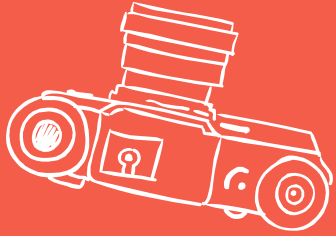
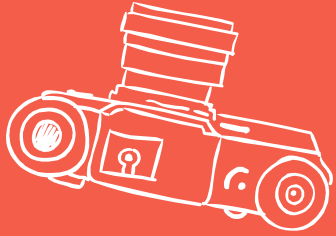


DESIGNING A MIGRATION APPROACH...



THAT ENGAGES
CONTENT OWNERS &
PROTECTS YOUR SANITY





WHO WE ARE

Kat Kuhl

Director of Technology, CHIEF

Samantha Elliott

Lead Associate, Phase One

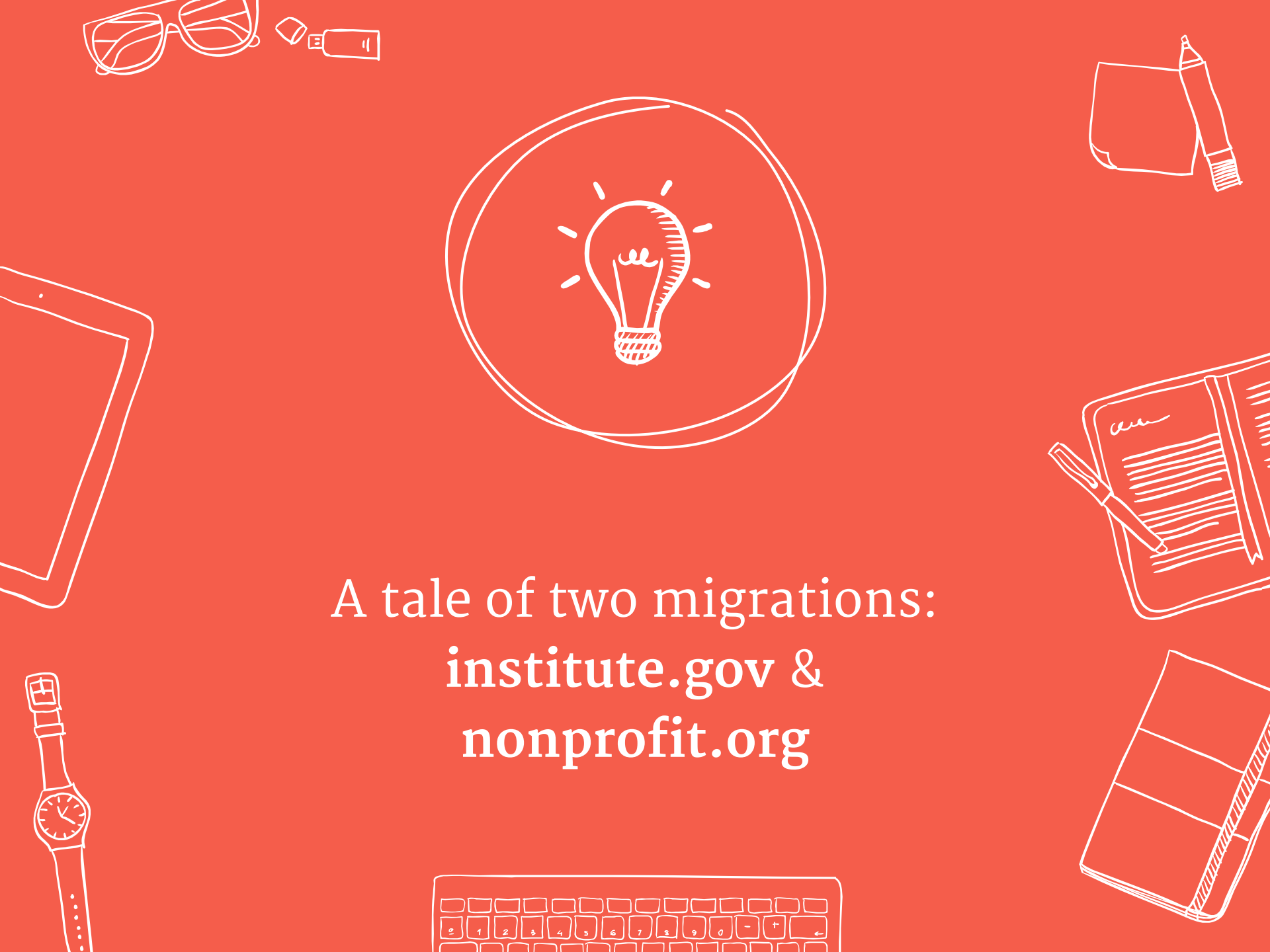


WHO YOU ARE

- ✖ Content strategists
- ✖ Project managers
- ✖ Project stakeholders
- ✖ Other project team members



A tale of two migrations:
**institute.gov &
nonprofit.org**





INSTITUTE.GOV

- ✖ 30,000 pages
- ✖ 5,000 documents
- ✖ 10-month timeline
- ✖ Static HTML -> Drupal
- ✖ Experienced development team

