

eCommerce replatforming

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A step-by-step migration
guide for online retailers
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According to industry forecasts, eCommerce is expected to account for almost a quarter of all worldwide retail sales by 2026. While this prediction is incredibly positive for the sector, it's also likely that some brands will fail to capture an increased market share - or even struggle to cope with demand - due to the limitations of their legacy eCommerce system.

To support retailers that have outgrown their current setup, we've created this step-by-step guide on how to switch to a different eCommerce platform. As a provider that **exclusively works** with experienced retailers rather than start-ups, **we've successfully replatformed thousands of online stores over the last two decades**, giving us all the insight and real world experience you need on how to switch.

Covering everything from spotting the signs that it's time to move on, right through to the final checks you should carry out when your new store goes live, this guide aims to provide practical, actionable advice for a seamless transition. For more in-depth guidance, or to discuss the specific needs of your business, **our team is on hand to help.**





Reasons to replatform

Migrating your store to another platform is a major undertaking, however, if your current setup is holding you back in one or more of the following areas, replatforming is crucial for the ongoing success of your business:



Scalability

One of the most common drivers is a lack of scalability, where a provider can no longer meet the increasing needs of a retail brand as it continues to expand. When a platform struggles to handle a higher volume of third party integrations, visitor traffic, stock levels or orders, it will not only lead to major service disruption for you and your customers, but also ultimately restrict your growth and lead to loss of sales and customer loyalty.



Internationalisation

If expanding across new territories is a key part of your business strategy, it's crucial that your eCommerce platform can support international markets - failing to offer storefronts in native languages with localised payment methods is a major hindrance to global growth. You should also assess whether your platform can help you to reach foreign markets via translated product feeds and marketing data.



Functionality

As the eCommerce industry expands and evolves, so do the needs and wants of online shoppers. Retailers therefore need to regularly review, refine and adjust functionality to suit these ever-changing requirements. While some platforms offer a wide range of customer-facing and marketing features to choose from, others are much more restrictive. This can leave you to face excessively long development lead times, and prevent you from entering new markets and delivering an excellent retail experience that today's shoppers expect.



Performance

Sluggish stores drive away shoppers in droves, and slow back office functionality hinders productivity, so it's vital that your platform delivers optimum performance. Where you have concerns about your site speed, there may be a number of measures that your provider can implement, however if it's costing you a significant amount of time and customers, an alternative platform is likely to be the only viable option.



Security

Poor levels of security can quickly destroy an online store and your brand reputation. If you experience major breaches that threaten your business and customers, moving across to a platform that offers robust protection should be treated as a priority. eCommerce legislation also continues to change, so partner with a provider that can support your compliance with relevant regulations and provide top level security - for example, Visualsoft is PCI DSS Level 1 certified.



Compatibility

As your business grows, it's likely that you'll rely on a growing number of specialist software providers for operational support, covering areas such as warehouse management and order fulfilment. Where it isn't possible to link up such systems with your online store, a platform migration may prove to be the more cost effective option, enabling you to save time and resources through more comprehensive data synchronisation and allowing you to seamlessly integrate with those crucial third-party providers.



Cost

Where the total cost of ownership no longer aligns with your budget, or the return on investment is simply too low, the advantages of moving to another platform may outweigh initial replatforming fees, making it the right choice for your business across the longer term.





Understanding your needs

Before you begin the process of finding a new eCommerce provider, it's essential that you have a clear understanding of what your business requires in terms of functionality, control, and support. As well as considering what your customers want, you should also identify and gather requirements from all of the teams that manage your online store, with a focus on removing pain points and maximising efficiency.



Functionality audit

Carrying out a comprehensive audit of your existing store and its tech stack is a foolproof way to ensure that you don't lose any valuable features when you migrate to another platform. It also gives you the opportunity to identify functionality or third party integrations that you no longer need, highlight features that could be improved, review all associated/ongoing fees, and consider alternatives for key services such as your payment gateway.

At Visualsoft, we carry out a full audit of your storefront functionality as part of our onboarding process, and will also work closely with you to identify all of the back office features you need. This can include stock systems, payment methods, shipping options, currency options, merchandising functionality, sales and discounts requirements, a basket recovery system, loyalty schemes, customer review options, and any mobile-specific features.

