

# CMS Implementation Checklist

By Adam Hughes

- 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.