



Headless Migration Checklist: How to Switch to Headless CMS

The comprehensive guide on migrating to a headless CMS for non-techies.

INTRODUCTION

If you are a marketer, product owner, growth specialist, or have a similar non-tech position but are involved in content management decisions, this checklist is for you.



We know, that migrating to a new CMS might seem too complicated, expensive and only “accessible” to developers. However, marketers can also have a hand in the process and determine how they will interact with the new system.

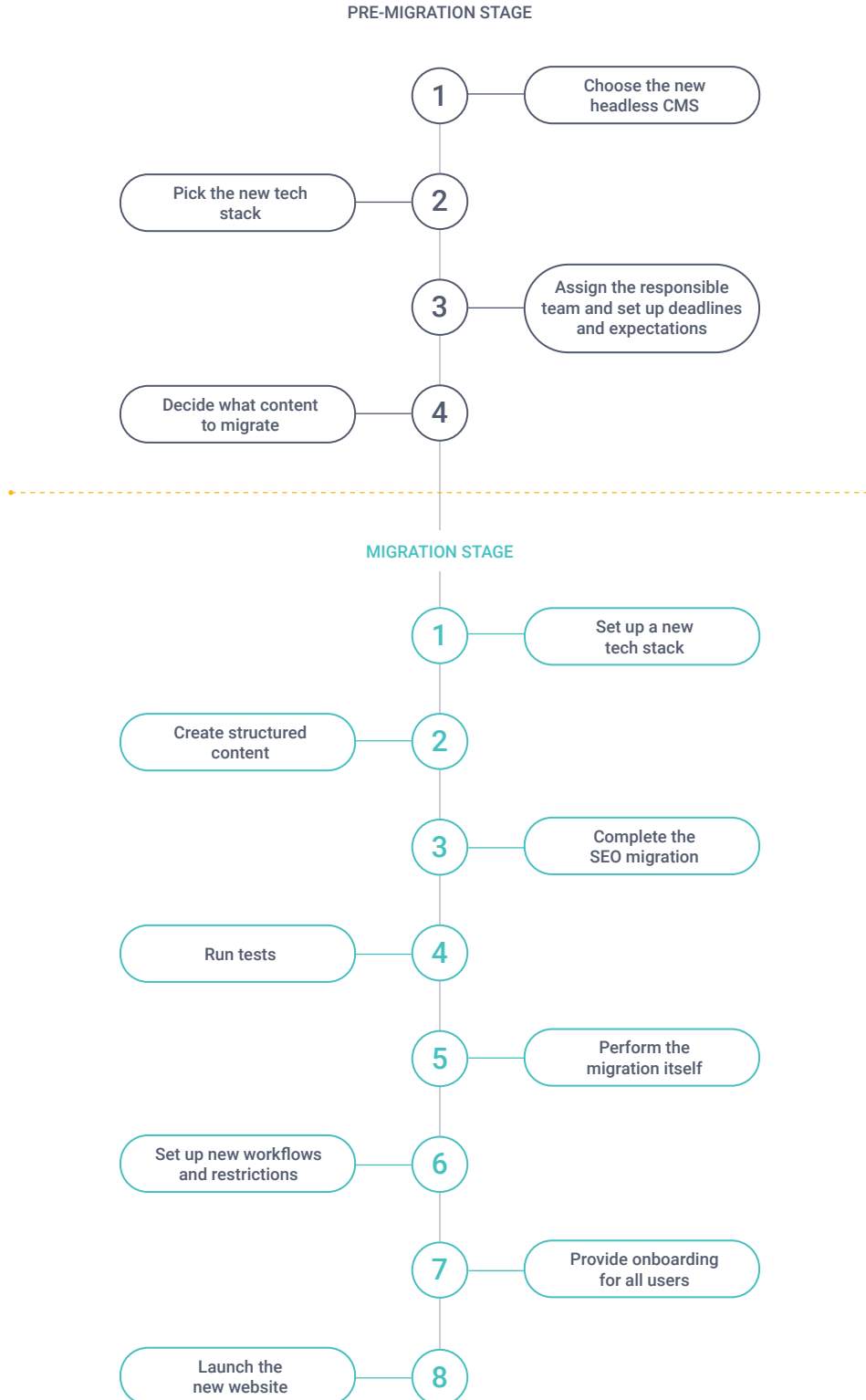
In this detailed “Headless Migration Checklist,” we will guide you through the process of switching to a headless CMS. We know that changes might be overwhelming, but they are always for the better (we hope so). That’s why we designed this checklist to be your roadmap to success.

