

Website Migration Checklist



Putting the right process in place simplifies website migration and keeps your team on track. This simple checklist outlines all the basic steps you'll need for a successful site migration.

For those who prefer a manual migration process, refer to the steps below.



If you're looking for an even simpler way to migrate a WordPress®¹ site, check out **WP Engine!**

Our **Site Migration plugin** removes much of the heavy lifting when you move a site to our managed hosting platform. For certain migrations, our migration specialists can oversee the entire process, validate your site in a staging environment, manage DNS transitions, and help protect SEO to risk throughout your transition.



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Phase 1: Migration Pre-Planning and Site Audit

Document your old site's baseline to ensure a successful launch and to serve as a benchmark for post-migration performance.

Assess and Document Current Production Site	
	Review current server specifications and resource allocation.
	Confirm PHP, MySQL, and WordPress versions.
	Document CDN and caching layers.
	Evaluate current security posture (WAF, firewalls, SSL setup).
	Gather all required access and credentials for migration
	Document the DNS provider, your credentials, and the current DNS configuration.
	Record current versions of all plugins and themes.
	Identify and eliminate non-essential features/plugins you don't want to take to the new environment.
SEO and Analytics Baseline	
	Crawl and export all existing URLs.
	Benchmark current performance metrics (traffic, SEO rankings, Core Web Vitals scores).
	Use traffic patterns to schedule an ideal migration date and time during a low-traffic window.
	Validate configurations in GA4, Google Search Console, and other tracking tools.
Migration and Rollback Planning	
	Create a Plan of Action: Record what needs to change/where (e.g., DNS records) and what needs to move/how (e.g., themes and plugins).
	Define explicit rollback triggers (e.g., specific issues or an amount of downtime that will trigger a fallback vs. pushing ahead).
	Create a fallback plan using assessment data that will allow teams to safely revert to current configurations.
	CRITICAL CRITERIA: Take a full backup of all files and databases before proceeding past this phase.

Phase 2: Migration Testing and Preparation

Practice and pressure test every single aspect of your migration plan in your new environment so it is perfectly repeatable on launch day.

Spin Up a New Environment	
	Mirror the production environment specs exactly on the new host (match PHP, MySQL, and WordPress versions).
	Configure hosting-level options for production (confirm HTTPS enforcement, configure security/WAF, configure caching).
	Install and validate SSL certificates (you can use platform-level default certificates through hosts like WP Engine).
Initial Migration: Move Files, Database, and Configurations	
	Export critical files and database content from the source site and import them to the new environment.
	Replace environment-specific URLs with the test domain using a search and replace tool.
	Ensure wp-config.php has the correct database credentials and security keys for the new server.
	Confirm the new server can properly read and write to all folders.
	Clear all caching layers.
Validate Integrations and Third-Party Services	
	Test and validate payment gateways.
	Test forms and CRM connections.
	Test APIs and external data sources.
Initial QA and Testing	
	Check all page templates and layouts.
	Identify and fix broken links or missing assets.
	Run initial performance tests (load speeds, Core Web Vitals).
	Confirm the site is functionally complete and your team is confident the process is repeatable.

Phase 3: Launch

Execute your migration steps carefully and coordinate closely across your team to minimize the risk of downtime or lost traffic.

Launch Preparation (24–48 Hours Prior)	
	Lower DNS Time to Live (TTL) settings 24–48 hours ahead of the planned migration to force cache clearing and quick propagation.
Catch-Up Migrations	
	Conduct another migration of only new content or content modified since the initial migration.
Go-Live Execution	
	Revert environment-specific URLs to the primary domain using a search and replace tool (or <u>leverage automated host tools</u>).
	Update DNS records to route traffic to the new host.

Phase 4: Post-Launch Validation and Monitoring

A migration isn't finished at launch. The first hours and days are critical for identifying hidden issues before they have a large impact on visitors or rankings.

Validate Analytics, Tracking, and Conversions	
	Confirm tracking tools are firing correctly on the live site.
	Compare post-launch data directly against your Phase 1 pre-migration benchmarks.
Monitor Indexing Status	
	Monitor indexing status in search tools like Google Search Console.
	Check closely for any crawl errors or coverage issues.
Performance Regression Monitoring	
	Monitor site uptime and server response times.
	Watch for traffic-related slowdowns.
	Continually monitor site performance metrics and Core Web Vitals.
Monitor for Errors	
	Identify and fix HTTP errors (specifically 4xx and 5xx errors).
	Monitor third-party integrations for post-launch bugs.
	Tip: Utilize continuous monitoring tools (like WP Engine's Site Monitoring) to catch and resolve issues early.

Pre-Migration Audit Notes

Use this page to record important information about your site before moving to phase two of your migration.

Infrastructure & Hosting Baseline

Record the specifications of your current hosting environment to ensure the new environment meets or exceeds these requirements.

Component	Current Specification	Notes
Server CPU / RAM		e.g., 4 vCPU, 8GB RAM
PHP Version		Confirm compatibility with the new host
CDN Provider		e.g., Cloudflare, Akamai
Caching Layers		e.g. Object Cache, Varnish, Page Cache
Security (WAF/Firewall)		Current rules and security posture

CMS, Theme & Plugin Audit

Audit your codebase to identify essential versus non-essential assets.

Asset Name	Type	Status	Migration Action
Plugin Name	Plugin	Active	Keep / Replace / Delete
Custom Theme	Theme	Active	Ensure Child Theme is used
Custom API Code	Script	Active	Check dependencies

Credentials

Old host login

Username: _____ Password: _____

New host login

Username: _____ Password: _____

DNS provider login

Username: _____ Password: _____

Other (list account and login information for all third-party vendors)

Account: _____	Username: _____	Password: _____
Account: _____	Username: _____	Password: _____
Account: _____	Username: _____	Password: _____
Account: _____	Username: _____	Password: _____
Account: _____	Username: _____	Password: _____

SEO & Performance Benchmarks

Document these metrics to verify that the migration does not cause performance regressions.

Core Web Vitals:

LCP: _____

FID: _____

CLS: _____

Average Load Time: _____

Total Exported URLs: _____

Key Organic Keyword Rankings: (List top 5)

1. _____

2. _____

3. _____

4. _____

5. _____

Migration Strategy & Rollback Plan

Plan the "when" and "how" of the migration to minimize visitor impact.

Selected Migration Window: _____

Last Full Backup Date/Time: _____

Backup Storage Location: _____ (Must be off-server)

Rollback Triggers: _____

(Critical checkout failure, downtime exceeding # minutes, etc.)

Rollback can be initiated by: _____