

CMS SWITCH KIT

A How-to Guide for Marketers



SILVERTECH

CONTENTS

CMS Switch Kit Introduction	3
Assessing Your Current CMS	5
Building a Business Case	9
Choosing the Right CMS	13
Defining Your CMS Requirements	13
Choosing a CMS	23
Vendor Shortlist	26
Planning the Website Redesign	27
Website Planning Stages	28
Develop an Effective Website Strategy	29
SEO Strategy	31
Content Modeling and Migration Strategy	32
Implementation Steps	36
Establishing a Project Plan	37
Working With an Agency Partner	39
Training Your Team	43
Launch Plan	46
Hosting, Security & Compliance	47
Hosting Options	48
Security Requirements	50
Post Launch Optimization	52
Toolkit & Resources	57
Conclusion & Next Steps	59

CMS Switch Kit Introduction

A How to Guide for Marketers

Purpose of the Kit:

To help marketing executives navigate the process of switching to a new DXP (Digital Experience Platform) or CMS (Content Management System) during a website redesign.

Switching your CMS or DXP during a website redesign is a critical decision that can impact your marketing efficiency, user experience, and overall business performance. This kit provides step-by-step guidance to help senior marketers make informed decisions about how to plan, execute, and optimize the CMS switch efficiently and effectively.

Why Consider a CMS Switch?

Outdated Technology:

Your current platform may lack modern features, limiting your ability to deliver a seamless user experience or implement new marketing strategies.

Scalability Needs:

If your business is growing, you may need a CMS that can handle increased traffic, larger volumes of content, and more complex integrations.

User Experience:

Older systems may create roadblocks for users, causing slow site speeds, poor navigation, and a lack of personalization, which can reduce engagement and conversion rates.

Integration Challenges

Legacy CMS systems may not integrate smoothly with new marketing automation, CRM, or analytics tools, limiting the data you can leverage for decision-making.

Security or Modernization:

Your organization may need to modernize technology in their stack, update to a modern development architecture, move to updated security practices or just take steps toward more progressive digital maturity.

2

Assessing Your Current CMS

STEP 1

Identifying Pain Points

Before selecting a new CMS, you need to clearly define what's wrong with your current system. Consider conducting a full audit or analysis, or hiring a trusted partner to do one on your behalf, that includes a list of problem areas with data to provide proof or back-up when available. This is an important step in validating the need for either switching out your CMS to a new solution, and/or trying to optimize the solution you have.

Consider the following:

Performance issues:

Slow page load speeds, site crashes, or inability to handle traffic spikes.

Content Management Difficulties:

Is it hard for your team to update content, manage workflows, or work with multimedia assets?

Lack of Flexibility:

Are you unable to create custom content types, change design templates, or customize layouts without significant development time?

Limited Integrations:

Does your current CMS fail to integrate with essential tools like marketing automation platforms, CRMs, or analytics tools?

Once you've listed these pain points, you'll have a better idea of the essential features your new CMS must include.

STEP 2

Functionality Gaps

Understanding the gaps between your current CMS's capabilities and your business needs is critical. You can use the following methods to identify these gaps:

Team Feedback:

Gather insights from content creators, marketers, and developers on the pain points they experience daily.

Functionality Audit:

Review whether your current CMS has up-to-date features such as personalization, A/B testing, SEO tools, or mobile-friendly support.

Benchmarking Against Competitors:

Compare your site's user experience, page speed, and overall functionality to that of your competitors to understand where your CMS may be holding you back.

STEP 3

Team Satisfaction

A CMS should empower your marketing and IT teams, not frustrate them. Conduct an internal survey with your team to answer questions like:

- Is the CMS intuitive and easy to use?
- Does it require extensive training for new team members?
- Are you spending too much time on manual tasks (e.g., updating product pages, managing content workflows)?

If your team is unhappy with your current system, this dissatisfaction can lower productivity and slow your ability to respond to market opportunities.



Important tip

As you evaluate the current state of your CMS, consider highlighting any challenges of your current CMS that could be resolved through an update or easy optimization/customization of the CMS. Sometimes, you set out thinking you need a new CMS and you realize it may make better business sense to get help in optimizing or customizing the one you already have.

STEP 4

Analytics Review

Review your website's key performance metrics to identify areas where the CMS is underperforming:

Conversion Rates:

Are they declining or stagnating despite new content or marketing efforts?

Bounce Rates:

Are users leaving your site after visiting only one page? This could be a sign that poor performance or navigation issues are turning them away.

Site Load Speed:

Analyze the site's load times. Slow performance can lead to a poor user experience, affecting everything from SEO rankings to conversion rates.

By tying these metrics to specific CMS-related issues, you can quantify the cost of maintaining an outdated system. Keep a documented report of your current CMS analysis so that you can compare and report back on progress once the new CMS has been implemented.



Important tip

As you audit the challenges of your current CMS, prioritize them by highlighting those challenges that either have a major impact to the outcomes you are trying to achieve or goals you are trying to hit. Also, we recommend selecting those challenges that, when solved, will become a quick-win for your team.

3

Steps to Making a Business Case

Understanding the full impact of switching your CMS begins with a thorough cost/benefit analysis, carefully weighing potential investments in time, budget, and resources against measurable gains in performance, scalability, and efficiency. It's essential to identify and involve key stakeholders—such as IT teams, marketing professionals, and the C-suite—to ensure alignment and smooth transition across your organization.

Step-by-Step CMS Business Analysis: Cost + ROI

STEP 1

Set Your Evaluation Horizon

Choose the timeline for your analysis—typically:

- **1 Year:** Implementation and ramp-up
- **3 Years:** Mid-term value and platform maturity
- **5 Years:** Full lifecycle and long-term ROI

STEP 2

Capture Direct Costs by Category

Document the all-in costs of CMS ownership – they may include:

Cost Category	Description
License Fees	Annual or monthly CMS subscription or license costs.
Hosting	Cloud infrastructure or on-prem setup and scaling.
Upgrades & Updates	Major version upgrades or platform enhancements.
Search Tools	Integrated search solutions (if separate).
Support & Maintenance	Ongoing vendor or internal team costs.
Initial Implementation	Setup, migration, integrations, and training.
Custom Development	Feature development, enhancements, API work.
Third-party Integrations	Tools like personalization, analytics, CRM.

