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CTRL+CLICK CAST #112 - CMS Upgrades & Migrations, Part 1

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Preview:

Emily Lewis: Clients do not know what they don't know, and so it's up to us to ask the right questions that lets us be proactive about how their site is developed and create those opportunities for improving their workflow and adding features they hadn't considered. This is on our shoulders to think beyond the technical.

Lea Alcantara: Right. And you have to really understand their site needs in relation to the answers, like can you extrapolate these business goals to technical solutions, and all of these will lead to a better understanding as to whether a CMS upgrade or a migration to a new system makes more sense.

[Music starts]

Lea Alcantara: From [Bright Umbrella](#), this is CTRL+CLICK CAST! We inspect the web for you! Today Emily and I will discuss the whys and hows of upgrading or moving away from your content management system. I'm your host, Lea Alcantara, and I'm joined by my fab co-host:

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Emily Lewis: Emily Lewis!

Lea Alcantara: Today's episode is sponsored by [Craft CMS](#). Along with the release of Craft 3 earlier this month, the team at Craft CMS is excited to announce Commerce 2 Beta has been completely rewritten for Craft 3 and includes subscriptions, extensibility improvements, payment gateway plugins and more. You can download Commerce 2 as a trial through the Craft Plugin Store today, and to learn more about Craft CMS and Craft Commerce, visit [craftcms.com](#).

[Music ends]

All right, I am very excited about this episode.

Emily Lewis: [Laughs]

Lea Alcantara: Because we get asked about this a lot, and it's pretty much Bright Umbrella's specialty.

Emily Lewis: Yeah.

Lea Alcantara: In the last part of our [Demystifying the Web Series](#), we tackled the importance of maintaining websites.

Emily Lewis: [Agrees]

Lea Alcantara: And we touched on CMS upgrades and migrations briefly as one of the major ways you should maintain your site, and we'll link that in our show notes, if you want a little overview, but CMS upgrades can get complicated quickly, even CMSs with one-click updates like Craft and Statamic can get messy if you're not careful, especially if you don't update your CMS on a regular

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basis. It's kind of like a car, right? So sure, you can ignore that oil change, the car will still run, but it might slow down and make funny noise.

Emily Lewis: And then all of a sudden you've got to buy a new car. [Laughs]

Lea Alcantara: Right.

Emily Lewis: And I think it's the same with CMSs, maybe an upgrade isn't enough. Maybe it's time for a new CMS even.

Lea Alcantara: Right. So how do you know if the newest version of the software your site is currently on is still serving your customers or serving your staff and admins? These are questions many of our clients and prospects ask us. Technology moves so quickly that when you decide to use something five or three or even one year ago may not be working for your business anymore, but there are so many factors to this decision, and budget, of course, is the obvious one.

Emily Lewis: But then that introduces even more nuances. Maybe it's time to invest a bit more now to save more in the long run or maybe you are over sold on your CMS or had ambitions a few years ago where you realized you can pursue it today or maybe you need to go to a simpler system or service to save you money or even stop headaches.

Lea Alcantara: Right. Which is why we wanted to continue this discussion about CMS maintenance, upgrades and migrations from a client-friendly perspective in this Part 1 to help our clients understand this process.

Emily Lewis: And also, we hope other devs will get some tips on how to help their clients how to uncover all of the details and the not so obvious things that you need to know about, not just the



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technical aspects, but about your client's business in order to support them in an upgrade or a migration.

Lea Alcantara: [Agrees]

Emily Lewis: And then later in Part 2 later this year, we'll get into the kind of technical nitty-gritty of upgrading and migrations. So before we dive into analyzing whether to upgrade your current CMS or migrate to a new CMS, let's first talk about why you and I encourage our clients to upgrade or migrate.

Lea Alcantara: Two major reasons, security and speed.

Emily Lewis: Yeah.

Lea Alcantara: Upgrading your CMS to a more modern CMS can protect your website from bugs, hacks and site crashes. If you use e-commerce for any reason on your site, you need to be on top of this.

Emily Lewis: [Agrees]

Lea Alcantara: I recently had a conversation with a prospect who was on a really old version of ExpressionEngine, a version I knew that made them vulnerable to credit card theft because I know of at least one incident where it happened.

Emily Lewis: [Agrees]

Lea Alcantara: This was a 2013 version of that software.



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Emily Lewis: And this is recent that you've talked to this prospect.

Lea Alcantara: Yes, yes, this was as recent as last week. Of course, there was a fix for this exploit in newer versions of EE.

Emily Lewis: [Agrees]

Lea Alcantara: But if you don't upgrade your site regularly, like this prospect, you could be sitting with a security breach literally waiting to happen. It's not a what if; it's a when.

Emily Lewis: And when we talked to our clients about these options, we really try and put it this way, "What's more expensive? Is it more costly to regularly update your CMS version or to explain to your customers that their personal information was compromised?"

Lea Alcantara: Exactly. Now, I want to point out that no software is immune to hacking. We've talked about WordPress vulnerabilities here and on our blog a lot. Drupal recently also had a very public vulnerability that's considered highly critical, and even our fave CMSs can be targets, but a major way to fix or mitigate this is upgrading and updating your CMS on a regular basis.

Emily Lewis: And from clients to other developers, sometimes they think that this kind of exploits are exaggerated, but I'm kind of dumbfounded, do you even want to take that risk? Why take the risk?

Lea Alcantara: Yeah, exactly.

Emily Lewis: And an upgrade gives you more than just security. Newer versions of software have efficiencies that, for example, can massively speed up your site, and we've talked a lot about the importance of speed optimization on this show before, and I'll make sure we link to that on our show notes, but this July, July 2018, Google is finally adding mobile site speed as an official ranking signal.



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When I think even Terri hinted about this in our episode on Google Analytics last year, but now it's official.

Lea Alcantara: Right. And a fast site is just more pleasant to use, which is why fast sites convert.

Emily Lewis: [Agrees]

Lea Alcantara: If you're serious about your site conversions, you should consider upgrading your CMS.

Emily Lewis: And while we've been talking a lot about upgrades, everything we've said also applies to migrating from an old CMS to a completely different brand new content management system.

