



HubSpot CMS Migration Checklist

The image displays two overlapping screenshots from the HubSpot interface. The top screenshot shows the 'Website' management page, which includes a navigation menu (Contacts, Conversations, Marketing, Sales, Service, Automation, Reports), a search bar, and a table of website pages. The table has columns for 'NAME', 'PUBLISHED', 'EATED', and 'LAS'. A search box for 'Search teams' is open, showing a dropdown menu with options: 'All teams', 'Marketing EMEA', 'Marketing APAC', 'Biglytics Sales', 'North', and 'Biglytics Sales > North'. The bottom screenshot shows the 'Settings' page, specifically the 'Domains and URLs' section. It features a sidebar with 'Your preferences' (Basic info, Notifications, Security), 'Account Defaults', 'Contacts & Companies', 'Conversations', 'Domains & URLs' (selected), 'Import & Export', 'Integrations', 'Marketing', and 'Private Content'. The main content area is titled 'Domains and URLs' and includes tabs for 'Domains', 'URL Redirects', 'Language Settings', and 'Sitemap'. Under 'Primary domains', there is a table with columns for 'Type', 'Domain', and 'Status'. The table lists: 'Website' for 'www.hubspot.com' (Connected), 'Website' for 'www.inbound.com' (Connected), 'Landing pages' for 'offers.hubspot.com' (Connected), and 'Blog' for 'blog.hubspot.com' (Connected). A third, smaller screenshot on the right shows a 'Session Details' table with columns for 'Date/Time' and 'Viewed By', listing several sessions from 11/29/2018 at 4:21 PM GMT to 4:19 PM GMT, viewed by 'Viewed 8 Con', 'Viewed 8 Con', 'Viewed What', 'Viewed 8 Con', and 'Viewed Biglyt'. A 'Show more' link is at the bottom right of this table.

Pre Migration – Technical Preparation

	Task	Notes
✓	Double-check URL structure, meta data, heading and body content	
✓	Double-check JavaScript, CSS, and image files, XML sitemaps, HTML sitemaps	
✓	Double-check load time and traffic analytics	
✓	AMP for HubSpot blogs	
✓	Mobile setup	
✓	Custom 404 pages	
✓	Double-check google crawlability	
✓	After crawlability has been verified, block access to "under construction" site with robots.txt file, password protection, and/or noindex tag	
✓	Verify DNS security settings and TTL values	
✓	Follow Web Content Accessibility Guidelines	
✓	If migration includes redesigned pages, scope wireframe drafts	

Pre Migration – Technical Preparation

	Task	Notes
✓	Analyze which pages and ideas perform better in terms of pageviews, conversions, and influenced revenue	
✓	Prioritize higher performing pages and ideas	
✓	Clean up testing pages or developer assets created during the process	
✓	Double-check that modules are built for non-technical users to easily use	
✓	Set up and develop all system templates	
✓	Use intuitive naming conventions for all assets	
✓	Set up a test environment to audit the migration and make sure the client is satisfied with it	
✓	Undergo a thorough QA process	
✓	Make a copy of the entire old site on a new server on a separate domain/subdomain for easy comparison later	
✓	Work with strategist to make sure keyword rank and traffic metrics are being monitored	
✓	If URL structure cannot be migrated as is, ensure 301 redirects are set up	
✓	Define all theme settings	

Pre Migration – Technical Preparation

	Task	Notes
✓	Redirect both pages and domains if you're changing the website URL	
✓	Update existing redirects' destination to the new URL structure	
✓	Update URLs across marketing channels: Google, Facebook, LinkedIn, Twitter, Email Signatures, newsletters, transactional email, and anywhere else a URL may live	
✓	Test all ideas in a test portal and ensure access is limited via whitelisted IP's or password protection	
✓	Address UX issues hat could impact the site's conversion rate	
✓	Is the site usable from different mobile phones and tablets?	
✓	Is the content readable and accessible	
✓	Verify fonts, sizes, and word wrap	
✓	Are ads and popups intrusive?	
✓	Do touch elements work properly	

CMS Migration Launch Best Practices

	Task	Notes
✓	Are there any limitations that could prevent search engines from indexing the site and updating the DNS?	
✓	Select a low traffic window for launch	
✓	Is the robots.txt file correctly configured?	
✓	Are all redirects, particularly for top pages, functioning as expected? This may take a while to check, but it's worth the effort.	
✓	Are canonical tags set up correctly?	
✓	Are the top pages' server responses what they should be?	
✓	Are there any noindex/nofollow directives that may have been set up unintentionally?	

Post-CMS Migration Review

	Task	Notes
✓	Check top performing pages, the robots.txt file, redirects, SEO data, and XML sitemaps.	
✓	Use HubSpot reporting tools to track traffic analytics.	
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✓	Cancel your old hosting once redirects are verified	
✓	Check on all necessary tracking codes.	
✓	Check on backlinks on external sources	
✓	Resolve confusion between testing environment and live site.	
✓	For HubSpot, make sure Forms and Meeting links are correctly embedded	
✓	Activate any security features needed and ensure that other integrations the client needs are live and functioning.	
✓	Do post-migration site metrics match pre-migration averages?	
✓	Check backlinks and redirects	
✓	Check HubSpot analytics tools for organic traffic	

Post-CMS Migration Review

	Task	Notes
✓	Check on backlinks on external sources	
✓	Undiagnosed or new UX issues	
✓	404 URL errors	
✓	Load speed (server speed, site speed, etc.)	
✓	Check theme	

Need help?

If you need help with your migration or just some advice book a 15 minute call with a CMS expert today

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