



Enterprise Guide

dxp implementation prep kit

A tactical guide for preparing your organization for a successful implementation effort.



introduction

Digital Experience Platforms sit at the heart of any modern digital ecosystem. In headless and composable architectures, they power the delivery of omni-channel experiences that extend beyond traditional digital channels and now include mobile apps, in-store displays and signage, kiosks, and more. They are the primary tool for marketers and editorial teams, and serve as the hub for the management and delivery of a brand's digital experience.

Despite the strategic importance of DXPs, many implementation efforts fail to meet expectations. Not because the tooling is wrong, or because a solution is misaligned, but because implementation issues - and a lack of planning and thoughtful design - leave cracks in the resulting solution. Implementation efforts require a coordinated effort that involves many parties, competing priorities, and a battle against the basic human impulse to combat change.

Organizations often set themselves up for failure by not addressing key questions early in the process. How will the DXP integrate with existing platforms? Who owns content governance across teams? How do we define an advantageous content model and how should content be structure for reuse across channels? How can we ensure scalability to account for future goals?

When these types of questions are addressed late in the implementation process, projects slow down, costs increase, and the platform fails to deliver its full value. The cracks grow.

Successful DXP initiatives begin with proper planning and preparation. By getting participation and buy-in early in the process. And by making things easier on your teams.

This guide is an artifact that we often use internally to support clients in preparing for the kickoff of a DXP implementation effort. It's typically distributed ahead of the kickoff and discovery process, and is most widely used as a tool for helping clients get organized and prepared for the upcoming process. It's also used to help organizations begin to shift their mindsets, and view this process through a new lens.

How to use this prep kit

This Prep Kit is designed as a working guide for organizations evaluating or preparing for a Digital Experience Platform implementation. Rather than providing theoretical advice, the guide focuses on the practical preparation steps that help organizations avoid common implementation challenges (and regrets).



Teams can use this guide to:

Identify preparation gaps

Align stakeholders across departments

Gather the documentation required for implementation planning

Evaluate and begin thinking about architectural decisions



The Guide is structure around key preparation areas:



Organizational alignment



Architecture and integration decisions



Content and experience preparations



Data and personalization strategy

As you review each section, consider whether your organization currently has the documentation, alignment, and operational clarity required to kickoff the implementation effort. If gaps exist, addressing them early will significantly reduce risk during the implementation.

For a more structured assessment of readiness, organizations can also complete the **Interactive Aionic DXP Implementation Diagnostic Tool**, which provides a preparation score and recommended areas of focus.

Organizational alignment & participation

DXP initiatives are not purely technology projects. In fact, they require collaboration across multiple departments and teams, all with varying technical aptitude.

When beginning an implementation effort, it's critically important that you involve all these team members early and often, so as to avoid downstream issues. From a tactical perspective, their perspective around how best to structure a new solution for your business is imperative. From a change management perspective, giving them a voice early in the process promotes buy-in and reduces the perceived threat associated with these types of projects. As always, it comes down to framing. This effort should not be perceived as forcing teams into a new way of working, but rather, it's giving them an opportunity to design a solution that delivers on their preferred way of working.

The following provides a list of client teams and team members who routinely participate in these engagements. This list can be used to identify relevant participants and serve as a basis for planning and alignment discussions. You should strive to hear an honest assessment of where the current technology comes up short, and what an ideal future-state looks like. Everyone's goals will be different, but taking them all into account will help you design the most impactful solution possible.



Marketing Team



Content Team



Technical Owners



Development Team



Business & Project Stakeholders



Data and Analytics Team



UX & Creative Team



Architecture Team

Activity

Inventory teams, identify participants, and have them start thinking through their goals and objectives for the future-state solution. Get them excited about the project and the future!

Documentation checklist

The following outlines a comprehensive list of existing documentation that you and your implementation partner should review as part of the planning and discovery process. While not every organization will possess all of these documents, this guide should help you identify and curate your own set of assets. All of the available assets should be analyzed and used as input for team-based discussions, requirements sessions, and solutioning activities.

- Current Customer Persona Details
- Current Customer Journey Maps
- Customer Experience Heat Maps and User Research
- Customer Experience Strategy Documentation
- Web Analytics Reports
- Existing Technical Architecture Documentation and Diagrams
- Existing CMS Documentation and Reports (Content Types, Specifications, etc.)
- Brand Guidelines
- Reporting and Test Results (Accessibility, Performance, Security)
- Past Audits, Technical Documentation, or 3rd Party Assessments
- Internal Process or Governance Documentation
- Inventory of Platforms and Databases

Activity

Collect existing documentation from various teams across the organization. Use this opportunity to identify gaps in your existing documentation library, and possibly define additional details that may be useful.

strategic questions to ask before implementation

Requirements and a review of the current state...