Lea Alcantara: [Agrees]

Emily Lewis: The situation when this comes up is really maybe your current CMS is super clunky and your staff dreads logging in to make changes to the site or it's really hard to update content or maybe your staff have a new campaign and they can't customize the site to work with that campaign.

Lea Alcantara: Right.

Emily Lewis: Maybe the staff has high turnover, a lot of volunteers, and the interface is super confusing so either it takes a lot of time to train them or they don't use it in the first place.

Lea Alcantara: Right.

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Emily Lewis: We've encountered these situations where the only way our clients can update their system is to be like a master, that front-end dev or contact IT or other vendors, and just starts getting expensive.

Lea Alcantara: Right.

Emily Lewis: And then there's even where the system they have is like super complicated and not at all intuitive.

Lea Alcantara: Right. Like they have to memorize where things are as opposed to actually just look at the integration and they're like, "Oh, that's where that widget thing is."

Emily Lewis: Yeah, those are all like good cues that it might be time for a migration.

Lea Alcantara: Right. Or maybe your system is so old that the cost to upgrade is about the same, right, as we're building it from scratch, so why not look at new software and see what opportunities you have to really maximize your site to serve your business.

Emily Lewis: Yeah, right. Yeah. So I mean, I think the bottom line is if your current CMS is holding you back, it may be time to move to an entirely new system, and we actually did a little blog post on that, Three Signs It's Time to Move to a New CMS, and I'll make sure we link to that in our show notes.

Lea Alcantara: Really, you know, at the end of the day, is your site providing the ROI you need for your business to succeed?

Emily Lewis: [Agrees]

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Lea Alcantara: And this is exactly what one of our clients recently explored and we ultimately moved them from a really old version of ExpressionEngine to something like Craft.

Emily Lewis: Do you know what I think was interesting kind of looking back, that EE system was super customized, like super.

Lea Alcantara: Right.

Emily Lewis: And at the time, and this was pretty old, I think it was five years old by the time we assumed it and then we managed it for almost two years.

Lea Alcantara: Right.

Emily Lewis: But it was super customized, which I think at the time was necessary, but staff turnover had happened and marketing needs had changed, and the system was something where by the time months leading up to their migration, Lea, were we getting like an email a day from their webmaster saying, "How do I do this? How do I add a link?" You know?

Lea Alcantara: Right.

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Emily Lewis: It was so no longer intuitive for the current staff that they had, but it was such a massive system. It was a multi-site manager running, four or five, five different systems plus all of that customization.

Lea Alcantara: Yeah.

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Emily Lewis: And so upgrading was a much more complicated thing, which is why migration really became a topic.

Lea Alcantara: Right, and all the things that you pointed out, too, what was interesting was a lot of those things weren't even necessary or used anymore.

Emily Lewis: Yeah.

Lea Alcantara: So there were sections and sites and pages and plugins that was just taking up resources.

Emily Lewis: Custom PHP.

Lea Alcantara: Yeah, just taking up resources, and just pointing out that years and years ago when it first launched, those things were necessary at the time because the plugins and the development software just was not at a point that that functionality existed.

Emily Lewis: [Agrees]

Lea Alcantara: But as we all know, the web matures, functionality and people's features and requests mature and also kind of standardized so those features just get either built in to the CMS itself and then you can just use it out of the box or plugins get more sophisticated so that there are newer ways to do the exact same thing faster, better, easier and cheaper.

Emily Lewis: [Agrees]

Lea Alcantara: But if you don't upgrade, update, keep on top of that on a regular basis, then what you're doing is just working on 5-year-old software that is just chugging along.



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Emily Lewis: Yeah, and it gets expensive.

Lea Alcantara: Right.

Emily Lewis: I mean, the other thing about deciding to upgrade versus migrate is that when you get into those really old systems that were highly customized five years ago and staff has changed and needs have changed and so those customizations don't suit the needs that as you start trying to meet your new needs, you're having to work with a really old clunky system that development time takes longer.

Lea Alcantara: Right.

Emily Lewis: Add-ons aren't even supported for the current version you're in so it's sort of questionable whether you want to leverage them or build something custom, and it just becomes complicated, and so again, this is about ROI and I feel like with the client that we move from an EE Version 2 to Craft, we could have stayed in EE.

Lea Alcantara: Right.

Emily Lewis: But that ROI thing really came up because I think they're going to constantly be in that situation of staff turnover. In fact, we found out last week, a key marketing person changed.

Lea Alcantara: Right.

Emily Lewis: And so what Craft offered them for their current needs in kind of projecting down the road was just a lot more flexibility in a cheaper way than we could accomplish for their needs with EE.

Lea Alcantara: Right, exactly, and I also want to emphasize that the ROI includes time.

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Emily Lewis: Yeah.

Lea Alcantara: So there is cost associated, of course, in dollars, but saving time really leads them to save money.

Emily Lewis: Yeah, right. Especially staff time, I mean, it was giving the staff control over their CMS to the most Nth degree we've ever done for a client ever before.

Lea Alcantara: Maybe a little too much.

Emily Lewis: [Laughs]

Lea Alcantara: Maybe in retrospect, a little too much.

Emily Lewis: Yeah.

Lea Alcantara: But this gave us the opportunity for them to really actually think about not just about the technical aspects, but what do they need to get out of this website?

Emily Lewis: [Agrees]

Lea Alcantara: Like what are their actual goals?

Emily Lewis: [Agrees]

Lea Alcantara: Which leads us to, how do you know whether an upgrade or migration is right for your business or your client's business? So for our clients, we start with the CMS audit. Depending on the scope of the site, this can actually be pretty simple.



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Emily Lewis: [Agrees]

Lea Alcantara: Minimally, you should always start off with an inventory, a CMS inventory. This could just be a spreadsheet that lists everything about your current setup; software versions, the server setup, associated add-ons, and age of installed items.

Emily Lewis: And we keep this as like a template, and it's kind of like all the assets that we create to help us run projects, we maintain as templates, and literally maintain them.

Lea Alcantara: Yeah.

Emily Lewis: They don't just sit in isolation. After an audit, we revisit them and see if something needs to be changed. So this isn't a 100% starting from scratch, which obviously is going to save us time. It also ensures that we're making sure we're covering all of our bases for this process and saves the client time in the project.

