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Fundamentals to Perfect Your
CMS MIGRATION

CMS migration at times, is a long and complex process. People often give up the idea of switching a CMS since they struggle to absorb the fundamentals of this process straight. A five-pointer guide to perfect your data migration exercise along with the best practices to be followed post migration.

Index

What is Content migration?

Content is the most important and critical aspect of CMS migration. **Content migration** is primarily the transfer of information contained in a CMS to a new system. However, there needs to be a specific plan regarding the transfer of content from the existing site to the new CMS. The budget strategy for the migration process is the major determinant behind choosing automated or manual content migration approach. CMS migration is often long and complex process, with heavy data conversion invariably in the mix. However, with proper planning and attention to every detail, the process can be smooth and hassle free.

Here are the 5 pointers to consider when embarking on a data migration exercise. Paying heed to these considerations would help in successful data migration.

01 Content inventory & assessment — **02** Data Cleansing — **03** Pre migration preparations — **04** Actual migration — **05** Post migration tasks

Content Inventory and Assessment

Making the necessary preparations and groundwork for CMS migration upfront makes the task of migration much easier down the road, and also reduces the risk of data loss. Conversely, lack of understanding and preparation may entangle the migration process. The first task in preparing to migrate is carrying out a thorough content inventory and assessment.

Carry out a **pre-migration data assessment** to make sure it is viable to migrate the data in the first place.

- Look into meta data, web page hyper-links, file types, and everything else connected with the content.
- **Crawl websites** and look for integrity issues such as broken links, chain of redirects, links to development server URLs, and more.
- Create a list on how the content is managed in the existing setup, and how it will be handled during the migration to the new platform.
- Automated scripts make populating such lists easy.

Do not underestimate the pre-migration content inventory. Taking the time to analyze all data, learning how it is structured, where it resides, and getting an idea of any special effort required not just makes the further tasks easy, but also improves the accuracy of the data being migrated.

Data Cleansing

Very often, the reason behind the problems with CMS migration is the legacy system. Making changes to the legacy system is critical to avert issues while migrating.

Common areas for improvement include quality of the content, structure of the content, removing inconsistencies, and even refreshing or updating the content. However, the primary task is to decide on the data to migrate and the data to abandon.

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The overriding focus should be on identifying ROT, or "redundant," "Outdated," and "Trivial" content, and discarding such content. There is no hard and fast methodology or checklist to carry out the exercise, but as a general rule of thumb, **assess each content in terms of the following factors:**

- *Relevance* of the content
- *Originality* of the content
- *Depth & length* of the content (for high search engine rankings)
- *Popularity,* number of visits, social shares, and other metrics
- Is the content *dynamic,* does it attract comments and interactions?
- Is the content *linked* to the website's navigational structure?
- *Links to external websites*

Identifying data to discard is a tricky preposition, and very often, people entrusted to the task tend to err on the side of caution. Being unsure, they tend to slip in much of the useless data, and often end up with a "Garbage OUT Garbage IN" situation that destroys the major objective behind CMS migration.

The best practice is to decentralize the process, empowering content owners to clean the data, wherever possible. The onus is on the central migration team to offer **clear support processes for the content owners.** The scope of such support can extend to:

- Providing specific guidelines on how to review content
- Communicating clear standards on content
- Mapping content to the information architecture of the new site
- Hands-on assistance for complex or unclear situations

The central migration team could also deal with technical matters such as ascertaining the popularity and dynamism of the content, without decentralizing such tasks.

It is also important to categorize and tag content during this stage, which would make the task of actual migration easier. Track in a system/ spreadsheet on how content relates to each other across various sections of the website and other variables using tags and categories.

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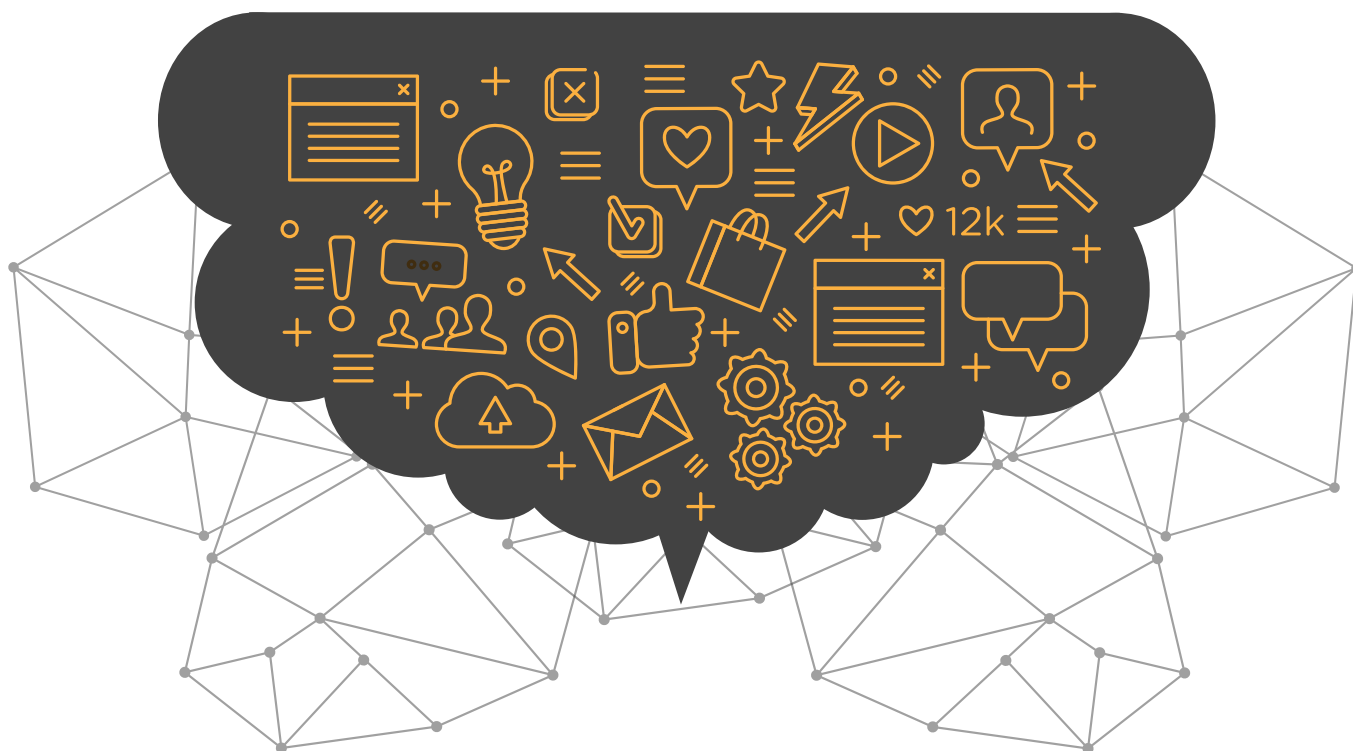
Pre Migration Preparations

