



# Roadmap to Replatforming

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YOUR STEP-BY-STEP GUIDE TO  
AN ECOMMERCE REPLATFORM



# Your Step-by-Step Guide to an Ecommerce Replatform

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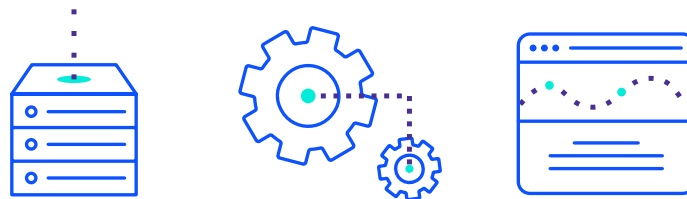
Replatforming is not a decision to be taken lightly. It affects many aspects of your business, requires buy-in from stakeholders across different departments, and can create headaches for existing systems.

While replatforming might be a costly or unpopular decision, it is also sometimes the right decision. Once you've successfully moved over to the new platform, it can lead to big savings and incredible growth for your business.

**This guide is intended to provide you the guidelines you need to:**

1. Make a decision on whether or not to replatform
2. Choose your new platform
3. Prepare for and execute the switch

You will get resources and worksheets to provide to various departments (or external agencies) to maintain organization during the project and make sure everyone is aware of action items and requirements. You will also get a step-by-step guide to the three biggest pillars of an ecommerce replatform project: data migration, integrations, and UX/UI.



By keeping everyone on the same page, you can transform a logistical nightmare into a well-organized project. Problem-solve challenges as they arise and get your new platform up and running faster, so you can go back to focusing on helping your customers and growing your business.

# Navigating the Replatforming Roadmap

This guide supports each stage of the replatforming journey with worksheets and assessments to help with both planning and execution.



## 1 Assessment

- ▲ If you need to replatform
- ▲ The primary deficiencies with your current platform



### ACTION ITEM:

Take the [Key Drivers to Replatform Assessment](#)



## 2 Discovery

Goals of the discovery phase:

- ▲ Build a strong foundation of business objectives and goals
- ▲ For every assessment, outline needed stakeholders to ensure the proper inputs and buy-in are provided
  - Marketing
  - Operations - Warehousing, Buyers
  - Customer service
  - IT
  - Finance
  - Business / Strategy
- ▲ Plan your project's timeline effectively



### ACTION ITEM:

Distribute these worksheets to relevant teams.

- ▲ [Customer Experience \(UX\) Audit](#)
- ▲ [Technology Audit](#)
- ▲ [Marketing Audit](#)
- ▲ [Total Cost of Ownership Calculator](#)

# Navigating the Replatforming Roadmap



## 3 RFP

In the previous phases, you determined you need to replatform and conducted a thorough audit of all systems to understand what you need from your new platform. Use that information to narrow down your ecommerce platform options to 3-5 potential vendors.

Here are the key pieces of information to include in your RFP:

- ▶ Replatform project overview
- ▶ RFP response formats
- ▶ Brief on current platform's strengths and weaknesses
- ▶ Expectations for the new platform, including estimated time to launch
- ▶ Asking for presentations from contenders that include evaluating your current ecosystem and walking you through a migration plan
- ▶ Budget and pricing



### **ACTION ITEM:**

Prepare your RFP. Use the [RFP Guide](#) section and [RFP Template](#) for help.

# Navigating the Replatforming Roadmap



## 4 Migration Pre-check

Once you have chosen a new platform from the results of your audits and RFP, prepare for your migration with these essential actions:

- ▶ Plan front-end design and UX specifications
- ▶ Conduct a content review and make an SEO URL redirection plan
- ▶ Prepare for the data migration
- ▶ Review ecosystem architecture and integrations to make sure your ERP, CMS, PIM, DAM, and SSO (if applicable) will integrate smoothly
- ▶ Assess risks to your business that could result from the replatform

### Considering a headless architecture? You have some additional points to consider.

- ▶ Will you be using a CMS (API/package) option or Framework (React, Vue, Angular, etc.)?
- ▶ If you're considering Framework, what will the hosting and infrastructure needs be and the additional development required to connect it to the platform's API?
- ▶ For a CMS, you may have less hosting needs but will still likely have some API considerations.



#### **ACTION ITEMS:**

1. Use the [SEO and Content Review Guide](#) to organize your redirection plan.
2. Make a plan to make sure data migration is handled correctly. Talk to your new platform about services and assurances they can offer.
3. Take [Risk Assessment](#).

# Navigating the Replatforming Roadmap



## 5

### Build and Project Delivery

It's important to carefully phase your replatform project as the unified list of objectives will undoubtedly be long.

