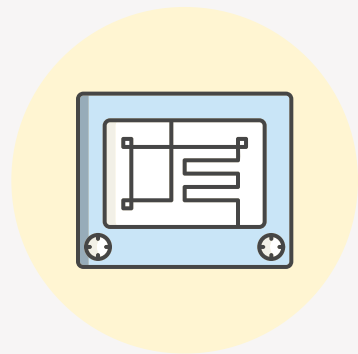


# The Ecommerce Replatforming Checklist

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# The Ecommerce Replatforming Journey Starts Here

Initiating a replatforming project is a serious and complex decision. It's one that businesses typically only move forward with after experiencing significant issues running or growing their business, and often only after going to great lengths to make an existing system work in ways it was never intended.

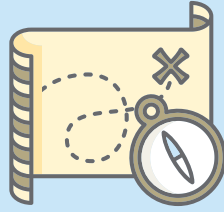
Subsequently, embarking on an ecommerce replatforming project is one of the most important IT and Marketing business decisions a company will make to lay the foundation for future success.

Any replatforming project requires a significant investment of time and resources, as well as a commitment to organizational and operational change. All stakeholders need to fully understand that the resulting platform will impact the business over the course of several years. On a human level, the success or failure of a replatforming project can make or break careers, which is why it's imperative to do things right from the outset.

**According to Monetate, 95% of ebusinesses have cited replatforming delays as the cause for drops in KPIs such as conversion rate, average order value, and site performance.**

This could be due to a number of factors, such as user experience deterioration, technology infrastructure limitations, and prioritization of resources to the replatform program.

In an effort to remove some of the complexity surrounding the multi-faceted, multi-phased process of replatforming, we've tapped into our experience replatforming hundreds of brands — from second-generation startups to Fortune 500 companies — to help navigate these treacherous waters. For this guide to be as useful and accessible as possible, we've created a high-level checklist of the process, alongside tips and insights to clarify key points along the way. Whether you sell direct-to-consumer, business-to-business, or in a hybrid selling environment, this guide can set your business up for success and minimize a significant amount of risk.



# Planning and Strategy

Just as a journey of a thousand miles begins with a single step, any replatforming project must begin with a cohesive, measured plan.

## Determine the Vision

Before choosing a platform, determining a budget, or selecting a partner, it's crucial to **identify the overall digital vision** for your business. If your team does not already have an aligned company vision that encompasses the business's goals, hold a workshop with your team and partners. Your vision will inform every decision throughout the process and is the essential first step to replatforming successfully.

## Set SMART Goals

Once your vision is solidified, it's imperative that it's specific, measurable, achievable, relevant, and timely (SMART). Set SMART business goals, framed as key performance indicators (KPIs), that serve your vision, whether it be a 10% increase in revenue within one fiscal year or a decrease in maintenance cost production six months post-launch. These goals will steer important decisions regarding everything from platform selection and site functionality to user experience and marketing efforts.

It's important to note that goals and **KPIs are ever-changing**. Your team should feel empowered to adapt and change these as the situation dictates. It's especially important to revisit these post-launch before creating any new marketing or technical roadmaps.

## Obtain (and Sell) Budget Funding Internally

Recent Gorilla Group benchmark studies on a sampling of both B2B and B2C ecommerce channels find that approximately 53% of companies surveyed were on custom or homegrown platforms.

In order to determine a budget for the upfront cost of the replatform, be sure to **review costs for building and customizing the existing platform over the past three or more years**.

Include:

- Agency services fees
- Platform costs
- Internal resource costs and salaries

How much the site previously cost to “get out the door” should be evaluated as a data point, but often is not a relevant indicator for current platform discussions. This is due to the nature of evolving technology, the services offered, and the increasingly integral role commerce plays within the technology ecosystem and brand experience.

**Forrester Research recommends using a factor of 5:1 – the cost of upfront implementation to platform licensing costs.**

If the capital expenditure becomes more than expected, work with your trusted commerce partners to identify options to spread out costs over time as an operational expenditure. With cloud and usage-based contracts becoming commonplace in IT departments, this could be a viable method to streamline the internal approval process.

## Justify Budget with ROI and TCO Models

What will the new platform cost over its lifecycle? What are the expected financial benefits of replatforming? These questions should be answered early in the process, before any commitments to move forward with a platform or agency are made.

