DON'T FEAR MIGRATION!
HOW TO SUCCESSFULLY MOVE DOCS TO A NEW TOOL

Brooke Wayne
Program Lead - Communications, FreshBooks

- **Welcome**! Thank you for watching this
- I'm here to talk to you all today about **something** that's **not scary** at all: **migrating** documentation to a new tool

HELLO! I'M BROOKE

- She/Her
- Batman
- Cyborg
- Canadian 🇨🇦
- Sci-fi nerd
- BFA + English minor
- Program Lead - Communications @

FRESHBOOKS cloud accounting

- Before I begin, let me introduce myself a bit!
- I'm Brooke Wayne, and you can refer to me as she or her
- I **also** go by Batman since we share the same last name
- **I'm hard of hearing** with a cochlear implant, so technically I'm a cyborg too
- I'm born and raised in Toronto
- As you can tell by my slides, I'm a pretty **big fan** of science fiction
- And as someone with a degree in fine arts and a minor in English, I **can confirm** that documentarians come from **even** the most of unlikely of places!
- I'm a Program Lead of Communications at FreshBooks. We're a cloud accounting company where we help small business owners run their businesses without having to learn accounting
- I manage **internal documentation** for our Support Team and **external documentation** for our customers through our Help Centre docs

LAND ACKNOWLEDGEMENT

I acknowledge that I'm on the traditional territory of many nations including the **Mississaugas of the Credit**, the **Anishnabeg**, the **Chippewa**, the **Haudenosaunee** and the **Huron-Wendat** peoples and is now home to many diverse **First Nations**, **Inuit** and **Métis** peoples.

The City also acknowledges that Toronto is covered by Treaty 13 signed with the Mississaugas of the Credit, and the Williams Treaties signed with multiple Mississaugas and Chippewa bands.

https://www.whose.land/en/

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- So now that you know about me, I also want to do **one more thing** before my talk
- And that is, in **my** personal journey of reconciliation as a Canadian, I recognize that I'm presenting to you all from the land of:
    - Mississaugas of the Credit
    - Anishnabeg (Ah-nish-naw-bek)
    - Chippewa (chip-pewa)
    - Haudenosaunee (hoodt-en-oh-show-nee)
    - Huron-Wendat (huron wen-dat)
    - Inuit (inu-it)
    - Metis (mey-tee) **peoples**
- We are **all guests** on this land known as Turtle Island, which is **still** home to many Indigenous Peoples today

## 00

THE PROBLEM
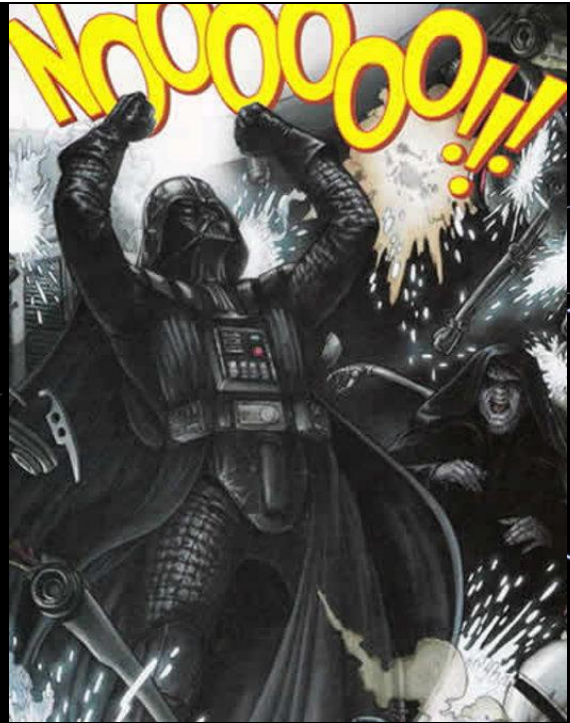
- **Now**, we **all** want simple and fast access to our docs
- This is true regardless of what tool your docs are on
- But what if your tool was **outdated**, **painful**, and **frustrating** to use?
- What if your users were **avoiding** the tool and asking colleagues or subject matter experts instead?
- That was **exactly** the situation we found ourselves in with our Customer Support documentation
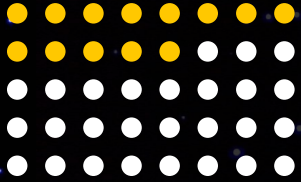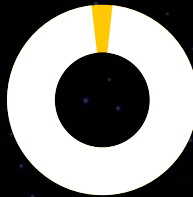
- If our agents weren't using our documentation, they **probably** weren't delivering consistently great customer support
- I also uncovered some concerning data:
  - Our agents were **spending** 13% of their time, trying to find information in our wiki
  - But **only 3%** of the info in our wiki was relevant to support
  - And from qualitative data, our support agents **could not** easily find that 3% in our wiki
- It was time to move to a new tool. After evaluating many tools and making a business case, we had the green light