Goal: Migrate the important content as-is

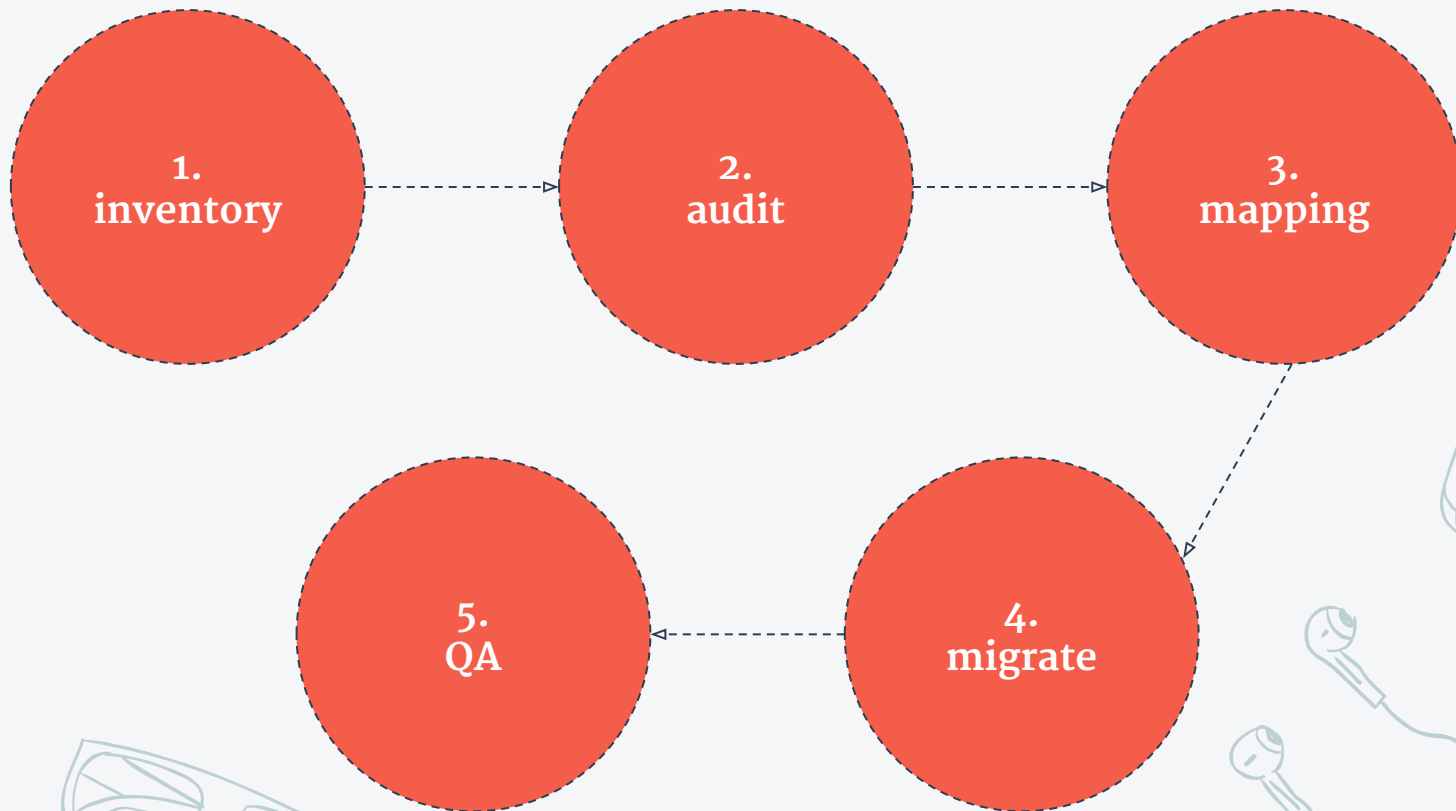


NONPROFIT.ORG

- ✖ 800 pages
- ✖ 100 documents
- ✖ 6-month timeline
- ✖ Custom CMS -> Drupal
- ✖ Small development team
- ✖ Experienced strategy team

Goal: Refresh & improve
website content

MIGRATION APPROACH





1.

CONTENT INVENTORIES

or: taking stock of what you have



TOOLS FOR INVENTORIES

Link checkers:

- ✖ Xenu (Windows)
- ✖ Integrity (Mac)

Next: Manual cleanup!



CFA Content Inventory - Sample



File Edit View Insert Format Data Tools Add-ons Help Accessibility All changes



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123



Arial



10



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317

	B	C	D
1	URL	Type	Node ID
2	http://www.cfa.gov/contact/	Basic Page	8
3	http://www.cfa.gov/meetings/2013/nov/	Agenda	76
4	http://www.cfa.gov/meetings/2013/nov/20131121cfa.html	Agenda	76
5	http://www.cfa.gov/meetings/2014/jan/	Agenda	80
6	http://www.cfa.gov/meetings/2014/jan/20140116cfa.html	Agenda	80