STEP 3

Estimate Operational & Opportunity Costs

Beyond direct expenses, factor in:

- **Internal Team Time:** Admin overhead, developer hours, QA
- **Training & Enablement:** Onboarding marketing, IT, and content teams
- **Downtime or Delays:** Lost revenue or reputation from performance gaps
- **Technical Debt:** Cost of sticking with legacy or inflexible systems

STEP 4

Structure Your Cost Model

Map out the annual cost view to compare options:

Year	License	Hosting	Support	Upgrades	Search	Other	Total
Y1	\$	\$	\$	\$	\$	\$	\$
Y2	\$	\$	\$	\$	\$	\$	\$

STEP 5

Identify ROI Drivers

Now assess the areas where the CMS will **deliver measurable value**:

- **Faster Time to Market:** Quicker campaign launches, fewer IT bottlenecks
- **Content Team Efficiency:** Easier authoring tools, fewer support tickets
- **Better User Experience:** Personalization, accessibility, mobile readiness
- **Conversion Rate Gains:** Improved UX, A/B testing, and targeted content
- **Operational Efficiency:** Less developer reliance, reusable components
- **System Consolidation:** Reduce costs by replacing separate tools

STEP 6

Quantify ROI Where Possible

Translate those drivers into business value:

- % improvement in site conversion rate × average deal value
- \$ saved by reducing dev hours or third-party software
- \$ value of faster speed-to-market for key campaigns
- Cost avoidance from not needing separate platforms (e.g., search, analytics)

STEP 7

Create Scenarios

Build multiple models to stress-test ROI:

- **Base Case:** Most realistic projection
- **Optimistic:** Higher platform adoption, smoother rollout
- **Conservative:** Slower rollout, hidden integration costs

Each scenario should reflect both **spending** and **value realization** timelines. Summarize in a slide, spreadsheet, or executive summary:

- Bar charts comparing 3 or 5 year total cost across CMS options
- Line graph of cumulative cost vs. projected value delivery
- ROI summary: Break-even point, % ROI over 3–5 years

Final Considerations

When choosing a CMS, cost alone doesn't dictate value. Prioritize platforms that:

- Empower your teams (low-code, no-code, extensibility)
- Scale with growth (multisite, multilingual, multichannel)
- Integrate easily with your marketing stack (CRM, CDP, analytics)
- Offer support for future needs (compliance, accessibility, AI readiness)



For help putting together a Business Case for switching CMS solutions for your particular circumstances or your specific business, scan this QR code and request a [cost/opportunity analysis today.](#)

4

Choosing the Right CMS

Defining Your CMS Requirements
Choosing a CMS
Vendor Shortlist

Selecting the right CMS or DXP is essential for effective and engaging digital experiences. Begin by clearly defining your business needs—including integrations (CRM, analytics, marketing automation), content flexibility, ease of use, security, scalability, and compliance.

Use this checklist to get started. Identify whether or not you have a need for each feature now or in the future. Future needs will determine how scalable the solution must be to support your growth.

STEP 1

Content Management

Website Platform Functional Requirements Checklist for Senior Marketers & IT Professionals

	Yes	No	Future
Multi-Language Support: Do you need to manage content in multiple languages?			
Multi-Site Capabilities: Will you be managing multiple websites under one platform (e.g., regional sites, sub-brands)?			
Content Versioning & Approval Workflows: Is version control, approval processes, and rollback of content changes essential for your team?			
Rich Media Support: Will the platform need to handle video, images, documents, or interactive content efficiently?			
Flexible Page Templates: Does your team need the ability to create dynamic page layouts and reusable components?			
Headless CMS Option: Are you looking for a headless CMS for flexibility with content delivery across various platforms (e.g., mobile apps, IoT)?			

STEP 2

Marketing & Personalization

	Yes	No	Future
Personalization Features: Does your business require the ability to personalize content based on user behaviors, preferences, or location?			
A/B Testing: Is A/B or multivariate testing needed to test different versions of content or user journeys?			
SEO Management: Does the CMS need built-in tools for managing meta tags, structured data, XML sitemaps, and redirects?			
Marketing Automation Integration: Should the platform integrate with marketing automation tools (e.g., HubSpot, Marketo)?			
CRM Integration: Does your business need seamless integration with a CRM system (e.g., Salesforce, Microsoft Dynamics)?			
Blog & Content Scheduling: Is a blogging platform with content scheduling and editorial calendar functionality required?			

STEP 3

User Experience & Interface

	Yes	No	Future
Customizable User Interface: Should the CMS interface be customizable for different roles (e.g., content creators, developers)?			
Mobile-First Design: Does the platform need to be optimized for mobile use or support a mobile-first strategy?			
Accessibility Compliance: Are there specific accessibility standards (e.g., WCAG 2.1) that the platform must meet?			
User Roles & Permissions: Is there a need for detailed user access control with customizable roles and permissions?			
Chatbot: Will your organization benefit from a live or AI-assisted chatbot to answer questions or conduct repeatable tasks?			
Search Capabilities: Will users need advanced on-site search capabilities with filters, faceted search, or predictive text?			

STEP 4

Hosting & Infrastructure

	Yes	No	Future
Cloud vs. On-Premise Hosting: Do you prefer cloud-based hosting, on-premise hosting, or a hybrid approach?			
Scalability: Can the hosting environment scale with traffic spikes and increased content demands?			
CDN (Content Delivery Network): Does the platform need CDN support for faster global content delivery?			
Load Balancing & Redundancy: Is load balancing and system redundancy required to ensure high availability?			
Disaster Recovery: Are robust disaster recovery plans, backups, and uptime guarantees necessary?			
DevOps Integration Does the platform need to support integration with CI/CD pipelines for continuous deployment?			

STEP 5

Security & Compliance

	Yes	No	Future
SSL/TLS Encryption: Is SSL certification mandatory for secure data transmission?			
User Authentication: Will the platform need multi-factor authentication (MFA), single sign-on (SSO), or LDAP integration for secure access?			
DDoS Protection: Should there be built-in DDoS protection to guard against attacks?			
Data Encryption: Is end-to-end encryption necessary for data storage and transmission?			
GDPR & CCPA Compliance: Does the platform need to support compliance with global data privacy regulations (e.g., GDPR, CCPA)?			
Industry-Specific Compliance: Does your business need to meet any specific regulations, such as HIPAA or PCI-DSS?			
Audit Logs & Reporting: Is there a need for detailed audit logs for tracking user activities and compliance reporting?			