Lea Alcantara: Exactly, and that way you're starting with data, right?

Emily Lewis: [Agrees]

Lea Alcantara: Like you know what you have to work with, and it gives you an at-a-glance view of the state of your site, so that's the really, really simple summary of that, but we also recommend checking for newer versions of the CMS add-ons. Are they still being updated? Is this an active system with a robust community? Is there an abandoned plugin, and if so, is there an easy alternative? And of course, cost, are there extra software license cost to upgrade?

Emily Lewis: [Agrees]



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Lea Alcantara: I think that's something we have to really emphasize with clients because just because they paid for it five years ago doesn't mean that they will have unlimited lifetime updates to that software.

Emily Lewis: Yeah, and not just the core CMS. This applies equally to add-ons.

Lea Alcantara: Right.

Emily Lewis: Sometimes add-on cost to upgrade as well.

Lea Alcantara: Right, exactly, and then on the other hand, you need custom coding in order to upgrade. And if so, is it a simple tweak that can be easily added just like a little line change in a plugin, for example, or are we talking completely recode of the functionality, you know?

Emily Lewis: [Agrees]

Lea Alcantara: And then when I say that, is the upgraded version of the software compatible with your current hosting configurations, right?

Emily Lewis: Right.

Lea Alcantara: Because you could be like, "Okay, so this plugin works with this CMS, but does your host actually match all of that?" Sometimes newer versions of the CMS demand newer hosting software versions, too.

Emily Lewis: [Agrees]

Lea Alcantara: So for example, Craft 3 requires PHP 7. It's no longer an option, right?



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Emily Lewis: [Agrees]

Lea Alcantara: And the reason being is that that makes their code a lot more lean and efficient, right?

Emily Lewis: [Agrees]

Lea Alcantara: As well as faster.

Emily Lewis: Right. So there's a benefit to it, but as you're putting this sort of inventory together and gathering these costs, don't forget about the costing.

Lea Alcantara: Yeah, absolutely, because I have. [Laughs]

Emily Lewis: Yeah. [Laughs]

Lea Alcantara: I remember when we had to move this ctrlclickcast.com site and we have some old plugins still on there and it was incompatible with PHP 7. I had to go through all of them and it wasn't too difficult, I had to make a few line changes, but there were a lot of errors when I first did that update.

Emily Lewis: Yeah.

Lea Alcantara: So make sure you check. [Laughs]

Emily Lewis: You mentioned this very CTRL+CLICK CAST. [Laughs]

Lea Alcantara: [Laughs]



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Emily Lewis: But I find it so ironic we're having this conversation about "You really need to keep your system upgraded," and we are on such an old version. [Laughs]

Lea Alcantara: I know, I know. Well, okay, people, we're on it.

Emily Lewis: [Laughs] We are in the process of updating both the front end of the site and the back end.

Lea Alcantara: Yeah, absolutely.

Emily Lewis: So maybe by then, let's see. [Laughs]

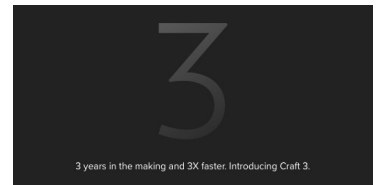
Lea Alcantara: [Laughs]

Emily Lewis: Anyways, though, I do think that asking these technical questions gives you the baseline scope for your client's current system, and then that allows you to start estimating the cost and level of effort, because you can't decide whether to upgrade or migrate just based on, "Oh, we really like the CMS."

Lea Alcantara: Yean, exactly.

Emily Lewis: There needs to be some sort of cost benefit as well as the business goal benefit. So we started with this inventory and then we take it another step further because you really do need to evaluate more than just maybe the existing system they're on so you want to do a comparative analysis.

Lea Alcantara: Exactly. So usually, our clients have another CMS in mind.



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Emily Lewis: [Agrees]

Lea Alcantara: And they ask us whether that makes sense for them, and that makes it easy to know what systems to compare, but at this point, this is where your expertise as the expert comes in. If you are tech agnostic like we are, you should have a few options for them to contemplate, but to keep it simple, choose one to compare to just to keep this analysis more focused and cost effective. There are hundreds of CMSs to choose from and it would be impossible to compare them all.

Emily Lewis: Before we get into that comparative analysis, it occurs to me that maybe we should talk a little bit about the cost of this effort.

Lea Alcantara: Right.

Emily Lewis: For us, as the agency, and for the client, how people run their business is up to them, but this is beyond just putting together a sales estimate.

Lea Alcantara: Right.

Emily Lewis: And so this is something that we typically charge our clients like a flat rate to do what we call a CMS audit.

Lea Alcantara: Right.

Emily Lewis: We have like different levels of these depending on where the client's budget is and needs are, but this isn't something that we're doing for free. I mean, it has a tremendous amount of value. Our final recommendations and findings, including the comparative analysis, is something that they can take with them and do whatever they choose with, to take it to another vendor, do it in-house or proceed with us.



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Lea Alcantara: Right.

Emily Lewis: But this is beyond just sales, so I think that's important to mention because if you're doing this level of inventory and auditing for a client in order to upgrade them, the upgrade isn't just what you should be getting paid for or the migration, if it's that. It's also the time and energy that you're putting into this process.

Lea Alcantara: Absolutely, the analysis, right?

Emily Lewis: Yeah, and I think that's a little bit hard to always feel that way, but you and I try and keep ourselves to a certain budget on this. If it's a flat rate thing that we're offering our client, then we really try and limit it, like Lea was saying to try systems to compare. Don't try to do ten. That's going to increase all of the time you're spending on it, and it's probably not even worth it in the first place.

Lea Alcantara: Yeah, absolutely. What's the cost benefit, right?

Emily Lewis: Yeah. All right, so to do that proper comparative analysis, it's really important that you're not just comparing whether there's similar functionality to the CMS they currently have, but it's really about seeing if that other system can do a better job or offer more features for them to improve their site, which really comes down to site discovery.

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Lea Alcantara: [Agrees]

Emily Lewis: And sometimes we're fortunate enough to do this before the inventory because that's the ideal scenario.