Create a **Total Cost of Ownership (TCO) model** that covers a five-year period, including software license fees, third-party software add-ons, design and implementation services, revenue sharing (applies to some ecommerce platforms and service providers), cloud hosting fees, post-launch maintenance and support, planned site enhancements, customer experience management/marketing services, and software upgrades and security patches.

Estimate **Return on Investment (ROI)** over the same period. Project lifts attributable to added functionality, merchandising tools, upgraded user experience, and improved SEO against current metrics as benchmarks. If your overall company revenue has been increasing despite legacy technology, utilize the growth figure and parlay a portion of growth into the digital commerce channel. Also, consider savings related to sunseting legacy systems, automating manual processes, and improving efficiency.

## Create Initial Project Scope

Our approach focuses on including key features, user experience, and brand engagement deliverables within the initial launch to meet customer expectations. We recommend shortening the initial project timeline (to initial launch date), thus increasing the time-to-value, and enabling continuous post-launch improvement. This differs from the traditional MVP approach which favors a stripped-down approach that can overwhelm users, especially if sacrificing existing functionality. In other words: **don't try to do everything at once, but don't deliver too little. Many customers will not give you a second chance.**

To do this, make sure the new functionality (e.g. Loyalty Programs, Account Registration, etc.) aligns with intended business and/or customer use cases during platform selection. If not, additional enhancements will be required, which will likely add to project costs and timeline.



*One of the most common struggles we see is identifying the right definition of “viable,” because it isn't a one-size-fits-all situation. You end up with either an underwhelming basic solution or overcorrect with a slow-to-market expensive solution. Truly define what needs to be in the first phase to have the impact clients are expecting.*

**Jeff Tarullo, Sr. Manager, Business Solutions Delivery**

## Post-Launch Plan

Approaching a post-launch marketing and technical strategy is somewhat dependent upon available resources. Some prefer to have an 18-to-24 month post-launch plan laid out from the beginning, while others tackle it once everything is finally up and running. Decide what makes the most sense for your team and plan accordingly.

Regardless of timing, **plan for both marketing and functional additions to the site.** Define and express critical platform needs for launch and make note internally as to why certain functionality was either omitted, replaced, or put on the back burner. If a phase two is necessary to launch in a timely manner or within budget, ensure next steps are included in your plan.

### Key Takeaways:

- Determine why you need to replatform in the first place. Solidify the company vision and measurable business goals necessitate replatform.
- Use TCO and ROI models to justify replatform costs.
- Choose a platform based on your scope requirements, not the other way around.
- Set yourself up for a successful launch by planning for post-launch initiatives early.



# Business Enablement

While replatforming it's imperative to maintain focus on both end users and the technologies required to support the site to ensure you are building relevant features. However, don't forget about a third key ingredient: **internal teams**. You could build the most ideal commerce channel with the backbone of the most rock-solid technical ecosystem possible, but without the supporting teams ready to maintain, innovate and evolve the channel, your relaunch efforts will not fulfill their potential. Ensuring you have the right people in place, strategically assigned responsibility, and orchestrated/communicated change is essential to prepare for launch and set up your business for long-term success.

## Organize and Optimize the Digital Channel Team(s)

Organizations often find themselves working ineffectively due to the wrong resources being in the wrong roles, or functional silos that obstruct forward progress. We've found that this occurs either because the digital channel was considered an 'add-on' and not cohesively built into the organizational structure, or because organic changes over time have morphed into a structure (i.e. solely Marketing or IT "owning" ecommerce) that no longer serves as an effective foundation for cross-channel growth. Review your current organizational structure. Realign roles and resources as necessary. Change is the only constant,

but it also makes people nervous. There will be resistance. To succeed, you will need to gain collective buy-in and/or remove impediments to progress.

If looking outside the organization to build your dream team, keep in mind that platform and technology best practices should be known and used. A little industry expertise doesn't hurt either. If selecting an agency, don't be afraid to ask for previous platform training, certifications and interviews with the potential engineering and project team.

## Mitigate Channel Conflict with a Communication Strategy

Introducing a new channel or enhancing an existing channel often reveals potential conflicts that could impact the success of the digital initiative. (This is increasingly the case as more brands sell through to end customers as part of their core strategies.)

These issues are common among retail, inside, and field sales teams that fear that digital sales will diminish or eliminate their roles. Proactively plan for this via a transparent strategy to avoid negative disruption and enable buy-in. Communication should be personalized for both internal and external audiences as well as individual teams and resources. With the right approach, you can avoid potential anxiety and fear of change while fostering open enthusiasm to the changing environment.

