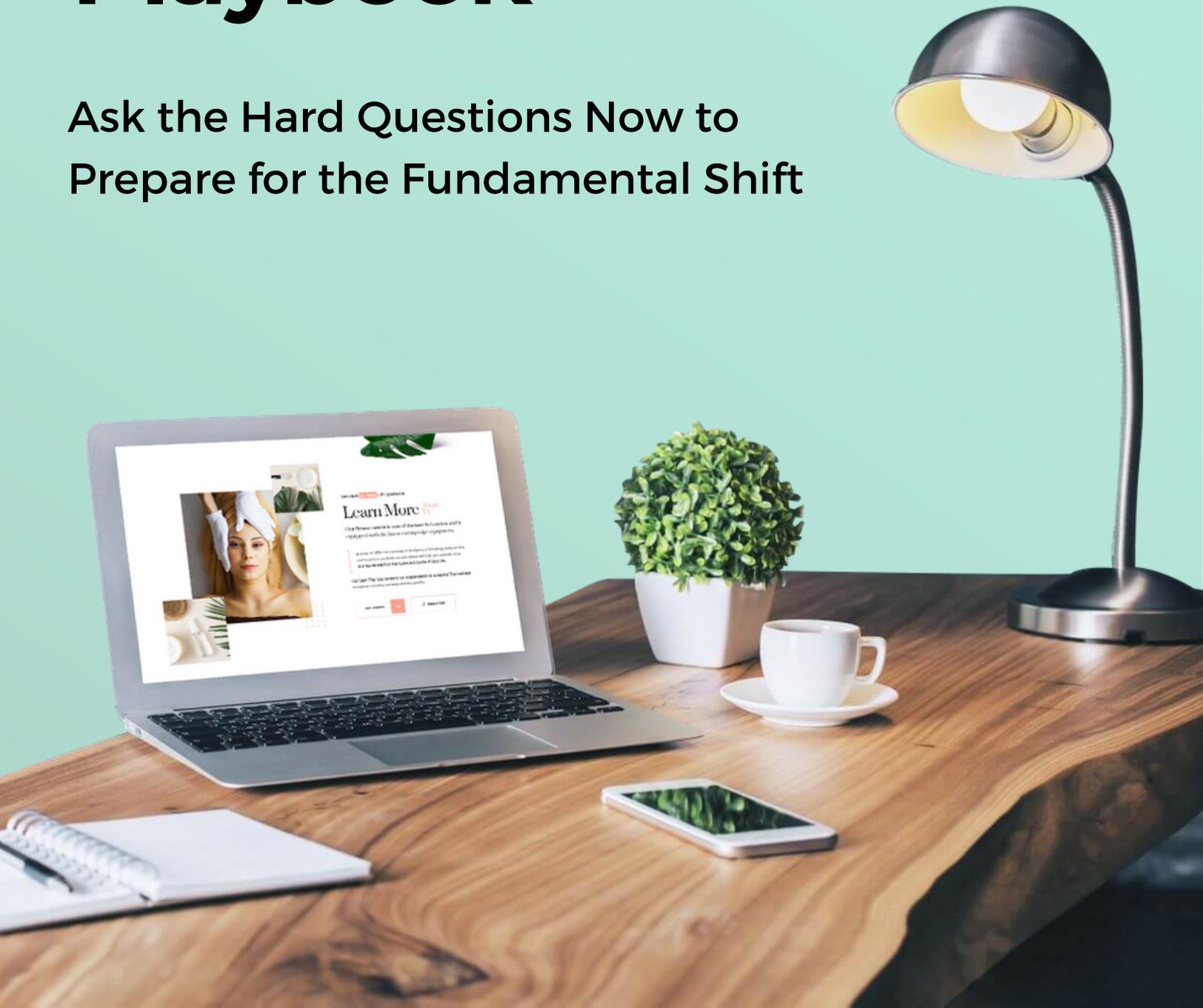


# Your Digital Replatforming Playbook

Ask the Hard Questions Now to Prepare for the Fundamental Shift



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# 01 The Big Promise of a Platform Transformation

**You've decided to take the first major leap with your digital transformation: migrating to a new digital platform.**

A platform transformation promises to increase your ability to deliver with speed and confidence, as well as delight customers with better experiences.

This isn't just a new launch. It's a fresh start. A complete overhaul. Replatforming will give way to an entirely new framework for content management, digital asset management, and functionality. It brings a new cloud infrastructure, API connections, and business processes. It'll impact every aspect of the customer experience and how it's delivered to users across your website and app.