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Lea Alcantara: [Agrees]

Emily Lewis: But some clients really want this technical comparison before thinking about how the rest of it fits their needs, and then I think it's worth stating, if you did go through your initial audit, that inventory, and everything came down to a really simple straightforward upgrade, maybe with some additional costs, we don't go down this route of discovering comparative analysis. We just get the upgrade scheduled because most of our clients or actually all of our clients are budget focused.

Lea Alcantara: Right.

Emily Lewis: So to go down the path of a migration really only make sense if the upgrade starts getting really complicated and costly.

Lea Alcantara: Right.

Emily Lewis: So when the migration looks like a viable option, we want that technical comparison and we start diving into discovery.

Lea Alcantara: And what's interesting about the CMS discovery is that even with the long-term client, you kind of have to go back to the beginning of the relationship.

Emily Lewis: [Agrees]

Lea Alcantara: And you start with the questionnaire.

Emily Lewis: Yeah.



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Lea Alcantara: Because it gives an opportunity for everyone to clarify their understanding of their organization as well as their site.

Emily Lewis: [Agrees]

Lea Alcantara: For hours, we break our CMS discovery questionnaire into key groups. We have more than these groups, but here are the most obvious.

1. Core functionality and features, like does this do what our client needs it to do?
2. Digital marketing priorities, does the marketing team need on-the-fly landing pages, maybe regional content for those pages?
3. Content and customization options, how customized does the page styling really need to be
4. Then of course, third-party integrations, does this need to talk to Salesforce or MailChimp or other APIs?

We create this questionnaire in Google Docs and share it with our clients so they can answer in line. This allows us to collaborate on the document and easily comment and change specifics with history tracking.

Emily Lewis: And if it's a new client, we'll send them our base questionnaire with a few tweaks, like I mentioned earlier, we have templates for all of our processes. One of these is a base questionnaire, but if it's an ongoing client, we really customize to what we know to be our client's particular needs. We have a few posts on the CMS discovery questions and we'll link to that in our show notes, but there are a couple of that a lot of developers forget to ask. They seem simple, but they're often overlooked. The first is what are your business goals for the web? It isn't about technical stuff. This is



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about the business, and though we are providing a technical service, we really need to understand those goals for that service to meet those goals.

Lea Alcantara: Right.

Emily Lewis: And then the other question that we've only just started making sure that we have a good clear picture of this is how does the website fit into the overall marketing.

Lea Alcantara: Right.

Emily Lewis: And I'm not just talking about, "Oh, we include share buttons." [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: Or, "We have maybe a MailChimp subscription thing even bigger." There may be opportunities to integrate systems to improve their workflows. When they receive contact inquiry on the site, maybe that needs to go into some other system, and having a bigger picture of things, we can also better evaluate the technical aspects that can meet those needs.

Lea Alcantara: Absolutely.

Emily Lewis: And for a lot of our existing clients, we actually answer some of the questions ourselves. It's mostly because we want to verify that what we know is true, but it also gives us a chance to showcase how well we know their needs.

Lea Alcantara: Yeah.



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Emily Lewis: Like while this is an analysis, this is a sales tool. We do want them to upgrade. We want to show them we know exactly who they are and what they need and we're going to get them where they need to go.

Lea Alcantara: Right.

Emily Lewis: But it also allows them to correct us if our assumptions are wrong, and it gives everyone a single place to refer back to for our ongoing discussions about their CMS. It almost becomes the scope document.

Lea Alcantara: Right, absolutely.

Emily Lewis: And oftentimes, a lot of conversations about the project and goals and needs are happening in Basecamp, so we'll often link to those threads in the questionnaire so there's kind of an integrated reference point.

Lea Alcantara: Absolutely, you know what's funny is that these questions can actually confuse a client.

Emily Lewis: Yeah. [Laughs]

Lea Alcantara: And what's funny, it's not the technical questions that confuse them. It's the business questions, and in fact, it confused the client we mentioned earlier. They had to ask us why we need to know more about their marketing goals on top of their technical questions, understanding the why of it all.

Emily Lewis: [Agrees]

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Lea Alcantara: And here it is, it's a common misconception that upgrades or migration is they're just technical in nature. That is a misconception.

Emily Lewis: [Agrees]

Lea Alcantara: It can be an opportunity for you, for us as a web partner, to advise clients on how to better use tech for their business.

Emily Lewis: [Agrees]

Lea Alcantara: So for example, if you talk to a marketing team about a campaign, they might want to have landing pages with high-resolution photography and the goal is improving brand perception and for visitors to see these photographs in all their glory, but fast.

Emily Lewis: [Laughs]

Lea Alcantara: Because their customers visit the site on their phone, right?

Emily Lewis: [Agrees]

Lea Alcantara: Notice the most technical thing I mentioned there was that the photos were high res. Internally, I might consider a CDN and image compression options that doesn't degrade the image, but the discussion doesn't necessarily mean me bringing up AWS or whether we need a specific plugin.

Emily Lewis: [Agrees]



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Lea Alcantara: By being generic in the solution, we can be flexible in how it's executed and not boxed in when it's time to execute.

Emily Lewis: Yeah, I think that's a good point. Not boxing yourself as the developer, as the agency partner, and you never know what you're going to find. [Laughs]

Lea Alcantara: [Laughs] Right.

Emily Lewis: How many times have we gone into these systems? We know it's an upgrade, but we find something completely unexpected. If we haven't been too prescriptive about the solution, then we can be flexible on how we fix it. I think everything you just said, Lea, it just really reiterates why we did the Demystifying series last year is that it's really not about getting into the technical, but it's really about understanding the business goals.

Lea Alcantara: Right.

Emily Lewis: It's the exact type of conversation and approach that we have not just for an upgrade or migration, but choosing a CMS in the first place.

Lea Alcantara: Right.

Emily Lewis: Or when you get a branding project, you're not talking to them about what their final print or needs are. [Laughs]

Lea Alcantara: Right. [Laughs]

Emily Lewis: You're talking to them about what their goals are, and the thing is that clients do not know what they don't know, and so it is up to us to ask the right questions that lets us be proactive



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about how their site is developed and create those opportunities for improving their workflow and adding features they hadn't considered. This is on our shoulders to think beyond the technical.