## Align Timing of Initiatives

Replatforming is an opportunity to reimagine your business, your brand, and your customer experience. So, it's important to think holistically about other initiatives that may impact the project. Anything that affects a core service offering, operations, or alters the business' value proposition — such as product line rollouts, rebranding initiatives, or strategic acquisitions — should be factored into replatforming decisions. If not, plans will need to be reworked, negatively affecting timeline and budget.

### Key Takeaways:

- Ensure you have the right team and partner(s) in place.
- Review/realign the organizational structure as needed.
- Technology alone is not a silver bullet. People and processes must be equally integrated into the solution
- Proactive communication and transparency are your best defenses against internal conflicts.
- Align the internal business initiatives with your replatforming project to streamline your business objectives and more efficiently adhere to timelines and budget.





# User Experience Design

Replatforming provides a unique opportunity to enhance virtually every aspect of the brand and user experience.

**83% of consumers are willing to pay more for a better experience.<sup>^</sup>**

The user experience design mindset has shifted. Intuitive UX and memorable interfaces are no longer just unique selling points. Brands must understand their customers and present a holistic experience that meets those customers' needs across channels at any given time. Doing so can pay dividends.

## Evaluate Your Omnichannel Experience

It is no longer enough to look at digital commerce solely through the lens of mobile or desktop. Today's consumers expect fully connected shopping and channel-agnostic experiences. Start by assessing all sales channels to identify where they currently (or could potentially) tie into the digital experience. For example, will the new solution require mobile shopping cart optimizations, in-store capabilities, or real-time processing across devices? Determine priorities based on analytics, sales data, and persona research.

## Conduct Research and Identify User Personas and Behaviors

Create or revise primary and secondary user personas. At the same time, map behaviors across the customer journey. To do this, use primary and secondary research such as customer interviews, current site analytics, voice-of-the-customer surveys, competitive/tangential industry benchmarks, any other first-party data. Use this information to inform the new sitemap, wireframes, and to uncover new functionality needs, channel opportunities, and content gaps. This information also nicely informs any brand or creative refresh initiatives tied to the replatforming.



*Good design and technology won't make up for a bad user experience. Research, wireframing, and prototyping allow you to explore and focus on the entire user experience.*

**Tony Knaff, Associate Creative Director - UX**

## Validate Research with Wireframes and Rapid Prototype Concepts

Based on the experiences your customers want, create wireframes to act as the framework for design. We recommend starting with high-fidelity concepts, and coding your prototypes in the platform language for easy integration. Introducing code early in the design process enables project stakeholders to see what the final product will look like and how it will operate from the early stages of the project. It also provides a solid foundation when beginning development, specifically in terms of less revisions in code and a faster time to market. Testing early ensures you're not investing in the entire development process before determining if the solution works.

### Key Takeaways:

- Determine how digital commerce channels fit into, and can enhance, the omnichannel experience.
- Conduct sufficient upfront research to inform UX and creative decisions.
- Utilize wireframes and rapid prototyping to validate design decisions before diving headlong into site development.



# SEO and Content Strategy

**66% of marketers claim that improving SEO and growing their organic presence are their top inbound marketing priority.<sup>†</sup>**

Implementing the right SEO and content strategies can create brand differentiation, drive new and repeat visitors, and increase search visibility and engagement.

## Review, Edit, and Revise Existing Content

Typos are inevitable. Information becomes dated. Links decay. Multiple writers will touch the site, potentially straying from the brand voice. Customers' needs change. It would be a mistake to address every other aspect of the site and simply migrate existing content as is.

Review each site page/article/post for relevancy. Archiving content that is underperforming and/or no longer relevant reduces the effort involved in content migration, which in and of itself can save time and resources, and recasts the focus on the great content that remains.

A streamlined shopping experience alone is no longer enough to drive lasting engagement. Identify content gaps and create content initiatives that go beyond the commerce funnel. Content initiatives will vary by business needs and industry. Content needs to help customers achieve their goals during the awareness and consideration process, and give them a reason to engage with your brand during the 99% of the time they aren't shopping. New content initiatives can begin once the sitemap and wireframes are complete, so you'll know whether you have the resources on-hand to hit the launch, or if you may need to find additional help.