7	http://www.cfa.gov/meetings/2013/jun/	Agenda	317
8	http://www.cfa.gov/meetings/2013/jun/20130620cfa.html	Agenda	317
9	http://www.cfa.gov/meetings/2013/jun/20130620min.html	Minutes	317
10	http://www.cfa.gov/meetings/2002/oct/	Agenda	326
11	http://www.cfa.gov/meetings/2002/oct/20021017cfa.pdf	Agenda	326
12	http://www.cfa.gov/meetings/2002/nov/	Agenda	339
13	http://www.cfa.gov/meetings/2002/nov/20021121cfa.pdf	Agenda	339
14	http://www.cfa.gov/meetings/2002/dec/	Agenda	356
15	http://www.cfa.gov/meetings/2002/dec/20021219cfa.pdf	Agenda	356
16	http://www.cfa.gov/meetings/2003/apr/	Agenda	365
17	http://www.cfa.gov/meetings/2003/apr/20030422cfa.pdf	Agenda	365
18	http://www.cfa.gov/meetings/2003/may/	Agenda	378
19	http://www.cfa.gov/meetings/2003/may/20030515cfa.pdf	Agenda	378



INVENTORY FOR INSTITUTE.GOV

- ✘ Large, unwieldy URL list
- ✘ Inconsistent directory structure in URLs
- ✘ Lots of documents



INVENTORY FOR NONPROFIT.ORG

- ✖ Small URL list
- ✖ Structured URLs
- ✖ Lots of old, outdated content
- ✖ Lots of images
(so many images)



