



Content Migration Plan Template

Is your team planning a migration from a legacy or outdated system to a CCMS? With an extensive history working with global enterprises including HP, Emirates and Horiba Medical, our expert teams can help you streamline the process. This template is implementation-focused and can be used by teams to plan, track, and execute the move to structured content (DITA and a CCMS). It should be adapted to your organization's needs. The sample content in italics or parentheses is for illustration and should be replaced with your project's specifics.

Project Overview & Objectives

Briefly describe the migration project at a high level. Explain **why** the migration is being undertaken and what success looks like.

- **Background:** (e.g. *"Our current documentation is in Word and PDF across network drives, making it hard to reuse or publish to web. The company is expanding globally and needs consistent, translatable content."*)
- **Objectives:** (e.g. *"Implement DITA and CCMS to enable topic-based authoring, faster updates, multi-channel publishing, and AI-ready documentation."*)
- **Scope:** (e.g. *"Migrate 20 user guides (~500 pages each) and 100 knowledge base articles from XYZ format into structured DITA content. Initial languages: English (source), with French and Chinese post-migration."*)
- **Success Criteria:** (List key measurable goals. For example:
 - *Reduce documentation update time by 50% (from 4 weeks to 2 weeks).*
 - *Cut annual translation spend by 20% after migration (due to content reuse and better TM leverage).*
 - *Improve content quality (zero critical errors in published docs; 30% fewer support tickets linked to documentation).*)

Stakeholders & Team Roles

Identify the people or roles involved in the migration and ongoing content operations, along with their responsibilities. Use a RACI or similar model if helpful.

Role	Name	Responsibilities
Project Sponsor	Jane Doe (VP Docs)	Champions the project at the executive level; secures funding; clears roadblocks.
Project Manager / Lead	John Smith	Plans and tracks migration tasks, timelines, and deliverables; coordinates team communication.
Information Architect	(TBD)	Defines the DITA information model and metadata; sets structured writing guidelines; oversees content consistency.
Content Strategist	(TBD)	Prioritizes content scope; decides migration approach per content set (convert/refactor/rewrite); handles content audit analysis.
Lead Writer / Migration Specialist	(TBD)	Converts or rewrites content into DITA; sets up topics and maps in CCMS; ensures quality of migrated content.
SME Reviewer	(multiple)	Reviews migrated content for accuracy; provides approval sign-off in the new workflow.



Localization Manager	(Name)	Advises on translation strategy; coordinates translation testing and updates during the migration.
IT / Tools Specialist	(Name)	Installs/configures CCMS and related tools; develops conversion scripts or oversees vendor doing conversion; ensures integrations (e.g. publishing, SSO) work.
Change Management Lead	(Name)	Organizes training for users; manages documentation of new processes; collects user feedback.

Add or remove roles as needed. Clearly define who is responsible for what (e.g. one person may fill multiple roles in a small team). Also list any external partners or consultants, if involved (e.g. a conversion service vendor, or CCMS vendor professional services contact).

Content Inventory & Audit Summary

Summarize the findings of your content audit and list the content to be migrated. You may reference an external **Content Inventory spreadsheet** for full details. Include any scoring or categorization that influences migration decisions.

- **Total Documents Analyzed:** 120 (e.g. 20 user guides, 50 procedures, 50 knowledge base articles).
- **Content Sources:** Word files (guides), Confluence pages (KB), and some FrameMaker files (legacy manuals).
- **Key Findings:**
- ~30% duplicate or overlapping information across guides (e.g. “Introduction” sections repeated).
- Inconsistent structure: some procedures are narrative paragraphs, others are step-by-step.
- Heavy use of conditional text in user guides for variant features (not well documented, risk for migration).
- Legacy content quality issues: outdated screenshots, terminology not standardized.
- **Archive Candidates:** Identified 15 old guides and 200 FAQ pages that are obsolete (to be **archived, not migrated**).
- **Migration Scope:** After excluding archives, ~100 documents (approximately 8,000 pages of content) to migrate into DITA. These include all current product documentation and high-value knowledge articles.