- R.01 Review current state architecture and CMS. What tools and platforms make up the ecosystem?
- R.02 How is content (including web content, images, video, PDFs, etc.) being managed today? Systems, processes, translations?
- R.03 Do you presently have any taxonomy or tagging structures in place?
- R.04 How is code being developed and optimized today? CI/CD pipeline? Automated testing?
- R.05 What are the biggest pain points being experience with the current system? What are the primary drivers for this initiative? Do the pain points vary by team? Are you able to identify and themes or patterns that are consistent across teams?
- R.06 What is your vision for the future state, including that related to the end-user experience, experience management, and operations?
- R.07 What goals and KPIs are governing this initiative? How do you ideally want to use a technical solution in the future?
- R.08 What technical considerations should form the basis for the solution? What must it include? What would you like it to include?
- R.09 What security requirements need to be incorporated into the solution design? Data governance? Compliance? Authentication and authorization?
- R.10 Will the new end-user experience include a logged-in experience? Is this new functionality or does this area of the site exist today?
- R.11 What accessibility level are you aiming to achieve? What does accessibility look like today? Are there known issues and/or optimization opportunities?
- R.12 What performance metrics are you aiming to achieve? What does performance look like today? Are there known issues and/or optimization opportunities? How are you currently measuring performance across the site?

strategic questions to ask before implementation

architecture and technical considerations...

- A.01 Have you inventoried content types and detailed how each is created, managed, and maintained?
- A.02 Identify platforms and databases that will continue to be maintained in the future-state architecture.
- A.03 Document your current deployment processes. Identify what works and what you would like to see improved in the future-state solution.
- A.04 What are your goals for personalization? Where can personalization have the most impact on the overall experience? On the overall goals of the digital experience?
- A.05 What are your current testing methodologies? What works and where would you like to see improvements? When does testing occur?
- A.06 How would teams at your organizations like to manage content within the future-state solution?
- A.07 What are the pros and cons of each solution architecture at your organization? Have you and your team evaluated and discussed the pros and cons of a composable architecture?
- A.08 Identify and inventory integration models and needs, including third party integrations, API integrations, and service-based integrations.
- A.09 How many sites do you have today? How much content do you have today? Have you considered how you would like content migration to occur? Is there a preference for automated vs. manual vs. hybrid methodologies?
- A.10 Will the implementation occur all at once? or in phases?
- A.11 Where will the solution be hosted? Have you evaluated hosting options against security, scalability, performance, and delivery requirements?
- A.12 Have you started to define a roadmap? Do you have preferences for an implementation methodology? What role will your team play in the implementation process? How involved do you or your teams want to be on a daily basis?

Strategic questions to ask before implementation

ux optimization, digital strategy, and design...

- D.01 Where along the customer journey do you believe there are opportunities for improvements? Have you collected or seen data that supports this thinking?
- D.02 Have you conducted any user research or interviews to inform your analysis?
- D.03 Do you presently have a set of key personas defined? Have these been validated recently?
- D.04 Have you assessed analytics or conducted heuristic evaluations to identify high value optimization opportunities within the customer journey?
- D.05 What digital experience do you find particularly enjoyable? Which do you feel are good inspiration for you brand?
- D.06 Do you have clearly defined brand guidelines?
- D.07 If you operate a multi-site ecosystem, how would you evaluate the strength of the overall brand experience and the consistency of the brand across each? Is this an area for improvement?

Activity

Distribute this question guide to your internal teams and start clarifying your vision for the future-state solution. This guide will spark a lot a valuable discussions that will increase the value of the resulting implementation.

Prep Kit

Common implementation pitfalls

Implementations can quietly (or not so quietly) break down for a wide-range of reasons. It's why early planning, preparation, and a shift in mindset are so important to the overall process. In this section, we have defined a number of common pitfalls that we have witnessed over the years. In thinking through these items proactively, your teams can avoid many of the downstream issues that cause friction in the overall adoption process.

The #1 Issue.

Some of the most prevalent issues that we have seen center on **Content Modeling**. While most organizations know that they must address content modeling, the real issues arise when the content model doesn't properly account for the competing forces that are at play. That is, there are a few tensions that seem to show up in every flavor of implementation:

You want a clean, scalable model for the future.

You need to move quickly and avoid over-engineering.

And you still have to deal with the reality of migration existing content.