TALKING TO CONTENT OWNERS

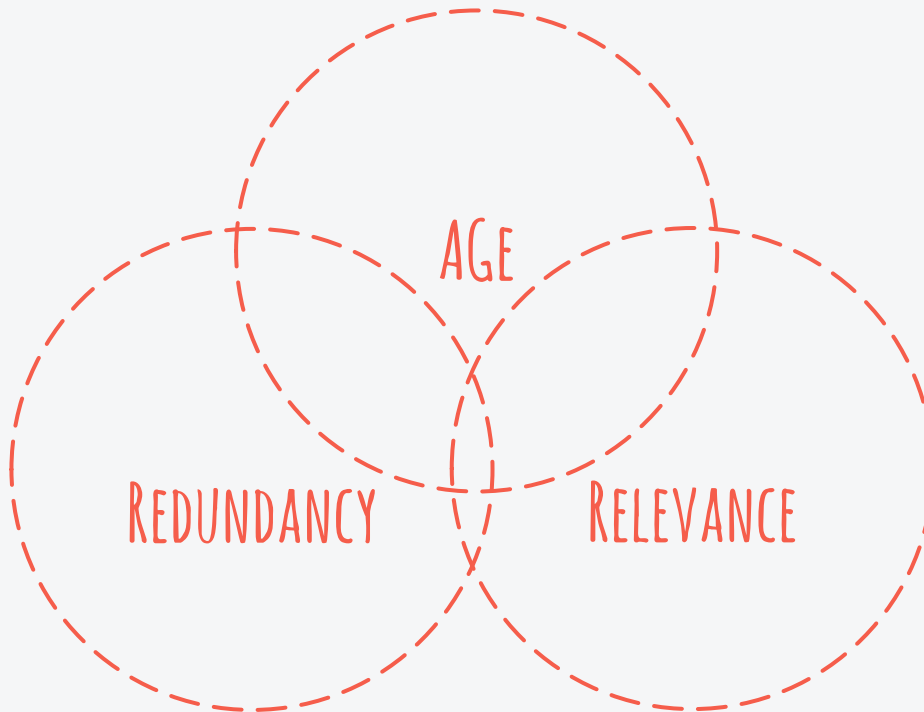
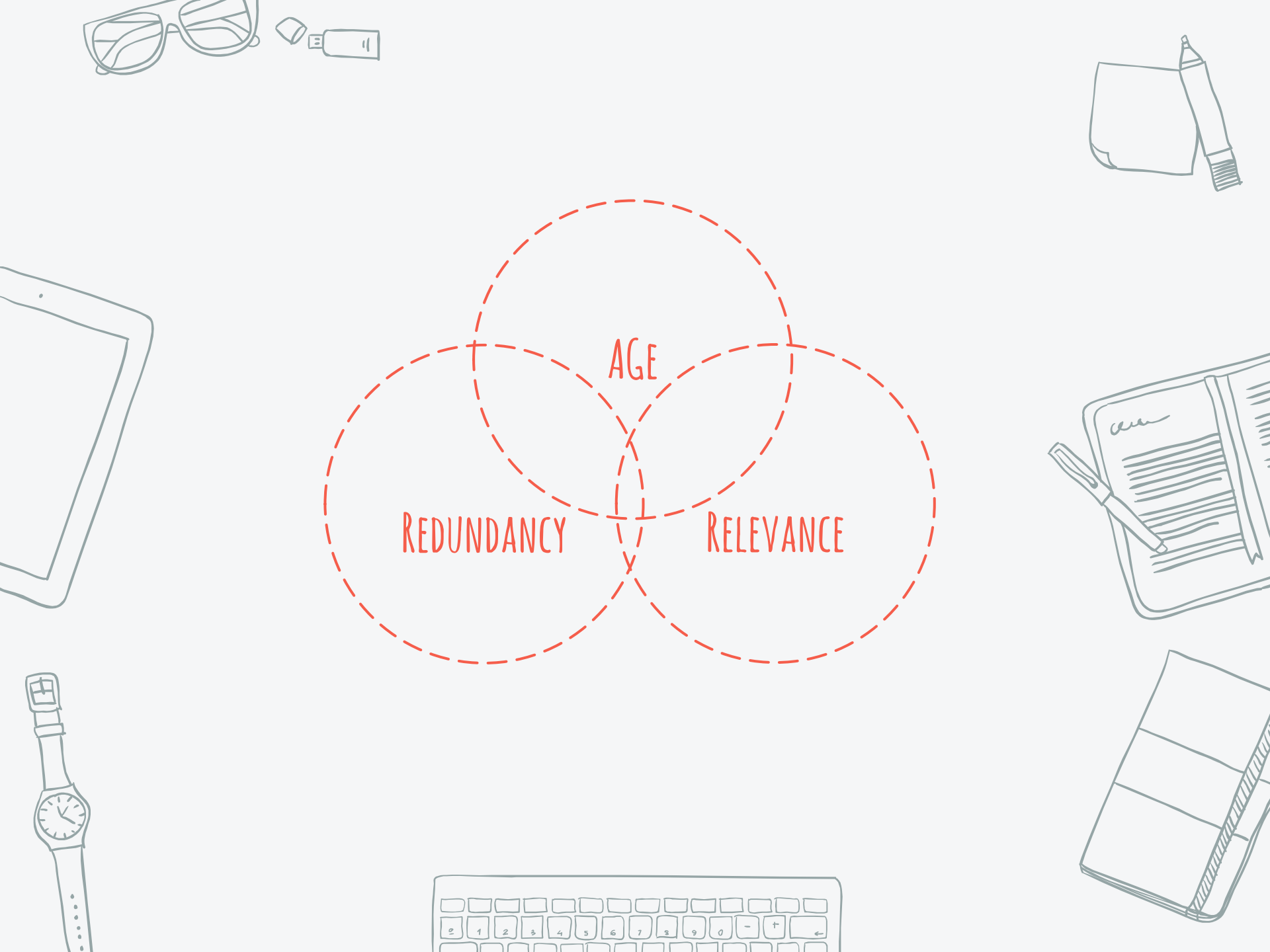
- ✘ Present (and email) an inventory summary detailing high-volume areas, files/assets, etc.
- ✘ Have them flag inconsistencies or missing information
- ✘ Explain projected challenges & level of effort on both sides