- ▶ All key stakeholders should collaborate and agree on what features require priority. Considerations should include: which brands, regions, currencies, and languages are needed.
- ▶ Determine what factors are involved in the execution. Will you be handling the build and migration process with internal teams or hiring outside agencies to deliver work? (If you're working with an agency, you can still use these guides to help you guide the workflow, keep communication open, and maintain best practices.)
- ▶ Ensure that you deploy well-designed core functions, such as your new platform's transactional abilities and APIs.
- ▶ Aim to adopt a flexible plan focused on core pieces that will deliver almost immediate value and execute through your chosen project planning method.



#### ACTION ITEMS:

1. Follow steps in [Replatform Pillar 1: Data Migration](#).
2. Follow steps in [Replatform Pillar 2: Integrations](#).
3. Follow steps in [Replatform Pillar 3: UX/UI](#).

**You've reached the end of the Roadmap. Continue through the workbook for more in-depth guidance.**



**01**

# **Key Drivers to Replatform Assessment**

# Key Drivers to Replatform Assessment

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What are the critical drivers that are leading your ecommerce team to consider a replatform? These drivers typically include outdated technology, operational overheads, and issues with scalability and security.

Use this worksheet to learn how relevant stakeholders in your organization assess your current system. Ask them to read through the assessment and weigh in on how many of the following factors are affecting your business. You can also ask them to comment on the degree of importance, backed up with any supporting metrics they can supply.

The results of this assessment can form the basis of your discussion on if a replatform project is necessary and cost-effective for your business.

## Outdated Technology

- ☐ **Unstable and unreliable** for handling peak traffic conditions. Our site's overall performance is negatively affecting user experience for shoppers.
- ☐ **Product catalog is slow** and captures a limited number of attributes.
- ☐ **Hard to integrate** with third-party applications due to custom-made hacks.
- ☐ **Struggling to smoothly make API calls** to critical third-party applications required to help drive more sales.
- ☐ **Difficult to develop new features or update quickly** on the current platform due to resourcing issues and high costs.



## Operational Overheads

- ☐ **Integration issues** are making it difficult to connect the ecommerce platform to the ERP, OMS, WMS, and other elements within the ecosystem.
- ☐ **Increasing order picking error rates** due to the inability of the current platform to effectively sync new orders with WMS.
- ☐ **Platform's server performance** relies heavily on its hosting company.
- ☐ **Unacceptable customer support response times.**
- ☐ **Large legacy bespoke architecture** requires significant technical resources to support.
- ☐ **Middleware and API connections** are expensive or resource-draining.

## Total Cost of Ownership

- ☐ **Calculating TCO is difficult** due to unforeseen maintenance and upgrade costs.
- ☐ **Testing is prohibitively expensive** on current platform which affects business expansion plans (i.e. launching new brands and product lines).
- ☐ **IT headcount is increasing** faster than revenue growth. Revenue per employee keeps reducing rather than increasing.

## Marketing and SEO

- ☐ **Tests critical to conversion, traffic generation and sales** are difficult for the marketing team to run.
- ☐ **Critical integrations are lacking** (such as personalization, site search, social buying, and tag management) making it hard to remain competitive in the ever-changing marketing technology landscape.
- ☐ **SEO has taken a significant hit** due to the inflexibility of current platform and the inability to carry out critical mobile first technical SEO changes.

## Scalability

- ☐ **Omnichannel readiness** is not supported.
- ☐ **Scaling with business growth** is no longer possible.
- ☐ **An acquisition or merger** has led to the business needing an ecommerce platform to provide new ways to win customers and capture revenue.
- ☐ **International expansion** requires an agile platform that will enable it to support new audiences.

## Security

- ☐ **Ensuring PCI compliance** is becoming challenging.
- ☐ **Security vulnerabilities** on current platform lead the business to find a 'versionless' ecommerce solution.
- ☐ **A major security and/or compliance incident** recently occurred.





**02**

**User  
Experience  
(UX) Audit**

# User Experience (UX) Audit

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A customer experience audit entails an assessment of user behavior patterns of your customers and potential customers. It should:

- ▶ Be an unbiased review of your current platform
- ▶ Highlight its strengths and weaknesses
- ▶ Include features that must be carried over to the new platform and features that must be improved.

**Here are the key questions your technical, marketing, data analytics, and customer services teams should answer:**

1. What experiences do customers enjoy when interacting with our store?
2. What experiences do customers avoid when on our website? What pain points do they experience?
3. What experiences do website visitors (not current customers) avoid when interacting with our website?
4. What types of experiences do consumers need in order to buy online or have the confidence to make the effort of heading into a physical store location?



**03**

**Marketing  
Audit**

# Marketing Audit

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This audit takes a broader look into how your current ecommerce platform supports and inhibits your marketing technology stack.