Lea Alcantara: Right. And you have to really understand their site needs in relation to the answers.

Emily Lewis: [Agrees]

Lea Alcantara: Like can you extrapolate these business goals to technical solutions? All of these will lead to a better understand as to whether a CMS upgrade or a migration to a new system makes more sense.

Emily Lewis: And I just wanted to go back to that last point, can you translate those business goals to technical solutions?

Lea Alcantara: Right.

Emily Lewis: Because if you have a moment of being like, "I'm not sure I can do this," then that would be to also say, "Should I be bringing a partner in to help with this?"

Lea Alcantara: Right.

Emily Lewis: And that also changes the whole conversation about what direction you go.

Lea Alcantara: Yeah, absolutely.

Emily Lewis: All right, so we've done all that discovery and that's in part in service to do that comparative analysis that we talked about earlier, and so for us, we approach it internally and then there's what we show the client, and that's a really important distinction.



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Lea Alcantara: [Agrees]

Emily Lewis: So we have that CMS inventory that Lea was describing, and that's primarily an internal asset that gives us a sense of, like Lea said, the plugins and costs and maybe even hosting considerations, the CMS discovery question is client facing because that's that collaborative document that Lea was talking about.

Lea Alcantara: [Agrees]

Emily Lewis: But then internally, we also create a few more spreadsheets that help us calculate the scope of an upgrade versus a rebuild, and this is going to help with that comparative analysis.

Lea Alcantara: Right.

Emily Lewis: And so when we're talking about defining that upgrade scope, we break down what add-ons to keep and upgrade, what add-ons to replace with other add-ons, what add-ons that are now completely unnecessary because the new upgraded CMS has that new functionality built in. Maybe there are add-ons that need to be replaced with custom development code, and whether that code is PHP or some fancy Ajax JavaScript or even additional CSS and front end kind of, that can get really big so you want to make sure you identify that.

Lea Alcantara: Right.

Emily Lewis: And not even just what add-ons need to be replaced with custom development, but just what custom develop is needed. I'm thinking of the client we're talking about earlier who had the active directory integration that we needed to provide.

Lea Alcantara: Right, right, right.



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Emily Lewis: And that's not an add-on that's out there, so it needed to be custom developed. General development changes that just support implementing that newer development in the CMS, and then we break down the pros and cons of an upgrade with what we gathered from the discovery, taking into consideration staff time, especially if we're dealing with a large team, as well as the server requirements that need to be considered.

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Lea Alcantara: Yeah. I think that's really important to reemphasize here, the staff time.

Emily Lewis: It's so big. It can be so big.

Lea Alcantara: Yeah, and it's one of those things where even when there is a perfect technical solution, let's say, like I was just thinking about some of the performance recommendations that we had.

Emily Lewis: [Agrees]

Lea Alcantara: Well, if staff don't have the time or bandwidth to be checking to clear the caches or understanding renaming conventions and making sure that it's synced with the CDN and then training them and there's staff turnover, at the end of the day, okay, maybe that would give a better technical solution to their problem, but it wastes them time and money.

Emily Lewis: Yeah. And they get frustrated.

Lea Alcantara: Exactly, so you have to balance the benefits.

Emily Lewis: [Agrees]



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Lea Alcantara: And I remember that launching this technical solution would only like shave off certain millisecond kind of situations. So it did speed them up, but I mean, the extra hour plus more of their staff on an ongoing basis to make sure they save that millisecond didn't really make sense.

Emily Lewis: So yeah, you do have to do that pros and cons, looking not just at the technical, but the impact to the staff.

Lea Alcantara: Absolutely, yeah, absolutely, and then for the migration, the breakdown is different because it's basically starting from scratch.

Emily Lewis: [Agrees]

Lea Alcantara: From there, we outline what can you develop natively in the new CMS, so no extra add-ons, commercial or free, needed to do what the site needs to do, and as a developer, this should be your baseline. You should try to do everything as natively as possible.

Emily Lewis: [Agrees]

Lea Alcantara: Then what add-ons are needed to have necessary functionality, and whether it's free or an added cost, right?

Emily Lewis: [Agrees]

Lea Alcantara: And then just like the upgrade, what custom development is needed overall and what type? Also important, what can't we accommodate in this new CMS?

Emily Lewis: Right.



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Lea Alcantara: And is it important?

Emily Lewis: Oh, yeah. I think about all the times that we would find something in the new CMS where we're like, "Oh, I don't even know if – do we even need this? Do you guys use this anywhere?" So many things turn out to not even be important.

Lea Alcantara: Right. It was majorly scaled down.

Emily Lewis: [Agrees]

Lea Alcantara: Like I remember with this particular client, we started with all these granular permissions with specific members.

Emily Lewis: Yes, that's right.

Lea Alcantara: And then in the end, they're like, "Okay, here are the admins. Here are the editors. We're done." [Laughs]

Emily Lewis: Yeah, two levels, that's it. [Laughs]

Lea Alcantara: Yeah, yeah, and it started off like these crazy levels and then this one individual person needed to do this, and we're like, "Okay," and then in the end when we kind of started giving them that, they were like, "No, pull back, pull back." [Laughs]

Emily Lewis: [Agrees]

Lea Alcantara: They just didn't have the bandwidth for that.



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Emily Lewis: Yeah.

Lea Alcantara: And just like the upgrade pros on the migrating and rebuilding the site in a new CMS as well as the cons and also like the upgrade, notes on staff time as well server requirements.

Emily Lewis: [Agrees]

Lea Alcantara: And also, I'd like to point out, these questions are also relevant if you want to stay in the same CMS, but are considering the difficulty of upgrading versus building it from scratch.

Emily Lewis: Right.

Lea Alcantara: Yeah, I was just reviewing some of our notes from the episode with Shawn Maida about EE upgrades and all his "upgrades," that the majority of them aren't actually a "regular" upgrade path, they're still in the same system so technically it could be considered an upgrade, but it was actually rebuild.

Emily Lewis: [Agrees]

Lea Alcantara: Because in the end, recoding it was faster for them than going through the "check this, check that" kind of process, right?

Emily Lewis: And it's not what we've so far decided for the CTRL+CLICK CAST CMS.

Lea Alcantara: Yeah.

