Migrations: Not Just for Developers Any More
by Paula Land

EDITOR’S SUMMARY
Migrating content between sites is a complex process requiring the carefully timed and coordinated work of a multidisciplinary team. Not just the work of IT specialists, site migration is best handled by developers, a project manager, business analyst, information architect and content strategist working together. Planning starts with a current site inventory and audit, when the content strategist assesses content, types, metadata and functions served. The information architect focuses on site structure, taxonomy, navigation and usability. The taxonomy should be implemented with an eye to serving organization, tagging and templates for author submissions and presentation. The migration process presents an opportunity to update and enhance the site. Best results depend on good decisions made early in the process by information specialists working with others for a site that serves users as well as the sponsor's goals.

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Content migrations are hard. They’re complicated, expensive, detail-intensive and can take a long time. To appropriate a well-used metaphor, a migration is like moving all your possessions from one house to another. If the proper planning isn’t done up front, you can end up with a jumble of broken, misplaced stuff at the other end. Taking the time up front to analyze and plan and involving a multidisciplinary team in the effort pays off in the long run, helping the migration go smoothly and achieving an end result that satisfies both the business owners and the site users.

It Takes a Team
Site migrations are often staffed as IT projects. After all, there are software programs to be installed and configured, databases to be mined, scripts to be written, templates to be developed and data moved from one system to another. These tasks are all critical, to be sure, but if done without analysis of the content, architecture and functionality of the site – both the current version and the new – they lack the necessary context.

The ideal makeup of a migration team includes the developers, of course, and a project manager to keep it all organized and running smoothly. A business analyst helps create the technical requirements and specs that the development team will build from. But just as important are the information architect (IA) and the content strategist (CS), who carry the mantle for user experience and form a valuable bridge between the business owners and the end users.

Taking Stock
Before anyone starts planning how and where to move the site, and ideally before the new content management system or platform is selected,
the IA and the CS should inventory and audit the current site. The goal of
the inventory is to understand in detail what content exists, what type it is,
how it’s structured and why, what characteristics it has (is there metadata?
are there naming conventions for assets?) as well as what functionality
exists (forms, feeds, interactive elements like reviews and comments,
transactional elements like registration or purchase) so that the new site can
support all those current needs (we’ll get to future needs later).

Although many migrations are done as part of a larger redesign effort, it
is seldom the case that every bit of content and every functional or design
element of a site is replaced – and organizations rarely have the budget or
organizational appetite to throw away everything and start fresh. Thus, it’s
important to assess what is and isn’t working and what can be salvaged from
the current site, perhaps polished up a bit, maybe moved to a different place
in the overall architecture, but retained. Removal of what isn’t working and
can’t be salvaged helps ensure that the new site is of uniformly high quality.
Audits also create the opportunity to do a gap analysis, which assesses that
current state against the desired future state and finds what’s missing and
needs to be created.

While the initial inventory is an essentially quantitative exercise, the
audit moves into the qualitative analysis. The CS will assess how much of
the content is still current and relevant, how well it represents the organization’s
brand and messaging goals, how well it supports user tasks and, in some
cases, how it stacks up to competitors’ content.

The outcome of the content audit is a strategy for how content will be
structured and managed going forward: what content will be migrated as-is,
what needs to be revised and what should be removed; what content needs
to be created to meet the new site goals and who will create it; and a set of
content requirements for the new system to support. This latter category
might include a content model that allows for content to be structured and
tagged in a way that allows it to be reused and published in multiple
contexts on multiple devices.

As the CS is auditing the content quality and developing content
requirements, the IA can, in parallel, be auditing the site structure, taxonomy and
navigation models and be determining how well the functional elements work.

Both the CS and the IA may also be looking at site metrics and analytics
data to learn how users are interacting with content and functionality to see
what’s working and what’s not, where users are dropping off or hitting dead
ends.

Conducting stakeholder interviews with content owners and authors is
important at this phase of the project too. These interviews should garner
insights into content ownership, publishing processes, lifecycle management
governance as well as elicit the pain points that need to be addressed in
designing the future state.

Building for the Future

The above activities often referred to as a discovery phase, provide a
solid basis from which the team can begin to plan and scope the project.
The business analyst can begin to document requirements, the technical
team can estimate the migration effort, and the project manager can track
migration and design tasks against the budget and schedule.

Setting up the new content management system offers several
opportunities for the IA and CS to provide input and ensure that what gets
set up supports the other important user group, the actual content authors
and publishers.

Taxonomy is usually mentioned in a web project in the context of the
overall site hierarchy and the structure of the terms with which content is
tagged to support management, dynamic content generation and search.
Unless an organization is fortunate enough to be able to have a dedicated
taxonomist, a CS or IA generally manages this task. The taxonomy is
instantiated in several ways in the content management system. The first is
in the actual content tree or structure within which content is stored, which
has implications for URL structure and, downstream, search engine
optimization. The second is in the tagging management itself – the hierarchy
of attributes and the vocabularies of their values. Building out that structure
and creating the lists of terms as well as defining rules for governing and
applying the tags is an important step in the design process and one that, if
not done carefully up front, can be painful and difficult to fix later. The third
way that taxonomy and metadata are built into a content management
system is in the authoring templates. Depending on the organization’s workflow, authors may be creating keywords and descriptions in the content input templates and applying tags from the taxonomy. All of this structure needs to be defined and requirements provided to the technical team for optimal implementation.

Templates, both the front-end presentation versions and the back-end content input versions, are another area in which content strategists and information architects play a key role. They are the experts in critical information such as

- different content types,
- requirements for breaking content down into its components,
- number of templates that need to be created and what they need to look like and do,
- metadata needs to be present and
- presentation of digital assets like images and video.

The IA creates the wireframes for the presentation templates, based on the content requirements provided by the CS and those that support the necessary user flows and interactive elements. Development of the content input templates likewise needs to be informed by the content and user experience strategies. Most modern content management systems support modularization – content and other assets stored and managed at a granular level that enables published pages to be assembled from components that are tagged for reuse. Decisions about the appropriate level of granularity and the triggers that cause the pieces to be assembled and presented (and how that differs on different devices) are the realm of the CS and the IA – and most developers will be more than happy not to take responsibility for design at that level.

In addition to the content management system design work, at this stage the IA is also designing new or improved navigation and user flows, creating the overall structure of the site. The CS is managing the actual processing of the content – creation, revision and tracking through from the old system to the new, making sure that the right content is moved and that it is placed correctly in the new system.

Workflows and governance round out the migration-planning picture. With the understanding of how content is created within the organization, how often it is updated or replaced and what level of review and approval is required, the CS can design authoring workflows and write governance guidelines. The IA, likewise, can stipulate a review and approval process for changes to the site structure, taxonomy and template design.

**Conclusion**

Content migrations are generally undertaken with the goal of creating a more capable, robust system that supports current needs and can scale to handle future growth. They provide the opportunity to clean out the old and non-useful and to retain the best of what exists and put it all into a shiny new context. Ideally, they are done when necessary to support business needs, but as seldom as possible. Making the right decisions at the start and calling on the collective talents of the whole team, including the IA and the CS, helps ensure a successful migration and an efficient, user-oriented, easily managed website.