You will need detailed answers to the following questions to enable you to build a picture of the marketing feature sets you require and what will need to be carried over to the new platform.

## 1. SEO

a. Onsite-SEO features missing from the existing platform?

b. Strong onsite-SEO features on the existing platform?

## 2. PPC Management

a. Is product feed support on the existing platform up to par? If not, what areas can be improved upon?

b. Are pixels and tracking codes effectively tracking on the existing platform? If not, how can implement be improved?

## 3. Social Media

a. Is there full support for shoppable social media posts? Pins, Instagram and Facebook posts?

b. Are all pages marked up and optimized for each social media platform?

#### 4. Email Marketing

a. Does our email infrastructure deeply integrate with our existing ecommerce platform?

b. What pain points do we currently have?

#### 5. Discounting

a. Can our marketing team run sales and discount campaigns without technical support?

b. If not, why is the marketing team unable to run sales campaigns autonomously?

c. How extensive are cart-level discounts and promotions? Is any coding required to set these up? Is this native functionality or a third party app?

#### 6. On-Site Merchandising — Upsells, Cross-Sells

a. Are upsells and cross-sells set up and effectively increasing cart values?

b. How relevant are the recommendations? Are recommendations supported by personalization?

#### 7. Shopping Cart Abandonment

a. Is the infrastructure we have in place for shopping cart abandonment adequate?

#### 8. Email Capture

a. Does our current platform support and deeply integrate with third-party email capture tools?

## 9. Personalization

a. Can we use and integrate with best-in-class personalization solutions?

b. What out of the box personalization features would we like our current platform to deliver that are currently not supported?

## 10. Product Reviews

a. How many product reviews do we have at this point in time?

b. Are they transferable by a third party provider or over a database export?

c. How can the customer review process be improved?

d. What is working well that we would like to carry over?

## 11. Mobile Usability

a. Can we say our site is fully functional on varied mobile devices?

b. Where are our mobile site visitors dropping off?

c. What about site speed on mobile devices?

d. What is the volume and share of mobile traffic?

e. What are our mobile traffic conversion rates? Are they sub-par to the industry average?



## 12. Rewards and Loyalty Programs

a. Are we satisfied with our current rewards and loyalty program?

b. Where does it falter?

c. Does it offer its full feature set on our current ecommerce platform?

d. Do the best-in-class loyalty and reward app vendors support our current ecommerce platform?

## 13. Content Marketing

a. Does our current platform support or integrate with a blog?

b. If so, what is the primary function of the blog? Is it intended mainly for audience education, for content marketing or both?

c. Are our product guides integrated with the product catalog?

# **04**

## **SEO and Content Review Guide**

# SEO and Content Review Guide

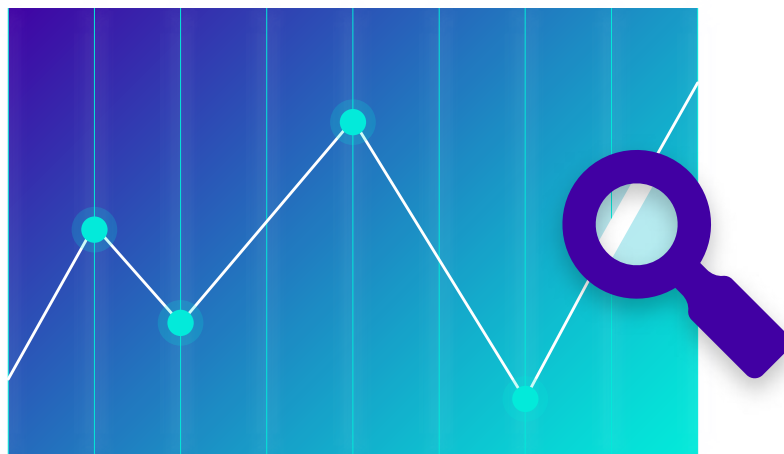
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SEO and a thorough content review are typically critical pillars of replatforming projects. Here are recommended steps and ways to approach your content and SEO.

## Benchmarking

Start by establishing a baseline by running a content audit that references website traffic, as you will want to:

- ☐ Benchmark top landing pages by sessions and page views.
- ☐ Discover landing pages with the highest amount of search referrals.
- ☐ Run crawl tests to assess the accessibility of the site to search engines and get the number of currently indexed pages.
- ☐ Do a thorough crawl of your existing site using SEO crawlers.



