

A 7-step guide to prepare your brand for Shopify Plus migration

STUCK ON SALESFORCE?
BOTHERED BY BIGCOMMERCE?
MAD AT MAGENTO?
WORRIED ABOUT WOOCOMMERCE?

The

WORKING

PARTY

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INTRODUCTION

There's a reason enterprise brands move to Shopify Plus. While that doesn't make replatforming less daunting, preparation does.

Cost, flexibility, scalability or simply freeing your business from the restriction of legacy architecture and on-going maintenance – you likely know the ways in which Shopify can improve your eCommerce.

Yet, there's no denying that migrating a major eCommerce store from Magento, Salesforce Commerce Cloud or BigCommerce, is a significant undertaking that can be difficult to navigate.

This guide lists the key considerations and actionable steps to set yourself up for a smooth, successful replatforming project.

Evaluate the cost of migration



Cost is a critical factor in a brand's decision to migrate. Frustratingly, calculating a clear comparison between platforms can be difficult. Not only do pricing structures differ, but what is included in these costs and the cost involved in maintenance over time also significantly vary.

Here, we'll explore the one-off costs involved in a typical migration to Shopify, a comparison of key platform licence costs and inclusions, and touch on third party app costs typically involved in your Shopify store.

One-off cost: website development

Site migration will typically require agency support. This investment costs anywhere between \$30,000 and \$250,000 and significantly depends on the scope of work and the level of front-end customisation.

When communicating with stakeholders across the business, it's important to not let the sunk cost fallacy gain traction and instead consider the total cost of ownership of the respective platforms.

Total cost of ownership:

Total cost of ownership is a financial estimate intended to help buyers determine direct and indirect costs. In eCommerce, this considers implementation, platform licence, transaction fees, third-party applications, hosting, security, maintenance and support services.

Sunk cost fallacy:

The phenomenon whereby a person is reluctant to abandon a strategy or course of action because they have invested heavily in it, even when it is clear that abandonment would be more beneficial.

Recurring costs: platform licensing and maintenance

BASE LICENSING PRICING STRUCTURE

Shopify Plus	Flat rate of \$2,500 USD per month or 0.4% of monthly revenue, whichever is greater. There's also a variable platform fee of 0.18% for B2B orders and 0.25% for retail.
Salesforce Commerce Cloud	Pricing tiers are scaled and merchants pay between 1-3% of their gross merchandise value (GMV).
WooCommerce	Basic licence fees start at \$1000 USD a year for large businesses. Transaction fees cost 2.9% + 30 cents for every purchase made with a US credit or debit card.
Magento Commerce Cloud	Pricing is based on annual gross revenue (AGR), with typical fees ranging from \$40,000 to \$190,000 per year.
BigCommerce Enterprise	A custom pricing model based on order volume, with fees ranging between \$12,000 to \$240,000 per year.

ESTIMATED LICENCE COST FOR \$20M ARR RETAILER

To put this into context, we've calculated an estimated cost of each platform for a business with a \$20 million annual recurring revenue. Consider your annual review to estimate how this applies to your business.

Note: WooCommerce's low-cost licence does not reflect costs generated from transaction fees. Most other platforms have been calculated to represent the majority of platform costs.



LICENCE INCLUSIONS

Depending on the platform you currently use, you may anticipate different levels of inclusions.

For example, Salesforce Commerce Cloud (SFCC)'s higher licence fees do offer a more comprehensive set of inclusions, including cloud-infrastructure, support services, security and compliance features and more. Although it's important to note these are all included in Shopify Plus too.

