

Migrating to Gutenberg

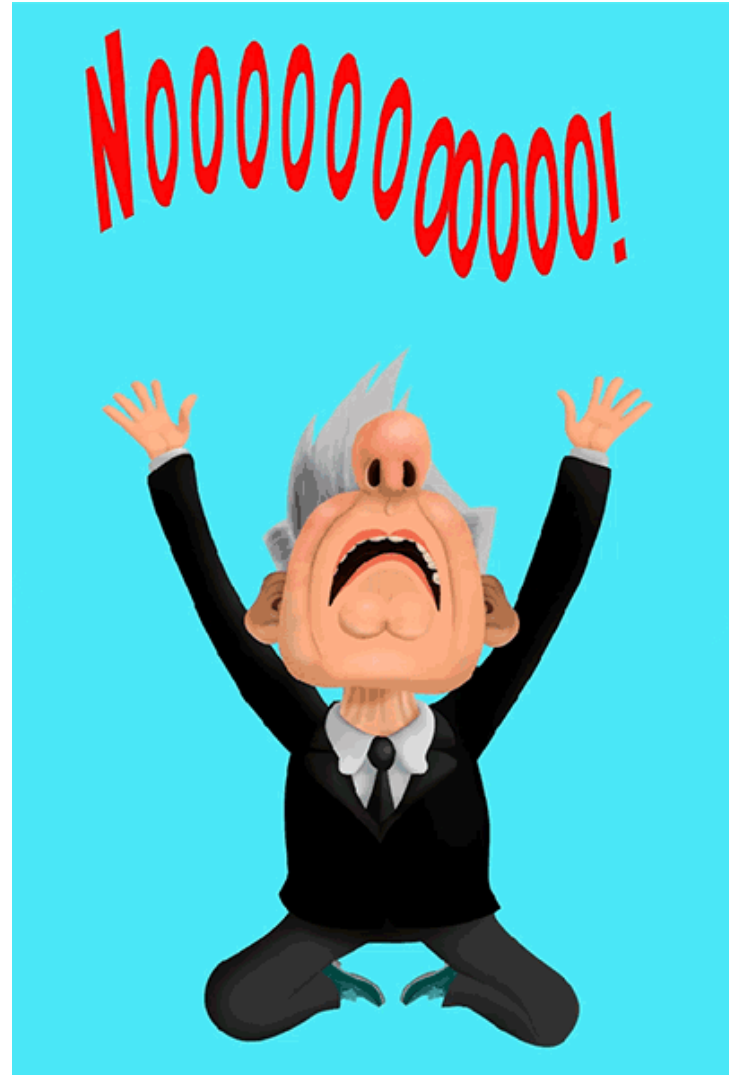
The End User Edition

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Change is hard



Why?

- In the long run it will make your life easier
 - As you build new sites with Gutenberg, you won't also have legacy sites to worry about
 - As new functionality is added, your users will be able to take advantage of features that previously required cumbersome customization
 - Plugins are starting to have dual modes and it takes more work to support two versions

Why?

A red warning sign with a white border and rounded corners. It features two silver screws at the top and bottom center. The word "WARNING!" is written in large, bold, white, sans-serif capital letters at the top. Below it, the text "The Classic Editor plugin will be officially supported until December 31, 2021" is written in smaller, white, sans-serif font, centered.

WARNING!

The Classic Editor
plugin will be officially
supported until
December 31, 2021

Migration
Project
Success Rule

**It's not about the
technology.**

It's about the rollout.

You need a PLAN

1. Take stock
2. Clear the cruft
3. Set up a test environment
4. Communicate
5. Find the quick wins
6. Set up a pilot
7. Have a backup and rollback plan
8. Train
9. Communicate some more
10. Phase the process and repeat

1. Take Stock

- Understand the scope of the project
 - How many sites?
 - How many users?
 - Who are the stakeholders?
 - What is the budget and timing?