## Content Review

You want your content review to reflect the current page level taxonomy. So you will want to take the following actions:

- ☐ Outline and count pages by page type, i.e. category, product, static, blog, review, search and transactional pages (like add to cart and checkout pages).
- ☐ Note the URL structure of each page type and discuss with your SEO team as to whether the URLs are the most optimal.
- ☐ Review on-page template by taking note of word count and heading tag placements. Again, set aside time with your UX and SEO team to review if your current on-page structures are both optimal for SEO and UX.
- ☐ Review page templates on mobile screens and unpack the most challenging UX pain points.

Over the course of your content review process, the following questions will need answers from your SEO and analytics team on a spreadsheet that will outline every page on your current site:

- ☐ How does the content on this page serve a purpose? (It's best to group your answers by page taxonomy.)
- ☐ How much traffic did each page receive over the last 30, 90, 180 and 365 days? (Be sure to chart the answers out on a spreadsheet.)
- ☐ Is this page orphaned?
- ☐ Has this page earned any external backlinks? What is the page-level authority?
- ☐ How many social shares has this page amassed?
- ☐ Is content on this page similar or duplicated on any other page(s)?
- ☐ Is the content on this page still relevant?

## URL Structure and Redirection Plan

You will need to establish if URLs will be changing over in the replatform. If so, a comprehensive URL outline and redirection plan must be created for the replatform.



### Launch and review

1. Pre-launch: Carry out final checks on content, pages (by carrying out a crawl) and assurances that correct (301 - permanent) redirects are in place.
2. Post-launch: Review baseline metrics and results over the course of the first week and months.

The key baseline SEO metrics to have your SEO team report back to you include:

- |  |  |
|--|--|
| <input type="checkbox"/> Traffic by referral source  | <input type="checkbox"/> Crawl errors              |
| <input type="checkbox"/> Top SEO landing pages   | <input type="checkbox"/> Backlink reports          |
| <input type="checkbox"/> Rankings  | <input type="checkbox"/> Internal link reports     |
| <input type="checkbox"/> Engagement metrics such as time on site, pages per session, and bounce rate | <input type="checkbox"/> Broken links (404 errors) |
| <input type="checkbox"/> Customer journey and conversion paths                                       |  |

**05**

**Technology  
Audit**

# Technology Audit

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This audit takes stock of the current integrations of your existing platform, server specifications (if you are running an on-premise platform), currently running plugins, and your full technology stack.

You should also consider logistical concerns like necessary payment gateways, shipping structure and complexity, currency offerings, inventory management and routing capabilities, supported channels, and warehouse structure.

Here is a summary of what to include in your technical analysis specification:

## 1. Frontend Development Capabilities

a. What pain points do our frontend developers have?

b. Are there any backend dependencies that deter or slow down frontend development work?

c. What key features of the current platform do we want to see carried over?

d. Are your product detail pages (PDP), product listing pages (PLP), cart and checkout pages optimized for conversion? How can that be maintained or improved?

e. What purchase models (subscription, single purchase, etc.) and approaches (seasonal sales, scheduled, flash sales, etc.) do you use that you want to change or maintain?

## 2. Backend Capabilities

a. What pain points do your backend developers have?

b. Do you have issues managing database tables, records, database scaling, or compliance?

How have these been managed to date?

## 3. Templating System

a. Is our current platform constrained to a specific programming language?

b. Are there any preferences we have?

## 4. Scalability

a. How has our current platform coped over the last 3 traffic spikes?

b. What infrastructure improvements are required to better scale for growth?

## 5. Integrations

a. What are the current mission critical system integrations (like ERP, OMS, WMS, CRM, BOMSs and 3PL integrations)?

b. What are critical pain points and inefficiencies that are costing us manpower hours or slowing down operations?

c. What are our current must-have integrations that we expect to be carried over to our new platform? This could include payment gateways, taxes, shipping solutions, etc.

d. What are the middleware/API messaging practices in place to connect our ecosystem?



## 6. Server Performance Benchmarks

a. What does our current uptime look like? Is it acceptable? If not, what's the standard we want to achieve?

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b. Has bandwidth been adequate? What will be acceptable on a new platform?

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c. What is the current CDN setup and its reliability?

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d. What are our acceptable standards for PCI compliance and security? Outline all major breaches.

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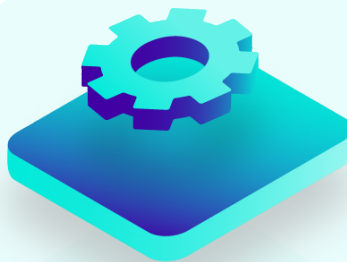
## 7. Architecture

a. Is our current platform coupled or decoupled?

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b. Would a transition to a headless commerce platform improve or complicate our technical and marketing team processes?

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**06**

## **Total Cost of Ownership Assessment**

# Total Cost of Ownership Assessment

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Another important factor to consider when choosing to replatform is the total cost of ownership. According to a Forrester report on TCO in [ecommerce replatform projects](#), almost half of all ecommerce projects in their survey had significantly higher than predicted TCO.

