Optimizely Solution: Yearly comprehensive audit and task guide

Discover best practices for maintaining solutions hosted within Optimizely DXP, and find out the additional care you need to provide to self-hosted ones.

Infrastructure and Operations

Task	Frequency
Regularly verify alignment of Dev/Test/UAT environments with production data	yearly
Review backup policies and schedule *	start
Create and update the disaster recovery plan	start
Optimise database size and clean up data *	yearly
Optimise database queries *	yearly
Rebuild/reorganize indexes & update statistics *	yearly
Review schema update process and ensure ORM migrations use *	start
Review pipeline processes: build, release, and rollback	yearly
Clean up unnecessary resources and identify cost reduction opportunities *	start, yearly
Monitor End-Of-Life (EOL) resources	yearly
Identify infrastructure improvements: scale, resize, and extend with new resources *	yearly
Retain and clean up logs *	yearly
Identify common errors and review log structures	quarterly
Integrate 3rd party monitoring services and setup alerts	major updates, as needed

Security and Compliance

Task	Frequency
Schedule SSL certificate renewal and plan the process for it *	start
Review and monitor 3rd party licenses	yearly
Audit SEO, Accessibility, and Analytics	as needed
Security audits	yearly
Manage accounts – perform cleanup and revoke permissions	yearly
Review and manage password/secrets security	yearly

Development and Code Management

Task	Frequency
Identify technical debt by analysing code hotspots int the backlog	half yearly
Check Data protection / GDPR compliance	monthly
Review and update front-end packages	quarterly
Review and update back-end packages	as needed, half yearly
Review policies and conventions	half yearly

Quality Assurance and Testing

Task	Frequency
Create or update tests in CI and conduct static code analysis	start
Review code coverage	yearly
Test quality improvements in code hotspots	monthly
Create or update UI tests	as needed, monthly
Conduct reviews and suggest improvements	quarterly
Smoke test page performance	monthly
Analyse performance reports and metrics	major updates, yearly
Run checks on development environment performance	major updates, yearly

Content Management and Update

Task	Frequency
Clean up customisations and clean up scheduled jobs	quarterly
Implement or revisit caching strategies for frequently accessed content or data	yearly
Clean up content types	monthly
Regularly review content and update	as needed

Documentation and Reporting

Task	Frequency
Review analytics data & client feedback	monthly
Update documentation	major updates, yearly

*Self-hosted only (own cloud subscription + on-premise)

Legend: major updates · as needed · start · monthly · quarterly · half yearly · yearly