2.

CONTENT AUDITS

or: deciding what to migrate





AUTO OPT-OUT

Old press releases, old events, old bios...

AUTO OPT-IN

Mission statements, budgets, policies...

AUTO MAGIC!

Flag content sections for scripted migration



AUDIT FOR INSTITUTE.GOV

- ✘ 2,000 press releases are >5 years old
- ✘ Offices have redundant content
- ✘ Clear content types
- ✘ Old menu structure is very different from new sitemap



AUDIT FOR NONPROFIT.ORG

- ✘ Evergreen content is no longer accurate
- ✘ Complex but rarely visited "About" section
- ✘ Content like contact information only in documents



TALKING TO CONTENT OWNERS

- ✘ Agree on migration criteria
- ✘ Stress importance of content owner expertise in determining relevance
- ✘ Provide window for content revision
- ✘ Communicate positive impact of overhauls



3.

CONTENT MAPPING

or: identifying where your pages
will live on the new site



FEDERAL TRADE COMMISSION

PROTECTING AMERICA'S CONSUMERS

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Business Center

[ADVERTISING & MARKETING](#)[CREDIT & FINANCE](#)[PRIVACY & SECURITY](#)[SELECTED INDUSTRIES](#)[LEGAL RESOURCES](#)[BUSINESS BLOG](#)

FILTERS

Title keyword**Type****Topic****Industry**

Legal Resources

Use the filters to find legal resources like cases, reports, staff opinions, and events. You can sort by topic, type or industry.

Displaying 1 - 50 of 1845

Public Event: **Debt Collection Dialogue: A conversation between government and business**

November 18, 2015

The Federal Trade Commission will host the third of its Debt Collection Dialogues in Atlanta, GA, on November 18, 2015. The FTC held the first Dialogue in Buffalo, NY, on June 15. The second will be held in Dallas, TX, on September 29. At the Dallas and Atlanta events, representatives from the FTC...

Public Event: **Cross Device Tracking**

November 16, 2015

Not long ago, consumers accessed the Internet primarily through the browser on their desktop or laptop PC. While the PC remains a fixture for many, today's typical consumer relies on a variety of different connected devices to navigate their daily lives. Examples include consulting a traffic app on...

