that may not be captured through automated tests.
- Involve team members, stakeholders, and end-users in the manual testing process to gather feedback and ensure alignment with user expectations.



“

The end-user experience is absolutely critical and often, the most fun thing to focus on. But a platform migration that doesn't think through the ongoing authoring experience will leave a team handcuffed and frustrated.”



Becki Dilworth.

Chief Strategy Officer at [BlueModus](#)

blue**Modus**

Step 12:

Provide user training



User training plays a crucial role in facilitating a smooth transition to the new CMS, ensuring effective utilization of its features and functionalities while fostering user confidence, ultimately driving organizational success and desired business outcomes.

- Offer targeted training sessions tailored to the specific roles and responsibilities of content creators, editors, and administrators within your organization.
- Provide detailed instruction on how to use key features, such as content creation, editing, publishing, workflow management, user permissions, and site administration.
- Establish a schedule for regular training sessions to reinforce learning and a dedicated support person to address user inquiries.
- Continuously monitor user feedback and engagement to identify areas for improvement.



“

Along with preparation, it is vital to allocate and invest time in understanding the new technology and the capabilities of the new system. This includes sufficiently training team members on the new system to help leverage new features effectively.”



Ivan Adriel.

Strategy Lead at [Granite](#)

GRANITE

Step 13:

Monitor and evaluate



Continuous monitoring and evaluation are essential to ensure the ongoing success and effectiveness of the new platform post-migration and that it meets the evolving needs and expectations of users and stakeholders. This iterative approach to monitoring and optimization fosters continuous improvement and drives the long-term success and sustainability of the platform.

- Gather feedback from users through surveys, interviews, and feedback forms to gain insights into their experiences with the new CMS.
- Develop a comprehensive plan for ongoing platform optimization and enhancement based on user feedback, data insights, and evolving business needs. Prioritize based on user priorities and business objectives.
- Implement A/B testing, comparing different versions of web pages, design elements, or messaging to identify the most effective configurations.
- Define key performance indicators (KPIs) to measure the performance and effectiveness of the new platform post-migration (user engagement, conversion rates, page load times, bounce rates, and other relevant indicators).



<input type="checkbox"/>	1	Identify goals and objectives	Clearly define specific goals. Ensure they are measurable.
<input type="checkbox"/>	2	Determine scope	Outline what will be included. Assess readiness, capabilities, and resources.
<input type="checkbox"/>	3	Choose the right DXP	Involve stakeholders. Assess compatibility, customizability, ease of use, and scalability.
<input type="checkbox"/>	4	Set timelines	Set timeline and milestones of overall migration and of each phase. Be realistic.
<input type="checkbox"/>	5	Allocate budget	Consider initial and ongoing costs. Do cost-benefit analysis. Prioritize critical aspects.
<input type="checkbox"/>	6	Assess current content	Inventory and categorize all content assets to be migrated.
<input type="checkbox"/>	7	Review current structure	Examine page hierarchy, menus, site architecture. Note custom elements and integrations.
<input type="checkbox"/>	8	Strategize data migration	Allocate time and resources. Prioritize data accuracy, security, and privacy compliance.
<input type="checkbox"/>	9	Seize the opportunity	This is a good time to enhance content strategy and refresh your website design.
<input type="checkbox"/>	10	Execution	Do it in phases. Start on smaller components. Test throughout. Preserve SEO.
<input type="checkbox"/>	11	Test for success	Test functionality, integrations, devices and browsers, and UX (admin and end-user).
<input type="checkbox"/>	12	User training	Provide tailored training, dedicated support, and ongoing feedback channels.
<input type="checkbox"/>	13	Monitor and evaluate	Gather feedback, implement A/B testing, and plan for ongoing optimization.

Embarking on a migration journey can be daunting, but with the right strategies and preparation, it can also be immensely rewarding. By following the 13 steps outlined in this ebook, organizations can navigate the complexities of migration with confidence and achieve their desired outcomes. From clarifying goals and objectives to ensuring data integrity, each step plays a crucial role in ensuring a smooth and successful transition to a new platform.



Remember, migration is not just about moving data and applications—it's about transforming your digital ecosystem to better serve your organization's needs and objectives. It's an opportunity to optimize processes, enhance user experiences, and position your business for future growth and innovation.

As you embark on your migration journey, keep these steps in mind and leverage them as a roadmap to guide you through the process. And remember, you're not alone—reach out to experts, collaborate with stakeholders, and don't hesitate to seek support when needed.

With careful planning, diligent execution, and a focus on continuous improvement, you can ensure that your migration journey leads to success.



About Kentico.

Kentico is an award-winning provider of digital experience platforms that enable businesses to drive better outcomes with fewer resources by delivering multichannel digital experiences using a hybrid headless approach. Its digital experience platform (DXP), Xperience by Kentico, minimizes overhead by focusing on real customer needs. With a wide set of capabilities, it empowers teams to deliver better customer experiences through multiple channels faster.

Thanks to Kentico, marketers can craft consistent personalized customer journeys from awareness to advocacy using built-in low-code, no-code tools. They can experiment with new marketing channels and improve the maturity of their marketing ecosystem, while enhancing business and marketing agility. Kentico offers excellent Time-to-Market and Total Cost of Ownership (TCO), market-leading support, SaaS or on-premises deployment, and is backed by a global network of implementation partners.

Eager to learn more?

Talk to our experts! Schedule a free live online 1-on-1 demo of Kentico and let one of our experts walk you through the features and capabilities that will help you create amazing digital experiences.

[MEET OUR EXPERTS](#)

H.Q

Kentico software s.r.o.
Nové sady 996/25
602 00 Brno
Czech Republic

CZ

Kentico software s.r.o.
FLEKSI BETA
Beta Building
Vyskocilova 1481/4
140 00 Praha 4-Michle

US

Kentico Software, LLC
15 Constitution Drive,
Suite 2C
Bedford, NH 03110
United States

UK

Kentico Software Ltd
One London Square
Cross Lanes
Guildford, Surrey,
GU1 1UN
United Kingdom

APAC

Kentico Software Pty Ltd.
83 Mount St, Level 4
North Sydney, NSW 2060
Australia

Germany

Kentico Software GmbH
c/o Schnorbus Helmhold
Wardemann PartGmbB
Kanalstraße 2
41460 Neuss



kenticocom