



# CMS UPGRADE BUDGETING CHECKLIST

1

## Establish stakeholder buy-in for the need to upgrade a Content Management System.

This is a critical step in obtaining a budget to move the project forward.

2

## Review and document all website functionalities.

This is important so you can effectively complete quality control over the project. It is also important to help understand all the items that will be impacted by the upgrade itself.

3

## Assess internal staffing workload and capabilities.

Be honest with yourself. Do your team members have time to work on this project and/or do they have the technical capabilities to work within the CMS? This will help determine if a partner agency is needed to assist with the upgrade.

4

## Determine if you want to perform the upgrade by itself or perform a full website redesign.

This is important because if you perform a website redesign, it may make more sense to start with a fresh CMS database and CMS code base, meaning no upgrade is required. Content migration would be required in this instance.

5

## Document the following:

- Total number of website code bases
- Total number of blocks / widgets
- Total number of third-party integrations
- Total number of DevOps pipelines
- Total number of custom code packages
- Total number of hosted environments
- Total number of website templates

6

## Determine if or how long your organization can tolerate a content freeze.

If you do not go on a content freeze during the CMS upgrade process, the database will need to go through the upgrade process twice.

If you can go on a content freeze, you will still need to account for business-critical content updates that may need to be double published. Accounting for this effort should not be overlooked.

7

## Include at least a 10% contingency budget.

8

## Include at least a 20% budget for project management and communications.

9

## Include a 15% - 20% budget for custom integrations that may need to be upgraded.

10

## Don't overlook the amount of quality control that will need to occur.

Still not sure where to start? Try our free CMS Budget Worksheet.

[Download the Worksheet](#)