

# Information Management & the Migration Opportunity

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At some time in the career of every intranet and web manager a project will require content to be migrated from one application to another. At present many of these projects involve a migration from SharePoint SP2010 to SharePoint SP2013, but there are also CMS migrations into SharePoint and collaboration migrations into Google Drive. The bad news about migration projects is that they are extremely difficult to manage, and the good news is that they require a high degree of commitment to good information management strategy that will be of considerable future benefit to the organisation.

## The bad news first

It is impossible to forecast how long a migration project will take and what resources are required. Full stop! The reason for this situation is that managers have no idea how much content resides in the application, especially in situations where the CMS has just been upgraded without a requirement to migrate content. There are three categories of content to be considered:

- Content that is redundant, obsolete or trivial (ROT) and can be removed from the active system even if (for no good reason at all) it is retained on a server
- Content that needs to be migrated to the new application and meets requirements for content quality
- Content that needs to be migrated but because it fails to meet the content quality standards additional work needs to be carried out
- Content that does not exist at present but needs to be written for the new application. A good example would be new landing pages

I'll come back to the topic of content quality in the good news section. For now I'd like to focus on the 'needs' issue. Who is going to make the decision? This immediately gets us into the requirement to estimate the scale of the content migration. It is very difficult to write rules that say things like:

- All content older than 2010 can be deleted
- Any project files that have not been accessed for three years can be discarded
- Anything that refers to applications that are not current (e.g. the employee self-service portal) can be discarded

Very quickly the people involved in making the selection will make cogent reasons for keeping some or even all of the content in these and other categories.

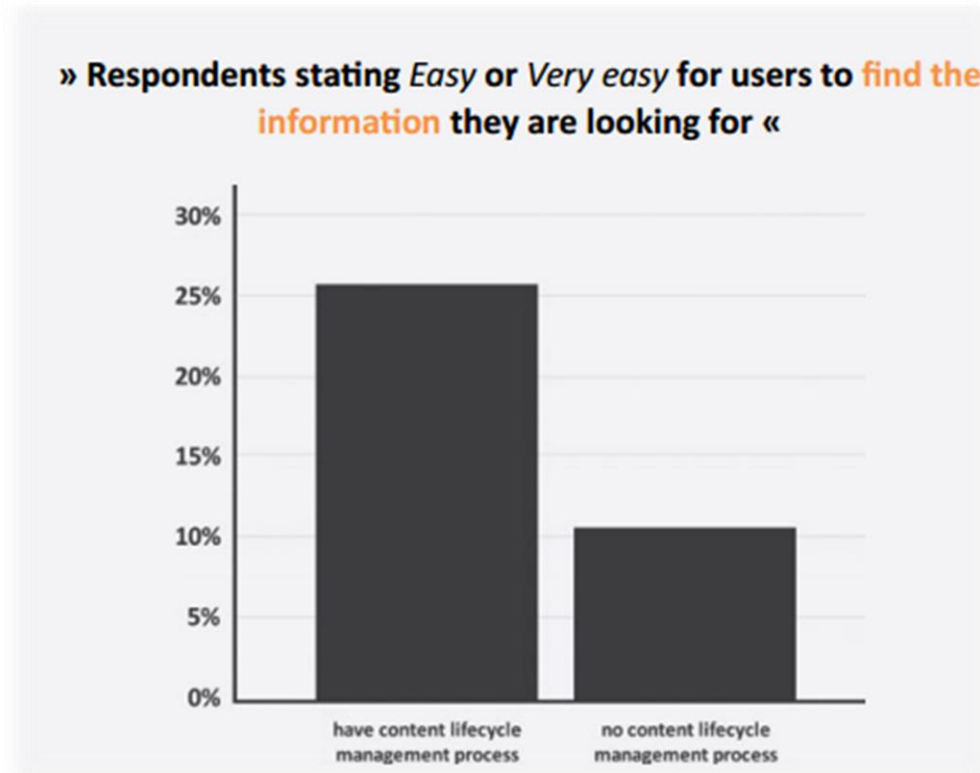
Now, because it is so difficult to write a set of rules, using migration-support software can only at best be a partial solution. These software applications can be of use in doing some bulk migration of well-defined content (all news items) so long as the meta-tags are consistent and the content is going into some well-defined buckets in the new application. Do not believe any one in IT that says that the process is easily handled by Software X. Ask them if they were the project lead when they used it in the past. If they were the lead then ask how far the final date of migration was away from the planned date. If they were not, ignore any forecast. In the end the migration team are going to have to touch every single item of content, even if very briefly. A good rule of thumb is that each content item is going to take 15 minutes to migrate, from the time of the initial assessment through to the high-quality version of the content being available on the new site.

The element that is always under-estimated is the time that people will need to spend reviewing and rewriting. Their managers may have a problem accepting that some of their best team members are going to spend quite a substantial amount of time on the process. If that time cannot be allocated at the optimum period then the entire project schedule could be impacted.

Another issue to cover is that the internal links will need to be reviewed link-by-link as the architecture may well have changed and so will the URL structure. This is often overlooked, especially by designers who have the notion that the way that people will navigate across an intranet or web site in practice will be just the same as they have done so in the wireframe tests. This notion excludes the way in which search complements the information architecture and links provide a blend of short cuts and expertise - if you are looking at this document then you may also want to look at these documents.

### **The good news**

There is no better justification for setting out content quality guidelines based on an information management strategy than a migration project. By having guidelines related to content quality, including metadata quality, the process of review will be speeded up, the performance of the new application will be better in every dimension (especially search) and the process of any future migration (and there will be one) will be a great deal easier.



This is a chart from the Findwise 2014 [Enterprise Findability](#) survey and it shows that in organisations where there was a content lifecycle management process search performance improved by around 150%. That is a very convincing ROI for the work involved in enhancing content quality. For me the six main elements of a content quality strategy are the following:

- Corporate support for an information management policy, an information strategy, and for the training and support of content authors. Content creation and curation must not be seen as a hobby that people do in their spare time
- Titles that summarise the core content of an item. These ease both browsing and search performance
- A date when the content was published and a date when it will be reviewed to assess whether it is still fit for purpose
- The name of the person responsible for the content, and who therefore can be contacted by staff with a query about its validity. When this person leaves the organisation, or moves on to a new position, it has to be the duty of their manager to not only find a replacement but also ensure that the name of this person is added to all the appropriate content items
- The role and responsibilities of an employee for content authoring and curation have to be included in their job description and discussed at performance reviews
- Consistent metadata has to be applied. In my view it is better to have consistent metadata than to have a very complex schema on (say) corporate documents but nothing comparable for other content

There is quite a lot of work to do in establishing these five elements, so it is important to start as soon as is possible and not leave it until the start of the technical elements of a migration project.

## Resources

The definitive guide on content migration comes from David Hobbs, a migration consultant based in Washington DC. He has published a [very good handbook](#) on the subject.

Some other resources on content audits and migration include:

- <http://www.cmswire.com/cms/information-management/6-key-considerations-in-content-migration-022685.php>
- <http://www.4syllables.com.au/resources/templates-checklists/content-audits/>
- [http://maadmob.com.au/resources/content\\_inventory](http://maadmob.com.au/resources/content_inventory)
- <http://www.content-insight.com/resources/content-inventory-and-audit-articles/what-content-inventory/>
- <http://www.cmswire.com/cms/information-management/plan-for-migration-success-with-search-028046.php>
- <http://bainsight.com/gallery-categories/white-papers-gallery/improving-search-fast-using-a-search-first-migration-strategy-to-sharepont-2013>