Content Complexity & Readiness: (If you created a complexity scorecard or maturity assessment, summarize it here. For example, “*We rated each doc on a complexity scale 1-5. Average complexity was 3. High complexity areas: Installation Guide (score 5 due to many tables and conditional text), API Reference (score 4 due to code blocks). Low complexity: FAQ pages (score 1 or 2). This influenced our migration approach per document.*”)

Sample Content Inventory Table: (*an excerpt of the inventory with a few examples*)

Content Item	Source Format	Complexity	Proposed Action
Widget 1 User Guide	Word (.docx)	High – long text, many tables, conditional content	Refactor (split into topics by chapter; rewrite sections that don’t conform to structure)

Gadget 2 Installation Manual	PDF (FrameMaker)	Medium – structured steps but no tags	Convert (automated conversion to DITA, minor cleanup of steps numbering)
Knowledge Base – FAQ articles	Confluence HTML	Low – short articles, repetitive Q&A format	Rewrite as individual concept or Q&A topics (merge duplicates, apply style)
Legacy Product XYZ Guide	Word (.docx)	High – obsolete content	Archive (product discontinued; will not migrate)

This table would typically be much larger or in a separate document. Ensure each content item has an assigned migration action (as decided below) and an owner responsible for its migration.

Migration Approach Summary

Document the chosen **migration method** for **each group of content** (convert, refactor, rewrite, or retire). Include the rationale so the team understands why each decision was made. This will guide those executing the conversion.

- Automated Conversion:** *List content to be auto-converted.*
Example: “All 50 knowledge base articles (simple HTML pages) will be batch-converted to DITA using a script, because their structure is uniform Q&A and requires minimal rework. We expect this to be fast and straightforward.”
- Refactor (Convert + Edit):** *List content to convert then refactor.*
Example: “User Guides for Products A, B, C (about 2000 pages combined) – will be initially converted by a conversion tool to DITA, then each chapter reviewed and split into proper topics by the writing team. These guides have valuable info but need restructuring into concept/task topics. Refactoring chosen to preserve content while improving structure.”
- Full Rewrite:** *List content to rewrite from scratch.*
Example: “Installation Guide and Regulatory Compliance Guide – will be rewritten in DITA from the ground up. Reason: the legacy versions are very outdated/inconsistent and considered too risky to auto-convert. The rewrite will allow incorporating current standards and ensuring clean structure for these critical documents.”
- Archive/Do Not Migrate:** *List content not migrating.*
Example: “Older versions of product docs (v1.x series) and deprecated product lines will not be migrated. They will be archived as PDF in an internal repository for record-keeping. Only current documentation (v2.x and later) moves to the CCMS.”

If available, also note **who will perform each** (e.g. conversion vendor for initial conversion, tech writers for refactor tasks, etc.) and any specific tools (e.g. **Stilo Migrate** cloud conversion for FrameMaker files). This section essentially translates the audit results into an action plan.

Information Model & Content Types

Provide an overview of the structured **information model** that will guide content creation in the CCMS. This ensures everyone knows the framework they are migrating into.

- DITA Topic Types Used:** List the topic types and their usage. For example:
- Concept:** For theory/background topics (explanation of features, concepts). *In our model, concept topics answer “What/Why” questions.*

- **Task:** For procedures (step-by-step instructions). *Each task topic will cover one specific procedure, with prerequisites and steps.*
- **Reference:** For reference material (technical specs, tables, error codes). *Used when presenting data lookup or reference info.*
- **Troubleshooting (Specialized Task):** *We plan to use a specialized task or troubleshooting topic for problem-solution format content (this might be a specialization if needed).*
- *(Any other specialized information types?) e.g. FAQ (if deciding to have a specific FAQ topic type), Release Note, etc. Mention any DITA specialization or custom topic structures you will introduce, and why.*
- **Maps and Publication Structure:** Describe how topics will be organized into maps (hierarchies for deliverables). *Example: “We will create a DITA map for each user guide. Chapters will become first-level group topics in the map, containing relevant concept/task topics. Shared topics (like common safety info) will be referenced in multiple maps for reuse.”*
- **Metadata Schema:** Outline the key metadata fields for topics:
 - *Product:* values = {Product A, Product B, Platform X, ...}
 - *Version:* values = {2.0, 2.1, ...}
 - *Audience:* values = {Admin, End-User, Developer} (if applicable)
 - *Language:* values = {en, fr, zh, ...} (likely auto-managed by CCMS)
 - *Output scope:* e.g. {External, Internal} if some content is internal-only.
 - *Other tags:* Any other classification, e.g. Regulatory Approval Required (yes/no), etc.
- Note if you will use DITA attributes for some of this (like product filtering via @product attribute) versus using a CCMS metadata field.
- **Content Reuse Plan:** State how reuse will be handled in the model:
 - *“Common text like disclaimers or repeated procedures will be stored in dedicated topics and referenced via <conref> in DITA to avoid duplication.”*
 - *“Variables such as product names or versions will be managed through DITA keys (keyref mechanism) so they can be updated centrally.”*
- **Linking and Navigation:** Mention any standards for cross-references (e.g. always cross-reference by linking to a specific topic ID, not a page number, etc.) and how next/previous navigation might be handled by the output.