Inside, you’ll find a step-by-step guide that covers everything from strategic planning and data migration to frontend integration and post-migration optimization. We’ll break down the key considerations, potential challenges, and best practices that will help you navigate this journey with confidence.

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Migration checklist at a glance



Pre-migration checklist

1

CHOOSE THE NEW HEADLESS CMS

Finding the best CMS option is the first step in the migration journey. While headless content management systems offer multiple advantages compared to traditional systems, they differ a lot. Most headless solutions are primarily focused on developers, which means they provide robust functionality on the technical side but are less intuitive for marketers and content editors.

With that, if you are looking to migrate to a headless alternative, make sure that it offers such features as visual content editor, customizable workflows, user permission system, and collaboration suite.



3 THINGS TO CONSIDER BEFORE MIGRATION:

- Ease of use for non-technical users
- Community and documentation for developers
- Tech solutions and integrations

How do you determine which CMS suits your company?

Once you've selected the key features your business needs, examine the market to see what vendors offer. The most trusted and insightful resources are G2 or Gartner Peer insights. You can read reviews from various industries and roles on these platforms. Networking and personal advice from your peers are also good sources. Finally, you can actually try most systems using free trials or have personalized demos.

2


PICK THE NEW TECH STACK

At this point, you'll need assistance from your tech team. Create the list of criteria and features that you want to implement so that they could match them with the technologies available.

Choosing the right stack will simplify your developers' work while also ensuring your project's flexibility and scalability. That's why this stage should be a collaborative effort with the technical team. Cooperate with your developers to discuss various options and select the future-proof stack that would not require manual software updates.

No matter which CMS you are migrating from, you need to shape the new tech stack that includes such key points as:

Frameworks	Next.js, Nuxt, React, Vue, Astro, SvelteKit, Remix, Gatsby, etc.
Programming Languages	JavaScript, PHP, Python, Ruby, TypeScript, etc.
APIs	Graph or Rest
List of Integrations	marketing, eCommerce, analytics, etc.



NOTE: Did you know that changing the entire frontend stack is not required? You can decide to keep the existing frontend and just apply changes to the bits of your codebase related to how you retrieve and render content.

3 ASSIGN THE RESPONSIBLE TEAM AND SET UP DEADLINES AND EXPECTATIONS

Whether you opt for an in-house team or decide to outsource the task to an agency or freelancers, it's crucial to assign clear roles and responsibilities to all stakeholders involved in the process. This involves not only the individuals directly engaged in the technical aspects of the migration, but also those responsible for overseeing, approving, and managing the overall transition.

This collaborative approach reduces the risk of missing important features or functions during the migration. Instead, leading to a smooth and successful transition in the end. Setting deadlines allows your team to prioritize tasks effectively, ensuring that each step of the migration process gets the required attention.

Setting clear goals and deadlines is also helpful because it lets the team track progress and make adjustments as needed. Without clear deadlines, the migration process could get out of hand, causing delays, mistakes, and more stress for the team.

4 DECIDE WHAT CONTENT TO MIGRATE

Moving to a new CMS is not just a technology shift — it's a chance to revamp your digital content strategically. Deciding what content to migrate is a crucial step in this process.

Start by thoroughly examining your existing content. Evaluate each piece based on its performance, relevance, and quality. Identify the high-impact, consistently engaging content that resonates with your audience.

At the same time, this is a perfect moment to pinpoint outdated or redundant materials that no longer align with your objectives. Often, you can identify a lot of silos at this point. That's when you can get rid of them and start everything from scratch in a new system.

Consider user journeys and experiences when deciding what content to transfer. Prioritize content that help create a unified and compelling user experience. This selective approach optimizes the new CMS's functionality and positions your digital platform for growth and adaptability.