Once you've decided which features need to be available, we recommend using the **MoSCoW prioritisation method** to identify what functionality your store absolutely must have at the point of launch, what important features it should have, what features it could have but will have little impact if left out, and what it won't have within the initial launch time frame.



Marketing audit

A provider's ability to support your marketing strategy can be equally as important as your store's functionality, so ensure that you carry out a full audit of all of your SEO, PPC, social, affiliate, email and content marketing activities for a detailed understanding of your requirements.



Key things to consider include:

- What email newsletter and CMS page templates do you need?
- What level of design flexibility do you require?
- What kind of product feeds are essential for your paid ad campaigns?
- What third party integrations do you need?

Particularly if you've outgrown the support of your current provider, consider how valuable strategic digital marketing advice will be to your future growth and ensure your new eCommerce partner can really help you achieve your goals.



Solution type

Deciding what kind of platform solution you need is key as it will largely dictate which providers you can move forward with:

SaaS

A SaaS solution essentially enables you to hire eCommerce software and hosting from a third party, often resulting in a much lower total cost of ownership and a significantly faster migration. Typically, a SaaS provider - such as Visualsoft - will also handle all ongoing maintenance, support, and security for your online store.

On-premise

With an on-premise solution, you purchase a licence to use eCommerce software and develop your store using in-house or appointed resources, while also hosting it on your own network. This approach can give you full control over your store's code and functionality, however it can also be very expensive, and means that you take on complete responsibility for the server architecture, security, support, updates and maintenance of your store.

Cloud

A mix of the SaaS and on-premise route, with a cloud solution your hosting servers are managed by a third party, however you're responsible for developing and managing the platform.

Headless

A decoupled solution, where the front-end of a store is separated from the back-end, however the two systems can still speak to one another. This enables you to use different technologies for your storefront and back office, which can give you increased design flexibility, however it can also be a much more complex and costly approach.





Finding the right provider

Once you've identified and prioritised all of your requirements, the next step is to put them together in a scope of work and then meet with potential providers. Before you shortlist proposed solutions and ultimately choose the platform that best suits your business, here are some key points to consider that go beyond budget and basics:



Flexibility

Make sure you're clear on what can and can't be easily altered and updated on your store once it's live on a new platform, and how quickly new functionality can be added.



Multiple use cases

Assess whether the platform can meet your future plans as well as your current ones, specifically looking at B2B, B2C, international, and multiple storefront capabilities.



Hands on support

Check what the support service includes, how you can access help when needed, and the average resolution lead times for both urgent and low priority issues or updates.



Industry connections

As well as confirming that a platform is - or can be - integrated with relevant third party systems, find out if a provider has additional partnerships that can benefit your business.



Added value

Retail insights, business intelligence and marketing expertise often play a crucial role in eCommerce success, so look at how providers can support the growth of your business beyond the provision of a platform.



Lifetime costs

Rather than solely focus on the upfront costs of a replatforming project, look at the ongoing charges and potential costs that may become applicable as your business grows.



Top 10 questions to ask

During initial conversations with potential providers, some helpful queries to raise include:

- What does your standard migration process look like, and how long does it take?
- What's the initial project fee, and what are the ongoing costs?
- What is and isn't covered within the scope of work?
- What type of support is included in your service, and how can it be accessed?
- How has your platform performed (speed, uptime, etc) over the last 12 months?
- How often is the platform updated, and what does the process look like?
- What level of security do you provide for my business and customers?
- What out of the box features do you offer, and how much do they cost?
- Do you provide bespoke functionality?
- How will your platform cope if my store grows in terms of traffic, orders and customers?



Creating a request for proposal (RFP)

A scope of work should be well defined before appointing a provider, so we recommend that you put together an RFP that clearly outlines your requirements, expectations, and budget. As well as detailing what functionality is essential for your online store, it can also be helpful to give providers an overview of how your business operates, including information on key systems such as your EPOS setup.