STEP 6

E-Commerce Functionality

	Yes	No	Future
Product Management: Does the platform require advanced product catalog management features (e.g., SKUs, variations, attributes)?			
Payment Gateway Integration: Are multiple payment gateway integrations (e.g., PayPal, Stripe) needed?			
Tax & Shipping Calculation: Should the platform provide dynamic tax and shipping calculations based on customer location?			
Inventory Management: Does your business need real-time inventory management capabilities?			
Customer Segmentation & Personalization: Should the platform support dynamic customer segmentation for targeted promotions?			

STEP 7

Integration & API Support

	Yes	No	Future
Third-Party Integration: Does the platform need to integrate with existing tools like ERPs, email marketing tools, or analytics platforms?			
API Availability: Is it important that the platform provides robust API support for custom integrations or development?			
Headless & Decoupled Architecture: Are you looking for a decoupled or headless architecture to deliver content to multiple channels?			
Modular Architecture: Is modular architecture required to add new features as your business grows without complete overhauls?			

STEP 8

Analytics & Reporting

	Yes	No	Future
Web Analytics Integration: Do you need integration with tools like Google Analytics, Adobe Analytics, or custom analytics platforms?			
Real-Time Reporting: Is real-time tracking and reporting of site metrics (traffic, user behavior, etc.) necessary?			
Custom Dashboards: Does your team require customizable dashboards to monitor KPIs?			
Heatmaps & User Behavior Tracking: Is user behavior tracking (heatmaps, click tracking) important for optimizing site performance?			

STEP 9

Performance & Optimization

	Yes	No	Future
Caching Mechanisms: Does the platform need advanced caching strategies (e.g., server-side caching, edge caching) for performance optimization?			
Page Load Speed: Is there a focus on fast load times, especially for mobile users?			
Image & Media Optimization: Will the platform automatically optimize images, videos, and other media for faster performance?			
Lazy Loading: Is lazy loading for images and other content needed to improve speed?			

STEP 10

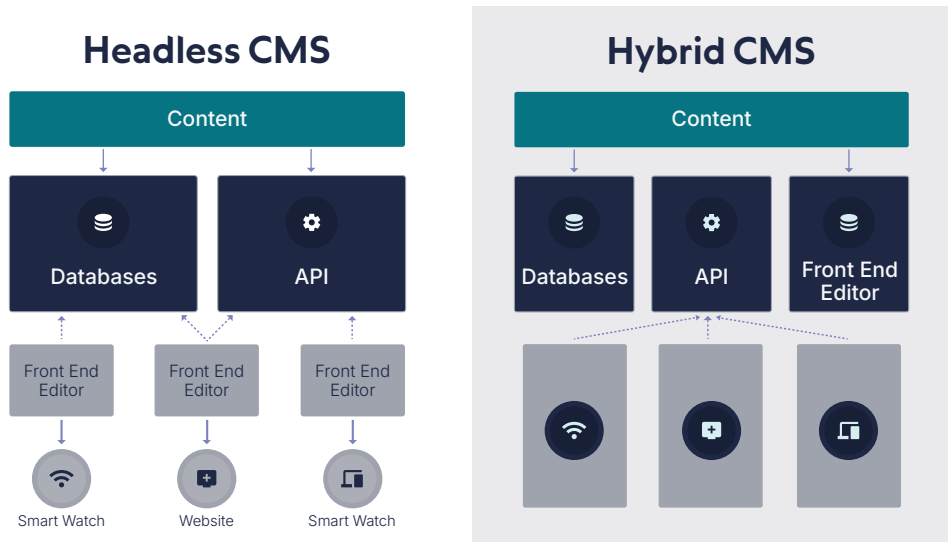
Future Proofing

	Yes	No	Future
AI & Machine Learning: Will your business benefit from AI-powered features like chatbots, predictive content, or machine learning analytics?			
IoT & Emerging Technologies: Does the platform need to support integrations with Internet of Things (IoT) devices or other emerging tech?			
Ongoing Support & Community: Does the platform have a strong support community or offer professional support packages for future scalability and growth?			

How to Choose the Right CMS For Your Business

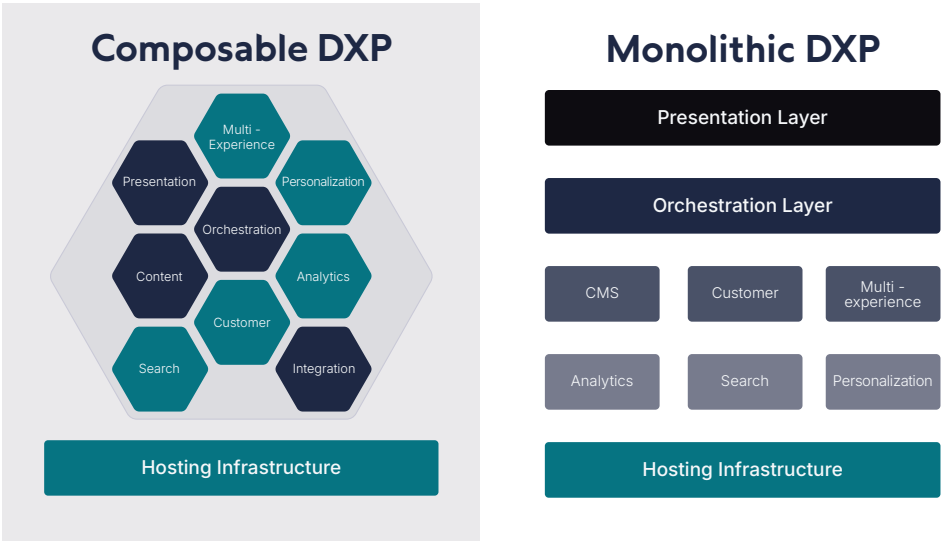
When selecting a CMS or DXP, marketers today have several options, each suited to different organizational needs and technical preferences:

Headless Vs. Hybrid



Headless Strengths	Hybrid Strengths
Flexible content distribution across various digital channels.	Combines intuitive content authoring with robust omnichannel content delivery.
Enhanced agility and speed to market due to decoupled architecture.	Integrates seamlessly with a variety of marketing tools and analytics.

