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HubSpot CMS Migration Checklist

Pre Migration - Technical Preparation

	Task	Notes
☑	Double-check URL structure, meta data, heading and body content	
☑	Double-check JavaScript, CSS, and image files, XML sitemaps, HTML sitemaps	
☑	Double-check load time and traffic analytics	
☑	AMP for HubSpot blogs	
☑	Mobile setup	
☑	Custom 404 pages	
☑	Double-check google crawlability	
☑	After crawlability has been verified, block access to "under construction" site with robots.txt file, password protection, and/or noindex tag	
☑	Verify DNS security settings and TTL values	
☑	Follow Web Content Accessibility Guidelines	
☑	If migration includes redesigned pages, scope wireframe drafts	

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Pre Migration - Technical Preparation

	Task	Notes
✅	Analyze which pages and ideas perform better in terms of pageviews, conversions, and influenced revenue	
✅	Prioritize higher performing pages and ideas	
✅	Clean up testing pages or developer assets created during the process	
✅	Double-check that modules are built for non-technical users to easily use	
✅	Set up and develop all system templates	
✅	Use intuitive naming conventions for all assets	
✅	Set up a test environment to audit the migration and make sure the client is satisfied with it	
✅	Undergo a thorough QA process	
✅	Make a copy of the entire old site on a new server on a separate domain/subdomain for easy comparison later	
✅	Work with strategist to make sure keyword rank and traffic metrics are being monitored	
✅	If URL structure cannot be migrated as is, ensure 301 redirects are set up	
✅	Define all theme settings	

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Pre Migration - Technical Preparation

Task	Notes
✅ Redirect both pages and domains if you're changing the website URL	
✅ Update existing redirects' destination to the new URL structure	
✅ Update URLs across marketing channels: Google, Facebook, Linkedin, Twitter, Email Signatures, newsletters, transactional email, and anywhere else a URL may live	
✅ Test all ideas in a test portal and ensure access is limited via whitelisted IP's or password protection	
✅ Address UX issues hat could impact the site's conversion rate	
✅ Is the site usable from different mobile phones and tablets?	
✅ Is the content readable and accessible	
✅ Verify fonts, sizes, and word wrap	
✅ Are ads and popups intrusive?	
✅ Do touch elements work properly	

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CMS Migration Launch Best Practices

	Task	Notes
☑	Are there any limitations that could prevent search engines from indexing the site and updating the DNS?	
☑	Select a low traffic window for launch	
☑	Is the robots.txt file correctly configured?	
☑	Are all redirects, particularly for top pages, functioning as expected? This may take a while to check, but it's worth the effort.	
☑	Are canonical tags set up correctly?	
☑	Are the top pages' server responses what they should be?	
☑	Are there any noindex/nofollow directives that may have been set up unintentionally?	

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Post-CMS Migration Review

	Task	Notes
☑	Check top performing pages, the robots.txt file, redirects, SEO data, and XML sitemaps.	
☑	Use HubSpot reporting tools to track traffic analytics.	
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☑	Cancel your old hosting once redirects are verified	
☑	Check on all necessary tracking codes.	
☑	Check on backlinks on external sources	
☑	Resolve confusion between testing environment and live site.	
☑	For HubSpot, make sure Forms and Meeting links are correctly embedded	
☑	Activate any security features needed and ensure that other integrations the client needs are live and functioning.	
☑	Do post-migration site metrics match pre-migration averages?	
☑	Check backlinks and redirects	
☑	Check HubSpot analytics tools for organic traffic	

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Post-CMS Migration Review

	Task	Notes
✅	Check on backlinks on external sources	
✅	Undiagnosed or new UX issues	
✅	404 URL errors	
✅	Load speed (server speed, site speed, etc.)	
✅	Check theme	

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Need help?

If you need help with your migration or just some advice book a 15 minute call with a CMS expert today

Book A Call