



## WHITE PAPER

# A Guide to Building a Strategic Roadmap for Your Ecommerce Replatform Project

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Replatforming may seem intimidating, but as an ecommerce company, failure to do so could prevent growth and scalability. The key to making your replatform successful is having a thorough strategic roadmap that lays out the following items:

1. Short- and long-term goals for your replatform
2. Platform requirements
3. An inventory and content audit of what your website currently contains and what needs to be migrated over
4. Key performance indicators (KPIs) and metrics
5. Timeline with milestones
6. Budget
7. Team members, partners, and/or technology vendors that will play a role in the migration

Ironing out all of these details before you begin the project will help make the actual process of replatforming as painless as possible, and will also help get everyone on the same page and avoid miscommunication of important details.

## WORKING THROUGH YOUR STRATEGIC ROADMAP

### 1. DEFINING SHORT- AND LONG-TERM GOALS FOR YOUR REPLATFORM

Goal setting is a great way to increase focus, trigger behavior, and sustain momentum. For all those reasons, goals are vital in successfully carrying a project to its conclusion. Here are four simple steps to guide you in creating your replatforming goals:

- **Audit your current website's performance.** The first question you need to ask yourself is how your website is currently performing. Identify what works and what doesn't but most importantly record your website's KPIs to determine a point of reference. You need to know what you are starting with to be able to track the improvements generated from your replatforming

efforts.

- **Solicit stakeholders' input.** Ask department heads about their experience with the current website, what could be improved to help them reach their department's long-term objectives? Have they noticed anything preventing the company from reaching its business objectives? Some of the departments you might want to interview include: Marketing, Sales, Customer Support, IT, Production/Operations, and the Company's Executives.
- **Choose key metrics to focus on.** Be realistic about what you want to improve, a replatforming project, even though it will help you improve your website performance won't increase all metrics across the board. Maintain laser focus when it comes to selecting the right metrics, identify what metrics will help you attain your business objectives. If you are a young brand that wants to increase brand awareness you might want to increase website traffic (aka number of new sessions), however if you pursue revenue growth, then conversion rate might be the indicator you want to focus on.
- **Define SMART goals.** Now that you have a point of reference, have interviewed stakeholders, and know what metrics you want your replatforming to help you improve, you can start writing out your short and long term goals. A good method for setting your website's business objectives is the SMART Model. Formulating your goals using this model will help you stay focused on attaining your business objectives. You want each goal to be:
  - Specific (What would you like to accomplish?)
  - Measurable (How will you know it is accomplished?)
  - Attainable (Can it be realistically accomplished?)
  - Relevant (Does it match your business needs?)
  - Timely (When would you like to have this completed by?)





Here's an example of a SMART Goal: "Increase conversion rate by 5% by the end of the 4th quarter"

Now that you have a clear idea of where you're heading you need to choose the proper platform and tools to get you there. In the following section we take a deep dive into all the functionalities an ecommerce platform needs in order to be successful.

## 2. PLATFORM REQUIREMENTS

Choosing the right platform and the proper features can be overwhelming, even though your final choice will have to be adjusted to your business size, budget, needs, and objectives here's a list of some of the main requirements to get you started:

- **Payment Options** — Make sure your new platform integrates with your chosen payment gateway and can support your country's currency (or currencies).
- **Checkout Ease** — Choose a simple checkout process to increase your chance of conversion
- **Attractive and User-Friendly Design** — Make sure your new platform offers a diversity of (free and paid) templates as well as personalization options to make your store appealing and easy to navigate.
- **Responsive web design** — According to a report by Abode, 88% of consumers use on average 2.42 devices at the same time. Your store needs to be responsive across all devices to avoid losing potential customers.
- **Security** — Is your platform PCI compliant? Does it offer an SSL certificate? What about additional security perks? Those are critical questions you need your new platform to answer to secure your customers' data.
- **Prompt Page Loading** — Online shopping experiences should be seamless and easy, if a page takes too long to load the shopper will leave right away. According to Google a half second increase in page load time could cause a business a 20% drop in

traffic and revenue.

- **Customer Feedback** — Shoppers want to hear from real people about their product experience, make sure they have a place to share their feedback that will be visible for future visitors.
- **Online support** — Look at platforms that offer good support options in case your website has a glitch.
- **Scalability** — Your platform should be able to grow with you, make sure you can upgrade your plan or add new extensions as your needs change.

