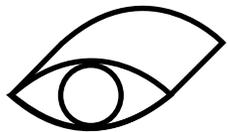


Checklist:

- _____
- _____
- _____
- _____



Successful replatforming - checklist

There is no doubt that replatforming is a significant decision. It affects all aspects of your business, often requires redesign of the internal processes across a variety of departments, and other software changes (ERP, IMS, CRM).

It may not be easy or inexpensive to replatform, but it is sometimes a necessary step. You can save a lot of money and experience incredible benefits once you switch to the new platform. Explore Centra customers' stories to learn more about the platform's influence on your business.

How to use the checklist?

You can use our checklist throughout the whole replatforming process. Remember to assign the owner to each task and ensure that status is always updated. You might consider choosing a set of statuses that you'll work with across the team to clean the communication. Important notes can be used to share the challenges or risks that were found during each step. They might influence the whole process and should be known by everyone in the team.

1 Business Case

Steps	Status	Important notes	Owner
1. Identify the business problem in cooperation with all the teams (marketing, finance, customer service, IT and developers, ecommerce manager, CTO, etc.			
2. Assess the alternative solutions. Quantify their benefits and feasibility.			
3. Evaluate the cost of replatforming.			
4. Conduct TCO analysis for your current platform to assess the opportunity costs.			
5. Create a financial return plan.			
6. Evaluate the business growth possibilities of the current platform and after replatforming.			
7. Recommend a solution.			
8. Address larger business objectives of the organization.			
9. Create a draft of a replatforming project team with explanation.			
10. Find benchmarks, where applicable.			

11. Suggest an external replatforming consultancy.			
12. Consult your business plan with the finance department.			
<p>13. Assess your relationship with your agency:</p> <ul style="list-style-type: none"> • Evaluate risks of telling them about the end of cooperation. • Evaluate risks of not telling them until the last moment. • Assess how they have to be involved in the migration process. • Estimate when to involve the agency in the process of migration. • Evaluate the possibilities of sabotaging the migration by the agency. • Discuss the issue with the team and get their feedback and opinions about the cooperation with the agency. 			

2 Project set-up

Steps	Status	Important notes	Owner
1. Show your business case to the board.			
2. Find a project sponsor.			
3. Nominate the project owner and project manager. Preferably with ecommerce experience.			
4. Curate the project team.			
5. Establish project goals, objectives and KPIs by consulting your recommendations with the board and all the teams included in the problem's discovery phase.			
6. Create the project management structure and decision-making paths.			

7. Define responsibilities, reporting mechanisms and reporting tools.			
8. Choose communication channels, processes and tools.			
9. Test the project collaboration processes, tools, communication channels and systems.			
10. Create a RAID log.			
11. Create the summary of all arrangements and report it to the board.			
12. Make necessary changes if reported by the board and repeat the process until full acceptance.			
13. Share accepted documents to all stakeholders.			
14. Set-up key project meetings and invite required attendees.			
15. Run a first meeting, brief everyone on their responsibilities and set up the on-boarding process for new stakeholders.			

3 Project budget

Steps	Status	Important notes	Owner
1. Share all documents, including project KPIs and goals with the finance department.			
2. Exam project cost streams (use TCO evaluation).			
3. Agree on the budget with the finance department and project sponsor.			

4. Sign-off the detailed budget.			
5. Work on a contingency budget to cover project unforeseen expenses.			
6. Agree on the escalation path.			
7. Choose the budget owner.			
8. Create the summary of all arrangements and report it to the board, team and stakeholders.			

4 Current platform evaluation & business requirements capture

Steps	Status	Important notes	Owner
1. Organize workshops with representatives of all the teams and work on the summary of all strengths, weaknesses and key restrictions / bottlenecks of your current platform.			
2. Prioritize strengths and weaknesses.			
3. Organize workshops with representatives of all the teams and collect their “must haves” and “nice to haves” of the future solution.			
4. Conduct marketing audit.			
5. Conduct user experience audit.			
6. Conduct performance audit.			
7. Conduct technology audit (integrations).			
8. Document your existing environment data. The process of collecting the data is often a good way to scope system requirements down the line:			