As exciting as it sounds, a platform migration is an endeavor that's high risk and high visibility. Accordingly, expectations will also be extremely high. Capital and resource expenditures will be enormous. When it comes time for a phased rollout, disruptions to the customer experience are inevitable.

## **In this this e-book, we'll share:**

- Reasons why a replatforming is so fraught with risk
- Six questions to ask to minimize replatforming risks and maximize impact
- How to measure replatforming performance
- The fundamental mindset shift you'll have to shepherd once your migration begins

# 02 The Risks of Replatforming: The Hard Things About a Hard Thing

If you ask anyone who's been through it before, a replatforming initiative is one of the biggest initiatives you'll drive in your career. Accordingly, it's fraught with immense risk and challenges, such as:



## Misalignment and pushback

Everybody comes to the table with a different set of priorities. How will you prioritize what product wants vs. executives vs. engineering? Stakeholder disagreements can squelch momentum.



## Gaps in requirements

With all the complexity, you're bound to miss things. Gaps in requirements now will mean defects, finger-pointing, and disruptions to the customer experience later.



## Keeping the lights on

The biggest risk during a platform transformation is that you have to conduct "open heart surgery while keeping the body functioning." There is NO pause button.



## Disruption to the UX/CX

As you roll out, it's inevitable that there'll be unforeseen UX or technical issues that negatively impact the customer experience, including customer confusion, lower conversions, and revenue reduction.



## Mounting backlog

With so much changing, you'll be overwhelmed with defects and requests for improvements. It will be hard to prioritize what's most important.



## Lack of visibility

With a completely new interface between you and your customers, it won't always be easy to find the culprit. Suddenly, customers are calling in complaining they can't do something, and it'll take you days or weeks to figure out what happened.



## Cultural inertia

You do all the hard work, but, ultimately, your organization isn't ready for the fundamental shift required to see the benefits of a modern platform.

# 03 Answer These Six Questions Before You Embark on Your Platform Migration

Before you go too far down the path, ask yourself and align with key stakeholders on the following questions to best set yourself up for success:

## 1 Is your organization ready for the cultural shift brought on by a digital platform migration?

Think of a platform migration as a marathon, not a sprint. It'll be tempting to claim "mission accomplished" on a particular end date following successful rollouts.

But when the launch is over and nothing changes in daily operations, then all the hard work and effort on the technology change will be destined to fail. Organizational culture plays a pivotal role in making any platform transformation successful. Common challenges include:

Functional silos

Fear of risk-taking

Lack of data fluency

This requires an honest self-assessment to ensure your organization is ready:

- Leaders must have the discipline of making data-driven and customer-defined decisions
- Team members must be ready to make accurate assessments and generate actionable insights from data
- The organization must have a test-and-learn mindset to fuel rapid iteration

## 2 How will you invest in change management and regular communications?

The next step is to be extremely thoughtful about your change management strategy. A communications plan is needed to keep stakeholders and executives aligned and mitigate:

- Missed communication opportunities
- Lack of governance
- Fear of change
- Low adoption rates

Therefore, managing the "people" aspect of change should be at the center of your overall initiative. As you prepare for replatforming:

- **Communicate a charter** that outlines business goals, as well as what teams can expect (good and bad) before, during, and after the replatforming initiative. This has to be done up and down the chain and across the business to gain support. Not everyone may love the idea of change, and some may even feel threatened. There must be a foundation of trust that makes the risk seem less risky.
- **Identify key executive champions** who can remove obstacles and advocate for the change when times get tough. It's important to identify your influencers and relationship builders early on.
- **Establish regular steering committee meetings.** It's not just to keep stakeholders aligned. It's critical to continuously elevate the business case and keep the organization energized. It's a long road ahead. Resistance can derail a transformation effort.

