I'm Leaving You:

The risks of dumping your old CMS for Drupal and how to manage them

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Why this session?

Surprise dangers lurk

- Unrealistic expectations
- Hidden costs
- Change management issues
- Unrecognized risks

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What I’ll do

- Share my professional experience
- Expose the unknowns
- Help you to avoid common pitfalls

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The goal

- Set better expectations
- Recognize change management challenges
- Provide a risk assessment framework
- Minimize surprises
- Bring sanity to a potentially stressful experience

Understanding the Situation

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Understanding Drupal Doublespeak

Doublespeak is language that deliberately disguises, distorts, or reverses the meaning of words. Doublespeak may take the form of euphemisms (e.g., "downsizing" for layoffs), making the truth less unpleasant without denying its nature, intentional ambiguity, or reversal of meaning.

From Wikipedia *(paraphrased)*

"There's a module for that"

Implication:

Your site is practically already built!

Truth:

You're going to need plenty of development work to get the custom look and functionality you have in mind.

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From Wikipedia *(paraphrased)*

"Final designs"

Implication:

"Of course the designs are final". Just a few tweaks are expected and shouldn't impact functionality.

Truth:

Even small design changes can introduce significantly new functionality.

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From Wikipedia *(paraphrased)*

"Flexibility"

Implication:

The new CMS will be completely customized, but should act like shrink wrapped software with documented manuals and no bugs .

Truth:

Your CMS is custom-made and will require a debugging period and custom documentation.

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From Wikipedia *(paraphrased)*

"Cost Savings"

Implication:

Drupal is free! Of *course* it's going to be cheaper!

Truth:

Every project is unique. While Drupal is free, the development, support, and hosting of your project is not. Savings (and costs) will vary.

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From Wikipedia *(paraphrased)*

"There's talent all over the world"

Implication:

There are Drupal developers everywhere… just outsource to a cheaper country and save loads!

Truth:

Depending on your project, management style, and organizational culture, international outsourcing may not be a practical approach—and could end up costing more.

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From Wikipedia *(paraphrased)*

"Critical launch issue"

Implication:

Whoops! Something "just came up."

Truth:

Bizarre unknown use cases only became known at or after launch. Somebody didn't think things through enough.

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Understanding the Drupal Tribe Members

Just because Drupal was selected as the content management system doesn't mean everyone is happy about it (or even knows why they are unhappy about it).

Common tribe members of a Drupal CMS migration

- Evangelist member
- Passive-aggressive member
- Openly hostile member
- Know-it-all member
- Apathetic member
- The Shield member *(find them and make friends!)*
- The Chief

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Understanding Change

Common change management issues

- **People are scared.** Tough changes can make people redundant, threaten jobs or require the restructuring of the organization
- **Speed of change matters.** Slow is usually easier, but many web projects require urgency and speed to market
- **People react differently.** Some are more impacted by change and sometimes do not cope well; may act out, taking on tribe roles of the openly hostile or passive aggressive member
- **Change is inherently risky.** It should be managed with care and professionalism

Migrating is Inherently Risky and What To Do About It

Conducting a Risk Assessment for Your Migration Project

Identifying the most common risks

Risks

- No Drupal experience
- Unknown dependencies
- Scheduling
- Double data entry
- Unidentified block behavior
- Old legacy system has no clear migration path
- Lack of clear content mapping

Potential Impacts

- Cost
- Schedule
- Performance

+ Survey users and stakeholders for additional potential risk

- Don’t forget members of the technical team (including developers, system administrators and hosting partners). *Hosting is often overlooked in budgets and requires critical skills that maybe missing.*

- Spend the time to understand editor and content contributor processes and expectations for the administrative interface. *Often an overlooked area for risk.*

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Setting up a risk tracking method

- Many formats available on the web; Google “risk analysis” or “risk assessment” for ideas.
- Most often includes tracking risk for **Likelihood** of occurring and **Impact** on the project; impact could be financial, timeline, or quality of the outcome