Composable Vs. Monolithic



Composable Strengths:	Monolithic Strengths:
Modular architecture allows rapid customization and scalability.	Enables marketers to easily integrate best-of-breed technologies.
Unified solution simplifying content management with fewer integrations required.	Typically offers straightforward, out-of-the-box functionality ideal for simpler use cases.

Open Source Vs. Proprietary

Open-Source CMS

- Anyone can view the source code and modify to their needs
- Developers can contribute features in form of plugins and themes
- Often low-cost or free
- No one is "owning" the platform itself nor its security
- Support available from other users and in online forums
- Self initiation of vulnerability checks in code
- Common target for malicious hackers to find vulnerabilities

Proprietary CMS

- Source is not accessible by users but provider handles the backend for you
- Unique solutions for business needs and little options for plugins and themes
- Licensing fees
- Vendor may have its own security testing of products
- Central support from vendor
- Security patch releases to fix vulnerabilities
- Not as commonly hacked but still can be exploited

Open Source Strengths	Proprietary Strengths
• Extensive community support and collaboration.	• Reliable support and frequent updates managed directly by the vendor.
• Highly customizable with broad plugin ecosystems and transparency.	• Often optimized for enterprise-level security, compliance, and performance.

Choosing the best approach depends on your organization's specific needs, digital strategy, and technical capabilities.



How to Choose a CMS Webinar
Watch on-demand as SilverTech's director of engineering walks you through the pros and cons of various content management options.

Creating a CMS Vendor Shortlist

SilverTech has been helping marketers select the right CMS solutions for over 30 years. We typically recommend narrowing your list to 2-3 vendors based on your specific business requirements, CMS preferences, and long-term goals. Our team can help you evaluate solutions, coordinate platform demos, look at hosting options, and even support licensing negotiations.

SilverTech has formed strong partnerships with some of the world's leading Content Management Solutions and Digital Experience Platforms. Here are just a few of the vendors we partner with:



Contact a CMS Expert Today

If you'd like any guidance during this process, schedule a conversation with one of our CMS experts today.

5

Planning the Website Redesign

Website Planning Stages

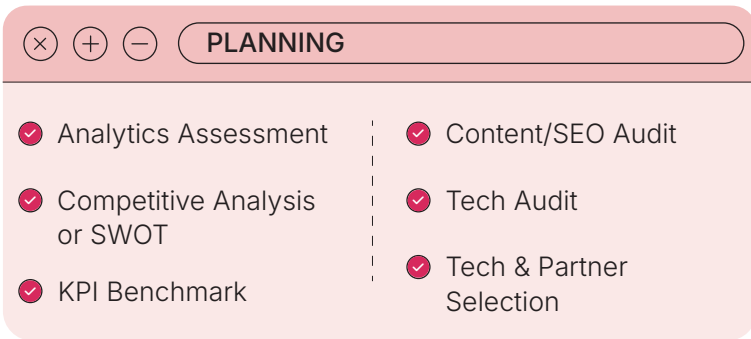
Develop an Effective Website Strategy

SEO Strategy

Content Modeling and Migration Strategy

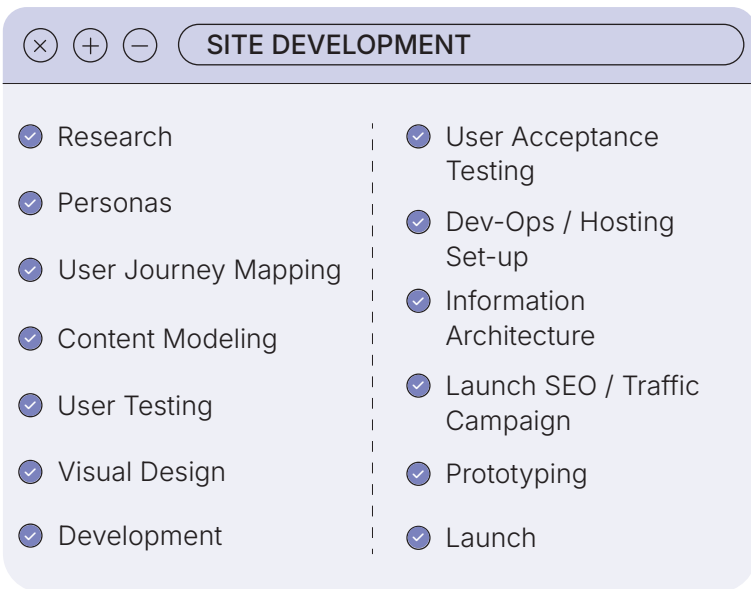
Your New Website is Coming—What Should You Be Doing in the Meantime?

While your agency builds, your marketing team should be optimizing, planning, and preparing for a high-impact launch.



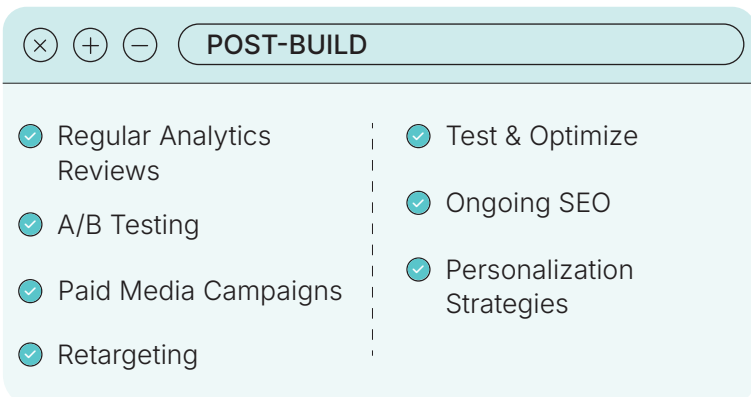
Assess & Benchmark

It's often underestimated how much time the pre-planning stage can take. Selecting the right technology partners and agency partners can be time-consuming if your organization needs to undergo an RFP process. There are ways to speed up this process and/or complete each simultaneously with the help of the right, experienced partner.