Your TCO should include these 2 phases:

- ▲ The initial build costs, or CAPEX costs
- ▲ Predicted ongoing costs after the new site goes live, or OPEX costs

Ecommerce replatform project leads should invest time and effort into meticulously detailing your TCO model. This worksheet aims to take you through key elements that should be incorporated into your project's TCO.

Ask relevant stakeholders to calculate the following costs (if applicable) to calculate your projected replatform TCO. Use the results to inform your budget during your RFP process.

## CAPEX Costs

### Pre-build, consulting and business analysis costs:

- ▲ Platform evaluation (consultancy costs if applicable)
- ▲ RFP support (for the evaluation and selection of agency)
- ▲ External contractors at the project discovery stage
  - Business Analyst
  - Project Manager
  - Solution Architect
  - Quality Assurance
  - Developer(s)

## Delivery, agency and technical costs

- ▲ Design and build costs (not necessarily a fixed fee, factor in contingency)
- ▲ Data import (if not part of the build cost)
- ▲ Third party integration costs (i.e. PaaS setup or managed integration by a third party, if not part of the build cost)
- ▲ Third-party search and merchandising solution (licensing, integration, etc.)
- ▲ API integration and third-party module/app costs.
- ▲ SEO discovery and consultancy around the project (input into the functional specs, creation of project plan, management of SEO data migration and redirects)
- ▲ Hosting and hardware costs (if on-premise)

## Post-launch costs

- ▲ Pre-launch testing
- ▲ External platform training

Your CAPEX costs should be thorough and factor in not just the more obvious costs related to technical, design and development but also costs related to staff training, pre-build analysis and testing.

## OPEX Costs

The blind spot for most TCO analysis in replatform projects is OPEX costs. Here are must-have costs to consider incorporating into your TCO OPEX section.

### Retainers for service providers

- ▲ Ongoing development
- ▲ Support and maintenance retainers
- ▲ Technical SEO retainers (if applicable)
- ▲ Ongoing staff training

## Infrastructure and integration licensing fees

- ▲ Data migration service to transfer catalog and customer data
- ▲ API integration fees
- ▲ Ongoing hosting fees (if applicable)
- ▲ Payment processing fees
- ▲ On-going module costs (for cloud-hosted platforms)
- ▲ Annual license fees for third-party apps and integrations

## Third party tools

- ▲ Monitoring tools (e.g. New Relic, Pingdom, Shoppimon, etc.)
- ▲ ESPs - Email service provider (if also transitioning to a new provider)
- ▲ Fraud prevention services
- ▲ Personalization solutions
- ▲ Address validation services
- ▲ Shopping feed management services
- ▲ Licensing for other third-party tools

Ask relevant stakeholders to help you calculate amounts for all of the above. Are you overspending?  
Set ecommerce platform costing benchmarks based on your financial forecast.

Use this information to inform the RFP process to make sure your new platform has the needed ROI.

**07**

**RFP Guide**

# RFP Guide

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Now that you have completed a thorough situation analysis of your existing platform, you will know its strengths and weaknesses. All of the information you collect should enable you to ask the right questions in an RFP to ecommerce platform vendors.

Here are key sections to include in your RFP. You can also use our 193 question [RFP template](#) to create your RFP.

## 1 | Project Overview

- ▲ A brief introduction to your company
- ▲ A detailed overview of your replatform project
- ▲ Details of the goals and objectives of your replatform project
- ▲ Your expectations from proposals and ecommerce platforms

## 2 | Preferred Response Formats

- ▲ The preferred document format of responses (i.e. Word doc, PDF, PPT)
- ▲ The expected length and level of detail of answers to each question
- ▲ Where responses should be sent
- ▲ The expected final deadline for responses

### 3 | Current Platform Audit

- ▶ An overview of your existing platform
- ▶ Describe your existing platform's limitations and pain points
- ▶ Include any strengths or features you will need the new platform to carry over
- ▶ Give a comprehensive technical overview
- ▶ Outline known risks in the project

### 4 | New Platform Expectations

Organize your features list by priority using methodologies such as the MoSCoW method:

1. **M** - Must have this requirement to meet the business needs
2. **S** - Should have this requirement if possible, but project success does not rely on it
3. **C** - Could have this requirement, if it does not affect anything else on the project
4. **W** - Would like to have this requirement later, but delivery won't be needed at this time

### 5 | Budget and pricing

- ▶ Getting specific on your budget is optional, but it is important to provide guidance on pricing, i.e. whether you will be working on a fixed time and materials budget or whether pricing will be time (per day) based.
- ▶ Pricing guidance will manage expectations from vendors from the very beginning and ensure that their proposals align with your project's billing and finance cycles.
- ▶ Keep in mind that each provider will present pricing differently. Look at the details of what is included and what pricing is based on to get a total sense of cost before making comparisons.