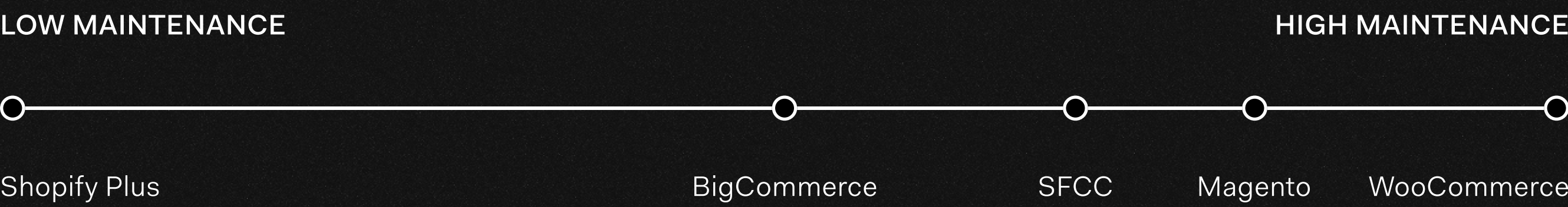
On the opposite end of the spectrum, WooCommerce provides very little included within their initial offering, heavily leveraging on third-party applications and plugins to enable key features and necessary securities.



MAINTENANCE COSTS

When it comes to technical support and maintenance, both basic and comprehensive platforms can require additional resources. Brands on WooCommerce may typically engage support to manage version upgrades. Whereas, those using the more sophisticated Magento are likely familiar with technically complex day-to-day requirements being the reason for additional development support.

Shopify's streamlined front end and back end allows developers to focus on innovation, rather than updates.



Additional costs: Third party applications

Both the capabilities of your existing platform and your customer experiences objectives will impact your current third party app costs, although thankfully, these are usually simpler to calculate.

From the outset, Shopify has been designed to easily integrate with the vast ecosystem of eCommerce technologies to support the experiences that add the most value to your specific customers and brand.

Typically, the third-party app spend for mid-to-enterprise brands is about \$3,000 per month.

Determine the right time

2

Site migration timelines for enterprise-sized businesses can blow out over years.

Shopify's speed to launch, complete within 3-4 months, is a draw card for brands wanting to hit major dates on the retail calendar.

IDEAL TIME: Commencing conversations in the first half of the calendar year and committing to a replatforming project by July will ensure your new site is live in time for Black Friday and the critical Christmas period.

MONTH 0

Pre-commencement

Site audit:

Identify, review and document all website elements, including pages, content, URLs, metadata, and functionality.

Data analysis:

Analyse and audit existing data structure, including product catalogues, customer information, and order histories. Identify any data issues or inconsistencies.

Discovery session:

Explore and record what is required from your new site, including brand, design, UX, features and functionality.

MONTH 1

Design, Content and Mapping

Design:

Create a brand-led design system to define the look and feel for the key components of your site. Then, use these components to design the interactive prototypes for the new site for mobile and desktop.

Content:

Evaluate existing content and decide what to migrate, revise or exclude. Develop a plan for creating new content on Shopify.

Data mapping:

Develop a plan for the mapping and transferring of data. Ensure data relationships are maintained and establish a mapping strategy for product categories, attributes and customer information.

MONTH 2 – 3

Development

Development:

Convert design prototypes into a Shopify Plus theme, featuring key features and functionalities.

User acceptance testing:

Create a staging environment and test all website functionalities from an end-user perspective.

Audits:

Conduct a second round of audits, this time focusing on performance, SEO and accessibility.

MONTH 4

Launch

Migrate:

Ensure that all data and content has been loaded onto the new site. Conduct a final data sync to ensure all final audit changes have been implemented. Execute the migration during a low-traffic period.

Monitor:

Commence regular monitoring of site performance post migration. Gather feedback from users and stakeholders and identify areas for optimisation.

Continuously improve:

Implement iterative enhancements based on feedback from internal stakeholders and customers. Consider evolving needs.

Review your tech stack



A beautiful by-product of replatforming is the opportunity to review the value and performance of your eCommerce tech stack.

The model engaged by BigCommerce and Salesforce leans on the usage of their own, in-platform solutions which can limit innovation.

Comparatively, Shopify, Magento and WooCommerce prioritise the use of technology integrations. Shopify's network is the largest, with more of than 8000 apps – many of which are exclusive to Shopify – that specialise in different aspects of the eCommerce experience.

