

LYONSCG ARTICLE

8 Questions to Ask Before Migrating to a New Commerce Platform



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The devil is in the details, especially when it concerns replatforming. It's a major project and a large investment, not only in terms of budget, but also your team's valuable time. Typically, goals for a successful replatforming project include a more engaging user experience, increased sales and revenue, more efficient customer service, and in some cases an improved order management system (OMS).

Businesses need to meticulously think through each step before they embark on the replatforming journey, as it's not just a simple site redesign or software upgrade. There are eight important questions to ask before you begin. Answering the first four questions, which we'll explore in the first of this two-part series, will help you lay the groundwork to replatform successfully.

1. What type of experience do your customers expect?

Before choosing a platform, you need a clear picture of what your customers expect from your online store in terms of navigation, mobile friendliness and content. Start by asking yourself:

- What do your customers interact with?
- What pages and content lead to conversion?
- Will your new platform need to support rich media like videos and photography for category and product pages?

- What functionality do your competitors offer on their websites that results in a more engaging commerce experience?
- What back-end systems will you need to integrate with for ERP or order management?

This knowledge is critical to making the right platform decisions. If these questions don't deliver an experience that inspires, engages and meets shoppers' expectations, they won't connect with your site and will end up moving on very quickly. To keep this from happening, you need to understand how customers interact with your site in its current form and learn which pages or paths drive the highest conversions. Second, you need to identify the gaps: What optimizations will remove friction, boost engagement,

and enable you to achieve your digital goals? The most important thing in any digital project is to have clear and detailed goals, and to use this information to guide requirements gathering for any potential new technology or platform.

2. How clean is your catalog data?

Managing product catalog data is an ongoing challenge, and if there's ever a time to master that challenge, it's before you replatform. A clean, consistently organized catalog will help you avoid costly delays. If you want to implement a product information management (PIM) system or reorganize your store categories and navigation, make sure you tackle the planning and requirements for these projects before turning to a new commerce solution.

An organized, clean catalog makes a huge difference during site development. Once your new site design is approved, your development team will need clean data to properly test category landing pages and product detail pages before taking the site live. On the flip side, messy and disorganized data puts the onus on developers to create test data and guess what the catalog might look like — never an ideal situation. When the real catalog data is finally loaded, the development team will have to go back in and get all the pages to render correctly and uniformly, creating additional work.

3. How will replatforming affect customer service and order management?

Modern commerce platforms are primarily built to enable transactional shopping functionality. To address increasingly important customer experience needs, some platforms now come out-of-the-box (OOTB) with modest service, content and OMS capabilities. To further simplify building a holistic commerce technology ecosystem, these platforms also incorporate easy-to-integrate "hooks" to connect with more specialized third-party applications.

As you evaluate your platform options, ask whether you'll need sophisticated order management and/or customer service functionality, and consider whether it makes more sense to leverage limited OOTB capabilities or invest in more robust external solutions.

Take your time, as these decisions could affect not only your project budget and timeline, but also your organization as a whole.

4. Is your ecosystem prepared?

Usually, when you sign a contract to replatform, the clock starts ticking. How much of this time do you think will be spent finding and signing third-party services like address verification, sales tax calculations, personalization, and more? Surprisingly, quite a bit.

Contract-related delays can have an impact on the launch date. Without access to the right systems and resources, it's more difficult for developers to efficiently build the new experience. Chances are, moving to a new platform will incorporate a few third-party features, so these contracts should be signed before developers get involved in the project.

With these questions answered, you'll have a clear idea of your replatforming goals, the scope of replatforming's impact on operations, and the readiness of your catalog and ecosystem. In the second part of this series, we'll ask four more questions that delve into the details of timing, platform selection, and your company's overall readiness to implement this major project.

5. How realistic is your timeline?

Replatforming any site will take time. These are complex systems whose functionality is the foundation for every digital business. With so many considerations, inputs, outputs and options, it takes a significant amount of time to reliably launch a new commerce platform.

With that said, each project is unique. There's no one-size-fits-all timeline.

But there is one recommendation that will turn out a reliable, realistic timeline: Take your best estimate and add three months to four months to make sure your team has time to learn the new platform before the start of the project and to address unexpected issues that could come up, especially with regard to working with independent software vendors (ISVs) and getting through contracts.

6. Which platform and post launch support is the right fit?

After you answer all the questions previous to this, you'll have all the information from across your business and digital ecosystem to finally make a platform decision. Different platforms will have different strengths and weaknesses depending on the needs of your business and your customers. Make sure to prioritize your requirements to determine which features are most important.

So when the site launches, what then? Application support is probably the most overlooked value driver in digital commerce. Make sure your support partner is not merely taking tickets. While this may keep your site up and running, it isn't moving your business forward.

Remember that a commerce platform is a means to an end. Both technology and support enable your company's strategies and solutions to be deployed and be successful.

7. When should you design and launch the new site?

Site design should wait until you select your new platform. Going into replatforming with a design-first approach prior to selecting a platform can add significantly to the timeline and budget for the project. Ideally your new design should take the platform you've selected into consideration as a starting point in order to avoid unnecessary development costs and delays. Otherwise, you may have to choose between spending extra time and money trying to make the design work with a mismatched platform or paying for a new, platform-specific design.

By allocating enough time to evaluate not only your needs but your customers, then define your goals, organize your catalog data, set up third-party relationships, and draft a reasonable timeline, you can replatform in a way that minimizes delays and unplanned expenses.

8. Is your organization ready to take on these changes?

As your organization prepares to replatform and embrace the breadth of omnichannel opportunities that are on the horizon, there are often a handful of important questions to consider. First of all, it's important to understand why the existing platform is failing and not meeting your current business needs. Is the platform unable to scale and support your company's growth? Do you need a platform with more robust technical capabilities? Are you planning to roll out multiple sites and need a new master architecture? Is your site not able to keep pace with your customers? Are you planning to expand internationally?

No matter the reason, your workforce needs to be agile and ready to handle and manage the new platform technology. The organization you have today may not necessarily align with the upcoming changes that tomorrow may bring, and this may be a good time to outline your future organization's structure.

As your business users are being prepped and trained, it's important that they're fully aware of the goals of the project and the changing business structure. A digital agency or experienced technology partner can help address these common challenges by lifting the burden of resource restraints and any unanticipated organizational shifts.



ABOUT THE AUTHOR

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