**08**

**Risk  
Assessment**

# Risk Assessment

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Every single sub-process and step in your replatform project should have a risk assessment plan that is focused on minimizing project risks. Here is a quick summary of the key areas to carry out due diligence.

Share this assessment with relevant stakeholders to make sure the following areas are being monitored.

## 1 | Data migration

Handle data with extreme care during the data migration phase. For business continuity and the maintenance of trust, it is critical to keep customer and product data secure. You should consider factors like:

- ▲ Is the data coming from a single source or multiple sources?
- ▲ How clean is the data? Will it need to be cleaned before migration?
- ▲ Will you be migrating everything or only active/recent transactions? If so, how far back will you be transferring historical data?

## 2 | Website functionality

Regularly check your initial discovery and RFP documentation to ensure that your replatform is aligned with the project's initial goals and your overall business expectations.

### 3 | **Impact on traffic and SEO**

When it comes to SEO and reducing the impact of the replatform on traffic, it is critical to work with the right people with experience on your chosen platform. SEO will typically be initially affected by replatforming, but with solid SEO migration execution including maintaining unique URL structures, the mid- and long-term effects of a replatform on SEO traffic is positive.

You can help mitigate the short-term impact by utilizing paid media while you wait for new traffic to build through organic search.

### 4 | **Integrations**

Ensure that your new platform integrates with third party tools and platforms the right way. Avoid deploying hacks and shortcuts. API calls and integrations should be deployed effectively. Consider all components of your core systems from supply chain and shipping to taxes and payments. Emphasize proper and adequate integration in your specification documentation. Run thorough tests prior and post go-live with adequate documentation to ensure that an audit trail is in place for other team members.



**09**

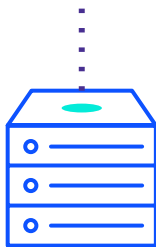
**Three  
Pillars of  
Replatforming**

# Three Pillars of Replatforming

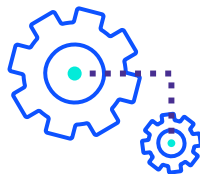
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When it comes time to take steps to actually complete your replatform process, there is no shortage of steps to consider. However, the most pressing of these needs will usually fall under one of these three pillars.

## PILLAR 1: Data Migration



## PILLAR 2: Integrations



## PILLAR 3: UI/UX



By handling these three pillars in a careful and methodical way, you are setting yourself up to have a successful replatform.

In the following pages, we outline the steps necessary to move your data from your old platform to your new platform, link any necessary integrations, and build your site's UX and UI.

# Replatform Pillar 1: Data Migration

The first phase of your actual replatform will be focused on getting all of your valuable data from platform A to platform B.

## Why start with data migration?

- ▲ It's usually your heaviest lever and will require the greatest manpower to pull down. Move the big rocks first and uncover risks now to avoid derailing the project later.
- ▲ It's the true heartbeat of the business. Marketing asks, UX optimized to personas, and SEO are all nice to have, but—assuming your business is not a completely new venture—one thing you truly can't go live without is your data.

Here are the key steps to tackling your data migration.

## Step 1: Decide who will be executing the data migration.

### Important questions to ask:

- ▲ Does the platform you're moving to offer data migration support services?
- ▲ Will you use an external agency or an internal team to handle the data project?

### Things to consider:

- ▲ Even if you don't do the actual execution of the data migration yourself, it's important for your internal team to be overseeing the project. Someone who knows your business data inside and out should be owning the project from the beginning.
- ▲ Are you a B2B or B2C business? Your data migration needs will vary based on this. B2B may require a deeper review of your data, as you will likely have a greater amount.
- ▲ Keep in mind that an agency may take longer to complete the data migration than an internal team will.

## Step 2: Decide what data to migrate.

Data to migrate will likely include:

- ▲ Products
- ▲ Customers
- ▲ Pricing - promotional/discounting, base prices
- ▲ Custom or customer-based pricing (price lists)

### Step 3: Hygiene data to prep for migration.

Part of choosing what data to migrate is choosing what data to not migrate.

Replatforming is like moving to a new house. Don't take boxes of unsorted junk to your nice, new place. Make sure to hygiene your data *before* migrating it.

Consider how far back you want to go with your data. Is data on a customer who hasn't purchased from you in three years still relevant to your business? Choose the parameters that make sense for your business regarding what to save and what to leave.

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**EXPERT TIP:** After you clean your data, stage it on a separate location so it's ready to deploy when you are and won't get mixed up with the data you haven't cleaned yet.