Migration checklist

1 SET UP A NEW TECH STACK

If you plan a complete revamp and cleanup of content and code, this can be a perfect opportunity to do so, but it's optional.

Again, this is a collaborative step with the development team. At this point, programmers will integrate frontend technologies into your new CMS using APIs* or SDKs*. At this stage, you are also putting together all the integrations, ensuring that they can communicate with one another and with your database*.

API — application programming interface. APIs serve as bridges between multiple apps and integrations within your content management system and allow them to communicate and share data.

SDK — software development kit. SDK is like a toolbox for computer programming that provides pre-made code and tools to make building apps and websites easier and faster.

DATABASE — in a CMS, a database is a structured digital repository that stores and organizes content, user information, and other essential data to simplify efficient website management.

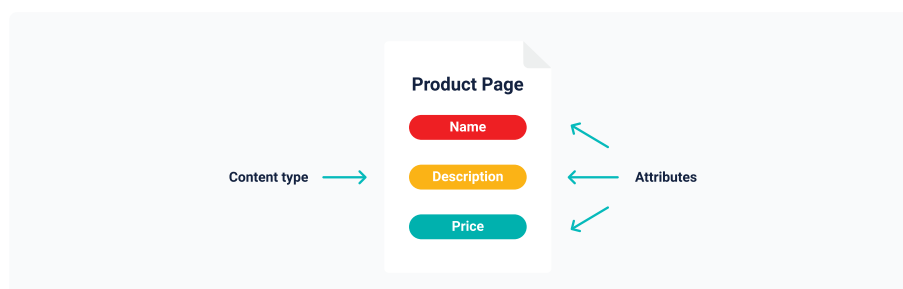


2 CREATE STRUCTURED CONTENT

Depending on your previous CMS, you may need to adjust or completely redesign the content model, including defining content types, fields, attributes, and their relationships. This is an important step because structured content is the foundation of your website, influencing how information is organized, presented, and accessed by both visitors and search engines.

Structured content enables consistent formatting and presentation across multiple pages, ensuring a unified and polished look for your website. A well-defined content model also allows for content reuse, making it easier to repurpose information across different sections of your site.

Finally, structured content is preferred by search engines because it allows them to better understand the context and relevance of your information. This can improve your website's search engine rankings, making it more accessible to users looking for relevant content.



3

COMPLETE THE SEO MIGRATION

New content structure might also affect your SEO.

Search engines use specific details and patterns in your content to figure out how relevant it is to user queries. If you change the structure of your content, you should carefully plan your SEO migration.



Make sure to move all SEO-related fields, like meta titles, descriptions, and keywords. This will keep the important information that search engines use to understand and rank your content. Also, keep a close eye on your URL structure. Any changes you make to it can impact how your pages are indexed and ranked.

It is critical to use proper redirects from old URLs to their new versions if you don't want to lose organic traffic and the SEO equity your website has built up over time.

4

RUN TESTS

Before the full-scale migration, conducting thorough testing is crucial to ensure a smooth and error-free transition. This involves creating a testing environment that mirrors the planned production setup and migrating smaller data portions to identify and address potential issues. To do that, developers write specialized scripts to facilitate the migration process.

By migrating a small portion of the data initially, you can closely monitor the process, identify potential bottlenecks, and promptly resolve any issues that may arise.

5

PERFORM THE MIGRATION ITSELF

After extensive tests and the validation of scripts are completed, you can actually migrate to the new content management system. This phase marks the culmination of detailed planning and preparation, requiring accuracy and attention to detail.

Once the last file and line of code have been successfully migrated, it's critical to double-test all integrations and third-party tools again. This ensures that the website's extended functionalities, such as eCommerce plugins, analytics tools, or payment systems, seamlessly interact with the new CMS. At this point, thorough testing is the only way to confirm all components work together, minimizing the likelihood of post-migration glitches.