Design & Build

If you are just switching to Content Management Solutions but not redesigning your website or overhauling your content, you may be able to skip some of the steps in this phase. However, beware of the 'lift and shift' because with modern CMS content may need to be organized much differently than your current solution. It may be that a lift and shift could end up costing the same as a complete revamp. The performance gains that you can get from a revamp could be significant.



Drive Traffic & Optimize

Never build a website and 'set it and forget it' because it would be throwing your investment down the drain. Find proactive ways to drive traffic to your site and increase conversions - tie web performance back to your business goals. Ask your digital partner how to attribute website visitors and engagement to achieving your business goals. Improving website performance does not happen passively. Develop a strategy to continue to get returns and results from your investment.

Developing an Effective Website Strategy

Developing an effective website strategy and user experience (UX) requires clear objectives, thorough research, and strategic planning. Follow these key steps to ensure user-centric content and an excellent digital experience:

Develop Goals for the New Site

Articulate and document your goals for the new website. What do you want it to accomplish? How will you measure success? Make sure that you can easily tie your web goals back to business priorities. This will help you

Know Your Audience

Identify and deeply understand your target audience. Make sure you consider your internal audiences as well as the needs of your external audiences. You want a positive online experience for your target audience(s) but you also want to make sure your internal business users can easily maintain and update the website. Conduct market research using analytics, surveys, and interviews to gather insights into user preferences, behaviors, and pain points.

Develop Personas

Create user personas representing typical audience or user segments. Include demographics, motivations, challenges, goals, and behaviors. Personas guide content relevance, tone, and messaging, ensuring alignment with audience expectations.

Map the Customer Journey

Document and break down each step users take from initial awareness to post-purchase support or from entry to conversion. Identify interaction points and content needs at each stage. Understand how users transition between channels (e.g., social media, email, search), recognizing their unique expectations and content requirements.

Prioritize User Experience (UX)

Ensure easy navigation, readability, quick load times, mobile compatibility, and clear calls-to-action (CTAs). Good UX reduces friction, increases engagement, and positively impacts conversions.

Create a Sitemap

Develop a clear and logical site map outlining the website structure. Organize content intuitively based on user needs, tasks, and journey progression. Make sure you spend time to evaluate and test navigation organization and labeling. This enhances discover-ability, SEO, and findability.

Develop Wireframes/Prototypes

Create simple visual blueprints (wireframes) that outline the arrangement of content, features, and navigation. Or try prototypes that allow stakeholders and users to interact with a near-final experience, ensuring alignment, identifying overlooked issues, and validating strategic decisions.

Conduct User Testing

Engage real users to test website navigation, content clarity, and functionality. Observe interactions, record feedback, and identify pain points. Iterative testing helps refine the UX and ensure content effectiveness.



[See How User Testing Had a Positive Impact on F&M Bank's New Website Launch](#)

Create Responsive and Compliant Website Design Mock-ups

Create visual mockups by selecting colors, typography, imagery, and UI elements that reflect your brand identity. Establish a clear visual hierarchy to direct user attention effectively and ensure your design is responsive across various devices. This step is essential because it shapes user perception, provides clarity for developers, and guarantees a cohesive, engaging, and user-friendly website experience. Don't forget to ensure your website adheres to WCAG 2.2 guidelines so that it is accessible to those with disabilities.

Iterate Based on Feedback

Analyze insights from user testing to make necessary adjustments. Continuously refine based on real-world user responses. It is typically much easier to make modifications to your strategy and execution prior to development and CMS implementation. Although CMS solutions are designed to allow you to easily modify content and even your strategy as you go, it is usually more time consuming than if you spend some time doing strategic planning up front. Optimizations will always be needed as you go and that is completely fine.

SEO STRATEGY

Developing an SEO (Search Engine Optimization) strategy is critical to the success of your website because it directly impacts your site's visibility, user engagement, and overall business objectives. By strategically optimizing your website for search engines, you ensure your content is discoverable by your target audience, thereby increasing organic traffic, brand credibility, and competitive advantage.

i SEO isn't set-it-and-forget-it—it's adapt or disappear



AI is reshaping results—will your strategy keep pace?



Beyond the Search Bar: Targeting the Modern Customer

Watch our webinar to learn about the importance of search engine marketing (SEM), how digital advertising has changed, and valuable next steps for your strategy.

Content Modeling & Migration Strategy

Switching to a new website CMS requires careful planning. The following instructions will guide you through the essential steps, ensuring a smooth transition and effective use of your resources:

Plan Adequate Time and Resources

- Expect the migration process to require significant time and internal resources
- Clearly define team responsibilities and timelines to ensure efficient workflow

Perform a Content Audit

- Conduct a comprehensive audit of your existing content
- Categorize all content into three clear groups

Keep:

Valuable, relevant & performing well.

Update:

Potentially useful but requires revision for accuracy or engagement.

Discard:

Outdated, irrelevant, or poor-performing content.

Map Old Content to New Site Architecture

- Establish a clear content structure for your new platform, aligning it to user and business goals
- Map content from your audit directly to this new architecture, ensuring logical flow and easy navigation
- Document redirects for content URLs that change, to maintain SEO value

Leveraging Content Modeling

Use content modeling to structure your content effectively, benefiting both external and internal users:

Internal Users:

Enables efficient content management, facilitates collaboration, and simplifies content creation workflows.

External Users:

Improves user experience through structured, easily navigable content.

Consider Platform Type

Content modeling and preparation will vary depending on your chosen CMS type:

Headless CMS	Hybrid CMS
Requires detailed content modeling for maximum flexibility and reuse.	Balances structured content with ease-of-use features common to traditional platforms.
Prepare content in modular formats that can be easily integrated across multiple channels, such as web, mobile, or IoT devices.	Content modeling should facilitate straightforward editing, allowing marketers to easily preview and publish, while maintaining content structure for flexible use.



Important tip

Evaluate and Prepare Your Content With Every CMS Switch:
Although it may be tempting to do a 'lift and shift' which means just porting over your current content to the new CMS as-is thinking that it will save time and money, you may want to get the advice of your agency because a 'lift and shift' can limit your growth and cost more in the long run.

Content Migration

After completing your content audit, you’re ready for the critical next phase: Preparing your content for migration. Proper preparation ensures a seamless transition to your new CMS and maintains your site’s SEO and user experience.