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- As someone responsible for maintaining our support team's docs, I was faced with something that I had **never** dealt with before:
- **Migrating** our docs to a brand new tool
- Where to **begin**? How have others **done it**?
- It was simultaneously exciting and terrifying
- It was a rare opportunity to start over, but with **so many** people relying on our docs, expectations were high...

KEY STEPS FOR A SMOOTH MIGRATION

1. Create a Project Plan
2. Audit your Docs
3. Build the Foundation
4. Prioritize in Blocks
5. Make Change Easy
6. Embrace Flexibility
7. End with Closure

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- But as someone who went through the entire process from start to finish, I can tell you that it doesn't **have** to be scary
- We did it with these seven key steps, and I'll be going through each of them in detail using my migration story as an example
- These steps are **valuable** in helping you prepare, anticipate and overcome anything that arises
- This will empower you to run a **smooth** migration, allowing your users to find and read **all** of your documentation.

01

CREATE A
PROJECT PLAN
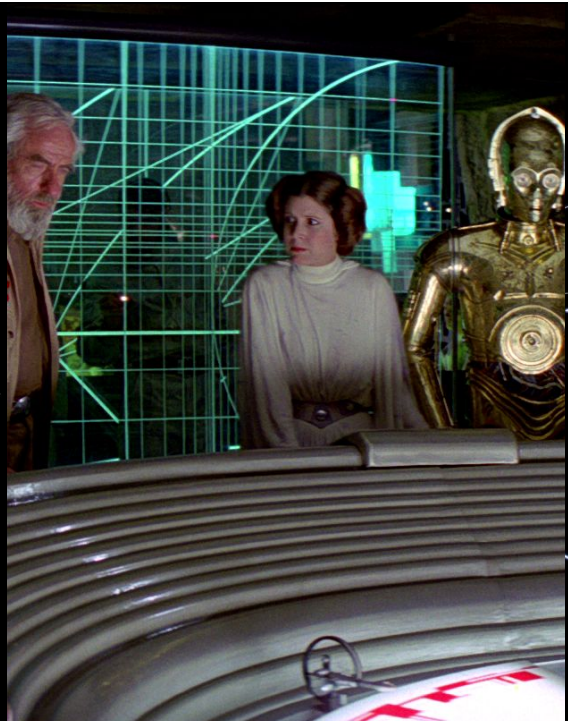
- Like any journey, it begins with the **first** step
- In this case, that is to **create** a project plan so you can track your work, **manage** your time and keep your stakeholders updated

01 - CREATE A PROJECT PLAN

> Take a step back
> Understand what's ahead of you
> Borrow from a template or make your own

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- **Now**, it might sound really fun to start working on the project right away, but it's important to take a step back and put together a plan first
- A **project plan** is perfect for migration - it'll have all the information, it'll hold you accountable
  - And it's much easier to complete a migration with a plan that's written down instead of keeping it all in your head!
- You can **copy** a template from project managers at your company and modify it, or make your own
- Either way, just make sure your project plan includes the following:

01 - CREATE A PROJECT PLAN

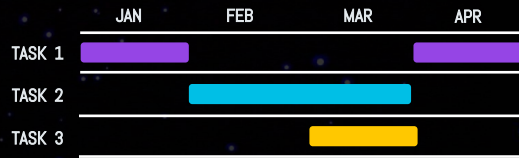> Project Description
> Business Case
> Stakeholders
> Priorities

	Least Flexible (1st)	Flexible (2nd)	Most Flexible (3rd)
Scope			X
Schedule		X	
Budget, Resources & People	X		

