CMS Implementation Checklist

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# Tasks:

☐ **Build An Oversight Committee**

☐ **Upper Management**

*At least one high-level manager to give you executive input and buy-in.*

☐ **Unit Managers**

*For departmental input and prioritization.*

☐ **Information Technology**

*Guidance for high-level technical decisions.*

☐ **Vendor Management**

*Committee member who communicates directly with any related vendors.*

☐ **Impartial Party**

*Someone who is not directly involved with implementation, for improved perspective.*

☐ **Customer Advocate**

*Represents customer concerns in strategic decisions.*

☐ **Legal Counsel**

*Helps to make sure that your new site does not set you up for legal problems.*

☐ **Assemble Your Implementation Team**

☐ **Project Manager**

*A team leader who can talk to various parties and drive the project.*

☐ **IT. Key IT staff members who are vital to resolving technical issues and integrating systems.**

☐ **Content Managers**

*Business unit experts who will develop the individual CMS pages and posts.*

☐ **Web Designer**

*Someone with an eye for detail and aesthetics to make your website appealing and user-friendly.*

☐ **Vendor**

*Maintain regular contact with your CMS vendor contact for training and guidance.*

☐ **Build Your Project Plan**

☐ **Structure**

*How will you run your project? Waterfall? Scrum?*

☐ **Scope**

*Determine the overall goals of your CMS implementation project.*

☐ **Backlog**

*Build a catalog of all known tasks that need to be completed.*

☐ **Estimate**

*Develop a rough idea of how long each task will require to complete.*

☐ **Risk assessment**

*Determine which tasks are foundational to success and prioritize them first.*

☐ **Prioritize**

*Determine the relative importance and risk of remaining tasks.*

☐ **Organize**

*Group tasks to be done by related functionality and to fit into your implementation time blocks.*

☐ **Communication**

*Decide how and when you will communicate with project stakeholders.*

☐ **Progress tracking**

*Agree on mechanisms for tracking project progress.*

☐ **Develop Your CMS Implementation Schedule**

☐ **Target**

*When do you need to have the entire project completed?*

☐ **Start**

*When can work on CMS implementation begin?*

☐ **Milestones**

*What major tasks do you need to have completed by which dates to stay on track?*

☐ **Fill the calendar**

*Complete your schedule with grouped, prioritized tasks until all available time is filled.*

☐ **Re-evaluate**

*Are there tasks that did not fit into your schedule? Do you need to re-prioritize?*

☐ **Publish**

*Make the implementation schedule available to all members of the implementation team and oversight committee.*

☐ **Develop Your Content Management Policy**

☐ **Access**

*Who will be allowed to create content on the new site?*

☐ **Design**

*What design standards with content creators need to follow?*

☐ **Appropriate use**

*What type of content is appropriate (or not appropriate) for the site?*

☐ **Images**

*What types and sources of images will be used on your site?*

☐ **Social media**

*Will you include social media components in your site content?*

☐ **Deliver the Content Management System Implementation**

☐ **Build**

*Complete the foundational, high-risk tasks.*

☐ **Evaluate**

*Does the foundation function as you expected?*

☐ **Implement features**

*Build on the CMS foundation by completing other tasks in priority order.*

☐ **Test**

*Does your site perform correctly, and does it look the way you want?*

☐ **Track progress**

*Meet regularly with the implementation team to make sure that you are on track.*

☐ **Report**

*Meet regularly with the oversight committee to report progress and get feedback.*

☐ **Refine**

*Adjust your project plan as organizational priorities shift.*

☐ **Policy**

*Review and adjust content policy as your site takes shape.*

☐ **Train**

*Engage administrative users to make sure they can use the new CMS efficiently.*