Steps to prepare your content

Organize and Prioritize Content:

- Categorize content clearly (e.g., blogs, product pages, landing pages)
- Identify high-value content that needs priority migration

Standardize and Optimize Metadata:

- Ensure all content pages have properly formatted meta titles, descriptions, and Open Graph data
- Create templates or standards for consistent tagging across your content

Clean Up and Enhance Content:

- Fix any identified issues during your audit (broken links, outdated info, duplicated content)
- Optimize content structure for improved readability and SEO

Special Considerations for Sites with User Data:	Special Considerations for E-commerce Sites:
For sites that include sensitive user data—such as account information, order history, and other personalized details—it’s crucial to securely migrate this content. Your implementation partner can guide you on best practices, including using secure, compliant migration techniques and specialized data scripts that safely transfer user information to your new platform.	If your site is e-commerce focused with extensive product data, SKUs, descriptions, and product imagery, your implementation partner can develop customized scripts to automate importing this information directly into your new CMS, saving significant time and reducing errors from manual re-entry, or IoT devices.

Leverage Your Web Implementation Partner

Working closely with your web implementation partner can significantly simplify your migration. Many partners offer specialized migration tools designed to:

- Automatically capture and export key content elements (text, images, metadata)
- Ensure accurate tagging and mapping of content fields in your new CMS.
- Validate completeness of meta information and Open Graph data during export

Your partner's expertise helps prevent common pitfalls such as lost SEO value, content omissions, or metadata inconsistencies.

Final Tips for Smooth Migration

- **Backup your original content:** In case you need to reference or revert
- **Create a migration schedule:** Clearly communicating deadlines and responsibilities
- **Test thoroughly:** Conduct extensive testing in a staging environment before the live migration

By following these steps and leveraging your partner's migration tools, you'll be well-positioned for a successful and efficient transition to your new CMS.

6

Implementation Steps

Establishing a Project Plan
Working With an Agency Partner
Training Your Team
Launch Plan

Establishing a Project Plan

A comprehensive project plan includes clear objectives, timelines, key milestones, required deliverables, resource allocation, and necessary communication and management tools. Additionally, establishing specific roles and responsibilities for both internal and external teams is crucial for successful execution.

Every website project will have its own unique project plan established by you or your designated project manager/team. Typically the project is broken down into key milestones. A few you may want to consider include:

Key Milestones

PHASE 1



Planning & Discovery

- Project kickoff meeting
- Review of analysis or audits (analytics, competitor, technical, etc.)
- Finalized requirements document
- User personas and journey maps

PHASE 2



Design

- Wireframes & mock-ups
- Visual design prototypes
- Approval of final website design

PHASE 3



PHASE 4



PHASE 5



PHASE 6



Content Development

- Website content audit
- Website content creation
- SEO keyword research and optimization plan

Development

- Technical architecture diagram (if needed)
- Responsive front-end development
- CMS implementation and integrations
- Content and data migration
- Initial website QA and testing

Testing & Quality Assurance

- Cross-browser and mobile compatibility testing
- Functional and security testing
- Final revisions

Launch & Post-Launch Optimizations & Support

- Website launch
- Post-launch monitoring and support
- Documentation and training
- Website roadmap review and plan
- Support contract and ongoing optimizations

Working With an Agency Partner

Here’s a comprehensive checklist of important considerations when selecting a digital agency partner for your website design and development project:

Experience & Proven Capabilites

	Years of experience in website design and development.
	Portfolio showcasing successful projects similar to yours.
	Client references and testimonials demonstrating successful outcomes.
	Awards, certifications, or industry recognition.

Technical Expertise & Specialist Resources

	Number and qualifications of dedicated technical specialists and engineers.
	Specific experience with complex integrations (CRM, ERP, payment gateways, APIs).
	Track record with troubleshooting, problem-solving, and addressing challenging technical requirements.
	Capability with security, performance optimization, and scalability.

Responsiveness & Communication

	Commitment to timely and transparent communication.
	Clear points of contact and availability of key team members.
	Typical response times to questions, concerns, and technical issues.
	Frequency and clarity of project updates and reporting.

Team Dynamics & Enjoyability

	Personal rapport and professionalism demonstrated in initial interactions.
	Positive team chemistry and willingness to collaborate.
	Company culture alignment and mutual respect.
	Testimonials specifically addressing ease and enjoyment of working with their team.

Methodology & Approach

	Clearly defined processes and project methodology (Agile, Scrum, Waterfall, or hybrid).
	Approach to project management, task tracking, and timelines.
	Strategy for quality assurance, testing, and launching websites.
	How they handle scope changes, roadblocks, and unforeseen issues.

Extensive Industry Knowledge

	Proven understanding and depth of knowledge in your specific industry.
	Ability to offer strategic insights, best practices, and trends within your sector.
	Case studies demonstrating their successful delivery of projects within your vertical.
	Awareness of industry-specific regulatory requirements or compliance standards.



[Why SilverTech is the Right Partner.](#)

Creativity & Innovation

	Demonstrated ability to offer innovative and creative solutions to digital challenges.
	Willingness to proactively suggest enhancements or new ideas that add value.
	Track record of innovative website features, designs, or functionalities in past projects.

Budget & Pricing Transparency

	Clearly articulated pricing structures with detailed breakdowns.
	Transparency around potential additional costs
	Fair balance between cost and the quality of work provided.

Post-Launch Support & Maintenance

	Availability of ongoing support, monitoring, and maintenance post-launch.
	Training or knowledge transfer procedures to support your internal team.

Scalability & Long-Term Partnership

	Ability to scale services as your organization grows or evolves.
	Commitment to building a long-term partnership, not just delivering a one-off project.
	Flexibility and adaptability to your evolving digital needs.

Using this checklist will help ensure that the agency you choose is not only technically competent but also the best cultural and strategic fit for your organization.

Training Your Team

It's always recommended to hire your CMS implementation partner to do training for your team. Even though the CMS vendor may have training videos and tutorials that will be helpful to watch, the training specific to the site that you had built, should come from the implementor. They have an intimate understanding not only of how the platform works out of the box, but also how it works with added customizations, templates, widgets, modules and integrations that may have been needed.

We always suggest getting pre-launch training and then also asking your partner to include refresher sessions every 3-6 months. This not only allows you to get familiar with the CMS basic functions first before trying to become an expert, it also allows you to include new team members to the training that you may have added post-launch.