Emily Lewis: It's that we move the EE 4, but we're not upgrading. [Laughs]



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Lea Alcantara: No, no, no.

Emily Lewis: But to build that stuff from scratch.

Lea Alcantara: Yeah. We're going to rebuild it, but I also want to emphasize that that's not always the case, right?

Emily Lewis: [Agrees]

Lea Alcantara: Like for our other client, the lawyer website, because their needs are simple, it was just a straightforward upgrade.

Emily Lewis: [Agrees]

Lea Alcantara: There was no rebuild necessary, but just regular upgrade tweaks here and there, that kind of thing.

Emily Lewis: Yeah. I feel like that move – what was that – from EE 2 to EE3 for that client.

Lea Alcantara: Yeah.

Emily Lewis: I felt like the biggest amount of effort was actually updating their user manual because it was such a major interface change.

Lea Alcantara: Right, right, yeah. That was one of the biggest things, and I think one other add-ons and that was it.



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Emily Lewis: And that makes me just think that it's worth mentioning, don't forget about documentation and training. Those costs should also be considered when you're thinking about an upgrade or migration. There may be an assumption that migrating to a new system is going to be far more training and far more user manual creation, but if you are upgrading within a CMS to a different version that's majorly different than previous ones, you could be doing the same amount of training and user manual documentation.

Lea Alcantara: Right. Fortunately for this client, we didn't have to redo training. We just updated the documentation.

Emily Lewis: Oh, she's so bright. She's, you know.

Lea Alcantara: Yeah.

Emily Lewis: She picks everything up so quickly.

Lea Alcantara: Yeah.

Emily Lewis: A great client.

Lea Alcantara: Right.

Emily Lewis: So these things that we were just talking about in terms of defining the upgrade scope versus the migration scope, that's all internal.

Lea Alcantara: Yeah.



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Emily Lewis: That's not stuff we're going back and forth with the client on at all. For our clients, the most important point of the analysis is their goals and what they ask for and our overall recommendation, and then we break that down and bullet point for them the various pros and cons of each of the technical solutions.

Lea Alcantara: And we also like to break down the CMS's main benefits with the type of features the client is looking for.

Emily Lewis: Yes.

Lea Alcantara: And then we rank it from okay to excellent in a table.

Emily Lewis: Where did we get that idea from? I feel like we saw that somewhere. Was it [Masuga](#)?

Lea Alcantara: No, no, no. It was one of the other major, major web development firms. We'll link to it. We attribute it in our slides.

Emily Lewis: Yeah. It's a nice little chart that I think clients love, simple, easy to understand charts, and it kind of does that in a very simple way.

Lea Alcantara: Right.

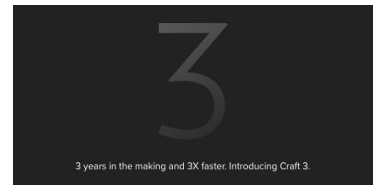
Emily Lewis: I do think it's really challenging, from all of this information, is figuring out the value versus the cost.

Lea Alcantara: Yes.

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Emily Lewis: Sometimes the solution is more expensive upfront, but less expensive in the long run for time and money, but sometimes the less expensive solution is better because the client really only needs like a static site and so maybe Statamic or Squarespace is better than, say, a full-blown custom Drupal or ExpressionEngine or Craft site, and sometimes when we do this comparative analysis, the options are pretty comparable.

Lea Alcantara: Right.

Emily Lewis: In one of our CMS discovery projects with a client, the technical came down to pretty equal, and they just ultimately chose user experience, their user experience as site admins using the CMS over the technical features that the other CMS offered, and that was because that was their priority.

Lea Alcantara: Right.

Emily Lewis: And while we've been talking about clients and their goals, we, I mentioned this earlier, but we need to consider what's better and easy for us to develop, because that also affects timeline and cost. It should be considered secondary to the client needs, but even something like, Lea, Rachel mentioned this on her episode with us about project management a couple of episodes back and she said, "If you find that you're going to dive into something you haven't done before, maybe you offer your client a discount for going in with you on it, a 10% off the top."

Lea Alcantara: Right.

Emily Lewis: So you knowing that in advance can be a selling point even.

Lea Alcantara: Right.



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Emily Lewis: It's not just something to make you not move forward, but something to give your client extra incentive for going in that direction.

Lea Alcantara: Absolutely, and since you brought up money, if budget is truly the main focus, then you need to scale down everything.

Emily Lewis: Oh yeah.

Lea Alcantara: Again, even with all this information, you will understand what is ideal, but budget is also a factor to consider.

Emily Lewis: [Agrees]

Lea Alcantara: But an upgrade or scaled down rebuild is much better than deciding to stick to an old, slow and insecure system.

Emily Lewis: [Agrees]

Lea Alcantara: So if they're like, "Oh, no, that cost is not what I expected," then just scale it down. It's better to upgrade or scale down a rebuild than sticking to something that's old.

Emily Lewis: Oh yeah. It never pays off.

Lea Alcantara: No. [Laughs]

Emily Lewis: It never does.

Lea Alcantara: Right.



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Emily Lewis: We have a client who's been on a system for years and years and years and I really hope someday they move to a newer system. [Laughs] But every request they ask for cost so them so much more than it needs to just because it's such an outdated system.

Lea Alcantara: Yeah, absolutely. And if user experience is the focus, sometimes you have to spend more time on choosing a system that is super easy to use, even if all the technical features are better elsewhere.

Emily Lewis: [Agrees]

Lea Alcantara: I know that's going to be difficult for a developer to wrap around, but if UX is the focus, that should be the focus of your comparison, right?

Emily Lewis: [Agrees]

Lea Alcantara: It might be frustrating knowing what the technical drawbacks are, but the reality is that non-technical people will use these systems at the end of the day.

Emily Lewis: [Agrees]

Lea Alcantara: And so make sure when you're comparing CMSs for migration, that you focus on what your client needs the most. Remember the client isn't you, right?

Emily Lewis: [Agrees]

Lea Alcantara: And sometimes the budgeting requirements actually dictate choosing a less than ideal CMS.



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Emily Lewis: [Agrees]

Lea Alcantara: But as a dev, you have to make it clear to the client the pros and the cons.