Site migration is the perfect time to review how these meet your customer experience goals, and if there's something out there that can better meet your needs.

REMEMBER: You're building a customer interface and the technology you're using should support that.

1. Rank your customer experience priorities

Take a step back from thinking about any specific technologies and consider your customer experience priorities.

In addition to those that sit within Shopify's scope, such as user-friendly design, fast loading times and efficient check-out, your brand may have a strong focus on post-purchase communication, customer support or simple returns.

QUESTIONS TO REFLECT ON:

1. What experiences do our customers praise the most?
2. What aspects of our experience have received criticism or requests for improvement?
3. What would make our experience more intuitive?
4. What would we like to offer that we currently can't?

From here, you can connect your priorities to certain eCommerce enhancements.

Common capabilities include:

- Email marketing and automation
- Loyalty
- Search and merchandising
- Reviews
- Personalisation
- Customer support
- Returns

2. Compare CX priorities with existing tech stack and identify gaps

Once you've established your needs, consider how these compare with your existing tech stack.

Existing technologies will likely fall into three categories: satisfied, open to considering alternatives, or no longer aligned with our needs.

TWP TIP: When migrating to Shopify Plus, you'll need to investigate if your preferred existing third-party technologies are available.

There is a Shopify Plus App Store, but this only features plug-and-play solutions. The simplest way to confirm if a platform you're currently using can integrate with Shopify is to visit the platform's website or speak to your account manager.

At this stage, it's important not to let preconceived ideas weigh too heavily on what's best for the future. Instead, consider your tech stack a co-dependent ecosystem of technologies working towards a common goal: your customer experience.

Depending on what makes sense for your brand, you might opt to consolidate two technologies into one to save costs and unify experiences. For example, some personalisation platforms also offer great product merchandising functionality. In other cases, your customer experience goals may be distinct and it will make more sense to curate a collection specialised software that are the best-in-breed for the solution you require.

3. Explore and test to find the best solutions

After initial investigations, complete your due diligence into your preferred tech stack. Leverage the resources available, such as expert opinions, other retailer's experiences and product demonstrations, to confirm this decision.

Ultimately there is no knowledge quite like experience. First-hand use of the platform will be the true test. Thankfully, Shopify's focus on flexibility creates the perfect environment to experiment with what integrations are best for you.

As a first point of call, you can explore Shopify's network of plug-and-play apps. Since they require little set up, the investment in testing different technologies is far less than with SAP or SFCC.

These platforms are ever-evolving, so keeping up to date with the latest innovations is a great way to consistently deliver top-tier customer experiences.

For the most bespoke needs, enterprise brands can now create custom apps that are unique to their brand and integrate with Shopify just as easily.

Streamline legacy operating systems

Cross-departmental operating systems can either be a key motivator or a huge deterrent when considering migration. Typically, these systems could benefit from modernisation, however their interdependencies add another layer of complexity to the project.

Hurdles can be overcome by considering options holistically using the systems thinking approach. However, if the business impact is too high, Shopify offers various integration solutions.

Operating systems to consider

OPERATING SYSTEM	DESCRIPTION
Customer Relationship Management (CRM)	Manages customer interactions, data, and supports sales and marketing efforts.
Enterprise Resource Planning (ERP)	Integrates business processes for streamlined operations and decision-making.
Order Management System (OMS)	Manages order processing, inventory, and ensures timely and accurate fulfilment.
Warehouse Management System (WMS)	Optimises warehouse operations, including inventory tracking and order fulfilment.
Product Information Management (PIM)	Centralises and manages consistent product information across sales channels.

Digital Asset Management (DAM)	Organises and stores digital assets for efficient retrieval and distribution.
Point of Sale (POS)	Facilitates sales transactions, integrates with inventory for retail experiences.

Find new systems with Shopify Apps

A strong business case for changing systems is the complete removal of a budget line item.