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- **First** off, a project description to explain **why** you're implementing this tool and the **goal** of your new tool, to help give readers context
- Next is your business case - this should cover details on why this project is happening
  - You can put **key data** you've uncovered, or link to your business proposal if you made one
- Then **specify** who is responsible for each part of the project. These are your stakeholders
  - And then people know who to reach out to if they have questions
- **Also**, consider your priorities like this table here
  - Outline where you're flexible and least flexible when it comes to the scope, schedule, **and** budget, resources, or people
  - This is **how** you will prioritize tasks as they come up
 - You can make it as specific or as flexible as your needs require

- **Then add** or link to a calendar, [Gantt chart](#), or something that visually depicts the timeline of your migration
  - It's okay if you haven't figured out how long each part of your migration will take; start with rough estimates for now
- Next, list **all** of your to-do items - every single one of them
  - Feel free to bucket them into sections or categories to make them less overwhelming
  - Checkboxes are optional but **very satisfying** to check off
- Then you'll want to **outline** what kind of communications you'll be sending out - is it a meeting, an email, a slack message or a mix of all?
  - Who are you communicating with? How often?
  - This sets stakeholders' expectations on updates from you
- And **finally**, specify any **potential** internal and external risks that could delay or derail your migration
  - Think about the impact and outline what actions you need to take should those risks become reality
  - And classify each risk with a status of mitigated, caution or critical, so you know which ones to keep a close eye on
  - This is **how** you'll anticipate obstacles before they occur and and how to handle them should they arise
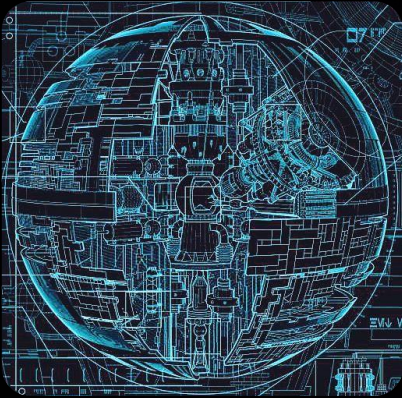
- **To summarize**, a good project plan has everything documented, for others to see and for you to reference
- It should always be updated as you check off an item on your to-do list, or as you encounter new obstacles
- And it should **always** be the first tab you open in the beginning of your work day, and the **last** tab you close at the end
- **After all**, Princess Leia didn't just steal the death star plans, did she? She **planned** it first.

02

AUDIT YOUR DOCS
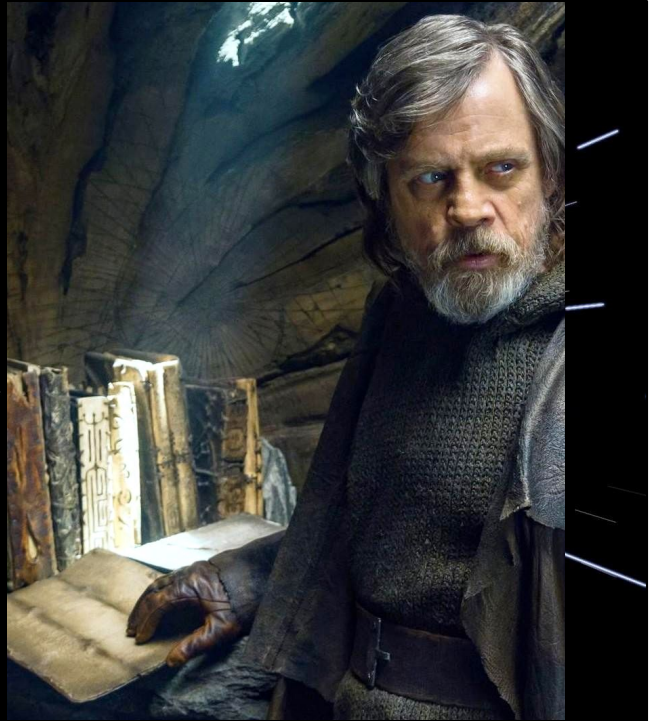
- The second step is to **audit** your docs to ensure that all of the migrated content is up-to-date and useful.