## Preserve SEO Equity

Replatforming entails site changes (e.g. URL changes) that could negatively impact organic search rankings if not addressed properly. While there is no one-size-fits-all approach, apply key technical checks and balances across the board to transfer SEO equity during a site migration.

Implement [schema.org](https://schema.org) best practices and canonical tags as necessary (particularly on filtered pages within the product catalog) to avoid duplicate content issues. Improve URL structure to incorporate natural language terms. Use relevant anchor text for inbound/external links, and regularly review the site for "link decay" (i.e. broken links).

Identify key site pages and plan to set up 301 page redirects accordingly. We do not recommend setting 1:1 redirects for every page, especially if the site requires login before accessing catalog pages. For high traffic pages and those with many inbound links, creating 301 redirects from the old to the new URL is beneficial. For all other site pages, redirecting users to the new homepage URL or to an appropriate category page will ensure current and potential customers can still find your site, regardless of what web address they are using.

## Enhance Discoverability and Crawlability

Make sure your site information is easily indexed by search engines. During platform selection, evaluate any native SEO features that provide control over your HTML components and site architecture. For example, does the platform enable granular control over page titles and page URLs? If the functionality you need to optimize content is missing or not applicable, then enhancements will be required.

Optimize HTML components. To provide visibility in search, start with metadata elements, such as page titles, page descriptions, and image alt tags for all potential landing pages. Such tasks may seem tedious, but failing to address basic SEO issues puts your site at a major disadvantage.

Update site taxonomy/information architecture to incorporate natural language terms. For example, many apparel brands tend to lump jackets and coats into an “outerwear” category, while almost all search queries for these product types are the products themselves, i.e. jackets and coats. As we move further into an AI-driven commerce world where voice search will play an even bigger role in product discovery, don’t ignore how your customers actually speak about the products they are searching for.



*It’s essential to understand how your customers naturally think and seek out information when it comes to site content. You want their journey to feel organic. Make it easy for them to find what they need and you’ll build trust from the start.*

**Debbie Williams, Director of Digital Marketing**

### Key Takeaways:

- Make sure every page/article/post serves a distinct purpose that benefits the user.
- Create content for people, not search engines, but don’t ignore baseline SEO requirements. Remember, customer-first content = improved SEO performance.
- Follow SEO equity transfer best practices.
- Optimize HTML components and site architecture to improve a search engine indexing.



# Data, Development, and Architecture

## Document and Map Data Sources

Enabling product information to flow seamlessly across channels is a foundational step in digital transformation. However, creating, maintaining, and leveraging product data throughout its lifecycle is not a one-time project, but a complex, ongoing program. Having a single system of record with thoughtful processes and technical guardrails developed to enable ongoing integrity is crucial. While **Master Data Management (MDM)** mainly revolves around product data, it's important to include strategy around existing customer, sales, payment and order data. Be sure to map out all systems and data types, both current and future, during replatforming planning.

## Plan for Data Migration

Prior to determining your migration approach, identify the data you intend to migrate. Cleanse your data by removing duplicate records, incomplete sets, and centralize disparate legacy data systems to ensure data is accurate, actionable, relevant, and consolidated. Inventory migration data, accounting for who owns it, where it lives (on the new platform or external system), and how its accessed. Consider migrating data incrementally to allow users and stakeholders to view the sample sets and correct any issues upfront, making it easier to identify areas for development if necessary.

## Finalize Scope and Integrations

Survey and document an **integration matrix** including all third party integrations in the ecommerce ecosystem to ensure all integrations are accounted for. Investigate whether each third party provider (i.e. payment processor, marketing automation, merchandising engine, personalization, analytics) offers a pre-built connector to the ecommerce platform, being mindful that if they do not, additional enhancements are likely. While evaluating service providers to select the best solution, be sure to **review any existing contracts prior to making changes**, as some service providers may provide an additional fee to license a new connector.

After a formal requirements gathering stage, **lockdown project scope** and convey to program stakeholders the importance of minimizing scope changes unless absolutely necessary. Regardless of the development methodology used, a failure to finalize project scope will negatively affect the entire project. Verify that platform configurations match those outlined in the functional specifications. Turn off or delay configuration of any functionality not needed for initial launch.

### Key Takeaways:

- Map existing data. Identify and cleanse data to be migrated.
- Document system integration requirements and related customizations.
- Define and lock down project scope and related system functionality.