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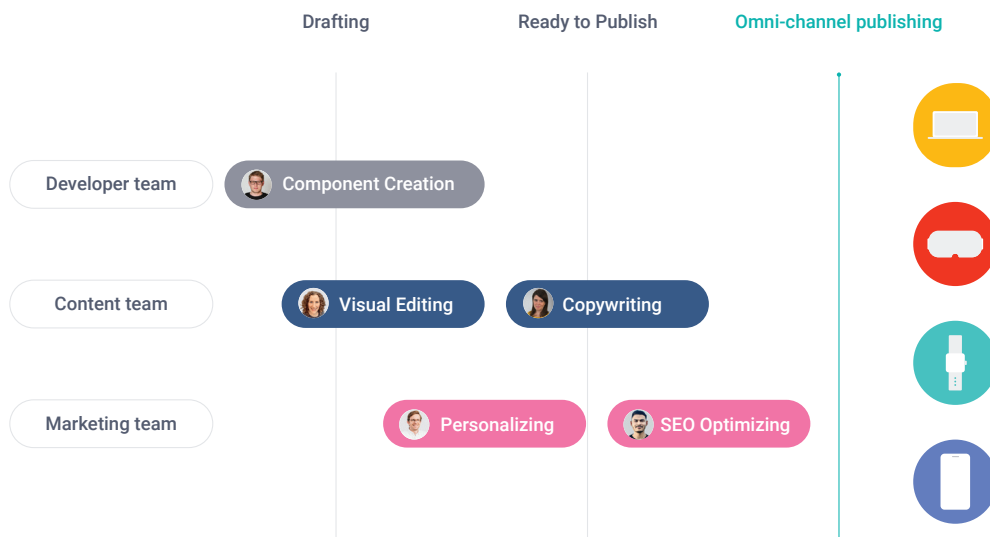
SET UP NEW WORKFLOWS AND RESTRICTIONS

As you transition into the new content management system, it's crucial to establish clear guidelines and permissions to foster effective team collaboration.

Begin by configuring different access levels, restrictions, and tailored permissions based on the roles and responsibilities of each team member. This approach ensures team members can contribute without inadvertently accessing or modifying areas outside their scope.

After that, create user-friendly workflows to provide a seamless and consistent experience for all team members. Form a rough plan, a clear and easy-to-navigate pattern for every process, from content creation to updates. This systematic approach enhances efficiency and reduces the chances of errors or confusion during daily operations.

By structuring access levels and creating user-friendly workflows, you add an additional layer of protection. For example, non-tech team members won't accidentally enter areas meant for technical operations, so your data remains secure and intact.



7

PROVIDE ONBOARDING FOR ALL USERS

Although the learning hub and materials are helpful, nothing beats practice. To speed up their future work with a CMS, all users should receive proper training, preferably an interactive one.

Such training can give users more than just theoretical information; it can also demonstrate how the CMS works in real life. Your team can learn how to use the CMS interface, complete tasks, and interact with different features in a simulated environment. They will not only learn faster, but they will also have a better idea of how the system works after having this hands-on experience.

Users who know how to use the system properly are more likely to take advantage of all of its features, making the most of your investment and the system's possible benefits.

Interactive onboarding also creates a space for group learning where people can ask questions, get more information, and share insights.

8 LAUNCH THE NEW WEBSITE



Welcome better performance, the latest technologies, and a seamless user experience. Now, with a headless CMS, that is not a dream, plan, or a stage in your strategy — it's all your reality. Congratulations!

Why choose Storyblok as your new headless CMS?

Storyblok is a headless CMS that empowers all teams to create and scale modern content experiences across any digital channel. Here is how it differs from other headless options:

	Average Headless CMS	Storyblok
Editing experience	No preview / limited editor	Visual editor with real-time preview
Collaboration	Limited workflow customization, complicated permission systems	Customizable workflows and user permissions, on-page commenting
Asset management	Digital asset manager often comes as a 3rd-party tool	Native Digital Asset Manager
Support	Often limited support or comes for an extra cost	Standard support for all users at no cost, and extended enterprise-level packages
Documentation	Often unclear, complicated or outdated documentation	Well organized documentation, learning hub and community support.
Pricing	Unpredictable pricing based on vital features	Flexible and completely transparent

One headless CMS – thousands of happy users.

The Voice of the Customer Report is a document that synthesizes Gartner Peer Insights reviews into insights for IT decision-makers.

775 reviews and ratings were analyzed to determine the “Voice of the Customer”.