- The **brilliant** thing about a new tool is that you have an opportunity to start fresh
- **Evaluate all** of your content first and save yourself time and effort by only moving content that's still useful
  - **Especially** if you've inherited a hot mess, or if you have **no idea** what kind of content lurks in the darkest corners of your documentation
- The auditing process will also ensure that your new tool is set up for success with immediately useful docs
  - When it comes to auditing your content, the **key requirements** are:

- If it's the **first time** you're organizing your docs, make sure you have everything in one place for you to audit first
  - If you've already centralized your knowledge, double-check that you have everything
- Once you've **gathered** all your info into one place, catalogue it into an index or a table of contents
  - This will give you a high-level view of what docs you have
  - **And** this catalogue will be important for other steps

02 - AUDIT YOUR DOCS

> Collect & store in central place
> Catalogue content
> Assess

> **R**edundant, **O**utdated, **T**rivial (ROT)
> **O**utdated, **U**nneeded, **C**urrent, **H**ave to Write (OUCH)
> **Y**es, **M**aybe, **N**o, **W**rite (YMNW)

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- Once you have your catalogue, **evaluate each** entry individually and determine what to keep, what to change, and what to omit
  - You can use your **own** labelling system, or **one** of these rubrics:
    - **ROT** - Redundant, Outdated, Trivial
    - **OUCH** - Outdated, Unneeded, Current, Have to write
    - Or the classic **YMNW** (Yes, Maybe, No, Write)
    - Don't forget to **add missing** content that may have never been documented to your catalogue with a label too

- To **summarize**, audit everything you have before you move it to save yourself time and headaches
- Use this opportunity to clean up and get your docs into the **best shape** of their lives
- An audit will also help you from getting stuck in the nitty gritty
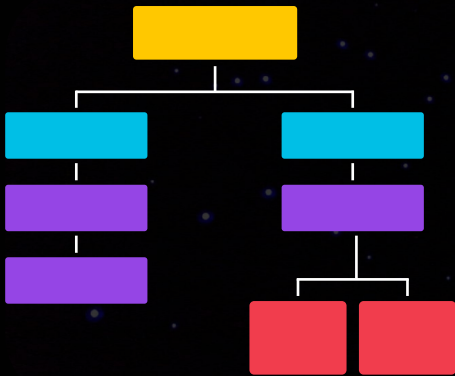- It keeps you **powering** ahead like the Millenium Falcon on the Kessel Run

- The **third** step is to build a foundation by **establishing** the information architecture and the tagging structure.
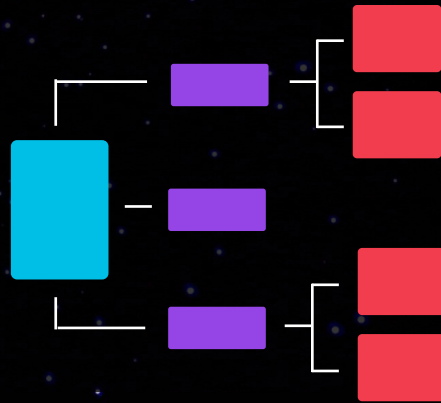
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- **Once** you have your content audited, you can **start** thinking about how it should be organized in your new tool
- This framework is **important** to establish early on, before you migrate
  - Elements are **easier** to manipulate before you add in actual content
- **Remember** the catalogue I mentioned in the previous step? That's what you'll use to determine your Information Architecture:

03 - BUILD THE FOUNDATION

> Organize your
> Information Architecture
> (IA)

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- Information architecture, also known as IA, is a great tool:
  - IA is **all about** the organization, structure and labelling of content in an effective and sustainable way. In **other words**, the hierarchy of your content
  - From the previous step, take your catalogue and look at it from an IA perspective
  - Does it make sense and is it **easy** to find content based on the categories and sections you've organized it into?
  - **Otherwise**, reorganize it. Create or remove parts of the structure as you see fit

- Next, use a **card sorting exercise** with your users to test your IA
  - This is a common tool for user experience testing
  - First, **write** each entry from your catalogue onto sticky notes
  - Then ask your users to organize the sticky notes **into** an hierarchy that is intuitive and meaningful to them
  - **Ideally**, you will do this with users of various levels of experience
  - See if your users sort the info into a hierarchy similar to the one you've created or not
  - **Then** look at all the results together, and **come up** with an IA that reflects everyone's sorting as much as possible
  - The **more** the IA makes sense to your users, the **easier** will be for them to find the docs in your new tool