### 3 How will you balance competing priorities?

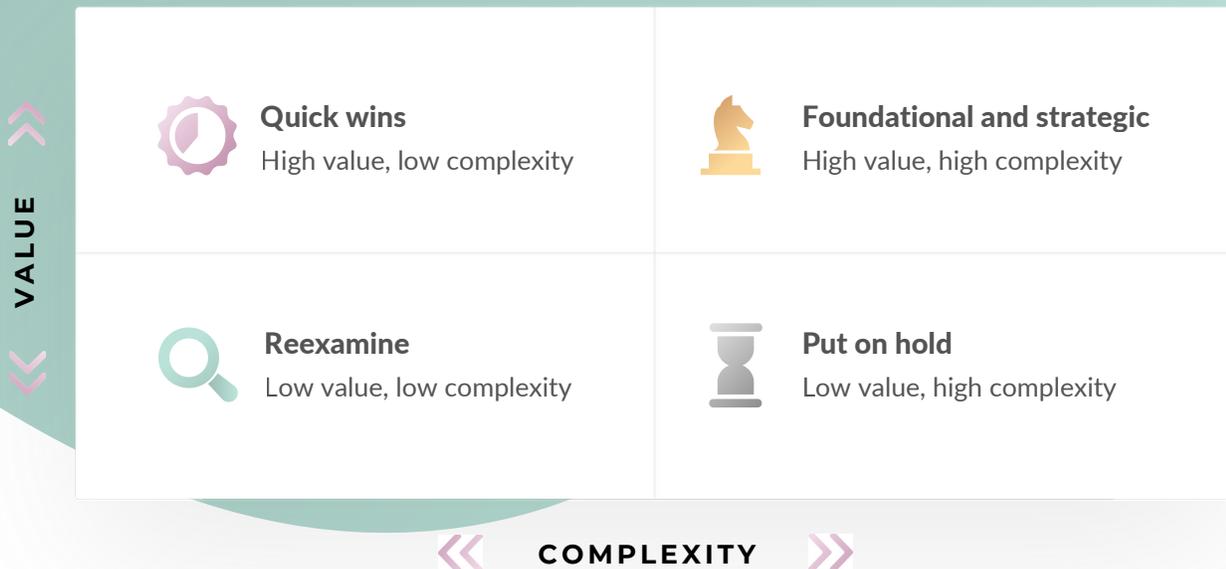
Many decisions, big and small, will be made throughout a replatforming. With so much in flight, there'll be plenty of competing priorities — and friction. The platform team will prioritize the back end as the heaviest lift, marketing might insist on all aspects of the UI, and product will be somewhere in the middle.

Since every system and feature requires investment in limited time and resources, it's impossible for every single one to be done well. How much will you invest in migrating over underutilized pages or features? How will you prioritize between fixing a failing legacy system, which is still relied upon for customers to transact, and the new platform, which is still a work in progress and unproven?

Having multiple balls in the air and being forced to choose can be a frightening prospect for any project manager. Here are a few strategies to help your teams prioritize:

- **Ensure that everyone is clear on the strategic priorities of the company.** Deprioritize items that aren't aligned. Some ideas start as good ideas but aren't always tied to the company's future.
- **Develop a strategic framework for prioritization.** For example, use a "value-effort quadrant" and plot backlog items based on business value and complexity (see the graphic on the next page). Separately, create one that measures urgency based on date-driven priorities.
  - Assign value in terms of both company and customers — those items that align with the needs of both company and customers should be considered foundational.
  - Measure complexity in terms of technical development and integration into the company's overall operations.
  - Measure urgency in terms of deadlines and date-driven metrics.
- **Back up value assessments with data.** Come to the decision-making table with data on customer engagement, conversion, and revenue impact.

### Sample Value-Effort Quadrant: Prioritize Replatforming Backlog



## 4 Will this be a lift and shift only or facelift too?

As you strategize your platform migration, there are pros and cons of lifting and shifting the application to the new platform with or without redesigning the user experience.

- **A full redesign of your site** during the lift and shift will, of course, be more complex, time-consuming, and costly, and it could be difficult to measure with so many factors changing at once.
- **The lift and shift-only approach**, on the other hand, involves (more simply) moving the application to the new platform, ideally with minimal disruption to user experience. It takes fewer resources and less time to execute, and measuring the impact should be cleaner (minus technical performance and page speed improvements).

However, this lightweight approach may result in missing the benefits of scalability and flexibility offered by a new dynamic platform. A middle ground may be to wait until after the lift and shift to do the UI changes to minimize disruption from technical issues happening at once. But with this approach, you'll have to seriously consider whether there'll be enough budget remaining for the redesign later down the road.

Instead of thinking about projects in terms of "backend only" vs. "front end only," an increasingly popular approach is to address all application layers in small increments. This so-called "vertical slicing" can prevent having to focus on the backend-first approach.

In the end, if you're already investing in a replatform, you'll likely realize more bang for your buck by redesigning your site incrementally as you go. Robust analytics, session replay, and performance tools can monitor and alert on customer impacts, even as multiple factors are changing simultaneously.

