Sitecore Governance Plan Template

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# Sitecore Governance Committee

The Governance Committee is responsible for establishing policies, standards and continuous monitoring and management of the Sitecore environment. Roles and responsibilities are as follows, bearing in mind that one individual may have multiple roles, especially in smaller organizations:

|  |  |
| --- | --- |
| Role | Responsibility |
| Executive Sponsor | Influencer with budget approval or budget submission/advocacy |
| Business Owner (Committee Lead) | Chief organizer. Acts as a Project Manager for the Governance Committee. May be, or work with, the Executive Sponsor on initiatives requiring approval |
| Sitecore Administrator | In charge of the Sitecore ecosystem. A mix of development and Sitecore architecture/operations/infrastructure experience |
| Network and Infrastructure Lead | In charge of the infrastructure supporting the Sitecore ecosystem, and any integrations that affect Sitecore (ex. AD Integration). Works closely with the Sitecore Administrator |
| Sitecore Development Lead | Lead developer. Might also be the Sitecore Architect. Focused to DevOps and Release Management |
| Sitecore Content Manager | Lead content editor/manager. Works closely with the Marketing Manager and may have Digital Asset Management (DAM) responsibilities |
| Sitecore Marketing Manager | In charge of Sitecore Marketing Campaigns. Will work closely with the Sitecore Architect, Developer, and Content Manager on campaigns |
| Internal Communications Lead | Chief communication individual for the organization. May not be the one who actually sends the message, but one who is responsible for crafting and following up on communication campaigns |

# Sitecore Governance Communication Plan

Good governance depends on strong and effective communication. A communication plan should embody the following:

* Who Are You Communicating To
* What Are You Communicating
* When Are You Communicating
* Differing angles and communication means
* Keep it clear and to the point with a strong “what's it in for me?”
* Be aware of message fatigue and proper timing

A critical tool in governance communication is to leverage a Communication Calendar.

Each time you reach out to your target audience, you should define a Communication Campaign and put this on your Communication Calendar. You can have multiple Communication Campaigns occurring at once, but beware of “Messaging Fatigue”. An example is as follows:

**Communication Campaign 1:** Users must login to Sitecore using two factor authentication

|  |  |  |
| --- | --- | --- |
| Target Audience | Communication Content and Method | Timing |
| Senior Leadership | * How does this change affect the organization * Concise email with bullet points | Email Prior to Leadership Meeting |
| Middle Managers | * How to reinforce the message to ensure compliance * Concise email with bullet points and FAQs | 2 Emails a Week Apart |
| Executors/Primary Workforce | * Steps to implement a change or how it affects daily work/operations * Longer email with steps to implement, FAQs/link and escalation points for any additional questions * Slack/IM messages on the topic | 3 Emails and Slack Updates a Week Apart |

# Sitecore Governance Policies and Standards

The following sections define the policies (rules) and standards (best practices/execution) for each item within a primary governance topic (ex. Infrastructure, Security, etc.). An example policy and standard is as follows:

Active Directory and Integration

**Policy:** Only Active Directory users can log into the Sitecore CMS

**Standard:** Using the Sitecore AD Module, integrate Active Directory and Sitecore. This allows centralized control of users that need to log into Sitecore, including setting roles/permission levels

## Infrastructure Policies and Standards – On Premises

The following policies and standards apply to the Sitecore infrastructure

### Network

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Servers (Physical, VMs, Hosts)

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Active Directory and Integration

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Scaling

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Storage (SQL)

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Hybrid/Cloud Services

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### WAF, Firewall, CDN, and Edge Devices

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Development Environments

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### QA/Staging Environment

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Production Environment

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### External Integrations/APIs

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

## Infrastructure Policies and Standards – Cloud

The following policies and standards apply to the Sitecore infrastructure

### Network

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

VMs, AppServices, and Web Apps

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

Active Directory/Azure AD and Integration

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Scaling

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Storage (SQL, Azure SQL)

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Hybrid/On Premises

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### WAF, Firewall, CDN, and Edge Devices

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Development Environments

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### QA/Staging Environment

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Production Environment

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### External Integrations/APIs