- **Then**, with your new IA, you can start thinking about tags or labels
- Most tools will allow you to tag or label your content - this is a **great** shortcut for your users to search with
- From there, you can set up best practices for how to tag content, what tags to use, and when to create new tags in the future.
- **Your** IA is the foundation of this structure

- **To summarize,** planning out your information architecture from the beginning means it'll be easy to add or modify the structure in the future
- This will also make the rest of the migration easier, since you can **work through** the information architecture you've established piece by piece
- **After all**, fundamental understanding of the Force is essential to becoming a Jedi
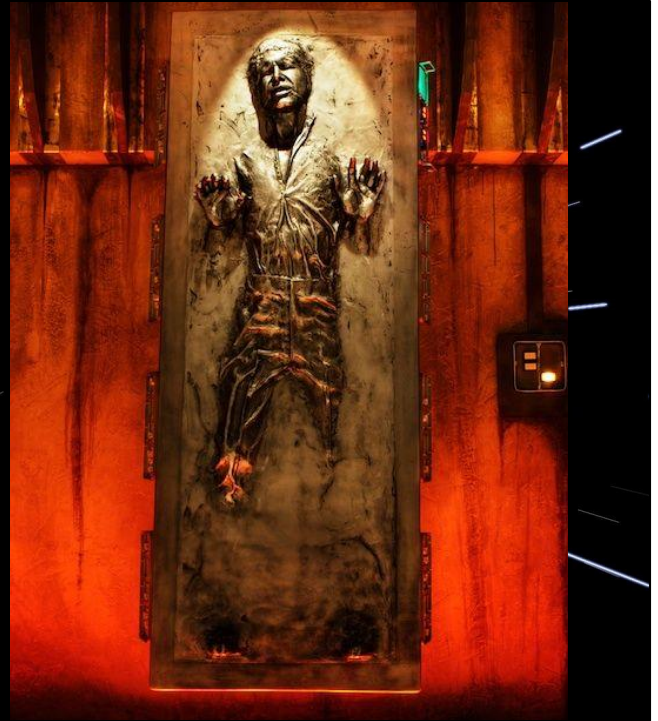
- The **fourth** step is to **prioritize** in blocks by breaking up the work into smaller pieces

Q4 - PRIORITIZE IN BLOCKS

> Keep realistic expectations
> Estimates are hard
> Plan for smaller blocks

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- **When** it comes to figuring out the timeline of a migration, it's best to go into this with no expectations
- It's **easier** to estimate how long it'll take to migrate by dividing up the work into smaller blocks and estimating your time from a block
- The **smaller** your blocks are, the easier it will be to re-prioritize when surprises come up

Q4 - PRIORITIZE IN BLOCKS

> Implement new IA

- **Now** you can use your IA to create those folders, categories, sections, boards, pages, whatever this new tool uses to organize your content
  - You'll gain confidence **while** working on a blank slate and you will get **more** familiar with your new tool
  - It'll also give you an idea of how much time it takes to create content in the new tool so you can make accurate estimates

- Then next, **divide** up your IA into smaller pieces
- **Prioritize** it into an order that makes sense to you
- **Work** one piece at a time, moving from simple to complex
  - If this is the first time you're organizing content, you might need to prioritize your **most important** content first
  - Or if you're like me, moving from an old tool, start with something simple and easy
    - It gives you room to make mistakes, play around with formatting before you tackle complex content

Q4 - PRIORITIZE IN BLOCKS

> Implement new IA
> Break up journey into blocks
> Utilize time management
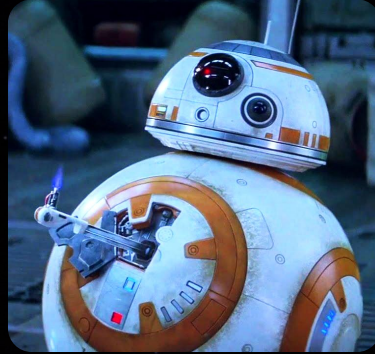
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- **When** it comes to prioritizing, time management plays a huge role too
  - Make sure you and your manager are **on the** same page about your time + expectations
  - If you have to balance migration with other duties, **schedule** your migration work where you'll have less chances of being interrupted
  - **For example**, I'm a morning person, and the earliest our Support Team starts is 8 am
    - So I knew I would have a lot more quiet time if I migrated content in the morning with less people to interrupt me
    - I would leave my afternoons open for meetings, surprises, and other things to keep my mornings free for migration