Emily Lewis: And you as a dev need to have the mindset that technical is just as important as budget, which is just as important as the client staff experience, like these factors all are equally important. Even though we're coming from that technical perspective, we need to understand that those things are ranked just as importantly.

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Lea Alcantara: Yeah, exactly.

Emily Lewis: All right, so let's go ahead and wrap up this episode with a few quick tips and thoughts about upgrades and migrations. We've been talking a lot about the in-depth analysis, but sometimes there are just some obvious points to mention.

Lea Alcantara: So number one, upgrade if your client site is uncomplicated.

Emily Lewis: Right.

Lea Alcantara: We kind of mentioned that a little earlier. That means they're not using strange content hierarchy and relationships. They have limited use of add-ons or the add-ons are all actively updated, and they're happy with the user experience, just upgrade.

Emily Lewis: Yeah. Sometimes we're tempted to move a client to a new system just because we like it, [laughs] but if after going through this process, if we really can't ourselves justify why they need to go to that new system, then why should we tell the client to do that and pay you for it.



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Lea Alcantara: Right.

Emily Lewis: It's about the client's ROI, every time, always.

Lea Alcantara: Absolutely, absolutely. Then try to get your client on a maintenance plan.

Emily Lewis: [Agrees]

Lea Alcantara: So they upgrade on a regular basis.

Emily Lewis: Yes, yes.

Lea Alcantara: Yes, exactly. This will keep their site secure and fast. All right, so what else do you think is a quick tip about CMS upgrades or migrations, Em?

Emily Lewis: Make sure your client does a content cleanup as part of this process.

Lea Alcantara: [Agrees]

Emily Lewis: Deleting old members, deleting old content, and on a regular basis because it's going to make their site more lean and preparing their site for migrations, because that will have to be done no matter what.

Lea Alcantara: Right.

Emily Lewis: It's a huge part of, even an upgrade, is to clean up data so we're not moving massive amounts of data that aren't even used or necessary anymore.



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Lea Alcantara: Right.

Emily Lewis: It saves us time, which saves them time and money, and not only that, how many times do we get the – “Well, I went into this channel and it didn’t do anything.”

Lea Alcantara: [Laughs] Right, right.

Emily Lewis: And we looked at it and we’re like, “Well, that’s because you guys don’t use that channel anymore and someone just left it there.” You know?

Lea Alcantara: Right.

Emily Lewis: So it saves also the confusion that staff encounters with a really old system.

Lea Alcantara: Yeah, absolutely.

Emily Lewis: Anything else, Lea?

Lea Alcantara: Oh, before we move on, I just wanted to step back and talk a little bit about some of the tips that you mentioned, like the deleting old members, come on, that’s a security issue, too.

Emily Lewis: Oh, right, totally. Staff, too.

Lea Alcantara: Right.

Emily Lewis: [Agrees]

Lea Alcantara: Staff and security issues. Don’t share passwords, people. [Laughs]



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Emily Lewis: [Agrees]

Lea Alcantara: Especially if you do have staff turnover, delete old members. Have a process for that in place with deleting old content. Also, just because a client says, “Okay, we’ve never touched this before,” don’t just willy-nilly delete it.

Emily Lewis: Right. [Laughs]

Lea Alcantara: Double check as a developer that it isn’t being used anywhere else. So just because they haven’t touched it doesn’t mean the content actually isn’t being used. They’re just not updating it. It might actually be like something in a sidebar widget and all of a sudden it’s gone, and that’s something that I’ve had to fix, you know?

Emily Lewis: [Agrees]

Lea Alcantara: When we did that migration, I’ve had to answer that question, “Lea, what happened to this thing?”

Emily Lewis: [Agrees]

Lea Alcantara: And then I had to re-review because it was one of those things where, “Oh, they don’t really update it or touched it,” but they needed it.

Emily Lewis: Yeah, I think it’s one of those things of having the distinction between the client has a sense of what they use and don’t use, but you can’t go 100% just on the questionnaire answers.

Lea Alcantara: Right.



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Emily Lewis: Like you have to follow up and dive in a little bit further to validate what they say.

Lea Alcantara: Right.

Emily Lewis: So it's not just going pulled off of their answers.

Lea Alcantara: Right, exactly. So like, again, you're the one who built the site or has taken over the site so even if they say, "This isn't needed or doesn't need to be touched or whatever," verify that that's true.

Emily Lewis: [Agrees]

Lea Alcantara: Especially with complicated relationships in multiple sites in one system, sometimes certain things are managed in one place and then they forgot that it's being pulled to that other site.

Emily Lewis: And that's hugely common for systems that, one, themselves are old, but for organizations that have high staff turnover.

Lea Alcantara: Right.

Emily Lewis: Just people get disconnected from why something was built, because maybe it was built for one person in their particular workflow, in their particular job description, and now that job doesn't even exist anymore.

Lea Alcantara: Right.

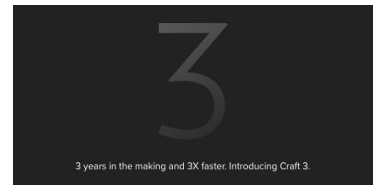
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Emily Lewis: So yeah, this is really, really common, but if you get your client to be on a maintenance plan, this is a regular thing you're monitoring and cleaning up, and so it just becomes like balancing your checkbook if anyone does that or whatever. Just keep it on top of stuff.

Lea Alcantara: Yeah, absolutely.

Emily Lewis: Anything else come to mind?

Lea Alcantara: For me, I think if the client is already going to redesign...

Emily Lewis: Oh, like a visual redesign?

Lea Alcantara: Yeah, like there's going to be – we're changing some brand or we've changed the layout or they're hiring you to change the layout and all that fun stuff, if there's room in the budget, you should strongly consider a rebuild or migration, especially if you're on an old system.

Emily Lewis: [Agrees]

Lea Alcantara: A redesign usually signals a need to improve overall site use.

Emily Lewis: Right.

Lea Alcantara: Not just by the visitor, but the staff in order to serve that visitor in a business need to improve site conversions, like they're like, "Okay, we need to make this landing page better. We need to change the flow of the site." Well, how does a CMS help make that happen as best as possible?

