



Hosting Platform Migration Guide



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“Silverchair conducts migrations more expertly than anyone in the industry. Moreover, their attention to the client experience is unrivaled. From the very first welcome message to the on-time launch of our site (yes, it's possible!), they carefully walked us through every stage, organized and captured every detail and made us feel heard at every point. I've experienced a number of migrations over the years, and Silverchair has written the ultimate playbook on how to do them well.”

—Stephanie Austin, American Accounting Association



Deep breaths.



Since launching the Silverchair Platform in 2010, our team has onboarded hundreds of publishers, and our technology now hosts 12 million articles, 85k books, and myriad other content types, all with 99.99% uptime. In the last decade, platform technology, industry standards, and development processes have come a long way, all of which mean that migrations are no longer the migraine they used to be.

As a company committed to Agile practices, Silverchair believes in a constant cycle of learning and adapting, which means ongoing process & technology improvements. After years of experience, industry-wide collaborations, and leaps forward in automation and technology, migrations are now efficient, predictable, and significantly simpler.

In this guide, you'll learn about the benefits of a migration, how to resource for a migration, key phases, and common challenges.

Benefits of a Platform Migration



Just as moving to a new house presents a chance to sort out years of accumulation that no longer serves you, so too can platform migrations be an opportunity for your content and your business.

Moving to a new platform is the perfect opportunity to remove existing tech/process debt from the current ecosystem. It offers an optimal time to retire old/redundant systems and processes and streamline publisher technology and operations. This frees up time for other mission-critical publisher activities. The platform provides the raw materials – tools and ever-expanding features – to give the publisher the ability to adapt and grow as the scholarly publishing industry changes.

“I wish all of our SaaS vendors worked as methodically and transparently as you. This is my third site build with Silverchair and it was the smoothest process of all.”
—Caroline Polk, AOTA

Migrations are also a key opportunity to normalize and enhance your content. Content often needs to be ‘modernized’ to take advantage of platform accessibility functionality in order to comply with ever increasing regulatory requirements. As content collections grow over time, inconsistencies creep in. The migration gives you a chance to comprehensively normalize subjects and article-types, check links, validate DOIs, improve reference tagging, and update math formats to modern standards.

All these improvements simultaneously improve the discoverability and accessibility of your content, ensuring that content is accessible to all readers.

Publisher Resourcing



Silverchair has a dedicated team that is focused solely on new client implementations. These cross-functional teams have the management, communications, and technical expertise to deliver all phases of an implementation. They operate an implementation playbook infused with the hard-won knowledge of more than a decade of platform migrations.

As we do several implementations a year and many of our customers are doing their first implementation in 10+ years, we fully embrace the project lead role and show our clients clearly up front when we will need output and decisions from their staff.

Silverchair understands that publisher staff who participate in a migration project generally have existing full-time responsibilities. Because of this, we operate a migration process designed to minimize publisher staff time commitment while maximizing publisher visibility, input, and control of the project.

To help you plan, here are the key publisher resources for a successful migration:



Migration Lead

~25% FTE during migration period

The publisher will appoint a designated lead contact for Silverchair who will interact directly with Silverchair staff and ensure timely completion of publisher deliverables such as design approvals, content delivery, integration specifications and test environment setup, and launch sign-off. This lead would also participate in all regular status calls and information-sharing activities during the migration.



Subject Matter Experts

<10% FTE during specific phases only

Publisher subject matter experts include executive strategy, content/production, technical integrations (e.g. SSO), marketing, and customer management (users, subscriptions, and products). These experts must participate in the final requirements sign-off, perform any integration work necessary on their side to enable a seamless Silverchair Platform connection, and participate in final testing.

Migration Phases

Using a process refined over dozens of migrations and aligned with the NISO best practices (which we helped to create), Silverchair's scaled Agile framework and cross-functional team give us the stability and flexibility to succeed. Below are some of the key stages of our standard migration process.