Q4 - PRIORITIZE IN BLOCKS
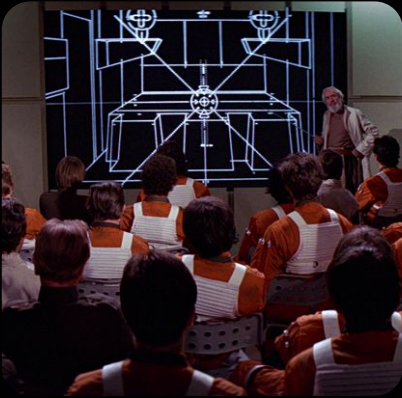
PRIORITIZATION MAKES FOR A SMOOTH JOURNEY.

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- **To summarize**, take control of your migration project by breaking it up into blocks, and by **intentionally** ordering those blocks
- The **smaller** the blocks are, the easier it is to manage your time and avoid costly interruptions
- And **remember**, it's a journey. The Death Star wasn't built in a day.

05

MAKE CHANGE EASY

- The **fifth** step is to make change **easy** by setting up a launch and training plan for your users after the migration

05 - MAKE CHANGE EASY

> Change is scary
> Users are important too
> Earlier is better

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- **Change** can be scary for some people, especially if you spring it on them suddenly out of nowhere
- **Even though** you're migrating content, you also need to think about how to get your users on board
  - Keep your users in mind from the beginning, and introduce changes to them gradually
- Your users **will** determine the success of the tool, so early communication and awareness is key to a successful launch

05 - MAKE CHANGE EASY

> Recruit beta testers

- **One** way to do this is with beta testing
- Which is when you let a few of your users test something before you release it to everyone else
- **Enlist** a few people, and make sure you mix it up - you want **some** to be new hires, veterans, individual contributors and management
- Get as **much** feedback as you can in the early stages of your migration so you can course-correct as soon as possible

05 - MAKE CHANGE EASY

> Recruit beta testers
> Keep your users informed
> Build a training plan

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- **Next**, you'll want to let your users know that change is coming
  - Send out teaser emails, prepare a quick slide deck of the tool's best features and present it at the next team meeting
  - Remind your users several times over your project schedule. Get them excited!
- **Then**, think about **how** you're going to train all of your users. Every new tool requires training
  - **How** will the training be delivered? **Who's** going to facilitate the training?
  - What do you want your users to **learn**?
  - What functionality do you need to cover? Like searching and navigation for example.
  - This will give you a **framework** to build a lesson plan from

05 - MAKE CHANGE EASY

A TOOL'S SUCCESS DEPENDS ON ITS USERS.

- **To summarize**, your tool will only be successful if your users buy in
- If your users are onboard from the very beginning it will be **easier** for them to adapt and adopt
- You don't **want** your users to get **angry,** like a Wookiee who has lost a game of Space Chess, do you?

- The **sixth** step is to **embrace** flexibility - migrate your docs with an open mind

06 - EMBRACE FLEXIBILITY

> Patience is key
> Utilize motivation
> Trust the project plan

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- **When** you're migrating content, it can be a rollercoaster of excitement and drudgery
    - The key is that you're migrating content **intentionally** and at your own pace
- **Use** your productivity to keep your motivation high
- **Follow** your project plan, stay on track with your blocks, and be ready for anything while you're moving content

06 - EMBRACE FLEXIBILITY

> Checklists are awesome

- As you **migrate** content, use your to-do list and check things off as you complete them
  - It **also** allows you to quickly add new checkboxes for random things that come up
  - You can also highlight or strike out items from your catalogue as you move them over to the new tool to keep track

06 - EMBRACE FLEXIBILITY

> Checklists are awesome
> Be flexible
> Take breaks & celebrate often

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- **And** with a migration, flexibility **really** is key
  - **Even though** you try to plan for everything, there's gonna be surprises
  - Keep a positive attitude and be **ready** for anything
  - Don't be afraid to **expand** your project plan while you're migrating content
  - Writing it all down makes it less overwhelming versus keeping it all in your brain
- **Lastly**, with a big project like this, don't forget to give yourself breaks every now and then
  - When you clear out a block, **take** a moment to celebrate!
  - **Watch** your to-do list shrink, marvel at your progress
  - **Share** sneak peeks, get your users excited for new things

06 - EMBRACE FLEXIBILITY

THE MINDSET DETERMINES THE EXPERIENCE.

