

CHROMATIC

# Website Migration Guide

**Nail the Strategy, Avoid Roadblocks, and Enjoy  
Long-Term Benefits**

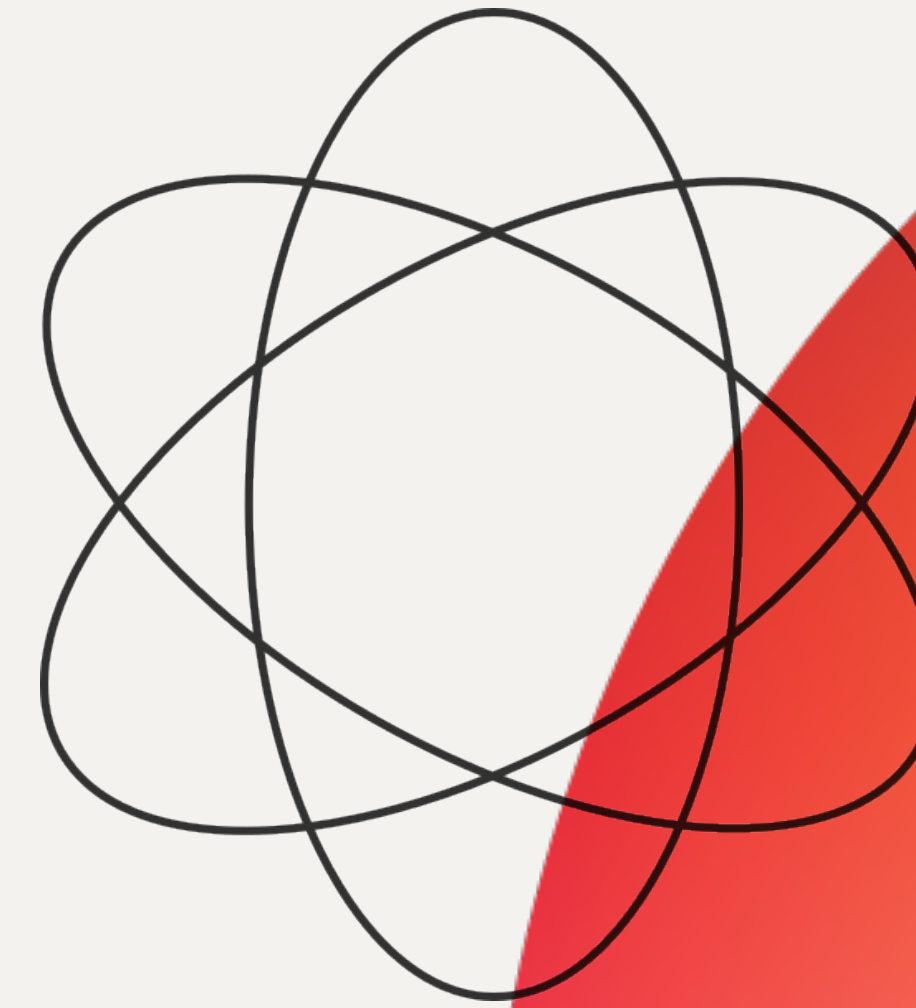


Many strategic agency leaders, even those competent and comfortable with technology, find the idea of website migrations intimidating. There are a lot of valid reasons for this — between switching CMS or cloud-based platforms, restructuring data and content, moving the site's location, redirecting traffic, and potentially making major design changes, migrations *do* seem overwhelming. These are not simple updates. They're complex, time-consuming, and costly.

Many site owners have also had very poor experiences with migrations in the past. That makes them wary of going through the process again.

There is always the risk of data loss and the SEO concerns that come along with changing the content structure, remapping aliases/redirects, and various other SEO considerations. And, because SEO directly affects revenue for many organizations, that point alone is enough to give strategic leaders pause.

Nobody wants to make a decision or recommendation about a site migration only to see a drop in traffic and SEO rankings as a result.



If these worries are front and center in your mind, then what you need is a change in perspective. It's time to stop thinking about a website migration as a necessary evil — and instead recognize it as a great opportunity to solve existing problems and reap long-term benefits to boot.