1. Take Stock - Sites

- How many sites and how are they configured?
 - Themes
 - Plugins
 - Custom templates and coding
- Are servers up to date?
- How complex are the sites?
 - Simple
 - Medium
 - Complex

1. Take Stock - Users

- How many and what do they do?
 - Basic posting – add/edit, images and media
 - Medium use – custom post types, ACF interfaces
 - Power users – html, full range of site changes
- How savvy are they about using technology?
 - Need help with everything
 - Comfortable once shown the basics
 - Skilled at adapting to new tools
- What is the culture around change?
 - Resistant to new ways
 - Champion of improving processes
 - Oooh shiny!

1. Take Stock - Stakeholders

- Who has to buy into this process?
- What is their level of support?

1. Take Stock - Budget and Timeline

- What resources do you need?
 - Technical
 - Communication and materials
 - Training
 - Implementation
 - Support
- When will you do it?

2. Clear the Craft



2. Clear the Craft

- Any unused stuff laying around?
 - Old tests, features no longer being used
 - Look at plugins, themes, features, users, sites
- Duplicate functionality with different solutions
 - Can you create a best practice and combine
- Abandoned plugins and themes
 - Do you know the roadmap for the tools you support?
- “The Horror of How You Used to Do Things”

2. Clear the Cruft

- Goal is to simplify and give you a maintainable platform for the future
- Also makes testing and support during the migration quicker and cleaner by removing unnecessary elements

3. Set Up a Test Environment

- How many test environments?
 - Benefit to having a core set of plugins and themes
- Test for compatibility and issues
 - What will change for the user?
 - What are specific use cases that need tested?
 - Is there custom code that also needs tested?
 - Create a test plan
- Decide if there will be user testing
 - Depends on workflows

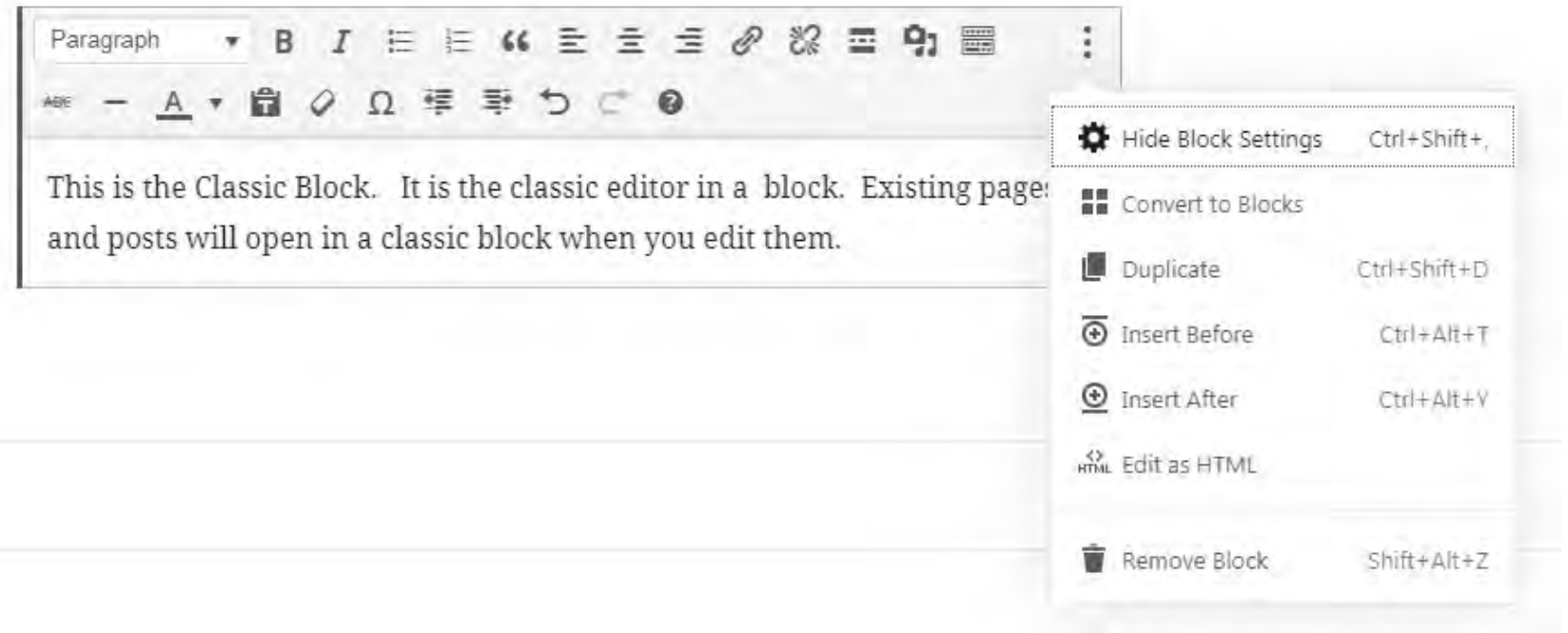
3. Set Up a Test Environment – Testing Stages