1 STAGE 1: SET THE SCENE

The most important step in this process is establishing our relationship and ways of working with our new clients. In our kickoff meeting, clients join members of the build team and Customer Success to get to know one another and to cover the expectations for the various migration stages.

Silverchair is fully hands-on with:

- UX design and applying publisher branding
- Content migration, enrichment, and loading support
- Thorough software and integration testing
- URL redirects & proactive linking/search partner updates
- Messaging of new features and advantages
- Training staff on tools and interfaces
- Pre- & post-launch enhanced support

PUBLISHER INPUTS

- Identify: "Decider in chief" for day-to-day decision making, content SME, design SME, integration SME
- Request content backfile for delivery to conversion vendor
- Schedule check-ins with migration team and leadership as needed

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STAGE 2: BUILD SCOPING, DESIGN, & CONTENT ANALYSIS

This stage firms up specific details of the build so the work can be broken down into component parts and scheduled with development teams.

This entails:

- Clarifying requirements
- Documenting configurations
- Reviewing design mockups
- Signing off on build scope and schedule

At the same time, content architects work closely with the publisher's content conversion vendor to analyze the backfile, recommend tagging changes, and review a sample of converted content to ensure compliance with specifications.

PUBLISHER INPUTS

- Technical staff to meet with Silverchair regarding details of integrations, access and products
- Review and sign off on Build Scope, Designs and Project plan

Note that this is a more intensive 4-6 week period for publisher staff

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STAGE 3: DEVELOPMENT

Next comes the actual code-writing part of the build. 80% of the build is covered by the base implementation, which includes standard industry features. From there, we add the 20% of features that differentiate the publisher's content from the rest of the market.

Our development teams:

- Stand up base implementation
- Apply style guide
- Build out custom features
- Coordinate third-party integrations with publisher

During this phase, the conversion vendor converts the full backfile and loads it into the system.

PUBLISHER INPUTS

- Join weekly status calls



“While many efforts like this start with a lofty goal, it is not often that all content remains in scope. Silverchair worked tirelessly to host/make discoverable all content from the original scope incorporating an exhaustive AMPP-specific taxonomy—all while we simultaneously implemented a new association management system. Thank you, Silverchair team, for being the ultimate partners.”
—Mandy May, Director, Content Management at AMPP

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STAGE 4: SITE & CONTENT REVIEW

With development complete and backfile fully converted and loaded, our teams provide the publisher with access to the site, giving them ample opportunity to provide feedback on:

- Features
- Functionality
- Configurations
- Content completeness and accuracy

Any defects are identified and prioritized for prelaunch or post-launch remediation, then new requests go through our standard change management process.

PUBLISHER INPUTS

- Review content for completeness and correctness
- Provide feedback regarding content's completeness and correctness and work with Content Analyst to update content as needed
- Validate the feature development is meeting functional expectations
- Work with team to prioritize any defects that are launch critical

Note that this is a more intensive 3-4 week period for publisher staff

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STAGE 5: PRE-LAUNCH & LAUNCH

With the bones and look-and-feel of the site complete, next come the finishing touches. This includes:

- Completing self-serve pages & boxes
- Finalizing user data loading
- Loading recently published content
- Configuring downstream deposits

With all the progress made on migrations in the last decades, launches are “almost (ironically) boring” in the words of our Chief Delivery Officer, Paul Sanders. “The process is so smooth and laid out in advance that we can launch and celebrate with confidence.”

