Roadmap to Replatforming

YOUR STEP-BY-STEP GUIDE TO AN ECOMMERCE REPLATFORM

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

Replatforming is not a decision to be taken lightly. It affects many aspects of an ecommerce 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 the business is successfully moved over to the new platform, it can lead to big savings and incredible growth.

This guide provides information you can use to support your clients as they:

1. Make a decision on whether or not to replatform

2. Choose their new platform

3. Prepare for and execute the switch

Inside are resources and worksheets to help brands maintain organization during the project and make sure everyone is aware of action items and requirements. This guidebook also includes a step-by-step guide to the three biggest pillars of an ecommerce replatform project: data migration, integrations, and UX/UI.
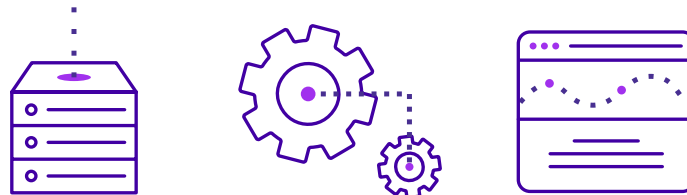
Using this guidebook, you can help your clients transform a logistical nightmare into a well-organized project. Problem-solve challenges as they arise and get their new platform up and running faster, so they focus on growing their businesses with the value adds you provide.

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

Help your client decide:

▲ If they need to replatform

▲ The primary deficiencies with their 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 the project's timeline effectively

! ACTION ITEM:

Work through these worksheets with the relevant teams.

▲ **Customer Experience (UX) Audit**

▲ **Marketing Audit**

▲ **Technology Audit**

▲ **Total Cost of Ownership Calculator**

Navigating the Replatforming Roadmap

3
RFP

In the previous phases, your client determined they needed to replatform and conducted a thorough audit of all systems to understand what they need from their new platform. They can now use that information to narrow down their ecommerce platform options to 3-5 potential vendors.

Here are the key pieces of information to include in their 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 their current ecosystem and walking them through a migration plan

▲ Budget and pricing

! ACTION ITEM:

Help them prepare their RFP. Use the [RFP Guide](#) section and [RFP Template](#) for help.

Navigating the Replatforming Roadmap

4
Migration Pre-check

Once your client has chosen a new platform from the results of their audits and RFP, help them prepare for their 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 their ERP, CMS, PIM, DAM, and SSO (if applicable) will integrate smoothly

- Assess risks that could result from the replatform

Considering a headless architecture?
There are some additional points to consider.

- Will they be using a CMS (API/packaged) option or Framework (React, Vue, Angular, etc.)?

- If they'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, they may have fewer hosting needs but will still likely have some API considerations.

! ACTION ITEMS:

1. **Use the** SEO and Content Review Guide **to help them organize their redirection plan.**

2. **Make a plan to make sure data migration is handled correctly. Have them talk to their new platform about services and assurances they can offer.**

3. **Walk them through the** Risk Assessment.

Navigating the Replatforming Roadmap
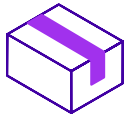
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Build and Project Delivery

It's important for your client to carefully phase their 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 they be handling the build and migration process with internal teams or hiring outside agencies (such as yourself) to deliver work?

- Ensure that they deploy well-designed core functions, such as their new platform's transactional abilities and APIs.

! 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

Ask your clients: 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 their organization assess their current system. Ask them to read through the assessment and weigh in on how many of the following factors are affecting their 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 their discussion if a replatform project is necessary and cost-effective.

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

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

- Be an unbiased review of the 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 their **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

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

They will need detailed answers to the following questions to enable them to build a picture of the marketing feature sets they 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 implementing 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

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

Benchmarking

Start by establishing a baseline by running a content audit that references website traffic, as they 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 their existing site using SEO crawlers.
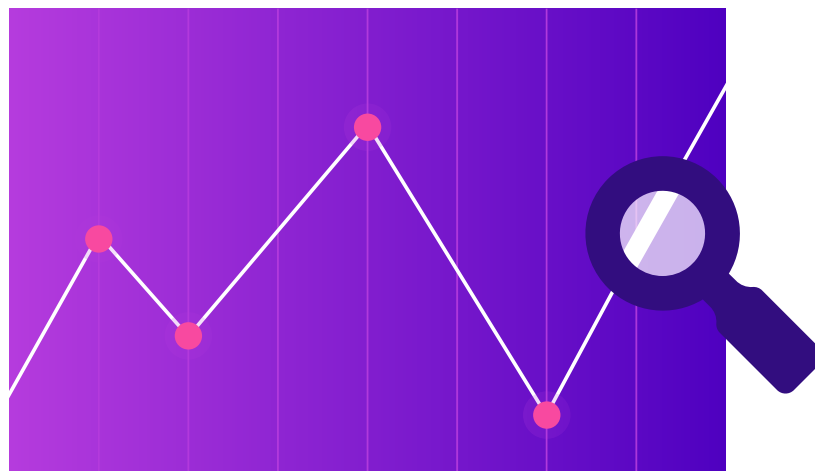
Content Review

They want their content review to reflect the current page level taxonomy. So they 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 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 UX and SEO team to review if 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 the content review process, the following questions will need answers from the SEO and analytics team on a spreadsheet that will outline every page on the current site:

How does the content on this page serve a purpose? (It's best to group answers by page taxonomy.)