- Core plugins and basic editing functionality with our theme framework
- Custom post types plugins
 - events, testimonials, portfolios are three common ones we use
- Custom-programmed custom post types
- ACF implementations and templates

3. Set Up a Test Environment – What happens when you switch

- Existing posts are not changed
- When you edit an existing post or page, all content automatically is automatically added to a Classic block where the editing experience is similar to the classic editor
- You can optionally switch existing content in the Classic block, by choosing Convert to Blocks
- Custom post types will use the classic editor interface unless rest and editor support is enabled

3. Set Up a Test Environment – Classic Block



3. Set Up a Test Environment – Custom Post Type Support

```
/*Register WordPress Gutenberg CPT */  
function my_post_type() {  
    register_post_type( 'portfolio',  
        // WordPress CPT Options Start  
        array(  
            'labels' => array(  
                'name' => __( 'Portfolio' ),  
                'singular_name' => __( 'Portfolio' )  
            ),  
            'has_archive' => true,  
            'public' => true,  
            'rewrite' => array('slug' => 'portfolio'),  
            'show_in_rest' => true,  
            'supports' => array(' title ', ' author ', 'editor')  
        )  
    );  
}
```

3. Set Up a Test Environment – What do you test

- Plugin compatibility
- Custom post types
- Shortcodes
- Custom templates and code
- Adding new content vs updating pre-Gutenberg content

3. Set Up a Test Environment – Results

- What will need to be done pre-migration or as part of the migration?
- Will you do any theme updates as part of the rollout?
 - `add_theme_support('align-wide');`
 - CSS updates for wide images, Gutenberg blockquote, button, rule styles
 - Editor styles
 - Locking down blocks, colors, fonts, etc.

4. Communication

- Start letting people know what is coming
- Get them used to the idea
- Make sure stakeholder support is there
- Develop your communication plan - timeline and materials

5. Find the Quick Wins

- Understand current pain points and use cases
- What will make them look forward to moving instead of running away
 - Button block
 - Media & Text block
 - Columns block
 - Reusable blocks for Call to Action for example

5. Find the Quick Wins



lock when you edit them.



Here is a list of reasons this boat is cool:

- summer time
- blue water
- sailing
- blue sky
-

6. Set Up a Pilot

- Strategies
 - Pick the easiest
 - Pick a difficult one
 - Pick the one where you'll have a strong champion

7. Have a Backup and Rollback Plan



Nothing to see here.
Please disperse.