<ul style="list-style-type: none"> • Business and online store details. • API credentials and connections. • Server details (hosting, settings, SSL certification, domain etc). • Supported countries and currencies. • Languages and local settings like time zones and payment gateways. • Shipping options and rates. • Tax rules and rates. • PCI/PCA compliance requirements. • Security and malware audit. • Prepare data and content backup. • Document disaster recovery processes. 			
<p>9. Document your catalog. This is often the biggest undertaking you'll encounter in a migration and any new provider will be keen to get started on potential remapping work quickly.</p> <ul style="list-style-type: none"> • Document all standards and custom product attributes. • Understand what options you have for import/export of your catalog. • Document your current catalog category structure. • Review product image formats and understand import/export capabilities. • Note down any special character or language requirements. • Document your product's dependencies. • Document pricing and promotion lists and rules. • Document product tax group and any important settings. • Check for data on things like google shopping or marketplaces and documents. • Check for any outlying product integration rules/data/automation. 			
<p>10. Review your Storefront style, brand and content: Your new agency (or existing if you're staying with them) can help but here's a short list of things to document/think about</p> <ul style="list-style-type: none"> • Prepare a brand book (brand style guide), make sure it's up to date. • Document the navigation. • Document the product's page structure. 			

<ul style="list-style-type: none"> • Document all the pages and dependencies (non-sell, checkout page, main category, subcategory pages). • Save links to external content (YouTube, media mentions, public webinars, etc.) • Document external modules connected to the page. 			
<p>11. Review and document your checkout process.</p> <ul style="list-style-type: none"> • Check order/customer data access and understand whether there are any migration & validation challenges to consider. Review all the policies (GDPR, returns etc.) and prepare them for the migration. 			
<p>12. Organize workshops with representatives of all the teams to sum up previous findings and audits and establish the priorities based on all data.</p>			
<p>13. Create a list of all third parties, integrations, all selling channels, key systems integrations. Visualize the connection in data flow.</p>			
<p>14. Create the summary of all findings and needs evaluation. Share it with all the parties.</p>			

5 Project scope

Steps	Status	Important notes	Owner
1. Split agreed goals and objectives into tasks.			
2. Agree on prioritization strategy (MoSCoW, Kano Model, The relative weighting method or other).			
3. Define priority order for all scope items. Create the phases and their goals according to prioritization.			
4. Agree on scope documents with the team.			

5. Define MVP phase.			
6. Get the approval of the project sponsor.			
7. Share the arrangements with stakeholders. Work with them to assess business case for each requirement.			
8. Approve the scope and timeline with the chosen project management structure.			
9. Create the summary of all arrangements and report it to the board, team and stakeholders.			

6 Platform search

Steps	Status	Important notes	Owner
1. Research the different types of ecommerce technology and their characteristics. Choose maximum two technologies that might suit your needs and budget.			
2. Look for recommended platforms. Don't close yourself only to the most known solutions. Look for the online shops that work and suit your needs and check which platform they are using. You can engage your industry contacts to get recommendations or anty-recommendations.			
3. Create an initial list of 10 platforms that caught your eye, five from each technology and review license costs for them.			
4. Contact development agencies associated with those platforms and learn build costs.			
5. Based on gathered information, shortlist your choices to 2 or 3 options that fit your budget and needs.			

<p>6. Compare chosen platforms further, take under consideration your particular needs.</p> <ul style="list-style-type: none"> • Create a weighted score sheet based on findings in stages 1 and 5. 			
<p>7. Engage your team to review all available documentation on each platform. Let the marketing department assess marketing functionalities etc. Search the ecommerce consultancy blogs to read professional reviews. Take under consideration their possible bias. Meet with the vendors for professional demo's or use free trials if available.</p>			
<p>8. Understand in house competence, a platform migration probably has some implications for your organization and it's important to scope them. Here are a few considerations:</p> <ul style="list-style-type: none"> • Customer support training • Potential specialist hires (such as in-house developers with PHP experience) • Agency or 3rd party skillset (do they know/support your new platform) • Sales team training • Warehouse and inventory system knowledge (will they need to change how they work or implement a new system) • Positions no longer required 			
<p>9. Rate vendors based on opinions of your team and weighted scorecard. Collect the questions that were raised. Shortlist if possible to have only 2 options.</p>			
<p>10. Conduct further evaluation, find the answers for all questions. Meet with industry partners that use those platforms if you can. Shortlist to have 2 options.</p>			
<p>11. Conduct TCO evaluation for each option. Add in a provision for a detailed Discovery phase.</p> <p>*Learn how to conduct TCO analysis here.</p> <ul style="list-style-type: none"> • Calculate the TCO analysis for each platform for a few revenue scenarios. F.e. -10%, -20% of GMV targets and +10%, +20%. 			
<p>12. Update the platform's evaluation. Include full TCO analysis.</p>			

13. Choose a recommended platform, organize a meeting and show the evaluation and preferred platform to the team, board and stakeholders.			
14. Get approval.			