Here is a sample list of things you may want to learn during training:

CMS Overview & Navigation

- Platform introduction and general navigation
- User roles and permissions
- Dashboard functionalities and insights

Content Creation & Editing

- Creating, editing, formatting, and publishing content (pages, posts, articles)
- Use of rich text editors, including handling images, videos, and embedded media
- Drafting, scheduling, and version control management

Media & Asset Management

- Uploading, organizing, tagging, and managing digital assets
- Media library best practices
- Image and video optimization

SEO & Metadata Management

- Managing metadata: page titles, descriptions, tags
- Best practices for URL structures and redirects
- Understanding SEO tools within the CMS
- Optimizing content for search engines and readability



Important tip

Don't forget to ask your trainer to go over who to call for any future troubleshooting or support that may be required. Also, depending on the host you use, make sure you understand how platform upgrades and updates will work.

Workflow & Approval Processes

- Understanding and managing content workflows
- Content approval and review processes
- Assigning and managing content tasks and collaboration

Analytics & Reporting

- Accessing built-in analytics and generating reports
- Interpreting analytics dashboards and key metrics
- Connecting external analytics tools (e.g., Google Analytics)

Templates & Modules

- Selecting, creating, and customizing templates
- Using reusable components, blocks, or modules
- Understanding the limitations and flexibility of the platform's design system

Personalization & Segmentation

- Creating personalized content experiences based on user segments
- Utilizing audience targeting and dynamic content features
- Testing and measuring the effectiveness of personalization efforts

Integration & Automation

- Integrating external tools (CRM, marketing automation, social media)
- Managing API connections or external plugins/extensions
- Utilizing built-in automation features (email triggers, notifications)

Accessibility & Compliance

- Accessibility best practices (e.g., WCAG compliance)
- Content accessibility guidelines (alt text, headings, captions, readability)
- Privacy compliance and data management (GDPR, CCPA)



[Learn more about web accessibility and designing your site to be ADA WCAG 2.2 compliant.](#)

Launch Plan

We highly recommend that you create a detailed launch plan that covers the hours up to and including the actual launch of your new site. Although most site launches go smoothly, it never hurts to be prepared and have a checklist handy to make sure you've covered all the bases. A launch list makes sure everyone is clear on the process and shared accountability of completing the steps required to cross the finish line. Every project is different, so this checklist will need to be tailored to your specific project as well as the resources you have available.

In your checklist for launch you should include items such as:

	Make sure analytics code is installed on site (exclude internal IP addresses)
	Call a content freeze
	Final Visual/UAT Check
	Code freeze
	Submit Site to Bing Webmaster Tools and Google Search Console
	Run the site through Google Search Console Core Web Vitals test
	Redirect old URLs to new URLs (where applicable) and set up 301 redirects
	Run a scan for broken links, missing metadata, 404 page errors, etc. You can use a program such as Screaming Frog or other url crawling tool to do this.
	Run a penetration scan
	Have IT change settings pointing test site to production
	Test new live site thoroughly, reviewing all pages, clicking links, testing forms, etc.

7

Hosting, Security & Compliance

Hosting Options
Security Requirements

Determine Where to Host Your New Website

When switching your CMS, one crucial decision is how you'll host your new platform. Hosting impacts website speed, reliability, scalability, security, and compliance. This guide outlines the primary hosting options, highlighting their advantages and drawbacks, along with key security considerations.

On-Premises Hosting

On-premises hosting means your CMS is housed on servers located within your own data center or physical business location.

Pros	Cons
• Full control: Complete authority over your hardware, software, and security protocols.	• High upfront investment: Significant initial costs for hardware, software, and infrastructure.
• Customization: Ability to tailor the environment precisely to your organization's specific needs.	• Ongoing maintenance: Requires dedicated IT staff to manage hardware, security updates, backups, and disaster recovery.
• Data locality: Ideal for businesses requiring strict control over data location and compliance.	• Limited scalability: Physical constraints make scaling challenging and slow compared to cloud alternatives.

Cloud Hosting (Azure or AWS)

Cloud hosting leverages third-party infrastructure such as Microsoft Azure or Amazon Web Services (AWS) to provide scalable and reliable hosting.

Pros	Cons
• Scalability: Easily scale resources up or down based on website traffic and business demands.	• Variable costs: Resource spikes can lead to unexpected costs without proper management.
• Reliability: High uptime, with built-in redundancy and automated backups.	• Complexity: Cloud environments can be complex and require specialized knowledge to configure and manage effectively.
• Cost efficiency: Pay-as-you-go pricing models reduce upfront investment and align costs with usage.	

Benefits of Hosting with a Digital Agency Partner

Choosing cloud hosting managed through the same digital agency partner that implemented your new website adds significant value:

- **Proactive Managed Services:** Digital agency partners have dedicated resources specialized in continuously monitoring, optimizing, and securing your cloud environment. They proactively manage patches, updates, security monitoring, and backups, ensuring peak performance and security.
- **Rapid Issue Resolution:** Hosting with the same partner who built or manages your website implementation means they possess detailed knowledge of your infrastructure and CMS configuration. This familiarity greatly accelerates troubleshooting and reduces downtime should issues arise.

Security Considerations

Ensuring your CMS environment is secure is essential, regardless of your hosting choice. Here are a few things we recommend:

Web Application Firewall (WAF)

Deploying a WAF protects your website from threats such as SQL injection, cross-site scripting (XSS), and DDoS attacks by filtering and monitoring HTTP traffic.

Backup and Recovery

Reliable backup and disaster recovery protocols should be automated and regularly tested. Secure off-site or cloud backups enable rapid restoration of data following hardware failures or cyber incidents.

SSL and Encryption

Implement SSL certificates to ensure data encryption during transmission, safeguarding sensitive user information and enhancing visitor trust.

Continuous Monitoring and Alerting

Real-time monitoring and alert systems help promptly detect anomalies or breaches. Effective threat detection mechanisms and regular security audits significantly reduce risks.