How much traffic did each page receive over the last 30, 90, 180 and 365 days? (Be sure the 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

They 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 the SEO team report back on include:

Traffic by referral source

Crawl errors

Top SEO landing pages

Backlink reports

Rankings

Internal link reports

Engagement metrics such as time on site, pages per session, and bounce rate

Broken links (404 errors)

Customer journey and conversion paths

05 Technology Audit

Technology Audit

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

Make sure they 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 your clients should include in their 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?

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

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

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

7. **Architecture**
   a. Is our current platform coupled or decoupled?

   b. Would a transition to a headless commerce platform improve or complicate our technical and marketing team processes?
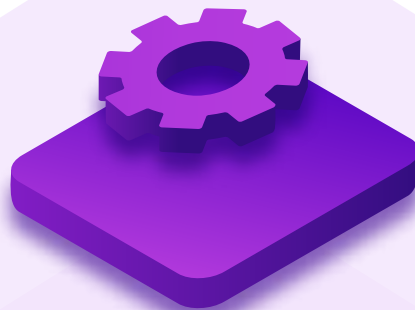
06 Total Cost of Ownership Assessment

Total Cost of Ownership Assessment

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 client's 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 their TCO model. This worksheet aims to help you take them through key elements that should be incorporated into their project's TCO.

Ask relevant stakeholders to calculate the following costs (if applicable) to calculate their projected replatform TCO. Use the results to inform their budget during the 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
  - Solution Architect
  - Developer(s)
  - Project Manager
  - Quality Assurance

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

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 their 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 calculate amounts for all of the above. Are they overspending? Set ecommerce platform costing benchmarks based on their financial forecast.

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

07 RFP Guide

RFP Guide

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

Here are key sections to include in their RFP. They can also use our 193 question **RFP template** to create their RFP.

1 | Project Overview

◢ A brief introduction to the company

◢ A detailed overview of the replatform project

◢ Details of the goals and objectives of the replatform project

◢ Their 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 their existing platform

◢ Their existing platform's limitations and pain points

◢ Strengths or features they will need the new platform to carry over

◢ Give a comprehensive technical overview

◢ Outline known risks in the project

4 | New Platform Expectations

Organize their 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 budget is optional, but it is important to provide guidance on pricing, i.e. whether they 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 the project's billing and finance cycles.

◢ Keep in mind that each provider will present pricing differently. Remind your clients to 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

Every single sub-process and step in a 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. They 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 they be migrating everything or only active/recent transactions? If so, how far back will they be transferring historical data?

2 | Website functionality

Have them regularly check their initial discovery and RFP documentation to ensure that their replatform is aligned with the project's initial goals and 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 the 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.

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

4 | Integrations

Your clients can ensure that their 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. They should consider all components of their core systems from supply chain and shipping to taxes and payments. Emphasize proper and adequate integration in 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.
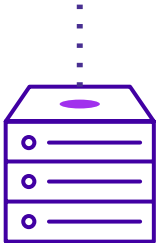
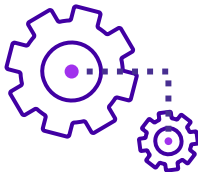# 09 Three Pillars of Replatforming

Three Pillars of Replatforming

When it comes time to take steps to actually complete the 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.
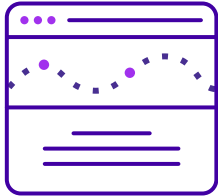
PILLAR 1:
Data Migration

PILLAR 2:
Integrations

PILLAR 3:
UX/UI

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

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

Replatform Pillar 1: Data Migration

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

Why start with data migration?

- It's usually the 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 their business is not a completely new venture—one thing they truly can't go live without is their data.

Here are the key steps to tackling data migration.

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

Important questions to ask your client:

- 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 they don't do the actual execution of the data migration themselves, it's important for their internal team to be overseeing the project. Someone who knows their business data inside and out should be owning the project from the beginning.

- Are they a B2B or B2C business? Their data migration needs will vary based on this. B2B may require a deeper review of their 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 the nice, new place. Make sure your clients hygiene their data *before* migrating it.

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

EXPERT TIP: After they clean their data, have them stage it on a separate location so it's ready to deploy and won't get mixed up with the data they haven't cleaned yet.

Step 4: Phase and test migration.

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

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

1. First transfers 10% of their clean data from their secondary server to their new platform. Tests their most historic data first and then works forward in time, as the newer data is typically cleaner.