Emily Lewis: [Agrees]

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Lea Alcantara: And is the system that you're using going to make that easy for your admins and your client?

Emily Lewis: I think it's also worth mentioning our episode with Ben Furfie.

Lea Alcantara: Do You Really Need...

Emily Lewis: Yeah. There's also just the bottom line reality. This may be less so for large complex systems that need to stay large and complex, but if you have inherited a client or maybe you put that client on a system that they just have not really ended up using, maybe they don't even need a CMS in the first place.

Lea Alcantara: Right.

Emily Lewis: And that should really be part of your discussion, right?

Lea Alcantara: Exactly. You want to continually provide your value and your professional opinion for these types of things.

Emily Lewis: [Agrees]

Lea Alcantara: And then that builds trust and then ongoing work as well, right?

Emily Lewis: Yeah, totally. So I think that takes us to the end of this episode. We've got a few dev questions from our listeners out there about upgrades and migrations, and we have tons of advice on how to do upgrades and migrations. [Laughs]

Lea Alcantara: Right. [Laughs]

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Emily Lewis: So we're going to tackle all of that in a Part 2 later this year.

Lea Alcantara: Absolutely, but before we finish up, we've got our rapid fire ten questions, and this time, I'm put on the spot.

Emily Lewis: I thought for sure you were going to sucker me into this one.

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs]

Lea Alcantara: No, I thought I'd go easy. [Laughs]

Emily Lewis: Okay, Lea. What your go-to karaoke song?

Lea Alcantara: I feel like I've answered this before, long-time listeners, it's *No Doubt – Don't Speak*.

Emily Lewis: [Laughs] What advice would you give your younger self?

Lea Alcantara: My advice to give my younger self, God, I should have really actually thought about this considering I assigned this to myself. [Laughs]

Emily Lewis: [Laughs]

Lea Alcantara: You know, be a lot more proactive.

Emily Lewis: [Agrees]

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Lea Alcantara: I feel like I think there was a lot of reactive things, like I put myself in positions for success in my career and this is where I am now because of that, but...

Emily Lewis: [Agrees]

Lea Alcantara: And I think this is also true with what we're doing with Bright Umbrella. Just being more proactive about getting...

Emily Lewis: What we want.

Lea Alcantara: Opportunities and being clear about what that means as opposed to, "Hey, this is like a cool situation. I'm just going to put myself in this cool situation." But there's no... [Laughs]

Emily Lewis: See what happens. [Laughs]

Lea Alcantara: Yeah, and see what happens, but there's no like real specific direction as to why. It's just more like, "This feels cool and fun." You know...

Emily Lewis: Yeah. [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: All right, what's your favorite PG-rated curse word?

Lea Alcantara: Bang.

Emily Lewis: Dang. [Laughs]



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Lea Alcantara: Yeah, I say it like dang a lot. Yeah.

Emily Lewis: You texted me that. [Laughs]

Lea Alcantara: Yes, I know. I know. It is. It's my favorite PG-rated curse word.

Emily Lewis: All right, who's your favorite superhero?

Lea Alcantara: Man, this varies all the time, but I'm going to say Sailor Moon.

Emily Lewis: Okay. All right, I have to ask another question. So she is a superhero like powers and stuff?

Lea Alcantara: Yes, yeah, yeah.

Emily Lewis: Oh, okay. [Laughs]

Lea Alcantara: She's the princess of the moon.

Emily Lewis: Okay. [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: Obviously, I need a little tutorial.

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs]



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Lea Alcantara: She fights evil by moonlight, wins love by daylight.

Emily Lewis: Okay, excellent.

Lea Alcantara: [Laughs]

Emily Lewis: What's your favorite time of year?

Lea Alcantara: Fall.

Emily Lewis: If you could change one thing about the web, what would it be?

Lea Alcantara: Oh, certain people should be banned from the web. [Laughs]

Emily Lewis: Yeah, straight up ban button.

Lea Alcantara: Yeah, yeah, like for life.

Emily Lewis: [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: What are the three words that describe you?

Lea Alcantara: Sassy.

Emily Lewis: [Laughs]



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Lea Alcantara: Smart and enthusiastic.

Emily Lewis: I agree with all.

Lea Alcantara: [Laughs]

Emily Lewis: What about three words that describe your work?

Lea Alcantara: Passionate, meticulous, and fulfilling.

Emily Lewis: All right, what's your favorite meal of the day?

Lea Alcantara: Dinner.

Emily Lewis: And last question, coffee or tea?

Lea Alcantara: I'm a tea person.

Emily Lewis: Yeah, I was thinking about this myself. I don't think I've seen you drink coffee very much.

Lea Alcantara: No, like coffee to me is almost like a dessert for me.

Emily Lewis: Yeah.

Lea Alcantara: It's not like I'm anti-coffee. I like coffee cake. I like mocha and dessert and stuff like that, but I don't like drinking it.



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[Music starts]

Emily Lewis: [Agrees]

Lea Alcantara: Yeah.

Emily Lewis: All right, well, that brings us to the end of today's episode. Be sure to check our show notes for all of the resources we mentioned today.

Lea Alcantara: CTRL+CLICK is produced by [Bright Umbrella](#), a web services agency invested in education and social good. Today's podcast would not be possible without the support of this episode's sponsor! Many thanks to [Craft CMS!](#)

Emily Lewis: We'd also like to thank our hosting partner: [Arcustech](#).

Lea Alcantara: And thanks to our listeners for tuning in! If you want to know more about CTRL+CLICK, make sure you follow us on Twitter [@ctrlclickcast](#) or visit our website, [ctrlclickcast.com](#). And if you liked this episode, please give us a review on [Stitcher](#) or [Apple Podcast](#) or both! Links are in our show notes and on our site.

Emily Lewis: Don't forget to tune in to our next episode when Tim Bardlavens joins the show to chat about fostering diversity in design leadership. Be sure to check out [ctrlclickcast.com/schedule](#) for more upcoming topics.

Lea Alcantara: This is Lea Alcantara ...

Emily Lewis: And Emily Lewis ...

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Lea Alcantara: Signing off for CTRL+CLICK CAST. See you next time!

Emily Lewis: Cheers!

[Music stops]

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