## 3. CONDUCT A WEBSITE CONTENT AND INVENTORY AUDIT

Creating a content and inventory audit is pretty straightforward, it will help you locate and take account for all the existing pages, urls ,and pieces of content on your website and allow you to determine what works and what doesn't, as well as layout a clear new structure for the migration into the new platform.

The content audit and inventory will not only help you pick and choose what to migrate but also help you establish a big-picture perspective to redesign the customer journey.

### Your content and inventory audit checklist:

- Create a list of the pages (and urls) you will keep
- Identify pages that need further editing or copy-writing
- Spot outdated and redundant material
- Consolidate what you have, this will bring consistency to your site
- Identify content gap opportunities
- Analyze viewer response and behavioral patterns
- See how pages are ranking in search
- Map out a more optimized customer experience

### The Catch

Conducting a content and inventory audit can be long and



tedious work and it can be tricky to conduct both at once, especially if you do the work yourself. The reason why the task can be so difficult to accomplish is because you will be collecting two different types of data, qualitative (the actual content) and quantitative (how much content).

### The Solution

To solve this problem, numerous tools and technologies have been built to bridge the gap between web content inventory and the quality of the content. Tools like Content Analysis Tool (CAT) or Dyno Mapper will save you a lot of time and provide a good quality report on your website's structure and "health".

## 4. KEY PERFORMANCE INDICATORS (KPIs) AND METRICS

It is extremely important to clearly articulate your objective prior to engaging in any replatforming project. It should include your primary goal as well as performance indicators, benchmarks and ideal project timelines.

### For a short example:

By replatforming fakedoors.com from platform A to platform B, we will generate \$X Million in additional revenue for 2019. Revenue per visitor (RPV) will increase by X%. Currently, analytics suggests that many users are finding it difficult to navigate to products/services, so we are looking to improve the 2nd and 3rd interaction clickthrough rate (CTR) from landing pages to product pages (PDPs). Analytics and customer feedback also point to the checkout as an opportunity to simplify. The main benchmarks are "activities" and "dates" the project should be completed by "date".

The importance of articulating this message cannot be understated. Two primary reasons exist:

1. Goals, metrics & KPIs should drive strategic optimizations.
  - These should inform strategy, wireframes ,and design.
  - Ensure customer behavior and feedback is considered
2. Quantified metrics ensure ROI is achievable.

- Clearly stated KPIs and benchmarks significantly increase project performance tracking.

### Determining the proper goal articulation

A well informed strategy based on both quantitative and qualitative data will outline opportunities with the highest yield for all stakeholders. Throughout discovery, it is important to uncover optimization opportunities and determine KPIs that may be otherwise missed. Additionally, an effective discovery process should determine how to measure project success through both business and customer focused insights. Although a plethora of KPIs will be determined through this method and are relevant, it is structurally efficient (and best for your own sanity) to prioritize and focus on the most important drivers.

To ensure the best strategic direction, discovery activities are segmented based on the business operational structure & goals, customer groups, products, technology, experience (branding guidelines), and competitive insights.

- Business operational structure & goals
  - Translating business goals to the overall strategy and specifically KPIs is necessary to set the proper foundation. This includes revenue, profitability and future organizational goals.
- Customer groups
  - Articulation of target customer segments is essential for setting realistic performance indicators that mimic your top customers motivations.
- Products
  - Proper product groupings for pathway segmentation are important to the overall strategy and vital to identifying and placement of key performance indicators within the shopping path. Product launch strategies are also impacted.
- Technology
  - Proper articulation of the current technology situation and desired future state will ensure the





team is prepared to utilize the right tech and also set realistic goals and solutions. (Site speed is always of particular importance)

- Experience
  - Constraints exist within the branding guidelines that need to be factored into the overall set of solutions and metrics. Potential brand alterations may be needed to meet stated goals.
- Competition
  - Competitive insights are needed to identify strengths and weaknesses and apply a well rounded external analysis to the replatforming strategy and aid in confirmation of existing KPIs or identifying others.

Segmenting your insights in this way and ensuring both primary and secondary research is included, you will have a well rounded strategy that places all stakeholder interests and business cases into account.

Additionally, the discovery process will include understanding of the past, present and future state of your business. Three to five year goals must be included to ensure longevity until a new platform is required.