Having evaluated the existing conditions, and prepared the data for migration, the next step is to prepare completely for the actual migration exercise.

Constitute the migration team
- Assign competent professionals
- Establish clear communication with team & stakeholders
- Clarify roles & responsibilities

Identify available resources
- List down resources required at each stage
- Ensure timely availability of resources
- List out tools and services (automated scripts, reporting software, testing tools, and more

Define accurate project estimates
- Ensure schedules are realistic and flexible
- Project plan & timeline should take into account the limitations & business considerations
- Follow agile methodology- this can work out best
- Review all regulations thoroughly
- Do not underestimate security

Set up target system
- Evaluate new system prior to transferring content
- Prepare the supporting migration technology based on evaluation

Create a rollback plan
- Do a worst case analysis and prepare
- Back-up data before migration
- Retain back-up copy post migration

Actual Migration

The **actual migration of data** to the new CMS may be effected either in an automated way or manually.

Features of automated migration:

- Automated migration is the easiest, quickest, and the most accurate way to go
- Becomes technically feasible only when the new site is structured like the old site
- The HTML of the old site has to be clean and consistent
- Unstructured or inconsistent legacy site defeats the very purpose of automation

If automated migration works:

- Give priority to set up the automation tool first
- Consider migration software that offers built-in import & export tools
- Devise custom scripts that can be used for the task
- Make sure the tool is readily available when it comes to the actual migration

Note: Even when a fully automated migration is not feasible, it may still be possible to run automated scripts to migrate certain sections.

However, even when automation works, adopting the wrong method could make the task more complex than manual migration. For instance, writing a script to use the APIs provided by the old and the new system for transferring the content- if there is a lack of APIs in both the systems for the migration purpose, it fails.

Features of manual migration:

- Simplest alternative to automated migration, but is time consuming and laborious
- Manual method offers the maximum flexibility
- Worth if the opportunity is taken to cleanse content during the migration
- To improve the accuracy of manual migration, set up an elaborate workflow (breaking down all the steps involved in migrating legacy content to a new piece of content on the new platform)
- Steps should also take into account entering meta-data, page titles, and more, apart from copy-paste of the actual text

Trial migration:

Regardless of the method chosen, it is a good idea to **test the migration** as close to the live environment as possible. It is also advisable to select a sample data and perform a trial migration to identify any possible glitches. Based on the results of the test migration, you can make the necessary adjustments or changes required to the system configuration, data, migration methods, or the target system.

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Post Migration Tasks

A strict "no" to letting the guard down post migration. There is more hard work to be done, to perfect the CMS migration.

- Test the migration results, check whether all data is accurate and is in the required format, and make sure there is no data loss.
- Data integrity may be ensured not just by record counts, but by summary verification and sampling as well.
- Undertake post migration data and system optimization, to iron out flaws.
- Optimize anything left out during the pre-migration data cleansing exercise (this task depends on the type of migration and the complexity of the project).

Some errors that remain undetected during the post migration tests, may manifest some time down the lane, when the new system goes live for day-to-day use. There is also the risk of the users, who lack experience with the new system, creating new errors. Here are **some best practices** that can be carried out post migration:

- Organize a quality monitoring strategy

- Train end-users to enable them to cope up with defects effectively

- Even after migrating data to the new CMS, it is worthwhile to retain the old system for a few months (until everything is sorted out and the rank and file are attuned to the new system).

- Update the workflow processes connected with the data migration.

- There could be significant differences between the source and the target systems, however, you need to adjust the business processes to match the peculiarities of the new system.

- Educate the staff to ensure that they understand how the system works so as to avoid additional difficulties.

Data migration is a complex procedure, but is obviously a necessary step to cross on the road of each project's development and growth.

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About Suyati

Suyati is a fast-growing, digital transformation solutions company that helps you rebuild your customer experience for the digital consumer. We collaborate with businesses to strategize and implement impactful digital initiatives that position our clients ahead of the competition. We are digital-first and we focus on delivering digital transformation solutions that support your various engagement strategies. With our niche and rich expertise in a wide range of technologies and services- CMS, CRM, e-commerce, Cloud, IoT, Data Analytics, and Product Engineering- we help companies leverage their best on web/cloud/mobile platforms.

We enable you to create insights driven customer engagement across all touch points to build a unified marketing approach. Our custom technology solutions have been deployed successfully in companies across the globe, especially in the US, UK, Europe and Australia.

www.suyati.com   *services@suyati.com*

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