

THE CMS ESCAPE KIT

Replatforming Runbook & Timeline

How to break free from a CMS that's holding your team back. On time, on budget, and without setting your search traffic on fire.

Most replatforms fail. Not because the team picks the wrong platform, but because of decisions made before the engineering starts. This runbook walks the decisions that matter, the pre-flight that protects your SEO, and the timeline that keeps it all honest. Pair it with the business-case spreadsheet in this kit.

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PART ONE

Before you decide: should you even move?

Replatforming is one of the few marketing projects where the default outcome is failure. Late, over budget, and shipping something nobody's proud of. So the first job isn't choosing a platform. It's deciding whether to move at all, and only moving when three things are true at once.

- 1. The cost of staying clearly beats the cost of moving.** Use the business-case spreadsheet. If the annual saving doesn't dwarf the one-off move cost, the pain isn't bad enough yet. Wait, and revisit.
- 2. The after-state is genuinely faster.** If pages will still take four days and simple edits will still need a developer, you're buying a new logo, not a new capability. Don't move to move. Move to ship faster.
- 3. You can freeze the scope.** This is the one everyone underestimates. If you can't get the organisation to agree what's in and hold the line, the project will grow until it collapses. No scope freeze, no migration.

If any one of those is missing, the honest answer is not yet. That's a valid outcome, and a cheaper one than a failed migration.

PART TWO

The four ways replatforms fail

None of these are technical. All of them are about what you decide before anyone writes code. If you have been through a bad migration, you will recognise at least one. Most projects hit two or three.

01 Scope grows during the build

Kicks off clean: 80 pages, 6 templates. Three months in, someone adds the campaign microsite, then a comparison feature, then a partner portal. Each ask sounds reasonable; together they double the work and sink the date.

→ **The guardrail: freeze scope at kickoff. Every change after that gets a new launch date and a cost attached, visibly. No quick additions. The team's job is to defend the original scope, not absorb new asks silently.**

02 The platform is picked before anyone knows what's needed

Most selections start with three vendor demos and a feature spreadsheet. The team buys what looked impressive, then discovers six months in that it's the wrong tool for the job they actually have.

→ **The guardrail: write a one-page needs brief before you take a single demo. What must marketing do on this CMS every week for three years? What pages, what workflow, what integrations, who edits? Most of the decision falls out of that page.**

03 No plan to protect the search traffic

The most feared failure, and the most preventable. URLs change, redirects get missed, structured data gets dropped, and six months of traffic evaporates. Nobody signed up to be the person who broke the SEO.

→ **The guardrail: a one-to-one 301 redirect map for every URL, on-page and schema preserved, and a measured before-and-after. The full pre-flight is in Part Three. This is where migrations are won or lost.**

04 No single owner who can freeze a decision

When every decision needs a committee, nothing gets frozen, and a project that can't freeze can't finish. Decisions reopen, scope drifts, and the launch date becomes a rumour.

→ **The guardrail: one named owner with the authority to say this is decided. Not a committee. One person who holds scope, calls the trade-offs, and protects the date.**

PART THREE

The migration risk runbook

This is the pre-flight that protects your traffic. Work it top to bottom. The order matters: you baseline before you touch anything, you map every URL before you build, and you do not launch until the staging crawl is clean.

Baseline first (before anything changes)

- [] **Record the numbers you'll be judged on.** Organic traffic, top 50 landing pages, keyword rankings, conversions, and Core Web Vitals. Screenshot Search Console. You cannot prove the move worked if you didn't capture the before.
- [] **Full crawl of the current site.** Export every live URL, status code, title, meta description and H1. This is your source of truth for the redirect map.

Audit and decide what travels

- [] **Inventory every template, content type and integration.** Not just pages: forms, CRM hooks, analytics wiring, embeds. Each one is a thread that has to be re-tied.
- [] **Kill dead pages on purpose.** Don't migrate junk. Decide which URLs retire, and plan their redirects deliberately rather than 404ing them by accident.

Map the redirects (the single biggest SEO protector)

- [] **One-to-one 301 map: every old URL to its new URL.** No chains, no loops, no lazy redirects to the homepage. Build it as a spreadsheet and check it twice.
- [] **Preserve on-page signals.** Titles, meta descriptions and headings carried across or improved, never dropped.
- [] **Preserve structured data.** Re-implement Organization, LocalBusiness or Service, FAQ and Breadcrumb schema on the new templates. Losing schema loses rich results and AI-search visibility.
- [] **Fix internal links.** Update links to point at the new URLs directly, rather than bouncing through redirects.

Re-instrument tracking

- [] **Rebuild analytics and tag manager.** GA4, GTM, goals and event tracking re-implemented on the new stack and tested with real events before launch, not after.

Prove it on staging

- [] **Crawl staging and diff against production.** Every production URL should resolve or 301. Any page that only exists on one side is a bug to fix now, not a surprise to find later.
- [] **Test the redirects at scale.** Run the whole old-URL list through and confirm each returns a single 301 to the right place.
- [] **Stakeholder sign-off, then freeze.** Last look, then no more changes until after launch.

Launch and watch

- [] **Plan the DNS cutover** for a low-traffic window, with a rollback path.

- [] **Submit the new XML sitemap** in Search Console and keep the old one available briefly so Google reconciles the moves.
- [] **Watch Search Console daily for two weeks.** Crawl errors, spikes in 404s, coverage drops. Fix redirect gaps within hours, not weeks.
- [] **Expect a short dip, confirm the recovery.** A brief wobble is normal. A dip that doesn't recover in a few weeks means a redirect or schema gap. Hunt it down.
- [] **Retire the old platform only once the new one has held for a month.** Not before.

PART FOUR

The phased timeline

What happens, in what order, and who owns it. Durations are typical for a mid-sized marketing site; scale them to yours. The rule that keeps it honest: you do not start a phase until the one before it is signed off.

Phase	Typical time	What happens	Owner
0 · Decide	1–2 weeks	Needs brief written. Business case built and approved. Scope frozen. Platform chosen for the job, not the demo.	Marketing lead + sign-off
1 · Plan	1–2 weeks	Content and URL audit. Redirect map drafted. Tracking plan. Success metrics baselined.	Marketing + SEO
2 · Build	3–8 weeks	Templates and content types built. Content migrated. Redirects and schema implemented. Integrations re-wired.	Build partner
3 · Pre-launch	1 week	Staging crawl and diff. Redirects tested at scale. Analytics verified. Sign-off, then freeze.	Whole team
4 · Launch	1 day	DNS cutover in a quiet window. New sitemap submitted. Monitoring on.	Build partner + SEO
5 · Stabilise	2–4 weeks	Daily Search Console watch. 404s and gaps fixed fast. Recovery confirmed. Old platform retired.	Marketing + SEO

The whole thing lives or dies at Phase 0. Freeze the scope there, and every later phase gets easier. Skip it, and no amount of engineering saves you.

When you want it done properly

If the business case holds and you'd rather not run this gauntlet in-house, that's exactly what Zenlio Studio does: fixed-scope, fixed-price replatforms that protect your search traffic and ship without padding the timeline. One senior pair of hands, twenty years in, no agency layers and no junior-led delivery. We'll tell you honestly if you shouldn't move at all.

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