Likelihood definitions

Likelihood description	Percentage of possibility
Almost certain	> 95%
Likely	65% to 95%
Possible	35% to 65%
Unlikely	5% to 35%
Rare	< 5%

Impact definitions

Impact	Description
Very serious	An event whose occurrence will impact the project's cost, schedule or feature set so severely that the project will be terminated.
Serious	An event that seriously impacts (more than 10%) project budget, feature set and/or schedule; alternately denotes serious loss in required functionality that will be unacceptable to business stakeholders.
Moderate	An event that, if it occurs, will cause a modest change to the project's technical architecture, a modest loss of some non-critical functionality, and/or a modest loss of some non-critical operational performance requirements. Minimum acceptable requirements will be achieved. Budget and/or schedule loss will be less than 10%.
Minor	An event that, if it occurs, will cause small cost (and/or schedule) increases that, in most cases, can be absorbed by the project. Little to no loss of required functionality.

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Sample risk assessment

Risk	Likelihood	Impact
Unnecessary project hours (budget) spent waiting for stakeholder approvals	Likely	Minor
Emerging requirements after discovery completed which could impact timeline, budget and quality	Likely	Moderate
Hosting solution is not "approved" as of yet	Almost certain	Very Serious
No clear migration path of existing content from old CMS which puts timeline at significant risk	Almost certain	Serious

Creating risk mitigation plans for Drupal migration projects

+ Common sense plans that help reduce risk

- Set clear and measurable goals
- Conduct a project discovery
- Provide as much training and documentation as budget and schedule allows

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Setting clear and measurable goals

Unclear

“We are moving to Drupal because we want our CMS to be more flexible.”

Not specific

“We expect to save a lot of money moving to Drupal.”

Unrealistic

“One of the main goals of this project is to double our traffic the first month after launch.”

Goals need to be specific and realistic to help set expectations for success of the project. Goals also focus our attention on higher priority activities versus lower priority activities.

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Project discovery

- Project discoveries help stakeholders and implementation team to understand the technical needs, goals, resourcing requirements, culture and timeline requirements

- Project discoveries are ideal for fleshing out the unknowns **(risk)** of a project. Once something is known, it often dramatically reduces the risk and exposure involved in migrating to Drupal

- Project discovery can be as short or long as need be but should be done regardless

Training and documentation

- The cost to develop and deploy the **required** training and documentation for a Drupal migration project is often overlooked, especially if project participants are new to Drupal. Budgets and timelines generally don't cover the **real** outlay, which is a risk

- A few recommendations for handling training and documentation that can allow more efficient delivery:
  - **Create inline documentation as much as possible.** Saves time and money relative to creating documentation in two places.
  - **Regularly demo functionality for stakeholders.** These sessions can be recorded and used for future training and documentation needs.
  - **Maintain a central repository for all project documents.**

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Putting everything together

Risk	Likelihood	Impact	Mitigate	Plan
Unnecessary project hours (budget) spent waiting for stakeholder approvals	Likely	Minor	No	
Emerging requirements after discovery completed which could impact timeline, budget and quality	Likely	Moderate	Yes	Implement ticketing system that tracks changes to features. System should be able to identifying bugs from improvement request
Hosting solution is not "approved" as of yet	Almost certain	Very Serious	Yes	Push launch timeline out 3 weeks to account for delay. Communicate to all project stakeholders
No clear migration path of existing content from old CMS which puts timeline at significant risk	Almost certain	Serious	Yes	Start looking for outside vendors that specialize in data migration

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Distributing and publishing the risk and mitigation plans

- Initial risk assessments should be placed in the project discovery documentation (if one is conducted)

- On-going risk assessments should be shared with project stakeholders through meetings, email, scrums, etc. Once new risk are communicated the document should be updated and saved to the central document repository (i.e. Google docs, Basecamp, etc.)

Final thoughts

- Be patient
- Understand your situation
- Be sensitive to how others deal with change
- Identify your risk
- Manage your risk

Thank you

Questions?

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