Public Event: **Start with Security - Austin**

November 5, 2015

The FTC's second "Start With Security" event will take place on November 5, 2015, in Austin, Texas, and will be co-sponsored by the University of Texas Robert S. Strauss Center for International Security and Law. This one-day conference will continue the FTC's work to provide companies with...

Public Event: **Debt Collection Dialogue: A conversation between government and business**

September 29, 2015

The Federal Trade Commission will host the second of its Debt Collection Dialogues in Dallas, TX, on...



TYPES OF MAPPING

- ✖ Content type
- ✖ Menu position

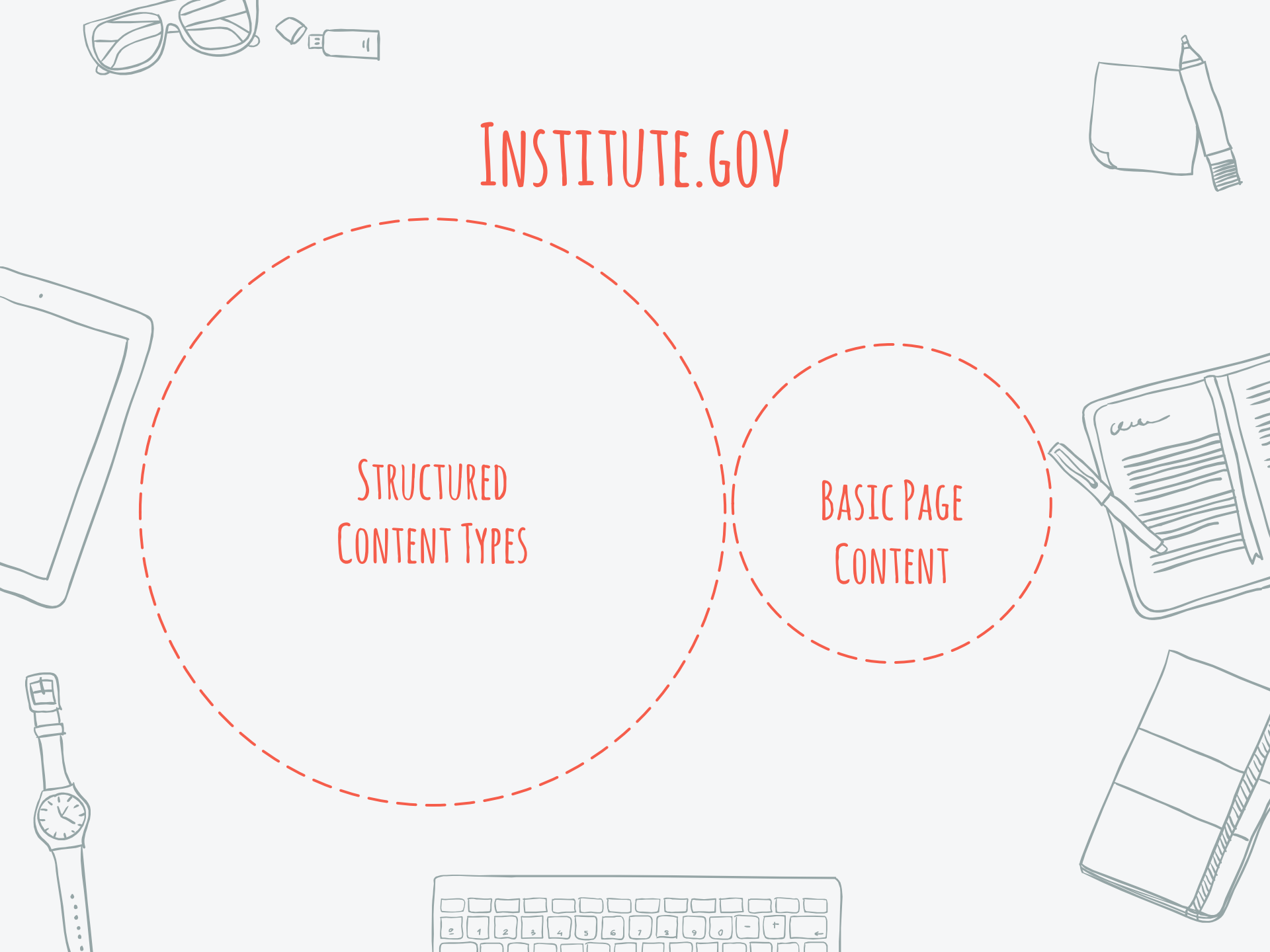


The more restructuring you're doing,
the more critical your mapping is.