Shopify POS and Shopify B2B are prime examples of this. These native systems are included in the base license fee, negating the additional spend and risk on complex integrations.

If this is not an option, Shopify’s app ecosystem offers intelligent ways to connect with your current technologies.

For example, Shopify’s global EPR Program allows merchants to connect their ERP provider with their Shopify store via a plug-and-play application in the Shopify App Store.

The ERP connector has been designed to work with Shopify’s most used logistic partners, including Brightpearl, Microsoft Dynamics 365, Oracle Netsuite, Acumatica and Infor.

Integrate old systems with Shopify APIs

In some circumstances it's best to retain the tech to you have. Salesforce's CRM was one of the company’s ground-up products and plays a crucial role for many businesses.

This tools integrate perfectly with Shopify Plus, either through an app or a custom built integration, using both platforms’ APIs.

Others, like Adobe Experience Cloud or any of the operating systems listed, can be integrated relatively simply thanks to Shopify’s suite of APIs. These APIs allow developers to send data to and from the platform and external technologies in cases where they aren't natively compatible.

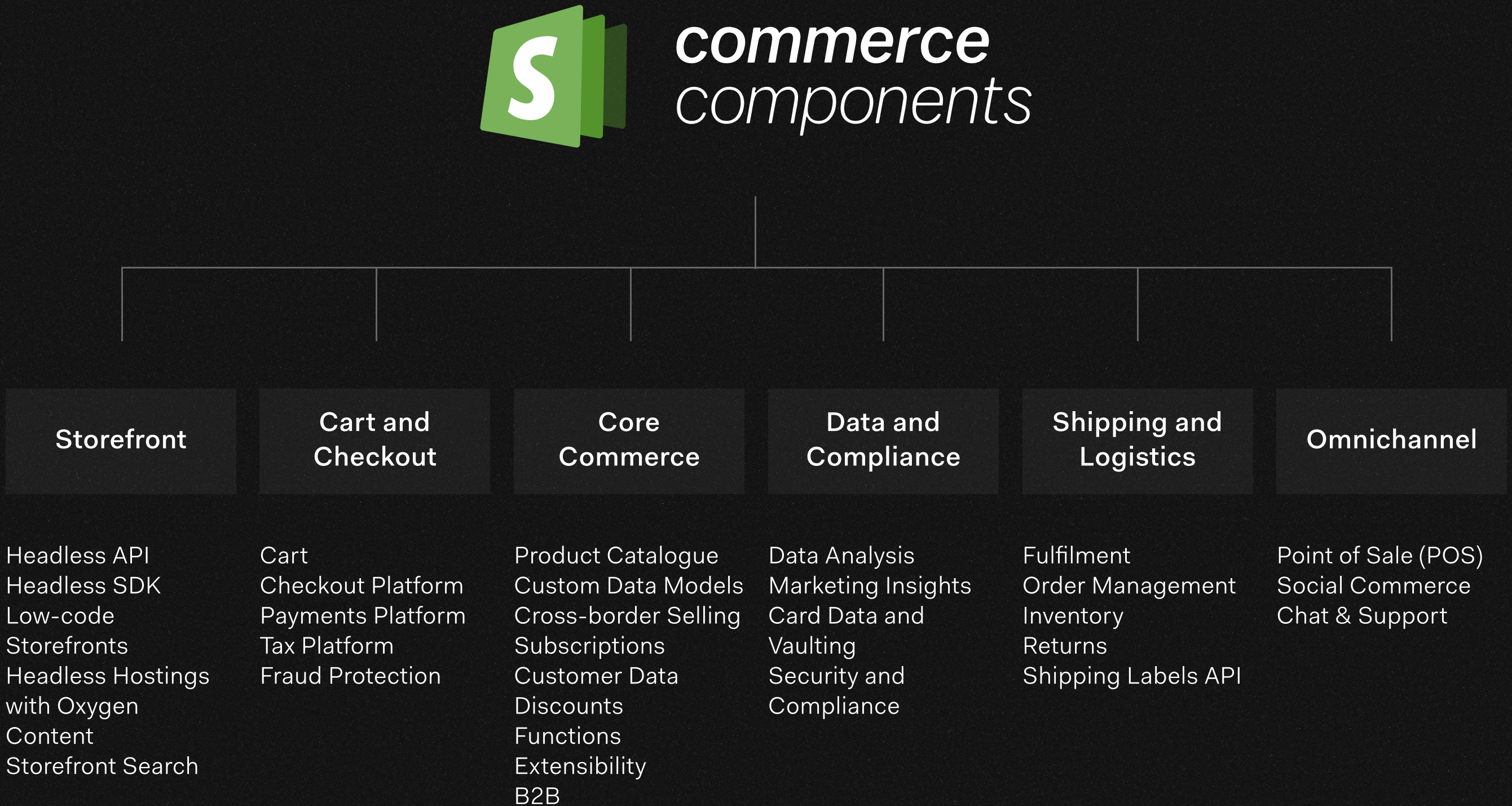
This capability enables other technology to be connected to Shopify with varying degrees of communication, depending on the specific operating system.