Preparing to move

You've found the ideal eCommerce partner and have an agreement in place, so what's next? While your new store is being built, you and your team will need to carry out multiple tasks in the background, so it's important to allow more than enough time to carry out necessary preparation work, which can include:



Data formatting

Carefully preparing all of your online store's data will save a lot of time later down the line, so ensure that it's clean, consistent, and compatible with the formats required by your new platform. While there are third party services and tools that can help you to migrate product, customer, orders and SEO data, your provider should also be able to support you with the process, and identify any issues as early as possible.



Content editing

In addition to your store's data, consider what content (including images) you'd like to move across to your new site and how it may need to be modified to fit different formats or layouts. You should also check all legal and operational documentation that will be customer-facing on your new store - e.g. terms and conditions, privacy policy, cookie policy, returns process - and ensure that it's accurate and up to date.



Integration mapping

Identify every third party service and marketplace that your online store is connected with, plan how each of those integrations will be carried across, and outline what actions you will need to take to ensure a smooth transition. Necessary tasks may include scheduling redirects and providing system access for your new platform provider.



Branding requirements

If you're looking to rebrand or update the visual identity of your store as part of the migration, ensure that you have up to date design guidelines, logos and imagery available.



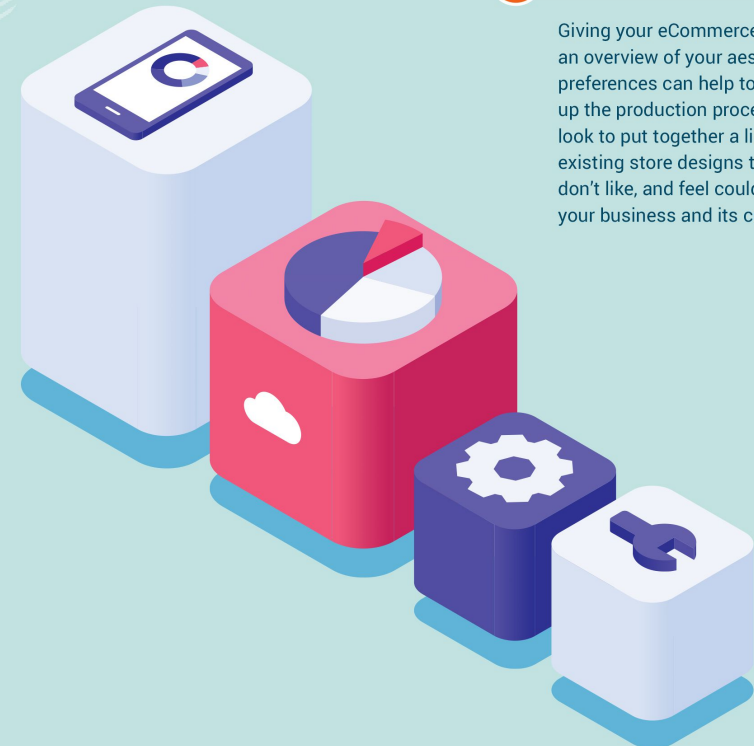
SEO planning

It's common to experience some disruption to your search engine rankings when moving from one platform to another, however, there are several ways to minimise risk. Most importantly, you should have a redirect plan in place that accounts for every page on your current store, and you need to ensure that all metadata will be carried across as part of the migration. It's also worth auditing all of your content as part of the process to remove duplicate text and ensure that it's fully optimised. SEO is critical to the success of your site so if you don't have access to the expertise needed to support your switch, ask your new provider how they can help - it's not an area you want to overlook.



Design preferences

Giving your eCommerce partner an overview of your aesthetic preferences can help to speed up the production process, so look to put together a list of existing store designs that you like, don't like, and feel could work for your business and its customers.





Ensuring a smooth launch

On top of choosing the right provider and carrying out careful preparation, there are steps you can take as a retailer to streamline the migration process, which we've briefly outlined below:

Get your team up to speed

Before your new store goes live, make sure that the people who'll be managing or using the back office system are familiar and confident with any new functionality and have received sufficient training.

Consider your customers

Where possible, choose a time to launch that will minimise disruption to your customers in the event of any technical difficulties. In some instances, you may also need customers to re-register with your store and its loyalty schemes or other updated features, so discuss this well in advance with your provider.

