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Planning the Perfect WordPress Website Migration

The Migration Success Journey Blueprint provides a comprehensive guide for a hassle-free migration of your WordPress website to MerlinFX.

2023

Introduction

Welcome to the essential guide for migrating your WordPress website to MerlinFX. This process is crucial, and this document will be your roadmap, so we know where to locate your website and how to make the transition as smooth as possible.

Step 1: Book a Clarity Call

The first step in this exciting journey is to book a Clarity Call with us. This call will allow us to talk about the specifics of your migration, understand your unique needs, and set the stage for a successful transition to MerlinFX. Let's get started!

Step 1: Book a Clarity Call

Ready to take the next step with MerlinFX?

Schedule a free Clarity Call. We'll discuss your current situation, whether it's a simple migration or something more, and outline our proven process tailored to your needs.

Expect a same-day or next-day proposal with options to consider, as we pride ourselves on swift responses. Please have all decision-makers present during the call to capture all requirements.

Book your Clarity Call today at www.merlinfx.com/clarity. Let's embark on this journey together and realise your online goals.

Book Clarity call on your phone.

Checklist

Tick off each task when they are done:

☐ Review This Guide

☐ Review Our Proposal

☐ Print this guide [optional if you are to take notes]

☐ Book Clarity Call

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Business Snapshot

Business/Organisation Name

ABN

Who are the decision makers for this project? [Includes authority to sign proposal, sign mutual agreemen, manage the website project]

After migration will you need additional pages? What will these be?

When do you need your website migrated?

What are your intentions for your web project &/or business into the future? [Depending on your answer - the strategy might change]

- Grow the business/organisation & website by adding content and value to my clients?

- Aim to have the website rebuilt using best-of-breed systems and become easier to edit and optimise within the next 12 months?

- Do nothing to the site after launch

- Looking to retire in the next 12 months

- Looking to sell the business within the next 2 years

- Other

Why you aren't using your current web developer?

How many staff members do you employ?

If not you, who will be managing the website?

Adding Pages, Blog posts, making changes etc. Include their full name, position and email address please.

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What is your level of experience with WordPress?

There is no right or wrong answer: eg: From "No Idea" to "Some" or "Online Wizard" or "I can barely turn a computer on!" It doesn't matter.

Capacity

What plan are you on now with your current provider?

Include a link to their plan page. We want to be sure we are matching the capacity of the current site with CPU, RAM, etc. Some sites are more resources heavy than others and we need to be sure we are placing you on the same type of server or better.

That you know of, include any extra optimisations included

For example: In some cases resource heavy websites might have their CPU and RAM doubled or tripled if the site is old, not optimised or resource heavy.

Do you have a Managed WordPress service?

This isn't the same as Web Hosting. Web Hosting is a small part of the picture. Managed WordPress means updating the Website and other services rolled into one package.

Approx how much per month are you paying for your managed WordPress?

What is included in your managed WordPress fee per month?

For example, Our plans include support, training, backup, monitoring, security, core/plugin updates, unlimited bandwidth, and premium plugin licenses. Some plans include content creation, email marketing, and social media publishing.

Domain & Access

Where is your website currently hosted?

Do you have cPanel access?

If not, do you have or can you get a full backup of the website?

A full backup includes the site, all files and the database. Any good web developer would know what a full backup means.

Do you have an IT firm that manages your domain? If so who are they?

Include contact name, number and website.

Do they manage your email?

For example: We do not host or manage email accounts for our clients. This is an old practice where web servers would host mail. But with cloud mail like Google Worskpace and Microsoft's 365; their mail, calendar, drive options are far superior and I recommend you use one of those if not already.

Where is your domain registered?

Do you have access to you domain?

How easy is it to edit your website now?

Can you easily add pages, add images?

Can you easily add and edit web forms?

Has your website been hacked before?

If so, what did they do?

Analytics

Do you have Google Analytics? If not how are you tracking website performance?

Do you have access to your Google My Business Account?

Do you have access to your Google Console Account?

Processes

If you have a CRM/Newsletter tool, what is it called?

Tick all that apply:

- We don't have a CRM/Newsletter but need one
- We want to get more leads
- We want to be sending newsletters
- We want people to be able to book appointments

Is there any other software you use or apps integrated with your website?
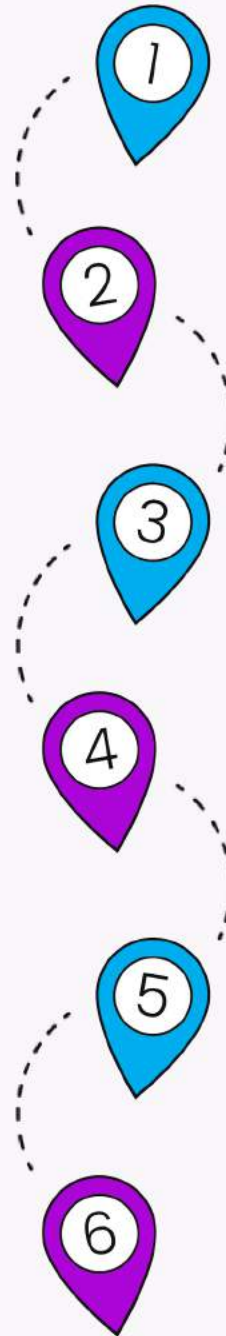
List all and purpose?

What business contact/calendar software are you using?

- Google Workspace
- Microsoft 365 or other Microsoft products
- Something else?

Please specify

What other online software do you use?

This could be Canva, Xero, Zapier etc

The Full Journey

1

PLANNING: YOU ARE HERE

Effective Planning Leads to Exceptional Website Projects: Our unique planning process and tailored approach to website development allow us to deliver exceptional results and exceed client expectations.

2

PROPOSAL

Our website proposal is a comprehensive and customised plan to help you achieve your online goals and succeed in the digital world. To benefit most from the Migration Success Journey Blueprint guide, we highly recommend participating in our Blueprint Call [details in the proposal], providing an even more in-depth and detailed analysis of your website project success.

3

ONBOARDING

Our website launch onboarding service ensures that your website is set up for success from day one, with a smooth and seamless transition from development to live launch.

4

MIGRATE &/OR REBOOT

We start from scratch with a new design or migrate your WordPress website from a backup and optimise the website to ensure it is updated to the latest versions of the software and plugins. Using best practice and premium options.

5

REVIEW & TEST

Testing a website before launch is crucial. Technical errors and poor user experience can harm the success of your online presence. We take the time to review and make the necessary changes. Ensure your website accurately represents your brand and provides a great experience for visitors.

6

LAUNCH & CARE

Your website launch is just the beginning. Our continuous care model ensures your site stays secure, supported and up-to-date, and we include excellent training, backup, monitoring and more. Trust us to provide the care your website deserves and keep it performing at its best.

Thanks!

We hope you've enjoyed working your way through our guide: Migration Success Journey Blueprint.

Your next website project could be the very first one for your new business or the latest re-design in a line of successful websites you've had previously.

It doesn't matter what level of experience you've had with website projects previously; the most important thing is that you choose to work with a web designer who clearly understands your business and your requirements.

We've got some additional tips and ideas that we'll send you via email in the next few days, offering further insight and action points to help you with a successful project.

If you have any questions or want more information on how we can help your business, please contact us.