Compliance Considerations

Compliance with hosting standards, including SOC 2, ISO 27001, GDPR, HIPAA, or PCI-DSS, is essential to ensure data security, privacy, and regulatory adherence. Choosing a hosting provider or digital agency partner that maintains SOC 2 compliance indicates rigorous security, confidentiality, and availability practices are in place. SOC-compliant hosting ensures continuous auditing and adherence to strict security protocols, significantly reducing risk and demonstrating to stakeholders and customers your commitment to data protection.



[Learn About SilverTech's Hosting Options](#)
Don't Fall For the Cheapest Hosting Package.

Of course, you should compare offerings and price is always a factor, but make sure you compare apples to apples. Many options that are inexpensive mean shared environments and reactive versus proactive management which could leave you open to security vulnerabilities and unanticipated down time.

8 Post Launch Optimization

Post Launch Optimization

Once your new website is launched, there will still be work to do. Make sure you are setting the expectations internally that a website is an evolution and should always be something your team is working on. This will not only allow you to keep pace with the changes in your industry and in digital technology in general, but it will also allow you to keep up with your changing customer expectations. Not only that, but, if you don't consistently and strategically evolve your website, your web investment will not pay off as quickly as it could and you may lose your competitive edge.



Important tip

Make sure you allocate a budget to monthly or quarterly website optimizations and updates in order to get the most ROI from your website investment. This industry is in a state of constant change and it is critical to be proactive with site updates in order to meet your goals and outperform the competition.

Here are a few smart examples of ways you can leverage that post-launch budget and continue to accelerate your digital maturity and performance:

Targeted Digital Advertising

- Implement pay-per-click (PPC), display advertising, and remarketing campaigns
- Continuously optimize digital campaigns based on analytics insights

Social Media Marketing:

- Develop engaging social content and campaigns to drive site visits
- Leverage social advertising, influencer partnerships, and user-generated content

Email Marketing Integration:

- Design strategic email campaigns linking to targeted landing pages
- Monitor and optimize email campaigns to maximize conversion rates

Content Marketing & Blogging:

- Create and distribute valuable content (blogs, guides, whitepapers)
- Promote content strategically through SEO, social media, and email

Conversion Rate Optimization (CRO):

- Continuously test and optimize landing pages and CTAs to improve user journeys and increase conversions from campaign traffic

Core Web Vitals & Load Speed

- Analyze and optimize page loading speed
- Improve Largest Contentful Paint (LCP), First Input Delay (FID), and Cumulative Layout Shift (CLS)
- Compress images, optimize videos, and minify CSS and JavaScript

SEO Performance

- Monitor and optimize site structure and metadata post-launch
- Regularly update XML sitemaps and ensure Google Search Console integration is active

Mobile Optimization

- Regular audits and enhancements to responsive design
- Optimize touch targets, responsive elements, and mobile-specific content

CMS Usability Testing

- Conduct ongoing usability audits with client users to identify workflow bottlenecks
- Gather feedback from content editors to refine the user experience

User Roles & Permissions

- Evaluate and optimize user role definitions, access controls, and workflows
- Ensure smooth content publishing and approval processes

Content Management Workflow Automation

- Implement automated workflows for content publishing, review, and scheduling
- Introduce integrations with third-party tools (CRM, marketing automation, social media) to enhance workflow efficiency

Editorial Experience Optimization

- Evaluate and optimize user role definitions, access controls, and workflows
- Ensure smooth content publishing and approval processes

Analytics Integration & Reporting

- Regularly monitor and optimize CMS integrations with Google Analytics, GTM, Sitefinity Insights or similar platforms
- Establish automated, actionable reporting within the CMS dashboard to track content performance metrics

Personalization & A/B Testing

- Implement built-in personalization capabilities to deliver targeted content experiences
- Continuously conduct A/B testing and multivariate experiments directly within the CMS to optimize content for conversions and engagement

CMS Performance Benchmarking

- Regularly benchmark CMS backend performance, database responsiveness, and administrative interface speed
- Address inefficiencies in database structure, indexing, and query optimization

Search & Findability Improvements

- Continuously enhance the CMS internal site search functionality to improve content discoverability
- Optimize metadata and tagging systems to streamline internal content organization and retrieval

Training & Documentation

- Provide ongoing training, resources, and documentation to the client's content team
- Maintain up-to-date documentation and self-service resources for CMS users

Editorial Experience Optimization

- Evaluate and optimize user role definitions, access controls, and workflows
- Ensure smooth content publishing and approval processes

Toolkit & Resources

Additional Resources

[Top SEO Trends You Can't Afford to Miss](#)

[Beginner's Guide to Personalization](#)

[Choosing the Right Web Platform in Today's Competitive Environment](#)

[Mapping Customer Success: How to Create Modern User Journey Maps](#)

[Why SilverTech is the Right CMS Implementation Partner](#)

Conclusion & Next Steps

Next Step

Switching your CMS is no small feat, nor is it a small investment. Ensure you are working with an experienced implementation partner to help you through each step of the process that is included in this kit. Although you can work with your internal team, a partner can save you lots of time and money through lessons learned, tips and tricks, deep vendor knowledge and specific industry expertise. SilverTech has been working with companies to help consult and advise on CMS vendor fit, CMS selection, migration, and implementation for over thirty years. We'd be happy to help guide you through a CMS switch process so that your business achieves maximum value for its investment. **Reach out** to speak to a CMS Switch expert today.



Get a professional CMS
assessment today with SilverTech

About SilverTech

SilverTech is a global digital experience consultancy focused on helping enterprise and mid-market organizations achieve growth and transformation by modernizing their digital ecosystems and accelerating long-term business performance. The firm brings together strategy, user experience, technology, marketing, data, and applied AI to deliver measurable outcomes through a collaborative, insight-driven approach.

With deep expertise spanning financial services, healthcare, consumer goods, manufacturing, and government, SilverTech connects strategy, experience, and technology to solve complex customer challenges and enable sustained growth through continuous optimization.

SilverTech partners with leading platforms including Contentstack, Sitecore, Progress Sitefinity, Kentico, Microsoft, and Salesforce to deliver scalable, secure, future-ready solutions aligned to each client’s growth strategy.

Founded in 1996, SilverTech supports global brands such as General Mills, Charles Schwab, Allison Transmission, UGG, and HOKA. With offices in New Hampshire, Indiana, and Ohio, the firm serves as a trusted partner to organizations pursuing innovation, modernization, and lasting growth.

Contact Us for Help Getting Started

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