# Security and Hosting

## Evaluate Host Platform Security

From the moment you consider replatforming, keep security in mind. The main objective is to secure PII, or personal identifiable information, such as cardholder data, names and addresses. Do your due diligence on potential platform partners to ensure security is a top priority. Verify that your selected platform, 3rd party systems, and implementation partners practice full PCI DSS compliance, GDPR, and the California User Privacy Law, taking account all requirements including encrypted data transmission, firewall configuration, and assistance with vulnerability scans and penetration tests. When considering a self-hosted platform, evaluate the simplicity of updates to mitigate costs required for basic security concerns.

Maintain internal policies that address information security, control server administrator access, and configure administrator IDs for traceability into back-end activity.

## Review Code to Mitigate Vulnerabilities

Prior to build, review security patches for all software in the stack. Check the stack versions that are currently supported and their end-of-life to ensure the language is compatible and avoid the need for early rebuilds. Make sure developers are trained on top vulnerabilities and the code undergoes a thorough review process prior to implementation. Automated code-sniffing tools can analyze the codebase to look for vulnerabilities, with similar tools to sniff vulnerabilities post-deployment. Security needs change often, so regularly test your applications, systems, and processes to identify and mitigate gaps.



*With commerce platforms becoming more robust, their reach and influence within a company's existing technology landscape is becoming wide. When replatforming, it is important to understand the selected commerce technology platform roadmap and what that carries in terms of current and future capabilities.*

**Chris Kostakis, Director of Enterprise Solutions**

## Investigate Architecture Options for Scalability

Today, it's not about whether to host on-prem or cloud. It's about finding the right cloud vendor for your business needs. Consider the host's customization capabilities, including integrations with existing on-prem systems in your business ecosystem, such as retailer location POS or data systems. Evaluate upgradability and host future roadmap. Nearly every cloud vendor offers autoscaling to accommodate future growth.

Regardless of your cloud vendor, you'll want to work with a service integrator who has a deep understanding of the cloud and ecommerce platform to fully leverage cloud capabilities. Every platform has limitations and requirements, and if they aren't considered correctly or are implemented poorly, the required reconfigurations can be costly to fix over the long-term.

### Key Takeaway:

- Do your due diligence on platform, hosting and implementation partners to ensure they meet security requirements and future business needs.





# Prepare and Activate

## Conduct Business User Training

Your business teams and customer service organization must be equipped with the systems knowledge to accomplish their day-to-day tasks efficiently. Effective training — part of the change management process — should include instructional courses, hands-on exercises, and user guides.

## Align Support Teams

This will certainly not be the first place you've read this, but it holds more than a grain of truth. Launch is only the beginning. Establish a post-launch support plan. Internal or external site support should be set up to go into effect as soon as the site warranty period has ended. Don't wait for a site issue to begin the search.

In addition, determine internally who will be deciding and approving any decisions post-launch. Is this a business decision? An IT decision? Will these decisions be made by a committee? A person? A team? Once the site has launched, remember that this may have shifted from the team or person who was previously making these decisions. It's important to have a plan to avoid internal struggles and keep the focus on the success of the new site.

Post-launch support entails more than managing the codebase. Marketing and merchandising resources (internal or external) should be an integral part of your commerce team.

### Key Takeaways:

- Conduct business team trainings.
- Determine internal ownership for post-launch decisions.
- Establish and deploy a post-launch support plan.



# Ongoing Enhancement and Growth

The process of continuous improvement begins immediately after launch. With ever-changing technical advancements, data security threats, and customer expectations, it's more important than ever to have a plan that ensures the longevity and success of your site.

## Adapt Goals & KPIs As Necessary

Over time, your business goals will likely change. When establishing KPIs to review before and after launch, look beyond conversion rate, AOV, and revenue uplifts. Establish a baseline for secondary conversion events, from contact form submissions to content engagement, so you're measuring performance across the experience.



*It's easy to get distracted by shiny objects, but KPIs keep you focused. It's the difference between being reactive and proactive.*

**Dechay Watts, Director of Digital Marketing**

## Track KPIs With Appropriate Tools

In order to accurately measure your KPIs, it's vital that the correct tools are configured to track site metrics. While Google Analytics with Enhanced Ecommerce functionality, Google Search Console,\* and Google Tag Manager should all be configured and tested before launch, it's only post-launch that these tools can be enabled. These tools will be your primary point of insight into KPI success and should be a priority immediately after launch.