Those forces don't naturally align, and optimizing for one usually creates tradeoffs in others. This can go wrong for two reasons...Teams either recreate their old model (and carry forward all the same inefficiencies), or they design something idealized that doesn't account for the realities of data migration, and which create a lot of downstream friction.

Really thinking through the intricacies of the content model, striking balance, and being intentional with tradeoffs will make the difference between a successful content model, and one cracks the foundation of the implementation.

Other common implementation pitfalls

01

Choosing a Platform Before Defining Architecture

Organizations often begin vendor evaluations before defining architectural requirements. Technology decisions should follow architecture strategy.

02

Lack of Governance

DXPs require clear ownership across teams responsible for content, experience delivery, and platform operations. Without governance frameworks, organizations struggle to maintain consistency and scale.

03

Thinking That Change Management = Training

Change management must be addressed early and often in the implementation process in order to ensure adoption across the organization. All teams should be involved beginning with Discovery, and everyone should feel as though they have a voice in the design of the new solution.

04

Underestimating Content Modeling Complexity

Content modeling is one of the most important elements of an implementation, and a critical success factor. These structures often evolve during implementation. If content models are not defined early, they may cause issues mid-implementation and even threaten the success of the overall solution.

05

Ignoring Integration Complexity

Composable architectures require integration with many systems across your digital ecosystem. Underestimating integration complexity – and failing to properly design them – can significantly delay implementation timelines.

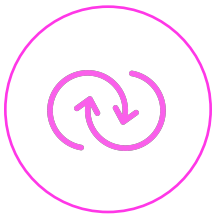
How prepared is your organization?

Preparing for a DXP initiatives requires alignment across architecture, content strategy, governance, and data infrastructure. Many organizations find that some of these elements are well developed, while some require additional preparation.

It's important to note that you don't need to have all of the answers today. Beginning to think through these key considerations, and beginning to shift your mindset, will position you advantageously for the effort ahead.

To help organizations evaluate their readiness more systematically, we have developed the **Interactive DXP Implementation Diagnostic Tool**, available now. The diagnostic tool evaluates readiness across key dimensions, including

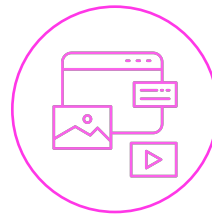
Four key evaluation dimensions



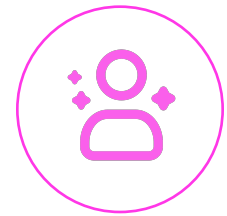
Architecture and
Integration Readiness



Composable Platform
Maturity



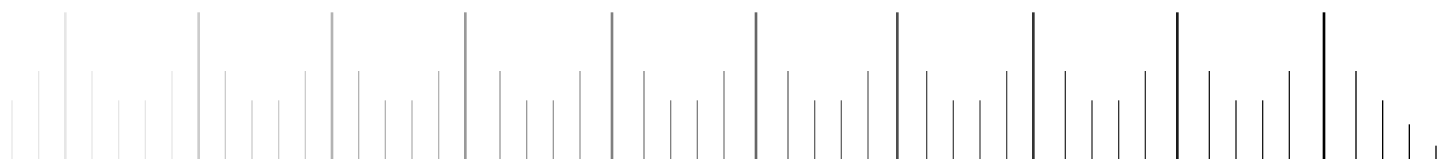
Content Modeling
and Governance



Data and
Personalization
Infrastructure

After completing the assessment, you'll receive a readiness score, a maturity classification, recommended preparation steps, and architecture considerations for implementation.