PUBLISHER INPUTS

- Identify the individuals who require the initial training on tools
- Participate in trainings
- Create instructions / communications for admins and users as needed
- Identify any launch blockers
- Identify technical personnel needed to update domains

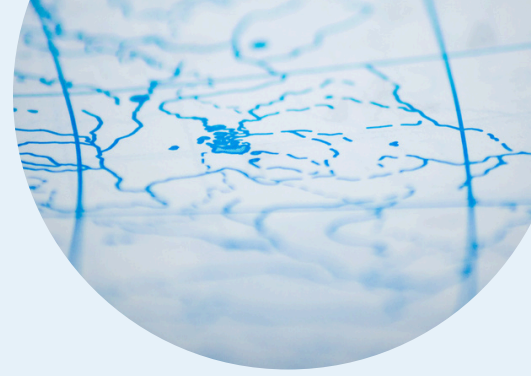
“Working with publishers for over a decade, I’ve seen a strong improvement in revenue results when the combination of standardization and awareness of business-critical requirements meets robust, SaaS-based functionality. It’s a powerful partnership that truly builds business value from day 1.” —Craig Griffin, VP, Solutions Engineering, Silverchair

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STAGE 6: BAU / POST-LAUNCH TRAINING & SUPPORT

The Client Services team provides documentation and training focused primarily on the publisher tools. Our experts have deep knowledge of the system and of individual client sites and business processes. User guides and training curriculums are available to clients for all our tools, as well as other documentation around various aspects of the platform.

Common Risks & Challenges



Having performed dozens of migrations over the past twenty years, Silverchair understands that even the best-planned projects will have elements of risk. The most common risk areas are around content, integrations, decision-making, and communication. Below, we describe those risks and how we mitigate them.

CONTENT DELIVERED LATE OR IN THE WRONG FORMAT

Both risks are mitigated by beginning the content import process early in the project. This allows room in the schedule to analyze content, discuss issues, correct, and remedy.

ISSUES WITH INTEGRATIONS

We start the integration discussion and process early in the project to ensure that resources are scheduled on the vendor and client side in accordance with the project plan.

DECISION-MAKING BLOCKERS ON THE CLIENT SIDE

At the outset of the project, we identify key stakeholders and decision-making protocols with the client. Regular status meetings and demos of released functionality will identify key decision-making points in the process (e.g., design approval).

COMMUNICATION CHALLENGES

Silverchair takes pride in our ability to collaborate with our clients in a transparent manner. During the build, you will have a consistent point of contact and the advocate for your project within the Silverchair team. We also provide a shared project web space that both sides will use as a communication tool for Q&A, requirements analysis, project status, & risk management.

“ Testimonials ”

Migrations have come a long way.

Here's what members of our community have to say about it:

“We've managed the migration of several publishers to the Silverchair Platform, and they've been very pleased with the progress of the migration, the support from Silverchair, the team effort, and most of all the increased features and functionality. It's been a revelation to them.”

—Rebecca Rinehart, Maverick Publishing Specialists

“The build of our site has been an education in a very pleasant way. I'm impressed by how the Silverchair team have applied themselves to find practical, workable solutions that enable us to achieve our goals. At the same time, they've been very good company on our journey.”

—Rod Cookson, IWA Publishing

“All the time and energy that Silverchair spent in the week coming up to launch getting us the information we wanted to be able to communicate to customers and exposing us to the features and data we would need to support them paid off in spades and librarian goodwill. It reflects well on Silverchair as well as DUP that we are able to respond quickly with good information, and librarians pay attention to that. Our customers appreciate our transparency, and I appreciate yours.”

—Allison Belan, Duke University Press

Ready to learn more?



Our team of experienced solutions engineers is ready to learn about your unique needs and discuss what a migration could look like for your timeline and budget.

SOLUTIONS@SILVERCHAIR.COM



After their November 2021 launch of a unified platform for their books and journals content, Peter Lynch of the American Academy of Pediatrics told our team:

“While things are still wonderfully quiet here, I wanted to take a moment and send a huge thank you for all your hard work and everything you’ve done to make this successful launch possible. I was never willing to speak it out loud back then, but when we started and probably even though the summer, I thought chances were minimal that we would hit our launch date, or do so with the full platform intact. It just seemed too tall a challenge. The fact that we made that tight timeframe while also launching complete, beautiful sites is a huge testament to your team. Throughout you all were hard-working, collaborative, and weathered every storm with commitment and professionalism. **It was a pleasure working with you, it was one of the best collaborative experiences of my career.**”