Enable each of these tools at launch so they can begin collecting data. Within 24 hours of launch, confirm that Google Analytics is being tracked on the live site.

It's important to note if:

- Traffic has spiked or dropped
- Bounce rate is above 5%
- Enhanced Ecommerce events are being accurately recorded

All of these indicate whether or not Google is accurately tracking your site. If your agency partner has SEO resources, they will likely take ownership of this responsibility. To ensure everything is running smoothly, make it a habit to routinely check your accounts.

*\*If your new domain has a different URL than your previous domain, you will be unable to configure Google Search Console pre-launch. Ensure Google Search Console is immediately configured and enabled immediately post-launch.*

## Set Your Marketing Up For Success

Now that you've launched, it's important to be prepared for an influx of new and existing visitors who will be excited to interact with your business. Ensure your marketing is set up for success, so that these potential customers are engaging with unique, relevant, and updated materials.

Before launching any campaigns, optimize your social profiles. Not only should all company information be listed, but all branding, photography, content, and visual assets should reflect the design and tone of the new site. Follow suit with your transactional and marketing email templates. Rewrite and redesign them as needed to align with the new site.

As more people come to your site, it's important that you captivate their interest and build ongoing relationships using relevant and engaging content. Whether it's buying guides, interesting CMS pages, or a charismatic and informative blog, ensure there's existing content to solidify engagement and increase conversion.

**A wholesale supplier experienced a 20x increase in inbound sales-ready leads due to an enhanced UX and brand promotion of its relaunched ecommerce site.**

## Plan for Security Threats

Your site is now available to the public and it's important to take into consideration that, like with any public property, it's exposed to potential threats. Continuously stay updated with patches, modules, and PCI compliance. To implement these updates in a timely manner, have a support plan and rollout strategy in place for the time and resources it requires to update and upgrade your site. Working with your partners to establish a plan for these changes is your best defense against security threats.



*The ideal QA process is iterative process, and occurs in each phase of development. For every development activity, there is a corresponding quality assurance activity. This ensures we capture failures as early as possible in the development lifecycle; the earlier a defect is identified, the lower the cost it is to resolve.*

**Jake Brawley, Quality Assurance Lead**

## Solidify a Testing & Change Management Process

For ongoing changes, utilize the functional test automation tools vetted during development to reduce error risk. Use performance testing tools to simulate large loads of users in preparation for sales, holiday events, or marketing pushes.

Implement several environments to ensure any faults from changes or tests are fixed before customers are affected. As the changes move closer to production, each environment should more closely mimic the production environment.

To be thorough, your team should have:

- A local environment for developers to test their own work
- A development environment for multiple developers to merge changes together
- A staging environment for regression and user acceptance testing
- A customer-facing production environment

## Maintain Digital Relevance with Evolving Technology Capabilities

Your ecommerce site cannot grow with a complacent mindset. Platform capabilities and consumer expectations are always evolving with new technological advancements. As devices, checkout features, and shopping behaviors change, it is your responsibility to facilitate an online commerce experience that reflects the changing digital landscape. Not only does this ensure a positive user experience, it facilitates higher digital engagement and ultimately, your profits.

Stay updated on new devices, platform features, and shopping behaviors and make it a priority that your website is compatible with any new technology. Work with your digital partner to plan ahead for important platform upgrades, Google algorithm changes, and digital opportunities to maintain a relevant shopping experience that puts the customers' needs first.

### Please note:

*Any successful ecommerce platform migration involves hundreds of primary and secondary tasks. This document is not meant to be a substitute for a detailed project plan, including dependencies, milestones, and due dates that must be actively managed during the replatforming process.*



*A website is a living, breathing thing that is constantly evolving.*

**Christian Kern, Engineering Manager**

**A luxury apparel retailer recently experienced a 30% increase in transactions and 21% increase in ecommerce conversions solely from improved site speed.**

### Key Takeaways:

- Revisit your business goals and KPIs and revise them as necessary to align with new initiatives and priorities.
- Ensure marketing channels like social media and email marketing templates are ready for use and that your site has substantial content to engage site visitors.
- Change management and testing requires its own thorough process. Solidify your resources, environments, and internal workflows to set your site up for success.
- Remember that your website needs to consistently evolve alongside technological advancements, new shopping behaviors, and best practice standards. How well you evolve with the digital landscape can make or break your business's success.