## **A website migration may be the right solution for your organization if you want to:**



Achieve a level of website performance that's just not possible with the current CMS



Build a better website infrastructure, yielding greater accessibility and data organization



Leverage new tooling options to improve their authoring interface, metadata generation, and more

Site migrations *are* hard — any web development partner promising otherwise is probably not going to do the job right. But once the migration is complete, the benefits — received in the form of a more performant, accessible, and capable site — make the process well worth it. A smooth website migration starts with proper planning. Here's how to get started in the right direction.

# Table of contents

5	Benefits of a Successful Site Migration
9	Website Migration Basics: Approaches to a Site Migration
12	Key Discovery Questions to Develop a Smart Website Migration Strategy
19	Potential Pre-Migration To-Dos
21	Prepare, Strategize, and Plan for a Smooth Site Migration





# Benefits of a Successful Site Migration

When executed properly, from initial planning stages to implementation, a site migration really can open up a world of possibilities. This is precisely why you and your team shouldn't focus on the short-term difficulties of a website migration or replatforming effort. Instead, view it as the opportunity for long-term benefits that it is.

These benefits may include (but aren't limited to): improved data, improved editing experiences, and improved systems allowing for easier site maintenance.

# Improved Data

Improved data allows for all sorts of website experience upgrades. The following are just some of the data and website experience advancements your organization might leverage following a migration.

## Potential outcomes from improved data

- ❖ Faceted search, which allows users to narrow and refine search results.
- ❖ Structured data with [JSON-LD](#), which improves click-through rates and search visibility.
- ❖ Meta tags, which describe and summarize content for users and search engines.
- ❖ Accessibility, which makes the website usable for everyone regardless of ability.
- ❖ Semantic markup, which makes web content readable to humans and computers alike.
- ❖ Improved URL alias structures for SEO.

# Improved Editing Experiences

Efforts in data cleanup and restructuring can lead to improved editing experiences.

## Potential outcomes from improved editing experiences

- ❖ Updated data, with old and irrelevant data stripped away and necessary data preserved.
- ❖ Upgraded system structure and functionality that aligns with editors' needs.
- ❖ Improved editing tools that make editors' jobs easier.

# Easier Site Maintenance

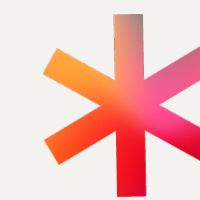
Improved systems can allow for easier site maintenance, depending on what system you are migrating to.

## Potential outcomes from easier site maintenance

- ❖ Migrating to a new CMS platform, for instance, may provide a whole new arsenal of tools for use now or down the road. The new platform may allow for more seamless integrations with social media scheduling tools, Slack, and other programs that improve productivity.
- ❖ If sites were migrated to a new, centralized platform away from individual, siloed sites, your organization will enjoy those **new benefits at the platform level** — *not* on a site-by-site basis.

Depending on a website's needs, some migrations sacrifice ease of maintenance for performance gains. These variable outcomes speak both to the **complexity of migrations** and the importance of understanding any migration's goals ahead of time. It's critical to think about what sacrifices are worth making in order to achieve the desired results of migration — and to not be caught off guard when those sacrifices manifest.

For example, a migration may actually result in a new system that is more complex and difficult to maintain. That's not necessarily a failure. If this is the case, the detailed planning, preparing, and strategizing processes should ensure that this increased difficulty is there for the right reasons.



**It's critical to think about what sacrifices are worth making in order to achieve the desired results of migration.**



## 2

# Website Migration Basics: Approaches to a Site Migration

Once your organization decides to move forward with a migration, there is still the matter of deciding which type of migration is best for your needs. This is a conversation you and your team need to have with your web development partner handling the migration. Generally speaking, you'll either be looking at a "flip-of-a-switch" migration or an iterative migration.

# “Flip-of-a-Switch” Migrations

Different organizations have different needs for their migrations. Many will require the simplest form of migration — though “simple” is a very relative term. This would be a single, “flip-of-a-switch” migration.

With a “flip-of-a-switch” migration, the existing site is maintained while the new site is put into place. Then, as soon as the new site is fully complete, all traffic is directed to the new site in one fell swoop. This often requires a content freeze on the old site so everything can relaunch on the new one.

The actual migration of the data may be completed programmatically, meaning your web development partner writes code that executes the migration, or manually, meaning that someone manually moves the data over.

