Content Migration Checklist

☐ **Assign a Project Manager to oversee the entire content migration project**

As with any large scale undertaking, having a designated team member who takes the lead is imperative for success. While each member of the content migration team will have an important part to play, this is the first and most important decision in starting a content migration exercise.

☐ **Legacy site content review**

Once you have decided that you're no longer happy with your site, or you've been tasked with modernizing it, your first step is to take a good, hard look at the web presence you have and determine what your primary goal is for the future. This could be anything from a minor redesign of the visual elements to a complete overhaul in both design and content and anything in between.

☐ Review all design elements of the site

☐ Review all current site content

☐ Review functionality and fundamental code of the site

☐ **Estimate a timeline for the entire project**

Have the project manager gather together representatives for all of the migration and website relevant groups including stakeholders, communications, IT, content authors, content migrators, etc. This step is crucial for staying on budget and on deadline. Include a "content freeze" in your timeline: this is to ensure that content is "frozen" avoiding a potential issue with a content author creating or editing something in the old environment, only to have it missed during migration. The content freeze should be scheduled right down to the day and even time, just to certain that you won't have to go back and reworking anything that's been added.

TIP: Start as early as possible. Content migration always takes significantly longer than organizations expect.

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☐ **Content audit and rewrites**

Now that you have a good grasp on all of the content you have and all of the content you want, its time to determine what needs to go on the chopping block; what can be reworked and updated for inclusion on the new site; and what needs to be written net new, making sure that anything scheduled for migration is of high quality and 100% ready to viewing. For each piece of legacy content, you must ask yourself (this is just a short example list, we're sure there are lots more):

☐ How long has it been on the site?

☐ When was the last time it got visitor traffic?

☐ Is it legally/organizationally required to be there?

☐ Would anyone miss it if it was gone?

☐ **Create Word document template for all content pages (For a sample layout, see Appendix A)**

While this step may seem like a lot of extra work, it will make your life a whole lot easier in the end. For each and every page that will appear in the new site, create a word document titled with a corresponding page name (e.x. "1.0 HomePage.doc").

TIPS:

☐ Use brackets < and > to indicate page placement where images, alt tags, links and PDF documents should be inserted throughout.

☐ Image placement instruction: you need to outline where you want the image placed within the page. For example, if you want an image aligned specifically to the right of a paragraph or below a paragraph, make a note in the corresponding word document for that page.

☐ **Create an images folder and optimize all of the contents**

All images that will appear on the site should be migrated to this folder, once they have been optimized for web use, meaning: formatted to be the right size for the page and saved in the appropriate format for web display (jpg, gif or png file formats and optimized for web at 71 dpi)

☐ **Make separate folders for all other exterior site assets**

Separate folders should be created for different file format types: PDF, Excel, SWF, Word, Vcards, video files etc. and all saved in their correct formats. These wil be situated on the webpage in the word template step, and having them all in one place ready to go will save you time and effort.

☐ **Metadata, alt tag and keyword strategy for website search optimization (See Appendix B for keyword placement & Appendix C for alt tag strategy)**

Today, a website is not complete unless it has been optimized for the search sphere. At this point in you new site/content migration, you must consider those implications and make decisions about what keywords visitors will be using to find your site. Your ideal goal at this step is ensure that all of your content is both searchable and sortable.

☐ **Decide between a manual migration, an automated migration or some hybrid of the two**

It is often recommended that for sites under 1000 pages, you should manually migrate content to ensure as few errors and as little rework needs to be done post migration. An automated solution, usually accomplished through either a script or software, can make things easier in a lot of cases, but there is usually still some manual work to be done. The only way to be sure of yourself on this step is do lots of research or check with an expert (we know a few!)

☐ **Confirm content migration logistics**

You're coming up to the finish line at this point; it's time to start setting up the particulars of the migration. Determine how many manual content migrators you will need, assigning them each specific content items, and ensure that all automated solutions and rolling and ready to go. At this point, you will want to do that aforementioned "content freeze" so that everything is set in stone (or as stone-like as a web project like this can be).

☐ **Migrate content**

Wahoo! You did it.

Congratulations, you have successfully completed a content migration!