7 Platform detailed evaluation

Steps	Status	Important notes	Owner
1. Carry out extended interviews with current platform users. Preferably from your circle.			
2. Ask the vendor for a sign-off list of native features and what's included in the initial price.			
3. Verify areas that are the weaknesses of the chosen platform and negotiate the fixes with the vendor.			
4. Cooperate with the vendor on the demos of different scenarios (Black Friday, global expansion, rapid jump in the revenue etc.) to see if the platform will work for you.			
5. Learn what requires configuration and what would be bespoke development.			
6. Ask the provider for a written and signed estimation of the predicted additional expenses to the project of including crucial functionalities and any risks they have identified.			
7. Review all documentation, evaluation and declarations with external consultant or technical ecommerce manager or CTO.			
8. Organize a meeting with the team, board and stakeholders to share your findings and get additional questions.			

9. Contact the vendor to request additional documentation and statements to clear all doubts.			
10. Create the summary of all arrangements and require a confirmation from the vendor.			
11. Send the summary to the board, team and stakeholders.			
*12. If the platform doesn't meet your requirements or the cooperation with vendor is hard right from the start, reconsider your choice.			

8 Partner selection

Steps	Status	Important notes	Owner
1. Create a briefing of the new platform's structure, goal and objectives for the potential partners.			
1.5. Create RFP (if you choose to do so).			
2. Contact current Partners that will be required to integrate with the new platform to learn if they are compatible.			
3.º List all the integrations/services that you need to find providers for.			
4.º Search the market for the best ____ partners.			
5.º Carry on initial research - check the pricing, professional reviews, ask industry partners, read the documentation etc.			
6.º Shortlist potential _____ partners. Choose 2 or 3 for further evaluation.			
7.º Create a weighted score sheet and ask your team for their input.			

8.▫ Submit a brief to potential ____ partners and try to negotiate. Learn how flexible they are and how good they can answer your needs.			
9.▫ Document your doubts and work on them with the potential partner.			
10.▫ Choose the ____ partner and request a formal project proposal.			
11.▫ Share the documentation of evaluation with the whole team and get the approval.			
12.▫ Sign the contract.			
13.▫ Provide new partner with a detailed information about the project scope and deliverables.			

▫ Copy this process for each partner type and insert the searched solution _____.

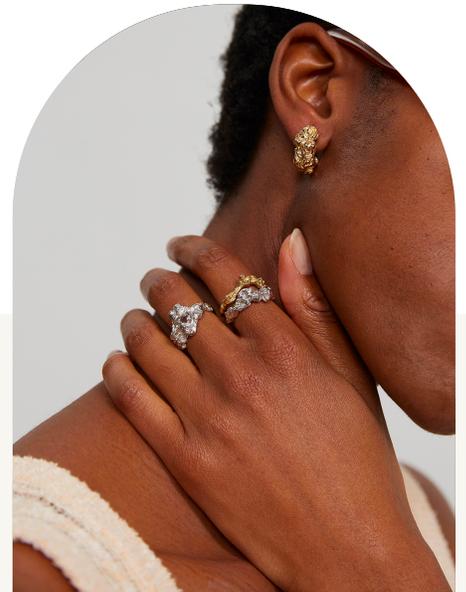
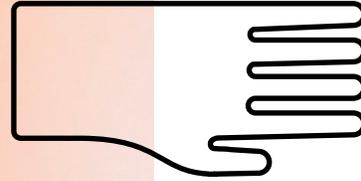
9 Risk analysis and mitigation

Steps	Status	Important notes	Owner
1. Collect the input from the team and all stakeholders about potential risks. (You can organize workshops)			
2. Evaluate and prioritize risks.			
3. Create a risk mitigation plan. You can split the risks within the team.			
4. Decide on the risk escalation path and reporting frequency.			
5. Create the summary of the findings - risk, mitigation plan, escalation path and responsibilities.			
6. Get approval.			

7. Share accepted risk summary to the team, board and stakeholders.			
8. Add risks to the RAID log.			
9. Monitor impact of risks and follow the escalation path if needed.			

10 Follow the plan

Steps	Status	Important notes	Owner
1. Follow the project scope.			
2. Escalate if Partners are not delivering proper services or missing deadlines.			
3. Make changes to project scope in the case of significant delay.			
4. Keep team members, board and stakeholders in the loop.			
5. Extend the team or look for additional partners if needed.			
6. Make sure that all data is migrated from the previous platform.			
7. Run extensive tests before reopening your store.			
8. Make sure that URL redirects work properly before reopening the store.			
9. Open your store.			
10. Evaluate if the platform fits your needs and if the project was successful after the first month.			
11. Evaluate if the platform fits your needs and if the project was successful after six months.			



If you're ready to join the vanguard of original brands that scale fast and expand on new markets without the limitations imposed by their legacy ecommerce platforms -

[Book a demo](#)