If only a small number of items are being moved, a manual migration may be more cost-effective. Larger data migrations might justify the additional cost of a programmatic migration.



**Flip-of-a-switch migrations often require a content freeze on the old site so everything can be relaunched on the new one.**

# Iterative Migrations

An iterative migration is a *much* more complicated process — double or triple the amount of complexity of a “flip-of-a-switch” migration. In certain cases, as when looking to increase e-commerce or ad revenue on a website by using new systems, this iterative approach to a migration is absolutely worth the added complexity.

## Benefits of an iterative migration

- ❖ The ability to more **quickly implement new systems**. Revenue-generating systems, like those mentioned earlier, can get up and running while other elements of the migration are rolled out.
- ❖ The ability for website editors to **continue publishing content uninterrupted during the migration**. For example, publishers can start delivering certain content types from the new system while still presenting others from the old system.
- ❖ The ability to more easily **test for and reduce risks** inherent to any migration. Website functionality and any impact on SEO performance can be evaluated at different stages during an iterative migration.



## Key Discovery Questions to Develop a Smart Website Migration Strategy

The importance of going into a website migration with a detailed plan in place cannot be overstated. Your organization needs to know precisely where it is with its websites, and also where it wants to go.

What are the existing issues to resolve? What functionality or tooling do you want to enable? How do you want the site to look, and how should content be structured? Completing an in-depth discovery process and conducting thorough research up front helps to ensure smooth sailing along the way to a successful migration.

**During this preparation and strategy development stage, consider:**

- ❖ Inconsistencies within the data
- ❖ How the data is stored
- ❖ What communication needs to happen

# What Inconsistencies Exist Within the Data?

Make sure your organization understands the importance of taking a careful inventory of their existing website's data in advance of the migration. Ideally, there should be a deep understanding and detailed documentation of a site's data internally before the migration process begins.

You are typically best suited to do this work if you have an internal resource familiar with the website and its data. There are a lot of details to keep in mind, and these details should be documented and understood by your team before your web development partner starts the migration work.

If internal resources are limited, your web development partner may be able to help. However, they will need to know that on the front end.

## **Even minor data inconsistencies can break a migration. For example:**

- ❖ 99% of a site's data might be formatted one way, but the other 1% of older data is formatted in another.
- ❖ One individual's byline formatting may be different from another, and that difference in formatting can affect a migration.
- ❖ Website fields may be missing data, meaning any areas without values need to be assigned fallback or default values and invalid old data cleared out.

Your web development partner will flag issues as they arise, but it helps immensely to have an internal development resource working on this ahead of time.

One way to avoid data problems is to identify a sample pool of content ahead of the migration. Standard content samples — as well as representative edge cases that require special handling to avoid code malfunctions — need to be checked to ensure they migrate correctly. Nobody wants to direct traffic to a website where nothing is displaying properly.

Steps like this add to the work you will have to do prior to getting a migration underway. But they are integral to making the migration as painless as possible. Resistance to internal auditing due to time or resource limitations may require external guidance on why these processes are so important.



**One way to avoid data problems is to identify a sample pool of content ahead of the migration.**

# What Format Is the Data Stored In, and How Will It Be Made Available For a Migration?

Properly formatting data ahead of a migration is important because it allows for time-saving automation. Equally important is figuring out how the data will be delivered to your web development partner so they can execute the migration efficiently.

Fortunately, many CMS platforms have export features that allow users to easily export site content in different formats.

When all the site's data is made available and passed off to the web development partner, that partner doesn't have to waste time making sense of the data or existing systems. Instead, they can get right to work — saving you time, money, and other migration-related headaches.

## You should:

- ❖ **Deliver the website's data in a machine-readable, structured format (CSV, JSON, XML, etc).** This prevents unnecessary costs and complexity with the migration because the data is already formatted for a computer to read automatically. Ideally, a point person on your client's team who understands the legacy systems will do this legwork.
- ❖ **Take time to review the structure of the website's content model.** Mapping out what you want to do with the source data ahead of time is a major overall timesaver. It's also possible to bring over the old data and put it into a legacy body field as is, if desired. Then, you can parse that old data out into the new model as time permits.

# What Communication Needs to Happen Throughout the Migration Process?

Communication is key throughout any migration. Avoid making any assumptions about what is possible. Ask questions as they arise and keep the lines of communication open. If you don't fully understand what's possible with their migration, ask for clarification.