SYSTEMS THINKING APPROACH: This school of thought views organisations as interconnected systems where changes in one area can impact the entire system. It encourages a holistic perspective and helps identify potential ripple effects and unintended consequences of change. It has been used as a way of exploring and developing effective action in complex contexts, enabling systems change.

For some enterprise brands, API connections might not be enough. Opting to instead build a completely composable tech stack powered by Shopify's Commerce Components.

This new offering allows businesses to pick and choose between 30 Shopify components to pair alongside external software from Salesforce, Microsoft, Hubspot and more, comprised of creating a perfectly tailored digital experience of the world's best technologies.

The 30 components offered by Shopify fall into six categories:



Create a change management plan

With any digital transformation, support and endorsement from stakeholders across the business is pivotal to its success.

Creating your plan

A carefully considered change management plan significantly aids the planning, implementation and adoption of Shopify throughout your organisation.

STEP ONE: IDENTIFY STAKEHOLDERS

Who is impacted by this project and to what extent? Think beyond those who will be using the platform, including leadership and adjacent departments who manage integrated software. Categorise these stakeholders based on their level of influence and level of interest.

STEP TWO: DEFINE THE CHANGE OBJECTIVES

Outline the objectives and benefits of moving to Shopify with consideration to these stakeholders.

Think about how the new platform will improve efficiency, customer experience, and overall business operations.

STEP THREE: DEVELOP AN ENGAGEMENT PLAN

Establish a plan to engage and communicate with different groups throughout the project lifecycle. For example, senior stakeholders may need to be engaged earlier with more input.

The key message will be the same across the business. Role-specific messages should be shared with relevant parties. Communication channels will vary depending on time and audience.

STEP FOUR: PROVIDE TRAINING AND SUPPORT

Design a training program, tailored to each stakeholder group and how they will interact with the platform.

Offer various training formats, such as online modules, workshops and one-on-one training sessions with Shopify's support team.

How teams get the most out of Shopify

Thanks to unlimited seats and friendly UX, stakeholders from across your business can view, access and explore the platform.