Taking the time to do the proper discovery and determine an effective strategy will not only provide laser focus for your project goals, but it will ensure that the business and all other stakeholders involved yield the most efficient return on the replatforming project. The mistake we have observed most often with less optimal replatforming projects is when companies forgo the proper discovery and strategic process.

## 5. TIMELINE AND MILESTONES

Now that you have defined your goals, selected your platform requirements, audited your website content, and determined KPIs the next step will be to layout a project timeline with milestones to help you reach your goals.

You may ask yourself why you need to create milestones

when you already laid-out your short and long-term goals? Glad you asked, your milestones will be directly derived from your goals, put simply, milestones are small actionable steps that lead to your main goal(s). By breaking your goal(s) into smaller actions, you will be able to keep track of the progress of the project while easily assigning tasks to each member of your team.

### Here are 5 steps to creating your project timeline

- **Step 1** - Write a project scope statement that outlines the deliverables you plan to produce by the end of the project. Since you already know what you want the final result to be, migrate seamlessly to a new platform, you can articulate the steps it will take to get there. For example, if you want to run in-depth research on who your customers are, one of the deliverables might be to create personas.
- **Step 2** - In order to organize your project deliverables we recommend you create a work breakdown structure (WBS), it's a visual way to represent your project that will help you organize your team and identify important milestones.
- **Step 3** - Now that your project has been broken-down into smaller pieces you can create a to-do list for each work package and assign it to the right team member or department. For example, you might assign the creation of personas to your director of strategy who will breakdown the deliverables into a to-do list for the team.
- **Step 4** - Some tasks will be completed simultaneously whereas others won't be able to start until another task has been completed. This is called project dependencies, make sure you can clearly see the order in which tasks have to be completed, this will help everyone in your team know what has to be done first.
- **Step 5** - Once your project deliverables have been mapped out and assigned a to-do list, taking into account dependencies, the last step will be to determine total time for each tasks and therefore for each deliverable. Ask members of your team how long



it usually takes them to complete their work or reach out to an expert who can give you some guidance on the industry norms.

Lastly, remember to plan for the unexpected, stretch the budget by a few weeks or allocate more time for tasks you are unsure of. You might get behind on your project but if you planned accordingly it might save you a lot of time and money.

**6. BUDGET**

Let's face it, time is money, this is why the last section on project timeline and milestones is so important. Planning and mapping out your project duration is the first step to estimate the cost of the replatforming. Forseeing the cost of a project isn't always easy, it's why the more detailed you can be on your project's deliverables the better you will see where budget needs to be allocated.

Cost management encompasses a blend of planning, allocation, and control of budget for a project. A good project cost management plan ensures that the organization does not overshoot their budget. This process involves cost estimates and calculations, cost-tracking spreadsheet development, reviews and approvals from top management.

Remember, that you need to account for the time your employees will put in the project just as much as any software or third-party you might need during the project.

**7. TEAM MEMBERS, PARTNERS, AND/OR TECHNOLOGY VENDORS THAT WILL PLAY A ROLE IN THE MIGRATION**

Our last words of advice when it comes to replatforming is to choose the right people to guide you in your efforts, whether it's your own employees, a technology vendor or an external agency, make your decision based on the right criteria. Before trusting anyone with the future of your business make sure the team you choose has had experience (successfully) leading similar projects, will be assigning the project to a suitable project management

team, and has worked with similar size retailers, if not bigger, in the past.

**THE WRAP-UP**

Far too many companies will take on a replatforming project by themselves with no prior experience, putting their business in jeopardy, but replatforming projects are not impossible to accomplish, with the right tools and a proper methodology they can be seamless, helping your business grow, prosper and scale for the future.



# About Us

Digital Operative is a growth-focused, full-service digital agency where transformative digital marketing meets creative commerce. As a part of the Transcosmos family of companies, we understand that today's "anywhere customer" browses, compares, and buys across many channels. That's why our offering is fully integrated to cover Brand Strategy, User Experience (UX), Visual Design, Digital Marketing, Analytics, and Development. We work with our clients to build better relationships with their customers at the intersection of commerce, content, and community, and our mission is to deliver cross-channel customer experiences that grow awareness, engagement, and revenue. For more information, please visit [digitaloperative.com](https://digitaloperative.com).



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