INSTITUTE.GOV

STRUCTURED
CONTENT TYPES

BASIC PAGE
CONTENT



NONPROFIT.ORG

STRUCTURED
CONTENT TYPES

BASIC PAGE
CONTENT



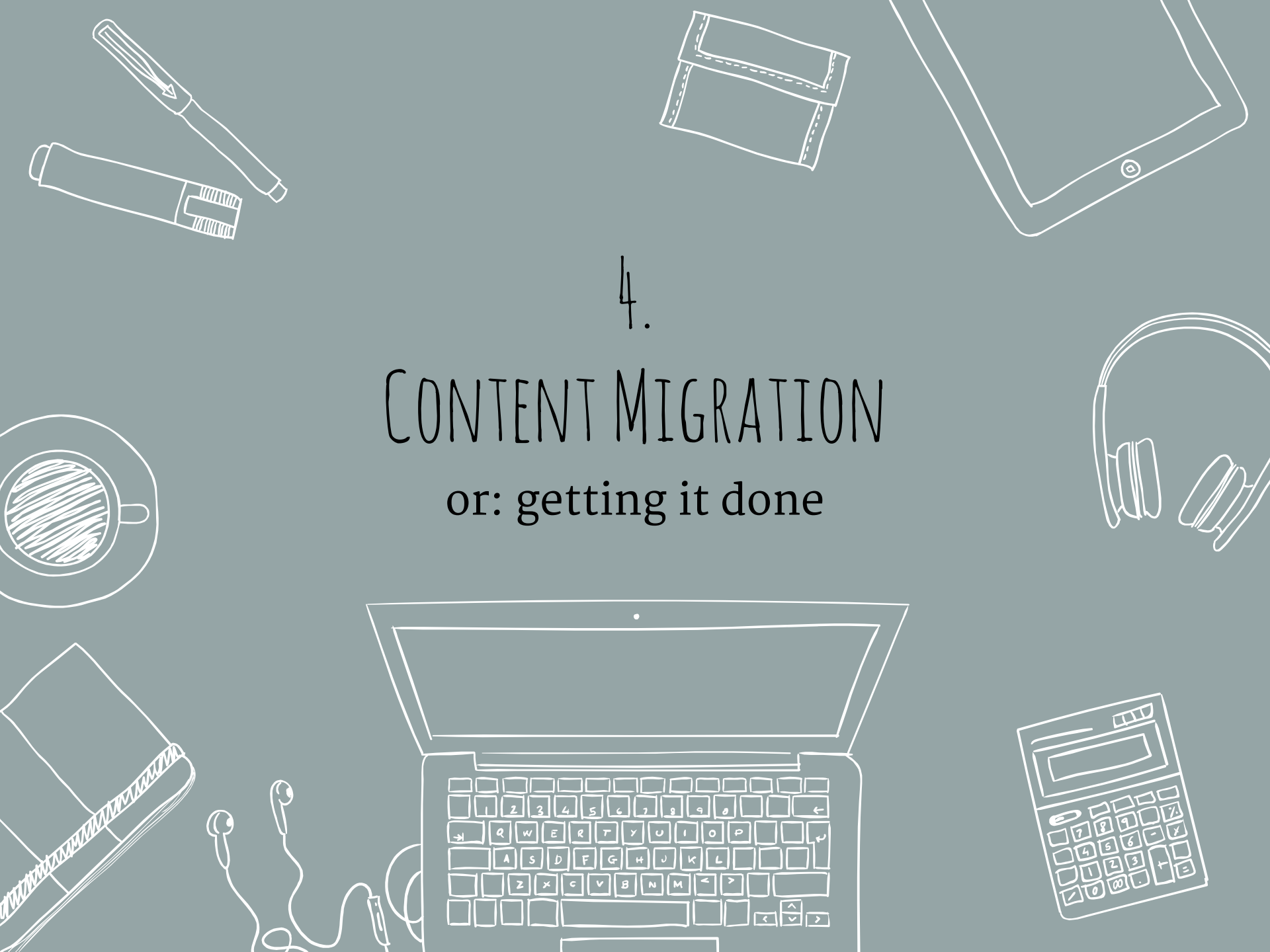
MAPPING PROCESS

- ✘ Start by associating pages with content types
- ✘ Review basic page/non-serial content
- ✘ Decide what's keeping the old menu structure
- ✘ Record where everything else is moving

4.

CONTENT MIGRATION

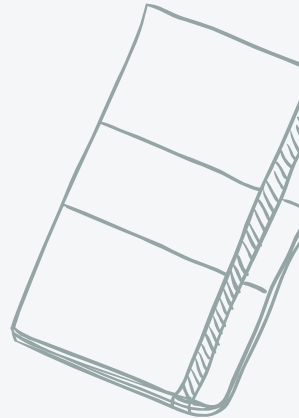

or: getting it done





STEP 1/4:

Make a game plan based on
the challenges of your project
and the skills of your team.





CONSIDERATIONS

- ✖ How structured is the old content?
- ✖ How much content is there per type?



PRO TIPS

- ✖ Annotate screenshots for each type to show field mapping for developers & manual migrators.
- ✖ Phase the migration by content type.



REDIRECTS

- ✖ When scripting, add old URLs as redirects for each node.
- ✖ When moving manually, add the new node IDs to each line of your content inventory (and use **Path Redirect Import** to import later).



STEP 2/4:

Use third-party content
when you can, to reduce your
migration efforts.



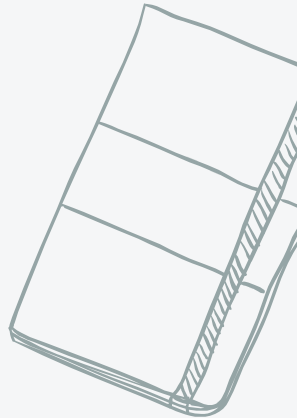
THIRD-PARTY CONTENT

- ✖ **APIs:** External datasets (e.g. USAJobs, Regulations.gov)
- ✖ **CSVs:** Data from third-party systems