Otherwise, you might miss out on opportunities in the migration just because you didn't realize what was possible — in turn missing out on chances to boost site performance, integrate new tools, and improve the website's overall user experience.



**Don't hesitate to ask questions as they arise and keep the lines of communication open.**



# Effective communication is a must because:

- ❖ **During a migration, your web development partner will have their hands full.** Migrations are not a standardized process, and your partner will be focused on smoothly migrating the website and all of its data. They won't necessarily implement every possible change that might benefit your organization. They'll know what's possible — but not necessarily what's desired.
- ❖ **Your web development partner doesn't likely have an extensive history with you and your audience.** A website migration is an outstanding opportunity to better meet your needs. But your web development partner won't come into the migration with a deep understanding of your target users. Bringing that information to your web development partner and discussing options for improvement gets everyone on the same page and prevents you from missing out on what the migration can offer. It might even inform which CMS or platform the website is migrated to.



**Effective communication prevents you from missing out on what the migration can offer.**

Collaboration results in custom solutions that offer your organization huge benefits. Sometimes these benefits are relatively easy gains, while others require more work — such as adding new functionality that was entirely missing from the previous website or seriously overhauling site structure.

More complex solutions might mean adding more cost, so having these conversations up front is important to avoid unwanted budgetary surprises down the road.



**Having collaborative conversations  
up front helps avoid surprises later.**

# 4

## Potential Pre-Migration To-Dos

There are a plethora of details to be mindful of over the course of any migration. Not only that, but tending to all the necessary planning activities can uncover additional requirements.

When you open up a wall in your home to address a plumbing issue, you might find electrical problems back there too. The same is true of a website. — Issues might be hiding in your legacy systems and their data that you don't want transferred over in the migration.

## **An efficient feedback loop and a system for critical analysis will help you, your organization, and your web development partner identify important to-dos that facilitate the migration process, such as:**

- ❖ **Converting big blocks of unstructured data in a body field to a new data format.** **Breaking up these blocks** into discrete components with fields allows for semantic markup and accessibility markup around images or titles, all of which will help SEO. This is a complex process, so identifying the need early on is important.
- ❖ **Converting hard-coded image tags to dynamic references to build performant, SEO-optimized images.** Such conversions benefit from some foresight. Your client may currently use basic image tags. But now that they're migrating, they've got a great opportunity to implement responsive images to boost page performance. They can also revisit and improve their accessibility markup while they're at it.
- ❖ **Cleaning up content and data in legacy CMS systems.** A migration is the perfect time to deal with those content issues everyone is aware of, but have never had the time or resources to address previously. You shouldn't migrate content issues over to their new site. You should cut non-performant content loose, address content navigation items they haven't tackled yet, and enjoy a fresh start on their new site.
- ❖ **Fixing up data in legacy CMS systems.** As the migration approaches, you either need to make these fixes now or plan for how you'll fix them post-migration. Again, it's best not to bring old problems to a new site.
- ❖ **Taking any unusual content types or exceptional edge cases within content portfolios into account.** Such cases may require special handling of data. Organizations should seek out the outliers that are mostly likely to throw a wrench in the gears of the migration, such as content pieces with specific features deviating from more representative samples.
- ❖ **Determining what criteria to analyze in evaluating the success of the migration.** What are the high-level criteria you will look at? Is your sample pool of articles displaying and working properly? Don't forget to include representative edge cases for testing. Keep in mind that solving the hardest edge cases will typically resolve the rest.

# 5

## Prepare, Strategize, and Plan For a Smooth Site Migration

It's true that a site migration is not a quick and simple solution — but the best solutions rarely are. As you've probably noticed, your biggest contributions to the migration process come toward the beginning. Nobody understands your organization's needs, pain points, and vision for the site's future better than you do.

The **right web development partner** can execute a migration as painlessly as possible. But even the best developers in the industry lean heavily on the input and guidance of their clients. That's where effective communication with a strategic partner really comes into play. Our team knows the **common pitfalls that can overcomplicate or even derail site migrations** — and how to avoid them. Our expertise can get you the benefits you're after, be they editorial, SEO, or performance-based.

If you're interested in learning more about how Chromatic makes site migrations successful, **let's chat**.



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and WordPress Platforms*

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