(This section can be supported by an actual information model document or diagram. In the plan, a concise summary suffices, with reference to detailed guidelines in an appendix or separate file.)

Technology & Tools

Detail the content management and tooling ecosystem that will support the structured content workflow. This ensures everyone knows **which platforms and tools** will be used.

- **Selected CCMS:** <Name and version of CCMS> – e.g. “RWS Tridion Docs 15 – our chosen CCMS for DITA content management.” Briefly note why or key features (e.g. “provides web-based review, robust version control, and integration with translation workflows”).
- **Authoring Tool:** Describe how authors will create/edit DITA topics. *For example: “Writers will primarily use Oxygen XML Editor connected to the CCMS for advanced authoring. Occasional contributors (SMEs) will use the CCMS’s web editor (structured form-based authoring via Fonto) for simplicity.”*
- **Conversion Tools/Utilities:** If using any specific tools or scripts for migration:

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- **Conversion Scripts:** (e.g. “Custom Python scripts to convert Confluence HTML to DITA” or “Stilo Migrate cloud service for FrameMaker->DITA conversion”). Mention responsibilities (who runs them, how results are validated).
- **Batch Processing:** (e.g. “A suite of XSLT transforms will clean up Word-generated HTML before import”).
- **Publishing Pipeline:** How will you publish content from DITA to outputs?
- **DITA-OT:** (e.g. “Using DITA Open Toolkit 3.x integrated with the CCMS to produce PDF and HTML5 outputs. PDF will use a customized PDF plugin for our corporate design.”).
- **Publication Platform:** (e.g. “Published HTML5 outputs will be deployed to our docs portal (AWS S3 + CloudFront) via an automated CI/CD pipeline.”).
- List output formats required: PDF, HTML5, in-app help, etc., and any special tools (like Adobe PDF Formatter, or a static site generator if using Markdown for some reason).
- **Translation Management:** Tools or systems for translation:
 - (e.g. “We will use RWS Trados/XTM/Acclaro as our Translation Management System (TMS). Tridion Docs CCMS will be integrated with the TMS via connector – enabling us to send DITA topics for translation and import translated XML back.”)
 - Mention if any machine translation is used in workflow, and how human review is incorporated.
- **Semantic/AI Tools:** If applicable, note any semantic search or AI tooling:
 - (e.g. “We plan to leverage Tridion’s Semantic AI for enhanced content tagging and to power a future chatbot that uses our documentation. This involves building a taxonomy/knowledge graph that maps to our DITA content.”)
 - Or “We will index the DITA content in an Elasticsearch-based engine to enable intelligent search on the support site.”
- **Legacy System Co-existence:** If the old system will run in parallel for some time, explain how you’ll keep them in sync or when the switch occurs. (e.g. “During Q3, authors will still use Word for modules not yet migrated, and CCMS for migrated ones. We will maintain a mapping of where the latest source of truth is for each doc.”)
- **Other Integrations:** Any additional tools:
 - Source control (if docs-as-code aspects, or snapshots in Git).
 - Issue tracking (e.g. Jira integration for docs tasks).
 - Automated QA tools (spelling checkers, link checkers).
 - **Analytics:** (e.g. “Google Analytics on the published HTML to track page views” or built-in CCMS analytics).

In summary, this section is a reference for the toolchain: everyone should know what technology is in play and where to go for each function (authoring, reviewing, publishing, translating, etc.).

Pilot Plan

Outline the plan for the pilot phase of the migration, which serves as a test and model for the full rollout.

- **Pilot Content Scope:** (Describe which content will be included in the pilot and why it was chosen.)
Example: “The pilot will include Product A’s User Guide (approx. 300 pages) and Top 20 FAQ articles from our knowledge base. We chose these because Product A is launching a minor update in 3 months – a good opportunity to test updated

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content in DITA – and the FAQs are small, self-contained topics to validate our model. This represents both a structured guide and standalone topics.”