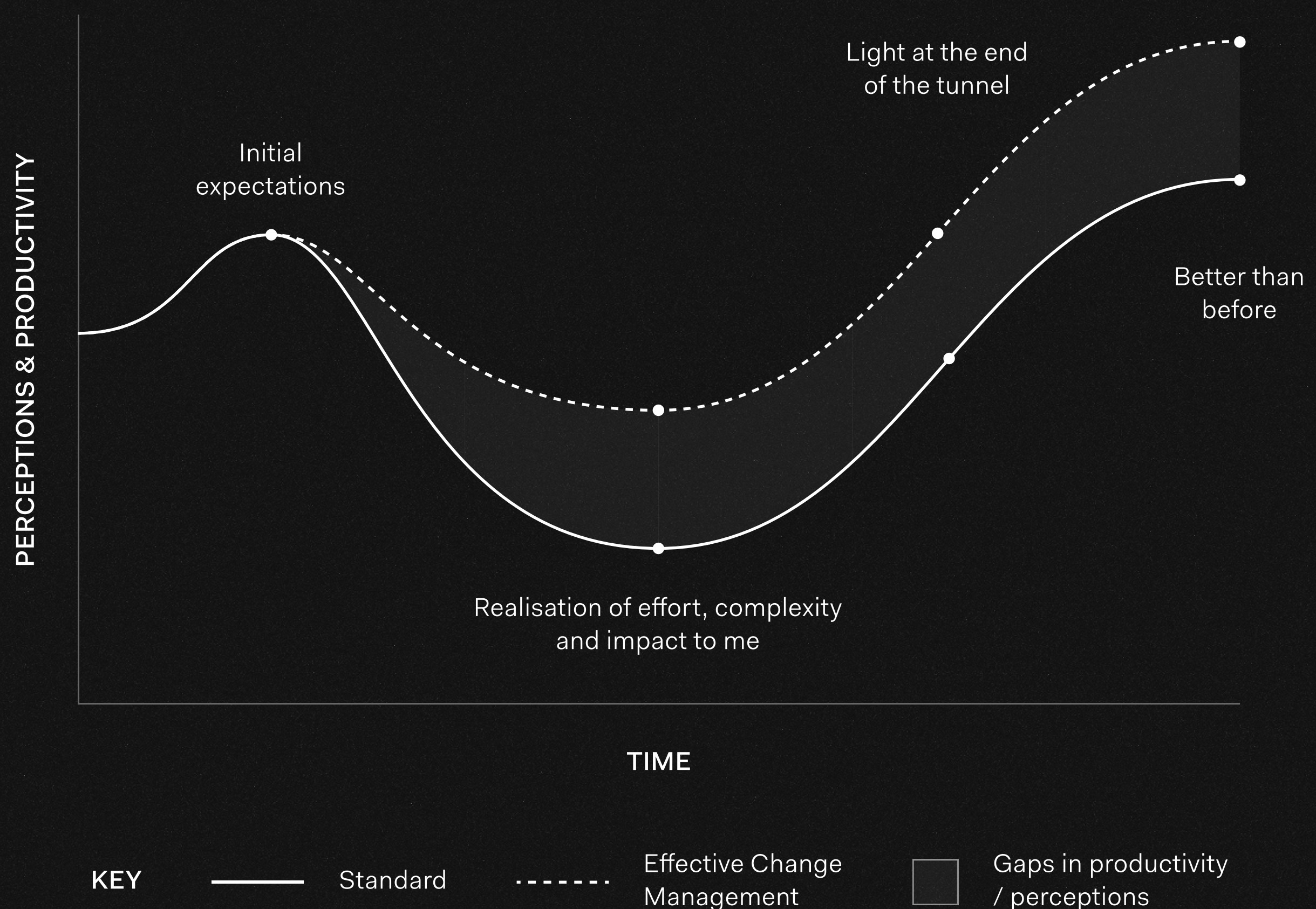
Advanced user access rights mean your CFO can log in and view the latest transaction data in real time, while content administrators can view and edit only what's necessary.

Shopify has an extensive library of training guides and Shopify Academy is available for team members to learn the platform in a more structured way.

Depending on your plan, you might also have a dedicated account manager from Shopify who is on hand to help with less common questions, specific to your site.