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

## DevOps and Development Policies and Standards

The following policies and standards apply to Sitecore development/DevOps

### Source Control/Branch Management

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Development Tools

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Team Communication

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Deployment Tools and Release Management

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Deployment Targets

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Testing Methods

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Infrastructure Management (Infrastructure as Code/ARM Templates)

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Escalation Points

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### DataOps and DevSecOps Integration

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### External Integrations and APIs

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

## Monitoring Policies and Standards

The following policies and standards apply to Sitecore Monitoring

### Infrastructure Monitoring

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Application Monitoring

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Service and API Endpoint Monitoring

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### RUM (Real Time User Monitoring)

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Ping/Health Checks

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Unified Dashboard(s)

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Key Business Transactions and Threshold

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Alerting and Escalations

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Development and Staging Monitoring

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Monitoring Tool Management

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

## Security Policies and Standards

The following policies and standards apply to Sitecore Security

### CMS Access

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Active Directory Users and Authority to Add Users

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Network

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Server, VM, AppService Access

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Services and Cloud Portal Access

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Development and Deployment Access

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Security Breach Process

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### WAF, Firewall, and Edge Devices

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Contractors, Consultants, Terminated Employees

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Password Management

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Physical Security

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Social Engineering and Non-Disclosure Procedures

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

## Analytics, xConnect, Cortex Policies and Standards

The following policies and standards apply to Sitecore Analytics, xConnect, and Cortex

### Target Audience Identification

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Data Collection

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Data Compilation

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Data Usage

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### GDPR

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Setting and Tracking Goals

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Personalization

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Troubleshooting xConnect and Cortex

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Cortex, Artificial Intelligence, Machine Learning

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Marketing Adaptation/Approach Changes

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Reporting

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

## Content Policies and Standards

The following policies and standards apply to Sitecore Content

### Content Creators

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Content Editors

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Content Managers

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Content Training

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Images and Dynamic Content

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Content Approval/Workflow

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Publishing Windows

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Content Synchronization Across Environments

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Content Tree Management/Structure

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Taxonomy and Item Buckets

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Version and Records Management

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

## Search Policies and Standards

The following policies and standards apply to Sitecore Search

### Search Providers

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Solr

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### SolrCloud

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Operational Index Management

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Custom Index Management

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Scalability and Performance

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Update Strategies

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Backup and Restore

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

## Commerce Policies and Standards

The following policies and standards apply to Sitecore Commerce

### Commerce Infrastructure

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Commerce DevOps/Development

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Payment Gateways

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### SSL and User Data Security

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Custom Commerce Solr Cores

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Scalability

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Item Management

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Content Creators and Editors

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Marketing Campaigns

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Sales, Promo Codes, and Promotions

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Customer Disputes and Resolution

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

## Upgrade Policies and Standards

The following policies and standards apply to Sitecore Upgrade

### Upgrade Evaluation Process

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Mainline Support of Sitecore

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Upgrade Process

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Migration of Code, Content, and Configurations

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Infrastructure Changes

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Development Changes

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Training of Development, Content, and Marketing Teams

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### New Feature Training for External End Users

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Great Opportunity for a Fresh Look and Features

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Timeline and Upgrade/Maintenance Windows

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

## Digital Asset Management (DAM) Policies and Standards

The following policies and standards apply to Sitecore Digital Asset Management

### Asset Creators, Editors, and Managers

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Creative Director

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Brand and Design Standards

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Storage Amount and Infrastructure/Cloud Management

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Asset Workflow

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Who Can Access the DAM

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Who Can Publish DAM Assets

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### DevOps/Sitecore Integration

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Stock Photos and Template Libraries/Integrations

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Marketing Campaign Timelines and Asset Usage/Licensing

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

## Disaster Recovery Policies and Standards

The following policies and standards apply to Sitecore Disaster Recovery (DR)

### Disaster Definition

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### DR Environment Infrastructure

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### DR Failover Process

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Acceptable Downtime and When to Failover

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Return to Service

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Maintenance Page or Low Grade Site Version

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Disaster Contacts and Escalations

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule

### Who and When to Communicate Outage and RTS

**Policy:** The Rule

**Standard:** The Best Practice/Execution of the Rule