Test, test and test again

Ensure that thorough testing is included as part of the migration process, and work closely with your eCommerce provider to identify any features that can only be fully checked once your new store is live, such as payment methods. Throughout every stage of the replatforming process, we also recommend that you thoroughly run through the user experience of your store - from the perspective of customers and staff - so you can address any issues or raise relevant queries before signing off designs and functionality.

It's also vital that you test your store on desktop, tablet, and mobile devices to be confident that your customers can enjoy a smooth shopping experience regardless of how they browse your store.





Avoiding common pitfalls

Having helped thousands of retailers to successfully migrate across to our platform, we know how to simplify the process, so here we've highlighted some of the most common pitfalls and how you can avoid them:



Unoptimised data

Inconsistent, overly complex, and poorly maintained product data can significantly delay the launch of a new store, so it's essential that it's reviewed and improved in the run up to a migration. Ensure that your product listings include barcodes, and check that product reference codes are the same across every system that makes use of them, including your EPOS setup and marketplace listings.

Sparse product pages

While the product pages of your new store may look great, the quality largely comes down to content, so take the time to comprehensively review and update your product descriptions and images to make sure they're optimised, engaging, informative and uniform.



Overlooked marketplaces

If your store is connected to marketplaces such as Amazon and eBay, you may need to make updates to your product feeds, links, and merchant info to avoid service disruption.

Last minute campaigns

If you want to launch your new store with a bang rather than a whimper, your marketing campaign and all associated assets - including newsletters, social posts, and blogs - should be lined up and ready to send or publish well in advance of your agreed go live date.

Insufficient capacity

If you're investing in marketing activities and expect a significant spike in traffic once your new store goes live, it's important to confirm this with your eCommerce provider to ensure that the right level of server capacity is in place. Falling short will mean that some customers will be temporarily unable to browse your store.

Domain issues

You also need to be aware of how your current DNS record is managed, so your new eCommerce provider can make necessary DNS changes in time for your store launch. Don't worry if this seems too technical - at Visualsoft we can guide you through this as part of our onboarding process.





Replatforming checklist

If you're planning to migrate your online store across to another platform, here's a quick summary of the key actions you'll need to take. For a more detailed look at what will work best for your business, reach out to our experienced team for expert guidance.



Step 1: Set a clear objective

Understand why you need to migrate your store, identify what you're looking to achieve in the short, medium and long term, and make sure you've got stakeholder buy-in.



Step 2: Create a scope of work

Identify your requirements - including storefront, back office, and marketing features - and document everything in detail.



Step 3: Choose the right partner

Look for a provider that can power your growth, deliver hands-on support, and give you added value alongside measurable ROI.



Step 4: Agree a migration schedule

Map out milestones and delivery dates with your eCommerce partner, third party system providers, and all relevant stakeholders.



Step 5: Be prepared

Get your data, content, and brand assets ready, put together a plan for migrating third party integrations, and devise an SEO strategy.



Step 6: Streamline the process

Make sure your teams are fully trained on your new store's admin system, consider how to minimise customer disruption, and check server and DNS setups.



Step 7: Line up your campaigns

Create and schedule marketing campaigns in advance so your promotional emails, social posts, blogs and other assets are ready to send and publish in tandem with your store launch.



Step 8: Test everything, everywhere

Thoroughly check storefront and back office functionality on desktop, tablet and mobile devices before and after your new store is launched.



If you choose to partner with Visualsoft, we'll manage most of the process for you to ensure that nothing gets overlooked, and that your store is migrated as quickly as possible. On average, moving across to our platform takes between 12 - 20 weeks, and small sites can be migrated in as little as eight weeks.

Once your store is live, we'll also work with you to monitor its performance, identify what's working well, and develop proactive strategies to achieve the next phase of growth for your business.





Ready to **grow**?

Trusted by thousands of retailers, Visualsoft offers everything you need to scale your business. Alongside our complete eCommerce platform - which powers some of the world's best known brands - we deliver award-winning store designs, proactive growth strategies, and multichannel marketing campaigns that **attract, engage and retain shoppers**.

If your eCommerce platform is holding you back, get in touch to find out how we can help.

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Get in touch today