CHANGE MANAGEMENT OPPORTUNITY CURVE

How stakeholders react to change

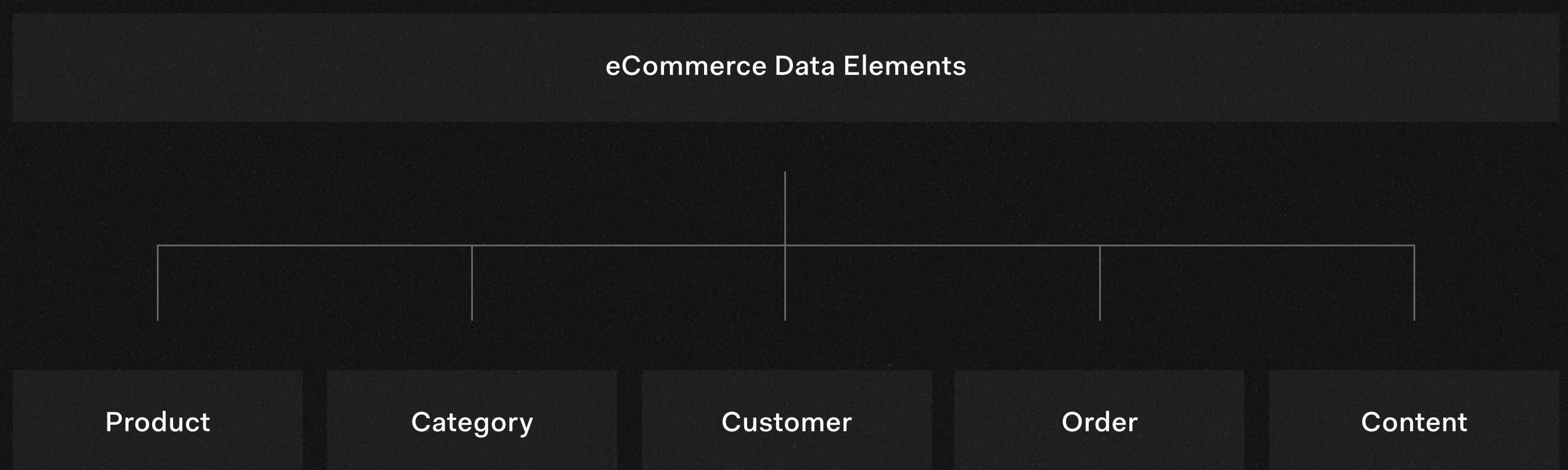


Prepare your data for migration

Understanding the current state of your data, where it is stored and the single source of truth for each element is crucial to a smooth migration.

Product data is both the most important and complex, spread across multiple teams and systems. Category, customer, content and order data are typically more centralised but still require your consideration.

REMEMBER: The organisation of disconnected data can be a hefty task, particularly if it hasn't been well maintained. Much like the replatforming project at large, this short-term initiative will streamline processes and save time.



Organise your product data

Methodical by nature, data is best prepared for migration with a 3 step cleansing process:

STEP ONE	STEP TWO	STEP THREE
Collate a list of all product data points in your existing platform	Identify the source, use and necessity of each data point	Perform a data consistency audit

To tackle this seemingly simple plan, we've identified the key elements to include and what to check for:

DATA FIELD	QUESTIONS TO CONSIDER
Product Name	This may seem simple on the surface, but often there is variance between teams, systems or products. Is there a naming convention used to ensure consistency?
Identifiers (SKU, EAN, UPC, MPN)	There can be several different product identifiers used within a business. Confirming which ones are in use is key to matching data between various programs and tools.
Product Descriptions	Do these live solely in Commerce Cloud, or in another content system i.e. PIM? Remember to consider short description, long description and any dedicated descriptions for specific channels.
Product Attributes	These enable many on-site features so consider what sources and systems power them.
Inventory	Is there a single source of truth for inventory management, such as a WMS or ERP? Do you run multiple warehouses or have retail stores that you need to represent online? Can all locations ship?
SEO	How do you currently manage content for SEO? What needs to be migrated over to the new site? Do you have manual Meta titles and Meta Descriptions? Is there an internal linking strategy in place?
Media	What types of media are used? Consider flat lay product photography, videos, model, campaign and lifestyle images. How is this managed? Do you use an asset management system?