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- **To summarize**, migration will seem less intimidating when you have the mindset of being flexible and being prepared
- **All the** previous steps you've completed will give you the tools to handle anything during your astronomical migration
- As **Qui-Gon Jinn** would say, *"your focus determines your reality"*

07

END WITH REFLECTION

- The **last** step is to end your migration with closure by **reflecting** on the journey and following up with updates.

- **At this** point, you've completed the migration, you've delivered **hours** of training, and your users are **finally** using the tool - it's an exciting time
    - If you have the means, celebrate with a launch party and ring in the new tool with style
- And **although** you might be tempted to close the project plan, walk away and call it a day…
    - There's a bit more work to be done with reflections and post-migration tasks
- **Lastly**, you want to give your users the closure they deserve with some final communications as well
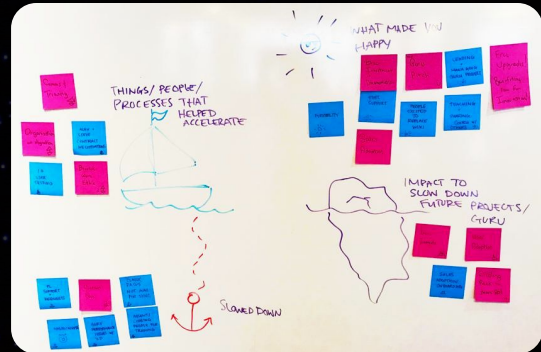
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- **First off**, do some reflection with a retrospective, or retro for short
  - In **Agile methodology**, a retro is held at the end of a sprint to discuss what worked and what didn't
  - **Reflect** on skills you used like time management and collaboration, and analyze processes so you can apply those lessons in the future
  - There are **a lot** of retro activities, but my preferred one is the sailboat. **This** variation I use is where:
    - The **sailboat** represents things, people and processes that helped **accelerate** the migration project, and the **anchor** represents what **slowed** us down
    - The **sun** represents what made us **happy** during the project, and the **iceberg** represents what could negatively **impact** the new tool or put it at risk

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- **Next**, think about **how** to future-proof your new tool so that it's always useful and relevant to your users
  - **How** are users going to pass feedback for missing or outdated content to you?
  - **How** can users get support when they are having trouble using this new tool?
  - Once you have it set up, make sure your users **know** this feedback cycle exists and how they can contribute
  - This **ensures** your docs stay relevant and continue to scale with your product or team
- **Lastly**, follow up with stakeholders
  - They will **appreciate** hearing back from you on how the migration went, especially if a lot of money was involved
  - You can share a high level summary of your retro, how the feedback cycle will work, and what data you'll be tracking to determine the success of your tool

07 - END WITH REFLECTION

RITUALS HELP END THE PROJECT ON A GOOD NOTE.

- **To summarize**, give your migration the ending it deserves, because you've spent a lot of time planning this migration and executing on it
- Some **reflection** will bring you a deeper understanding of your skills
- And **although** you've completed a migration, you might have few things left to do
- Your migration project is just the latest chapter of your documentation story. **This** new tool is the beginning of a new saga.

- **So** to recap, the seven steps you need to make a migration go smoothly are: [read text]
- These steps will **help** you move your docs efficiently, with minimal disruption to your users
- **After** all, a successful migration means your users are better educated and more empowered to find information in your new tool;
- **Your** stakeholders will be happy too
- And **most importantly**, people are **finally** reading your **beautiful**, well-written documentation!

THANK YOU!

in BROOKEWAYNE

M @BROOKE.WAYNE

@BROOKEWAYNE

CREDITS: This presentation was created with resources from Lucasfilm Ltd, starwars.com, Google Images, Vexels, Noun Project, + more.

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- Linkedin: https://www.linkedin.com/in/brookewayne/
- Medium, where I document my documentation practice: https://medium.com/@brooke.wayne
- And the Write the Docs slack community
- Thank you **so** much for listening - live long and prosper!