✳DIAGRAM

Start with the business outcome

Work through pages 1-3 with your business and technology teams. Start with one priority outcome.
Use page 4 only if a weighted comparison would help. You can choose a next step without scoring.

Organization / site

Decision owner / decision date

Current CMS, version, hosting and key constraints

1. What needs to improve?

Priority business outcome, such as faster publishing or more qualified inquiries

Current baseline

Target / target date

How will you measure improvement?

Who owns the outcome and adoption?

Expected added value and assumptions

Describe added contribution, time saved or service improvements versus today or another option.
State the time period and evidence. Keep benefits separate from costs; sales are not profit.

2. Name the paths worth investigating

Stabilize

Keep the current site working while you gather evidence and plan.
Set a review date and triggers to act. This buys time, not a permanent solution.

Modernize

Improve the current platform through an upgrade, hosting move or focused changes.
Name the target version and hosting model. Assess what carries forward.

Replatform

Move to a different CMS. Include delivery, migration, integrations and training.
For Ektron, plan a rebuild even if the destination is Optimizely.

Check fit and scope the work

Use the paths named on page 1. Mark a path N/A if it is not a credible option for your situation.
Apply the same requirements and evidence standards to your current platform and alternatives.

3. Must-haves come first

Enter Pass, Fail or U (unknown). An unmet must-have rules out an option as currently scoped.
Include essential security, accessibility, hosting or business requirements, even if hard to price.

Must-have requirement	Stabilize	Modernize	Replatform	Evidence / owner

4. What work is actually involved?

Use Keep, Adapt, New or U (unknown). Validate estimates against your actual implementation.
A substantial rebuild is a reason to compare destinations, not an automatic reason to switch.

Area to assess	Stabilize	Modernize	Replatform
Code, content models and migration			
Integrations, search and data flows			
Hosting and access to required tools			
Publishing workflows and training			
Team capacity and ongoing maintenance			
AI tools, data control and usage costs			

5. What evidence is still missing?

Question / test / evidence needed	Owner	Due date

Compare investment and choose a next step

Use the same three-year period, scope and currency for every path. Enter full-period totals.
Include one-time and recurring costs. Use ranges where needed; avoid counting bundled fees twice.
If stabilizing, include any later migration or upgrade expected within this period.

Currency / comparison start and end dates

Three-year cost category	Stabilize	Modernize	Replatform
Implementation, code and integrations			
Content migration, redirects and launch testing			
Licenses, paid capabilities and search subscriptions			
Hosting, frontend delivery and infrastructure			
Support, maintenance and internal team time			
AI usage and related services			
Training and change management			
Future upgrades and deferred work			
Contingency for identified uncertainty			
Three-year total (calculate manually)			

Cost assumptions, estimate sources and uncertainty

6. What is the right next move?

Does the expected improvement on page 1 justify the investment and effort over the same period?
Consider the tools your team will actually use. State any essential nonfinancial reasons separately.

Recommended path and reasons, or the evidence needed before choosing

Next action / owner / due date

Review date and triggers to act, especially if stabilizing

Optional: compare weighted fit

Use this page when several credible options remain and a structured comparison would help. Pages 1-3 are enough to identify a next step. A score does not replace the business case.

Agree on priorities before scoring

Priority: 1 = useful, 2 = important, 3 = critical.
Fit: 1 = poor, 2 = limited, 3 = adequate, 4 = good, 5 = strong. Use U for missing evidence.
For cost and effort, higher fit means more affordable or achievable within your constraints.

Criterion	Priority	Stabilize	Modernize	Replatform
Business outcomes and expected value				
Publishing workflow and team skills				
Delivery effort and time to value				
Required tools and integrations				
Hosting and data requirements				
Team capacity and ongoing maintenance				
AI flexibility and governance, if relevant				
Three-year ownership cost				
Overall fit (1 to 5, calculate manually)				

How to calculate, if useful

For each option, multiply each fit score by its priority. Add those results.
Divide by the total of the priorities used. Example: priorities 3 and 2, with fit scores 4 and 3, give 12 plus 6. Divide 18 by 5 for an overall fit of 3.6.
Before scoring, remove criteria irrelevant to all options. Use the same criteria for every option.
Do not rank options while material unknowns remain. Never treat U as zero or silently omit it.
Exclude paths that fail must-haves. Check whether small priority changes alter the result.

What does this comparison change about your next step?