STEP 3/4:

Script what you can.





WHAT CAN YOU SCRIPT?

- ✘ Database-to-database
(if fields match)
- ✘ Database-to-database with parsing
(if fields are close)
- ✘ Scraped content



STEP 4/4:

Move the rest manually.



5.

QUALITY ASSURANCE

or: making sure it worked





WHERE ARE THE BIGGEST FIRES?

- ✘ Content heavily rewritten or restructured
- ✘ Controversial sections/pages flagged during auditing or wireframing
- ✘ Broken links



INSTITUTE.GOV QA WINS

- ✘ Verifying that required fields are populated for each type
- ✘ Verifying that redirects exist for each node
- ✘ Utilizing content owners for in-depth QA



NONPROFIT.ORG QA WINS

- ✖ Reviewing index (views) pages for each content type
- ✖ Checking sample sets for each content type
- ✖ Utilizing content owners for an in-depth QA



PREPARING FOR CONTENT OWNER QA

- ✖ Set expectations beforehand!
- ✖ Agree on how to track whether content has been reviewed ("QAed" checkbox, Workbench status...).



Remember: The more you engage
your content owners, the better
your launch will go!



THANKS!
ANY QUESTIONS?

selliott@phaseonecg.com
kat.kuhl@agencychief.com
([@webbykat](#))



AND SINCE WE DIDN'T DESIGN THIS...

Special thanks to SlidesCarnival
for the presentation template.