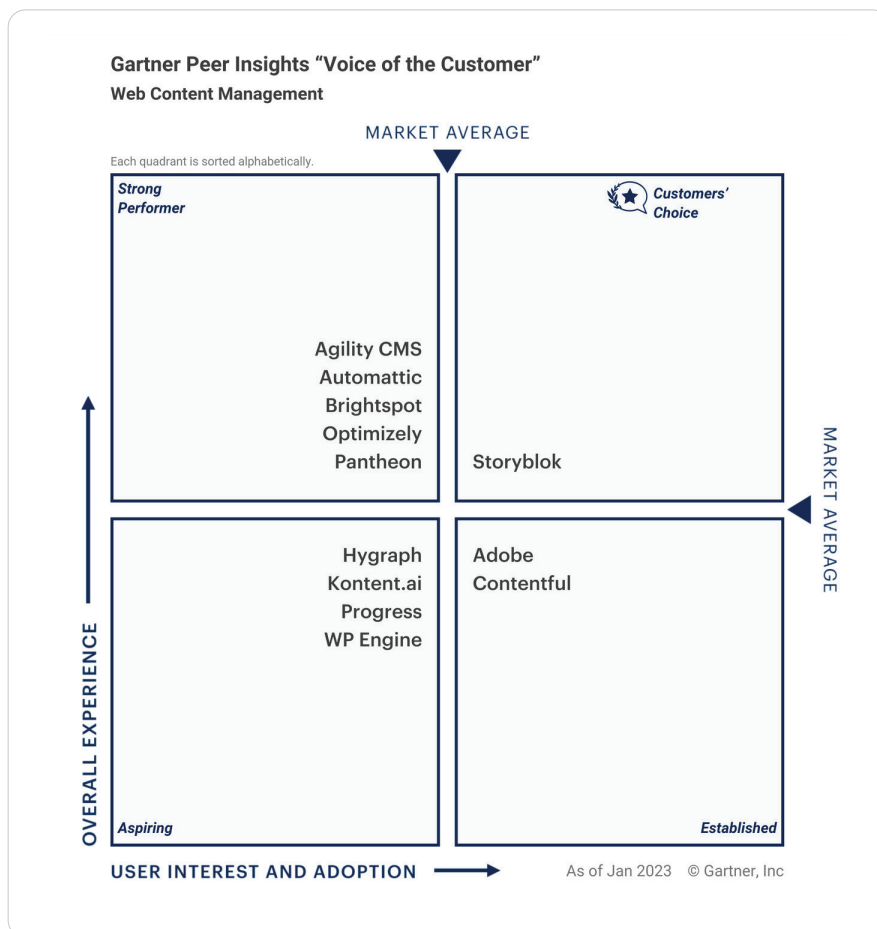
The results are in.

Storyblok has been recognized as the ONLY vendor as Customer’s Choice that meets or exceeds both the market average Overall Experience and the market average User Interest and Adoption.



DISCOVER MORE

[Gartner Voice of the Customer Report](#)



Key takeaways

Migration to a headless CMS might seem complex at first. However, it offers significant advantages for businesses in today's rapidly digitizing landscape, where delivering exceptional user experiences is a must.

Choosing the right CMS is also a big deal, as it shapes how you will create, manage, and distribute your content. Make sure to examine the market thoroughly before making the decision. Consider the core functionality and ease of use for all teams, including developers, creatives, and marketers.

ABOUT STORYBLOK

Storyblok is a next-generation headless content management system revolutionizing how storytelling scales. With an API-first approach, it helps users create and scale content to any digital channel. Features like the Visual Editor and Digital Asset Manager mean content creators can work independently. The power of headless's best-of-breed approach also means that developers can build a perfectly customized tech stack, all protected by Storyblok's ISO 27001 security certification. Add the benefit of Storyblok's advanced Collaboration Suite, and all teams can come together to work directly within the CMS.

In a constantly changing world with more user experience demands than ever before, brands such as Netflix, T-Mobile, and MindValley trust Storyblok to provide secure, personalized experiences to their users.

Try Storyblok for free today!

Ready to see how Storyblok can take your content management to the next level?

[TALK TO ONE OF OUR SPECIALISTS](#)