8. Train

- What do users need to know?
- Use it so you know!
- Don't overwhelm
- Consider multiple platforms
 - Documents, videos, webinars, classes

9. Communicate Some More

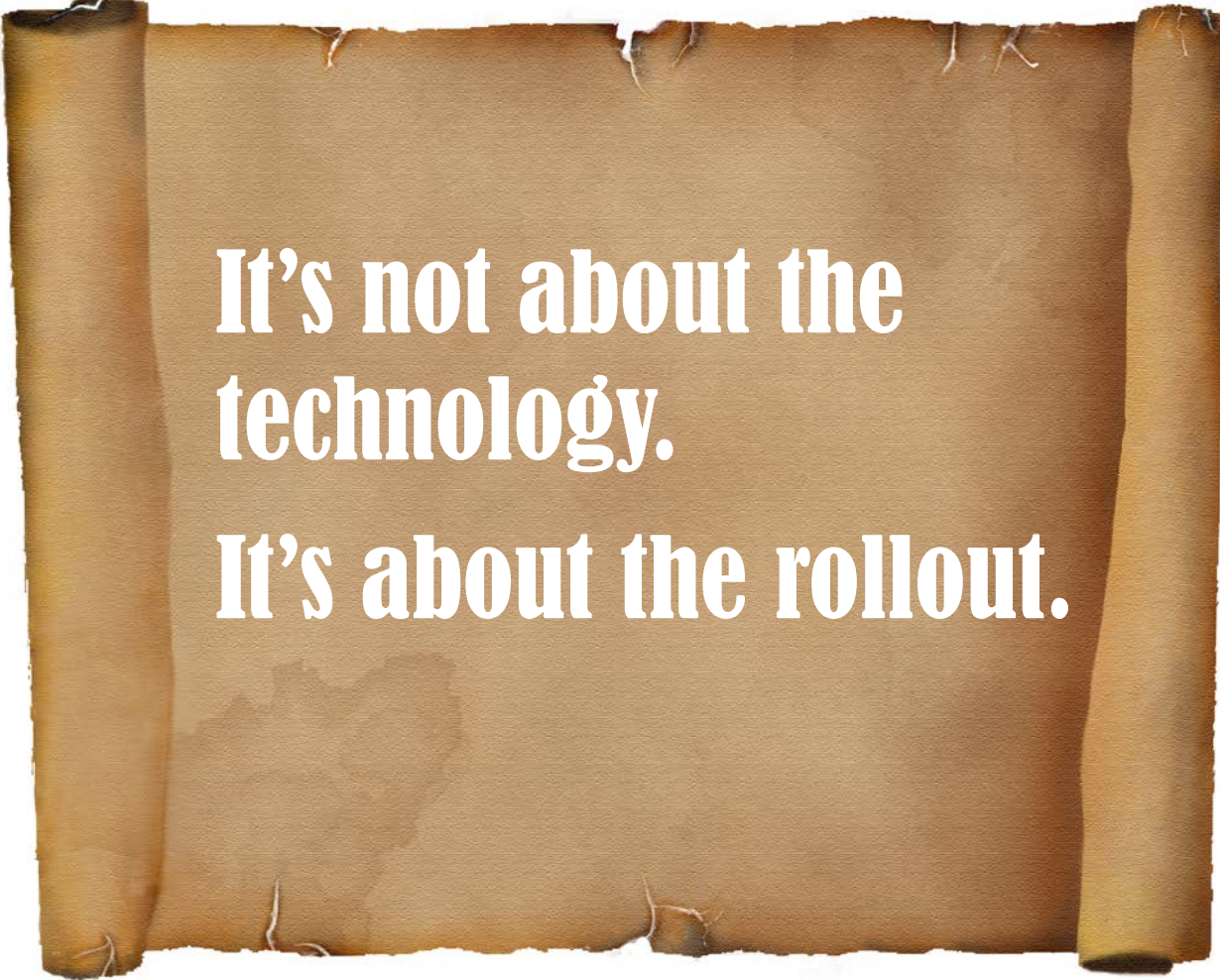
- Incorporate lessons learned from the pilot
- Make sure everyone knows the timing
- Build a buzz
- Promote the change



10. Phase the Process and Repeat

- Tweak as you go
- When done, don't stop communicating – coming soon:
 - All widgets are blocks
 - Menus are blocks
 - Customizations through blocks
 - Block Directory

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Thank you!

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