## 5 What approach will your rollout strategy take?

Split traffic (or "canary") rollouts are increasingly popular over the more risky "big bang" approach when launching digital platforms. The idea is to roll out new functionality incrementally to a small subset of servers side-by-side with the original version. Once you test the waters, you can slowly phase in changes to the rest of the infrastructure. This can limit the impact of any defects or stability issues, allowing time for product teams to work out the bugs as a greater percentage of traffic is exposed.

Successful rollout strategy will depend on your maturity and competency and can be combined and applied at different phases of migration. In "[The Top Strategies for Replatforming Your Commerce Solution](#)" (subscription required), Forrester outlines these rollout strategies:

- 1 Brand-by-brand, market-by-market
- 2 Segmenting customer channels and flows
- 3 Breaking the monolith
- 4 Migrating page-by-page



## 6 Who and how will you manage real-time monitoring and measurement?

Would you buy a car without auto insurance? Similarly for replatforming, you wouldn't invest in a major digital initiative without a robust and objective monitoring and measurement strategy. **Getting ahead of your monitoring and measurement program is critical for three reasons:**

01

To baseline legacy experiences against the new user experience so that you ultimately realize your return on investment

02

To hold yourself, vendors, and partners accountable for performance of the new platform and user experience

03

To rapidly identify and resolve defects that have a negative impact on customers and the business

The old mantra "First, do no harm" still applies. If the new user experience worsens or does not at minimum maintain current performance of the legacy UX, your company may confront more than just lost revenue, but damage to brand equity and loyalty.

Project teams will be focused on monitoring and communicating progress of the overall rollout, managing timelines and communicating strategies. Once the rollout is over, the project team moves on. Product teams, on the other hand, are thinking about the long-term success of a specific feature (such as the shopping cart, for example), fixing any defects, and assessing how it can be iteratively improved.

Both teams will need real-time, automated analytics to deliver rapidly and minimize the number of defects as you roll out the new platform and iterative improvements. Hypothesis-based feature testing allows you to anticipate which product defects might cause the most friction in the customer journey and mitigate them before they make it to production. Using the right combination of tools and testing methodologies, you can prevent customer frustration before it ever happens.

It's grueling work to replatform, but what's the point if all your hard work can't be measured and recognized? You'll have to measure performance but also strike the right balance between performance and content/design.

# 04 When the hard/fun work really starts

After a successful rollout, everyone deserves high fives and an acknowledgement of all the work that has been done. But in reality, the fun has just begun. That's when you'll really start to see that it's about more than just technology — it's about your company's ability to adapt to change. Organizational culture plays a pivotal role in making any digital initiative successful.

**As you traverse this new landscape, keep these things in mind:**

**You're relearning how your customers interact with your platform.** If you followed the recommendations in the previous section, you've got baseline data to benchmark performance. But your new platform is also untested and unproven. You've spent years building hypotheses and data to validate theories, but now there are a whole host of new variables. All assumptions have to be tested and backed with data.

**Rapidly build, test, learn, and repeat with continuous customer signals.** You've spent nearly a year planning and migrating to a new platform so you can move faster. It sometimes felt like a marathon. Now it's back to sprint mode. To get the most out of this fresh start, teams need to hit the ground running with a rapid, iterative, test-and-learn approach. Enable your teams to do this better with a shared view of real-time, quantified customer signals

**Continue to invest in a culture of Continuous Product Design.** Your ability to move fast and make customer-centric, data-driven decisions is fundamental to the long-term success of your platform migration. It's critical to cultivate a culture of learning faster and customer obsession. This is part of a Continuous Product Design mindset that organizations must fully embrace as part of a digital-transformation strategy.

## Summary

A platform transformation is a monumental initiative for any organization. By asking the hard questions now, you'll be in a better position to maximize your investment and realize the promise of delivering better products and experiences for customers faster.

## Replatforming? Five Reasons to Work With Quantum Metric if You're Planning a Platform Migration

- 01** Make data-driven decisions on what to prioritize during your migration.
- 02** Establish a baseline to compare performance pre- and post-migration.
- 03** Identify errors in QA to minimize impacts in production.
- 04** Proactively monitor performance in real time and alert on anomalies.
- 05** Automatically quantify the impact of errors to speed feedback and iteration.

Watch a recorded 5-minute demo of our platform or request a live, personalized demo:

<https://www.quantummetric.com/watch-a-demo>



**We help companies build better digital products faster.**

Our platform for Continuous Product Design gives business and technical teams real-time, quantified visibility into the customer experience. The result: Teams are aligned, learn faster, and release with confidence.

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