Consider other data categories

Sitting outside of the product category, it would be remiss to not consider how the data of the other key categories should migrate:

CATEGORY

Consider how your categories are structured, filtered and if they vary between different categories.

Is merchandising handled by your existing platform, your team or a third-party system?

What content is displayed on the category pages? Images, copy and SEO?

CUSTOMER

What is the source of truth for customer data? Do you have a CRM or CDP?

Is there potential for customers to have multiple accounts? What is the UID for customers, email or phone?

Do you have a Loyalty program? If so, how is this managed?

ORDER

Consider how far back you would need to migrate. Do you need to migrate cancelled or refunded orders?

Do you sync in-store purchases with existing platform? Do you need to migrate fulfilment and payment information with orders?

CONTENT

Consider additional website content, including campaign landing pages, returns policies, about pages and customer support.

Consider your blog: does it run on your eCommerce platform or independently? How is it managed? How does the blog interact with the rest of your site content strategy?

Elevate brand representation



Aside from the technical benefits, replatforming to Shopify Plus enables a level of brand expression that's exorbitant on SAP and underwhelming on WooCommerce.

Consider the attention economy: Consistent application of brand is crucial for building trust, reliability and loyalty with customers. Being distinctive amongst the noise and carrying identifiable elements across every touchpoint, culminating in your digital home, is key.

Shopify aims to make great UX and UI accessible via its tiered front-end build options. Depending on the scale of your business and the appetite for design, you will opt for varying degrees of customisation. Here's each Shopify tier and what it offers:

Theme Builds

Shopify offers an extensive library of pre-designed themes that provide a professional Shopify experience with less time, costs and developer involvement. The preset templates offer some customisation options, such as typography, colour schemes and homepage layout.

Altering only the superficial layer of the website is a more simple solution in the short term. However, as making changes to the underlying source code can break upgradability in the future, changes must be handled carefully.

TLDR: Theme builds are the best course of action if time and cost are deciding factors in your choice.

Custom Builds

The next step up is a custom build where every element of the website's interface is uniquely created and custom-coded into a bespoke theme.

This approach has none of the UX/UI limitations of a theme build, but costs more, takes longer and requires a much more sophisticated understanding of Shopify theme development.

Typically, retailers will partner with an agency to custom build a Shopify theme. In these cases, the process starts with the agency and retailer aligning on the look and feel of the website, specific features, functionality and general scope of work.

From here, designers will create a design system for the brand. Building from existing visual brand guides, this system specifies different website treatments, including buttons, typefaces, page structures and more. This design system is used to design the website, before being turned into custom code and brought to life.

TLDR: Custom builds are ideal for flexibility, while still leveraging Shopify’s front-end framework.

Headless Commerce with Shopify’s Hydrogen and Oxygen

Headless commerce is a path to content flexibility that also delivers expansive functionality and integration options. It involves the decoupling of eCommerce architecture where the front-end presentation layer and the back-end functionality are separated.

This style of build has appealed to enterprise businesses for the superior experiences it promises but, inherent to its bespoke nature, it’s more costly and demanding of development teams. Every aspect is completely custom and any integration requires bespoke development.

Shopify has taken the principles of headless commerce and developed Hydrogen, a more straightforward approach to headless development. Enabling headless flexibility without losing the functionality of Shopify.

Hydrogen allows retailers to build a storefront that enables exceptional experiences in a more transferable, universal framework, with Oxygen as the deployment and hosting tool.

TLDR: If delivering cutting-edge digital experiences is what you require, Hydrogen and Oxygen might be the front-end option that is best for your business.

Here’s the comparison at a glance:

	Theme	Custom	Headless
Project cost			
Time to build			
Performance			
Flexibility			



Next step: Discovery workshop

Now you're prepared for the smoothest migration possible, let's explore your brand's opportunity for exceptional eCommerce on Shopify Plus in a one day Brand and UX Discovery Workshop with The Working Party.

Reach out to us today to learn more about Discovery and how we approach it.

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