- **Pilot Team:** (Who will be involved in executing the pilot?)
Example: “2 senior writers (Alice, Bob) will handle converting and authoring the content in DITA, one reviewer from Product A team (Charlie) will use the CCMS review feature, and our localization lead (Diana) will test French translation on a subset of topics. IT support (Eve) will be on standby for any tool issues.”
- **Pilot Timeline:** (When will the pilot be carried out and how long will it last?)
Example: “Pilot starts April 1 and runs for 6 weeks. Week 1: team training & environment setup; Weeks 2-3: content conversion and DITA authoring; Week 4: review cycle and approvals; Week 5: publish outputs and translation test; Week 6: evaluate results and prepare pilot report.”
- **Pilot Success Criteria:** (Restate the success metrics specific to pilot content.)
Example: “Success if: (1) All pilot content successfully converted and published from CCMS with no critical formatting issues; (2) Review cycle time for pilot guide is cut by at least 50% (compared to last Word-based cycle); (3) French translation of pilot content imported smoothly and translator reports no major issues; (4) Writers and reviewer indicate comfort with the new process in feedback survey.”
- **Known Risks/Mitigation in Pilot:** (Any anticipated challenges and how you’ll address them.)
Example: “Risk: The CCMS workflow might initially confuse the SME reviewer -> Mitigation: Have a kickoff with the reviewer to show how to use the web review interface; fallback to PDF review if needed and then reconcile.”
“Risk: The conversion tool may not perfectly convert our tables -> Mitigation: Allocate time in pilot schedule for manual table fixes and have IA review table structures in DITA.”

(The goal of this section is to ensure the pilot is well-planned. After the pilot, this document can be updated with Pilot Outcomes as a brief summary, which then informs the full migration plan.)

Migration Timeline & Phases

Provide a timeline for the entire migration project with major phases, milestones, and target dates. This helps track progress and sets expectations for when each part will be completed.

- **Phase 1 – Preparation & Design:** (Jan – Mar 2026)
- Milestones: Completed content audit; Developed information model and style guide; Selected CCMS and completed proof-of-concept; Project plan (this document) finalized; Team training done.
- **Phase 2 – Pilot Migration:** (Apr – May 2026)
- Milestones: Pilot content migrated into CCMS; Pilot outputs published; Pilot evaluation report approved by stakeholders (go/no-go for full rollout).
- **Phase 3 – Full Migration Execution:** (Jun – Sept 2026)
- Milestones: Batch migrations in sprints (e.g. migrate 25% of content per month); Regular check-ins on quality; Legacy content freeze in effect after July 1; All priority content in CCMS by end of Sept.
- **Phase 4 – Go-Live and Decommissioning:** (Oct 2026)
- Milestones: New CCMS-based workflow officially becomes the sole source for documentation; Public website or docs portal switched to CCMS outputs; Legacy systems (e.g. wiki, old repo) retired or set to read-only; Final redirects in place for any URL changes.
- **Phase 5 – Post-Migration Governance:** (Nov 2026 onward)

- Milestones: First quarterly governance review of content; Metrics report on initial outcomes (Q1 2027); Ongoing continuous improvement activities (to be planned based on initial results).

Add a Gantt chart or timeline diagram if needed. Ensure to include any hard deadlines (for example, “Product B major release in August – its docs must be in the new system by then”). Also note inter-dependencies (like waiting on hardware for servers, or translation vendor availability).

Regular status checkpoints (with dates) can be listed here too (e.g. “Mid-project review with VP in July”).

Post-Migration Governance Plan

Describe how content will be governed and maintained after the migration, to sustain the benefits of structured content and prevent regression into old habits.