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### Step 4: Phase and test migration.

The more well-organized and carefully phased your data migration is, the more you can mitigate risk. Whatever model you use, you will want to make sure to work in regular tests. You may want to start with a single store or subset of data.

One useful testing model is the 10-40-60 method. This means you:

1. First transfer 10% of your clean data from your secondary server to your new platform. Test your most historic data first and then work forward in time, as the newer data is typically cleaner.
2. Do validations and testing and develop a benchmark structure to measure if your tests are successful enough to move forward.
3. Once you have passed your success standards, retest, this time with 40% of your data.
4. Complete validations and testing to reach your pre-set benchmark success rate.
5. Repeat test with 60% of your data.

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**EXPERT TIP:** After you've completed your 10-40-60 testing, leave the 60% of data in your staging site. You will move the last 40% over during your full deployment. You can also choose to review and process the remaining 40% of data prior to deployment to reduce risk even further.

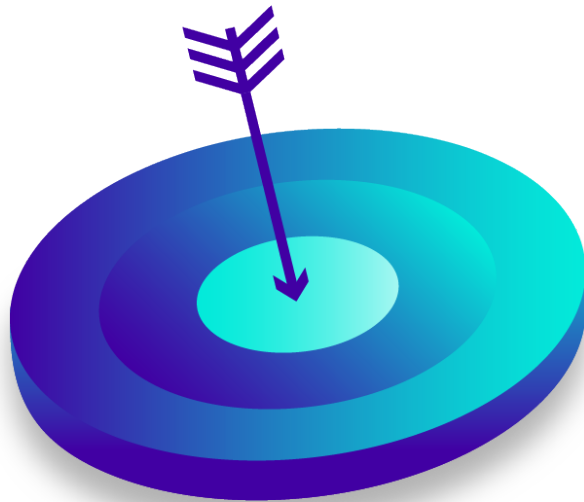
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## Step 5: Pre- and post-launch testing.

We recommend that the full migration of data should be completed at least 4-5 weeks (on average; this could vary based on your project size) before your go-live date. This is to ensure you have adequate time to run tests to ensure all of your data is in place and that everything operates correctly.

- ▶ Choose approximately 10% of your overall data to test and validate.
- ▶ In addition to internal testing, recruit a few valued customers to spend some time on your site to validate data. Consider offering gift cards as compensation.

Continue testing until you reach your pre-set benchmarks for success. Repeat testing cycle after updates are made.





# Replatform Pillar 2: Integrations

After your data, one of the highest potential sources of risk in your replatform project will likely be your integrations. You may choose to tackle these at the same time as your data, as they will require many of the same steps.

## Step 1: Prioritize your integrations.

Rather than trying to tackle all of your integrations at once, divide them into the following categories based on their relationship to your store's functionality.

- ▲ **Critical.** This is a fundamental component of your ecosystem such as your ERP.
- ▲ **High-level.** This is not necessarily critical but is a highly valued part of your day-to-day operations, such as your email marketing system.
- ▲ **Low-level.** This is a nice-to-have but is not necessary for a baseline store to go live.

By making these distinctions early on, you will better be able to plan not only for what order to tackle setting up and testing integrations, but which actually need to be done prior to launch.

## Step 2: Map out how different integrations connect to your platform.

Not all integrations are set up the same way, and some connections will require more work than others. Here are two questions to ask about each integration to help you understand and prioritize the workload.

- ▲ Is the integration connected or is it a connector?
- ▲ Is the integration heavily customized or is it out-of-the-box?

Get the hardest and most risky work out of the way by tackling the most specialized and customized pieces first.

### Step 3: Figure out who will handle setting up your integrations.

Determine who will manage the project of setting up integrations with your new platform. Does your new platform offer implementation project management? Will you be using an external agency? Will you be relying on internal teams?

Points to consider:

- Regardless of who is on the project, the first stage is to work with them to develop a clear implementation plan with potential risks outlined.
- If you're working with an agency and they haven't worked with this particular integration before, make sure to get a dedicated resource on the project, not a shared developer. At the very least, you want commitment from the agency that they will make your project a priority.
- Map out your plan early, especially for critical integrations that will affect your go live timeline.

### Step 4: Execute plan and test results.

Once you have set up your integrations you need to test and validate them. For the testing phase, consider this example with an ERP integration:

- Create a test plan and mark your success rate. For example, anything above 85% is good to move forward. While it is nice to strive for 100% accuracy, chasing absolute perfection can mean preventing an on-time launch and addition additional costs.
- Run through tests of both the customer side and connector side. If your ERP has a separate staging area available, use it to run your tests.
- Test functionality by creating an order and a customer. Make sure all of the connections flow both through your ERP and back through your ecommerce platform.
- If you fail at achieving your >70% success rate, move into a rollback strategy and retest.
- Conduct Go/No Go (pass/fail) testing 24-48 hours before designated go-live date.
- Have a risk mitigation strategy in place both pre and post launch.