2. Does validations and testing and develops a benchmark structure to measure if their tests are successful enough to move forward.

3. Once they have passed their success standards, retests, this time with 40% of their data.

4. Completes validations and testing to reach their pre-set benchmark success rate.

5. Repeats test with 60% of their data.

EXPERT TIP: After they have completed their 10-40-60 testing, they should leave the 60% of data in their staging site. They will move the last 40% over during their full deployment. They can also choose to review and process the remaining 40% of data prior to deployment to reduce risk even further.

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 project size) before the go-live date. This is to ensure they have adequate time to run tests to ensure all data is in place and that everything operates correctly.

- They should choose approximately 10% of the overall data to test and validate.

- In addition to internal testing, they should recruit a few valued customers to spend some time on their site to validate data. Consider offering gift cards as compensation.

They should continue testing until they reach their pre-set benchmarks for success. Repeat testing cycle after updates are made.
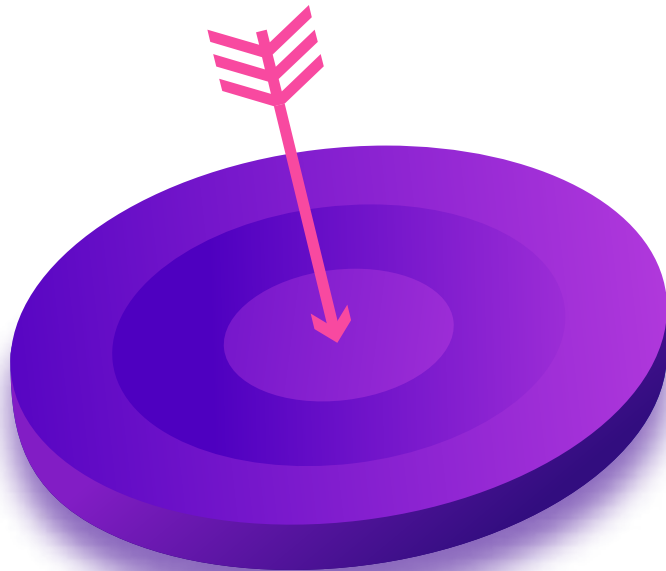
Replatform Pillar 2: Integrations

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

Step 1: Prioritize their integrations.

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

- **Critical**. This is a fundamental component of a store's ecosystem such as their ERP.

- **High-level**. This is not necessarily critical but is a highly valued part of day-to-day operations, such as the 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, they 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 the 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 your clients about each integration to help them 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.

It is important that they determine who will manage the project of setting up integrations with their new platform. Does the new platform offer implementation project management? Will they be using an external agency? Will they 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 they're working with an agency and that agency hasn't worked with this particular integration before, they should make sure to get a dedicated resource on the project, not a shared developer. At the very least, they want commitment from the agency that they will make the project a priority.

- They should map out their plan early, especially for critical integrations that will affect their go live timeline.

Step 4: Execute plan and test results.

Once they have set up their integrations they 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 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 they connect their other integrations as well.

Replatform Pillar 3: UX/UI

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

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

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

UI or user interface concerns the actual assets customers interact with on that journey.
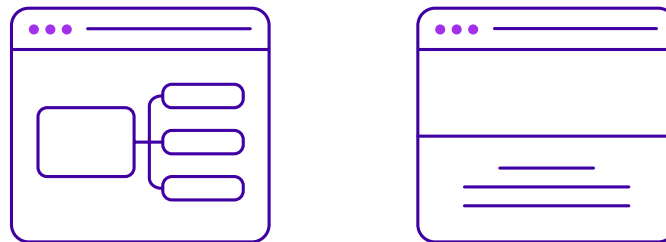
Step 1: Do research to understand customers.

Workshop with the marketing team to get feedback on what's working today and what's not working. The team working on the UI/UX can also pull from the **User Experience (UX) Audit** completed earlier. Questions you can ask your client:

- How many steps do you think a customer should go to buy something?

- What's the critical path?

- Who are your customers? What experiences are they looking for?

As part of this exercise, define different 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, the business will want to prioritize the coding requirements so they can 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 site pages, following this order:

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

With this second method, they're starting with the lower UX risks and working their 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, they again need to answer: will they be using an internal team or an external agency? Either way, communication is key to everyone staying on the same page. They should set up a weekly call or meeting to agree on the flow and plan of attack for deployment. They should also ask for demos of pages as they are built.

Step 4: Deploy implementation plan.

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

EXPERT TIP: A site's UI/UX is an important step because they are creating what their customer will experience when visiting the site. Giving themselves ample time to develop the UI treatment and experience flow will ultimately lead to stronger engagement and conversion. They 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.).

- 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, they 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 their new platform a better fit for their business and its future growth.

Ready to Support Your Clients in
Their Replatform Process?

As you're looking to grow your revenue and gain new clients, discover more tools you can use to support your clients' business growth and walk them through the complex process of replatforming.

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