- **Ownership & Accountability:** Clarify who will own the content going forward. *Example: “Each product team has an assigned Content Owner responsible for keeping that product’s topics up-to-date. The documentation manager will oversee overall quality and compliance.”* List any governance bodies (e.g. a **Content Governance Board** that meets regularly, comprised of senior writers and/or stakeholders).
- **Governance Policies:** Summarize key policies that will continue post-migration:
- **Content Update Process:** (e.g. “All changes to published content must go through the CCMS workflow with at least one peer reviewer’s approval before publishing.”)
- **Reuse and New Content Creation:** (e.g. “Writers must search the CCMS for existing content before creating new; any duplicate content requires approval or must be justified.”)
- **Metadata Compliance:** (e.g. “All topics must have required metadata (Product, Version, etc.) filled in; monthly audit by the information architect to catch missing metadata.”)
- **Template/Style Guide Adherence:** (e.g. “Use the standard templates for new topics. Run the automated style checker (Linting) on each topic before it’s considered done.”)
- **Translation Workflow:** (e.g. “New or updated topics marked for translation will be sent out within 2 days of approval to keep localization in sync.” And “No publishing of a language until its translations are back and reviewed.”)
- **Versioning and Archiving:** (e.g. “When content is replaced or retired, archive old versions in CCMS with appropriate status (Archived) rather than deleting, to maintain history.”)
- **Governance Meetings & Reviews:** State how often governance activities occur. *Example: “The Content Governance Board will meet quarterly to review content KPIs (see next section) and discuss any needed adjustments to the model or processes. Additionally, a monthly content quality audit will be performed on a sample of topics by the lead writer (to check for structure, style, link issues, etc.). Results will be shared with the team for continuous improvement.”*
- **Training and Onboarding:** “New team members or SMEs joining the content process will receive structured content training. An onboarding guide and mentorship by a ‘DITA champion’ are in place to ensure new contributors follow the standards.” Regular refresher training might be scheduled annually.
- **Tools Maintenance:** Note any tasks like “update style sheets or validation rules as standards evolve”, and who is responsible. Also, plan for CCMS upgrades or license renewals under governance.

- **Avoiding Content Drift:** Emphasize the commitment to avoid slipping back. *“We will monitor for any signs of content drift (e.g. manual work outside the CCMS, writers bypassing workflow) and address them immediately by understanding the root cause – whether tool issues or knowledge gaps – and correcting course.”*

The goal is to show that *after migration, there is a clear plan to manage and sustain content quality and efficiency.* This keeps leadership confident that the investment will continue to yield benefits.

Success Metrics & Monitoring

Define how you will measure the success of the migration and the ongoing health of the content operations. Include baseline measurements (pre-migration) and target outcomes. This section can be updated over time as you collect data.

(Below is a table of example metrics. Customize it to the metrics you plan to track. Provide a baseline if known, and a target. If baseline isn't known yet, indicate how you will gather it.)

Metric	Baseline (Pre-migration)	Target (Post-migration)
Content Reuse Rate (% of topics reused in more than one publication)	~5% (Minimal reuse, lots of copy-paste across docs)	50% reuse rate <i>after 1 year</i> (Significant shared topics across similar guides)
Update Cycle Time (Average time to implement and publish an update)	4 weeks (for a minor update in legacy process)	2 weeks or less (with structured topics and CCMS workflow)
Translation Cost per Release (for all supported languages)	\$100k per release (estimated, with many repeated translations)	\$75k per release <i>next year</i> (25% reduction via content reuse and better TM leverage)
Quality – Post-release Fixes (Documentation corrections needed after publication)	15 corrections on average (per release)	<5 corrections per release (<i>improve accuracy with better reviews & governance</i>)
Support Tickets (Docs-related support issues in 6 months)	200 tickets/6mo referencing unclear docs	100 or fewer <i>after migration</i> (aim to halve by improving content findability and clarity)
Contributor Satisfaction (Survey of writers/SMEs about new process)	Legacy tools frustrating (qualitative)	Positive feedback (e.g. >80% satisfied in survey with CCMS and workflow)
AI Answer Accuracy (if applicable) (Quality of chatbot or search answers using docs)	N/A (no AI in use)	Define once AI is implemented, e.g. <i>90% of AI-provided answers are rated helpful</i> (with structured content enabling this)

Monitoring Plan: For each metric, state how and when it will be measured. *Example: “Reuse rate and cycle time can be obtained from CCMS analytics or project tracking data every quarter. Translation cost is tracked per release via finance reports. Support tickets counted via support system analytics after each release.”* Assign responsibility,



e.g. documentation manager or analyst to collect these and report in governance meetings.

Include a narrative if needed: *“Overall, we expect to see efficiency gains within the first year. If targets aren’t met, we will investigate whether the issue is with process adoption, tool utilization, or scope creep, and take corrective actions.”*

Usage: This template is meant to be a living document throughout the migration project. Initially, it guides planning (with sections like inventory, decisions, and timeline). As the project progresses, update it with actual data (e.g. fill in baseline metrics, record pilot results, adjust timelines). In the end, it will serve as a reference for how the migration was executed and a baseline for ongoing structured content operations.