This same basic test strategy can be used as you connect your other integrations as well.

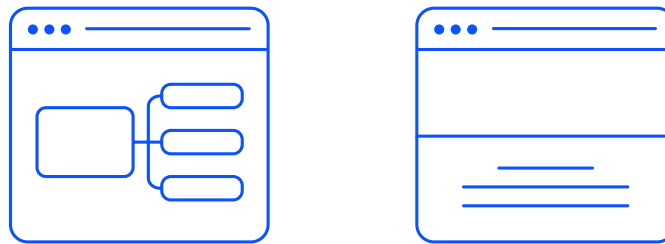
## Replatform Pillar 3: UI/UX

Focusing on user interface and user experience is often where many people redesigning a website want to start because you can see the most visual progress.

Once you've moved the heaviest levers of data and integrations and gotten your backend functionality in place, it's time to create the look and feel of your website and create your buyer experiences.

**UX** or user experience concerns the overall ease of use of the buyer journey, how your customers interact with your products, and how you can get them to convert at checkout.

**UI** or user interface concerns the actual assets your customers interact with on that journey.



### Step 1: Do research to understand your customers.

Workshop with your marketing team to get feedback on what's working today and what's not working. Pull from the [User Experience \(UX\) Audit](#) you completed earlier. Questions you can ask:

- ▲ How many steps do you think a customer should go to buy something?
- ▲ What's the critical path?
- ▲ Who are our customers? What experiences are they looking for?

As part of this exercise, define your customer groups into personas and create buyer experiences for them.

## Step 2: Plan the order for development.

Much like with the integrations in Pillar 2, you will want to prioritize the coding requirements so you focus on what is crucial for go-live first.

One option is to work on the pages in this order:

- ▲ Homepage
- ▲ Product listing page
- ▲ Product detail page
- ▲ Checkout

Another option is to build the core assets first (header, footer, global functions, etc.) and then work on your site pages, following this order:

- ▲ Global assets
- ▲ Checkout
- ▲ Product detail page
- ▲ Product listing page
- ▲ Homepage

With this second method, you're starting with the lower UX risks and working your way to the homepage, where many stakeholders will likely have the most opinions.

## Step 3: Make an implementation plan with the team.

For actual code deployment, will you be using an internal team or an external agency? Either way, communication is key to everyone staying on the same page. Set up a weekly call or meeting with your team to agree on the flow and plan of attack for deployment. Ask for demos of pages as they are built.

## Step 4: Deploy your implementation plan.

How your team actually develops the site may vary based on your business, however here is a recommended path.

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**EXPERT TIP:** Your UI/UX is an important step because you are creating what your customer will experience when visiting your site. Giving yourself ample time to develop the UI treatment and experience flow will ultimately lead to stronger engagement and conversion. You need to consider the approach in the context of building something that matches the UI requirements and also has the right type of code outcome (logical, clean, not heavy, etc.).

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- ▶ Download the CLI integrated development environment.
- ▶ Use Github or Gitlab to store and manage your code repositories as normal.
- ▶ Deploy code to a staging environment and move to your ecommerce platform on a weekly or daily basis.
- ▶ Use the 10-40-60 method to test the code base. (See [Pillar 1: Data Migration](#) for details of method).
- ▶ Fix anything flagged in your tests. You should have the complete code base (front-end and any integration related code) validated 4-5 weeks out from your go-live date.
- ▶ During the last weeks before launch, work on features from your rapid assessment model that needs to be incorporated. This is essentially your contingency period.
- ▶ Freeze code a week before go live. Go through integration test beds for migration and UX/UI.
- ▶ Go live! Then run post-launch internal and customer tests.

**With that, you have successfully replatformed. While the journey of switching ecommerce platforms is complex, doing the hard work and research in advance will only make it easier making your new platform a better fit for your business and its future growth.**



## Ready to Start Your Replatform?

Whether your old platform is sunseting or just no longer living up to your business needs, it's time to choose a platform that will help you meet your organization's goals and scale with its future needs.

Consider the platform that's leading a new era of ecommerce for enterprise brands. BigCommerce is a highly-extensible SaaS solution with proven security and scalability to fast-track your growth.

Try a demo of the BigCommerce platform and a solutions expert will walk you through what you can expect from your replatform to your new BigCommerce store from RFP through data migration and post-launch support.

Don't let your existing platform hold you back. The future of ecommerce is yours.

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