External Sources: [Monetate](#) | [Forrester Research](#) | [Thinkjar](#) | [Hubspot State of Inbound](#)

# Ecommerce Replatforming Checklist

## Planning & Strategy

- Hold internal workshop(s); align business/tech objectives
- Define overall digital commerce vision
- Set SMART goals to measure the digital vision
- Review trailing 3-year platform costs
- Review trailing 3-year agency/partner service fees
- Review internal resource costs and salaries needed to execute internally
- Create a 3-to-5-year total cost of ownership (TCO) model
- Create a 3-to-5-year total ROI model
- Define initial functional/technical project scope
- Determine estimated budget
- Secure project funding
- Create a go-live marketing plan
- Create a post-launch marketing plan (adjust as needed prior to launch)
- Create a post-launch technical support plan (adjust as needed prior to launch)

## Business Enablement

- Review current ecommerce business processes
- Streamline processes, remove bottlenecks where possible
- Review current organizational structure
- Identify skills/resource gaps and/or redundancies
- Realign roles/responsibilities/organizational structure to support the commerce program
- Create internal and external communication plans (i.e. change management)
- Communicate ecommerce objectives with teams to avoid conflict
- Identify other business initiatives; determine impact on migration project

## User Experience Design

- Address multichannel customer experiences; use analytics to inform channel decisions
- Define/validate target audience(s)
- Conduct primary and secondary research to solidify primary & secondary personas
- Create user flows to map behaviors across the customer journey
- Identify and resolve usability obstacles
- Review and optimize Information Architecture (category navigation)
- Streamline unnecessary menu or drop-down selections
- Update product & category taxonomies to include natural language
- Use wireframes and rapid prototyping prior to evolving the creative experience
- Conduct A/B tests and moderated/unmoderated user testing at regular intervals

## SEO & Content Strategy

- Review or revise high-priority content for accuracy, errors, etc.
- Coordinate content translation (if necessary)
- Restructure existing content to maximize impact:
  - Enhance scannability of copy
  - Update imagery
  - Reshoot dated video
- Archive dated content prior to data migration
- Capture and track pages requiring unique content to aid in content migration process
- Review and optimize meta page titles
- Review and optimize meta page descriptions
- Review and optimize image alt tags
- Review URLs to ensure they are aligned with page content/keywords
- Review, update internal/external links to avoid link decay
- Implement schema.org best practices
- Use canonical tags to mitigate duplicate search content
- Create 301 redirects for archived pages and/or changed URLs
- Track, correct 404 errors
- Test site speed (development task relevant to SEO)

## Data, Development, and Architecture

- Document and map data sources
- Inventory existing data; evaluate against Master Data Management Strategy
- Conduct data cleansing and standardization
- Identify and resource selected engineering and development teams
- Map required functionality to native platform capabilities
- Document required platform enhancements
- Finalize initial scope (seriously, lock it down)
- Create roadmap/backlog for fast-follow development tasks
- Map required experience functionality
- Finalize third-party integrations, data points, and data exchange frequency
- Evaluate hosting platform security
- Evaluate host upgradability and future roadmap
- Review code to:
  - Identify potential vulnerabilities
  - Ensure adherence to best practices
- Conduct QA following each development sprint

## Prepare and Activate

- Perform pre-launch design & content QA
- Collect/create platform user documentation
- Conduct business user platform training
- Prepare internal/external launch communications
- Prepare launch marketing/PR plan
- Align support teams
- Optimize information in social media profiles
- Update transactional email designs
- Deploy Customer Experience Management Strategies

## Ongoing Enhancement & Growth

- Enable Analytics tool(s)
- Enable Google Search Console
- Enable Tag Manager
- Confirm analytics package is tracking data
- Track post-launch traffic; escalate any abnormal patterns
- Ensure site bounce rate is above 5%
- Activate Enhanced Ecommerce events in Google Analytics
- Update content on social media channels to reflect new site design/branding
- Update content in marketing and transactional email templates
- Ensure there is ample content on the site for users to engage with
- Create an editorial calendar to schedule future content
- Continuously monitor for software patches, updated modules, PCI compliance issues
- Ensure continuous site monitoring for security threats
- Utilize functional testing tools for ongoing changes
- Utilize performance testing tools
- Maintain clean development, staging, and production environments
- Identify resources to stay updated on changing technology relevant to your new site
- Align with digital partner(s) on technology/digital marketing plans
- Begin executing ecommerce roadmap/fast-follow initiatives
- Execute post-launch digital marketing program