What is a Sitecore Audit and How Does it Help?

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If you've been shopping around for a new Sitecore partner, you've probably heard of a [Sitecore audit](#). The partners you've been talking to have probably suggested, or likely insisted, that you start your new relationship with an audit. If not, that should be a [red flag](#).

So, what's the big deal with these audits? You already paid top dollar to hire a certified Platinum or Gold partner to implement your site. Why would you need to evaluate their work?

The sad truth is that Gold and Platinum Sitecore partners do shoddy work, too. And when they do, you owe it to yourself and your organization to know exactly where they went wrong, how to fix it, and how to move on and ensure you're getting the most out of Sitecore moving forward.

That's why a Sitecore audit is a critical first step in any takeover scenario. It ensures your new Sitecore partner:

1. Isn't walking into the situation blind and making a bigger mess of things.

2. Is prepared to start providing effective and responsive emergency support on day one.

3. Has the information they need to eliminate all the unknowns that lead to bloated budgets and excessive estimate padding.

4. Can have an informed conversation with you about the enhancements you want to make and what it will take to leverage the Sitecore functionality you want to use.

5. Knows your organization's unique challenges and goals, and can provide a clear and bespoke roadmap to realize your ultimate vision.

Read on to understand what's included in a Sitecore audit, situations where your company needs one, and how to convince your boss of the long-term benefits.

What is a Sitecore audit?

A Sitecore Implementation Audit is a comprehensive technical assessment of your existing [Sitecore implementation](#). It should be conducted by a team of Sitecore

certified developers, support engineers, and architects who have dedicated their careers to being Sitecore experts and have been exclusively focused on this one platform for a decade or more. They should have a formal process and protocol they follow. They should also have numerous Sitecore audits under their belt and plenty of examples to share with you.

Sitecore audits are only useful when they're designed to help **everyone** take stock before making important decisions. The deliverables should be produced and delivered in a way that gives the C-Suite a high-level overview—while at the same time allowing the more technical members of your team to dive deep into the weeds about the findings and recommendations.

An audit should propose detailed corrective actions that must (or should) be taken to prepare for further integration, feature enablement, enhancements, performance tuning, and upgrades.

An audit should give everyone a clear, outside, and objective perspective on the overall quality of work of your Sitecore implementation, how well it adheres to best practices, and how it could be improved to better serve your business needs.

3 signs your organization needs a Sitecore audit

In our experience of supporting Sitecore clients for over a decade, we've identified three scenarios that companies commonly find themselves in. Each of these always necessitates a Sitecore audit.

1. Your relationship with your previous vendor fell apart

The first, and most common scenario, describes **clients whose relationship with their previous partner fell apart**.

It doesn't matter whether you broke up with them or they broke up with you, but something went wrong with the relationship and you're ready to move on. If you've already gone separate ways, all you really need to know is what damage they've done, how to fix it, and how to move on.

2. You suspect your current vendor didn't implement things correctly

The next most common scenario describes **clients who suspect their current vendor didn't implement things correctly**, or is otherwise struggling to meet basic performance or deployment expectations.

A Sitecore audit can give these clients the concrete evidence they need to hold the vendor accountable, or justify firing them. A Sitecore audit can help these clients gain a deep understanding of what their partner is doing wrong from a technical perspective, so they can recommend to the vendor how to fix things—or build a case internally to sever ties and find a new partner.

3. You want to supplement your internal team's Sitecore knowledge with outside expertise

Finally, some **clients have implemented or prefer to support Sitecore internally**, but they've come to the realization that it would be really beneficial to have an outside team of Sitecore experts to collaborate with, as they implement new features and functionality.

At Engagency, we have a solution for that called [Sitecore Co-Development & Consulting](). This is designed to help companies remain self-sufficient, while benefiting from some outside expertise. A Sitecore audit provides these teams deep insights into how to bring their implementation in line with modern best practices, while highlighting opportunities to optimize their implementation for better performance, easier upgrades, and seamless deployments.

If any of these scenarios sound familiar, you definitely [need a Sitecore audit]().

How do you convince your boss you need one?

You may already be convinced you need a Sitecore audit. Now, how do you convince the rest of your team, and more importantly, how do you convince your boss? Share these five undeniable benefits of a Sitecore audit with them.

1. More stable environment

A properly implemented Sitecore environment has fewer bugs and unpleasant surprises. A Sitecore audit is essential to ensuring that your Sitecore site meets that definition of proper implementation, by identifying sources of issues that create instability.

If your Sitecore partner finds any areas that affect the stability of your environment, they can be fixed and resolved now—instead of forcing you to rush to fix them when they pop up at an inopportune time in the future.

2. Better performance

An audit can also uncover problems with content setup, configuration issues that affect the speed of the Sitecore authoring environment, workflow issues that may delay getting content published, and gaps in knowledge.

By correcting configuration issues, reducing redundancy, adding in Sitecore caching, and making other incremental changes, you—and your visitors—will see a huge improvement in page speed and an overall boost in performance.

3. Seamless deployments

When your Sitecore site is built using Sitecore best practices, it runs smoother and more efficiently. There are no complicated workarounds to remember during deployments, because everything works together cohesively.

A well designed deployment process enables you to deploy code changes with zero downtime and without having to do it late at night or on the weekends.

By uncovering and fixing the configuration issues an audit identifies, your team can enjoy faster deployments in the future—with fewer headaches to boot.

4. Increased productivity

Your IT team won't be the only ones enjoying increased efficiency. A Sitecore audit pinpoints areas where your implementation wasn't set up properly to enable your marketers and content editors to do their jobs quickly and intuitively.

Once identified, the Sitecore partner will suggest fixes that can vastly improve the way they do their jobs. Your team can spend all the free time they get back on brainstorming new ways to boost your bottom line.

5. Long-term cost savings

When you have a Sitecore implementation that was implemented properly and things just work, everyone can get things done more quickly.

When your authoring environment is well designed, and your marketers and content managers can do their job efficiently, then you can hire fewer people. As for the people you do have, they can spend more time on activities that really move the needle.

When your implementation is designed and built with modularity in mind, you can reuse page layouts and modules on other sites and significantly reduce the cost of implementing additional sites.

When you configure your server environment properly and design a build and deploy process that follows best practices, deployments simply won't require as many people and they will take a lot less time.

Of course, these are just a few of the many ways to save big dollars over the long-run, just by having a team of Sitecore experts take a peak under the hood.

Schedule your Sitecore audit

If you're interested in learning more about how an audit can serve your company, contact Engagency. Tell us your situation. We'll share examples of previous audits we've done that resolved similar situations, and discuss how we can help you.

It's time to get your implementation back on track. Set up a phone meeting now.