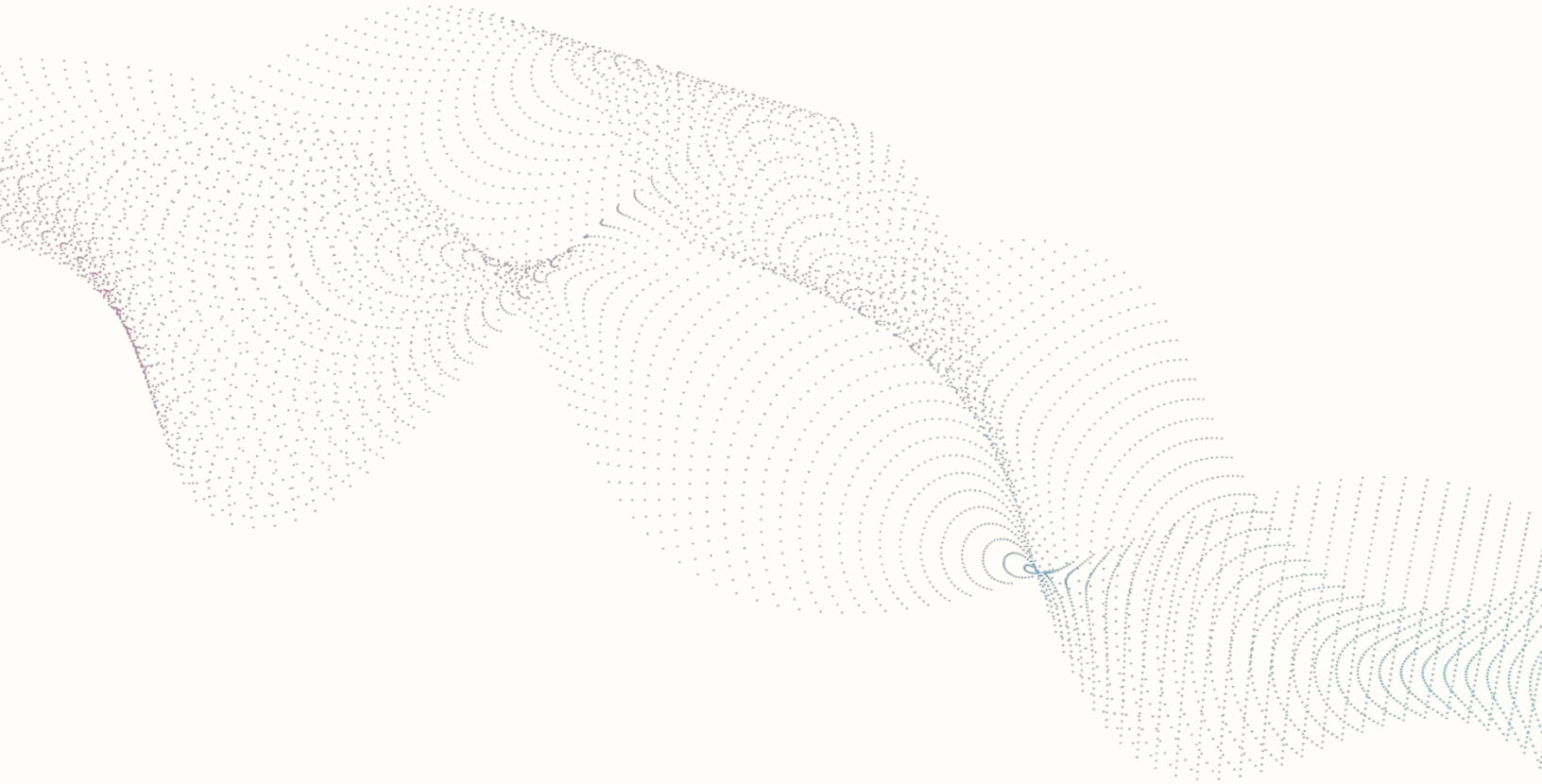
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WorkSheet

DXP Prep & Planning

- Gather documentation needed for analysis, discussions and discovery. Identify whether any documentation is missing or needs to be created.
- If needed, prepare access requests to key systems for the implementation partner (documentation sites, current site management tools, etc.)
- Identify decision makers for various project areas, and Identify other Stakeholders that will support and inform final decision making and solutioning
- Inventory content types with screenshots and a description of where they are used.
- Identify and other participants that need to be included (SMEs that know how things function today, actual content editors, etc)
- Identify key business goals or OKRs that the site aligns to and define where gaps exist today that prevent you from meeting those goals.
- Prepare for discussions around your vision for the project and the resulting omni-channel experience.
- Define a north star for the engagement. Work backwards to priorities business objectives.
- Define a high-level change management plan that addresses all facets of the implementation effort - from selection through go-live. What groups need to be accounted for?
- Create a list of current-state platforms and tools, define whether they will stay, maybe stay, or exit as part of the new architecture. Briefly detail the purpose of each in the current state.
- Determine whether a new design will be developed as part of this effort. Identify key UX optimization opportunities that may be addressed.
- Determine when customer personas were last updated/validated, and map them to performance metrics
- Review site analytics and data points to identify gaps in the current customer journey.
- Review your current testing methodology to identify what works and what can be improved.
- Prioritize your high-level business objectives and think through how the implementation roadmap should be defined. Ensure that this prioritization aligns with business goals.



About Aionic

Aionic is a full-service innovation and technology company, supporting all facets of digital transformation efforts. As an organization, we help businesses use the most modern technology to build meaningful connections and drive business efficiency.

Aionic specializes in headless and composable platform implementations, and the design and development of next-generation digital experiences. By combining strategic guidance with expert engineering, we help brands introduce platforms that support long-term innovation and growth.

