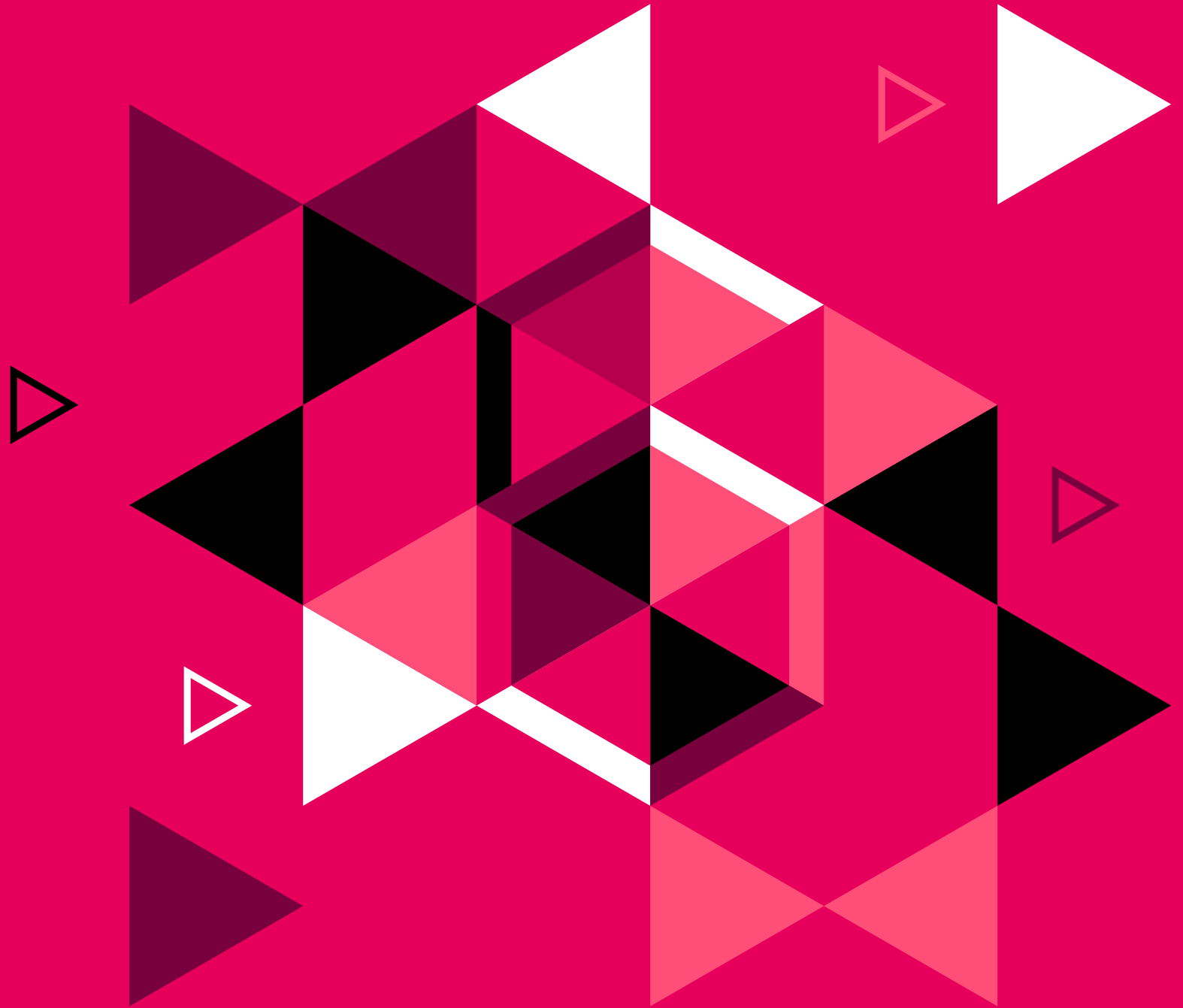


Quantum Metric

EBOOK

# Your digital replatforming playbook.

6 questions to prepare your organization today.



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# Replatforming: big promises, big risks.

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

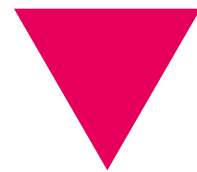
Migrating to a modern platform is the foundation for digital transformation. It's the catalyst for growth, speed, and exceeding customer expectations. But there is more you can do to ensure a successful migration.

This isn't just a new launch. It's a *fresh start*. Replatforming will give way to an entirely new framework for content management, digital asset management, and functionality. But a platform migration is high risk and high visibility—setting equally high expectations.

So how do you minimize replatforming risks and maximize impact?

# 6 questions you need to answer before you start 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:





## 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. 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:

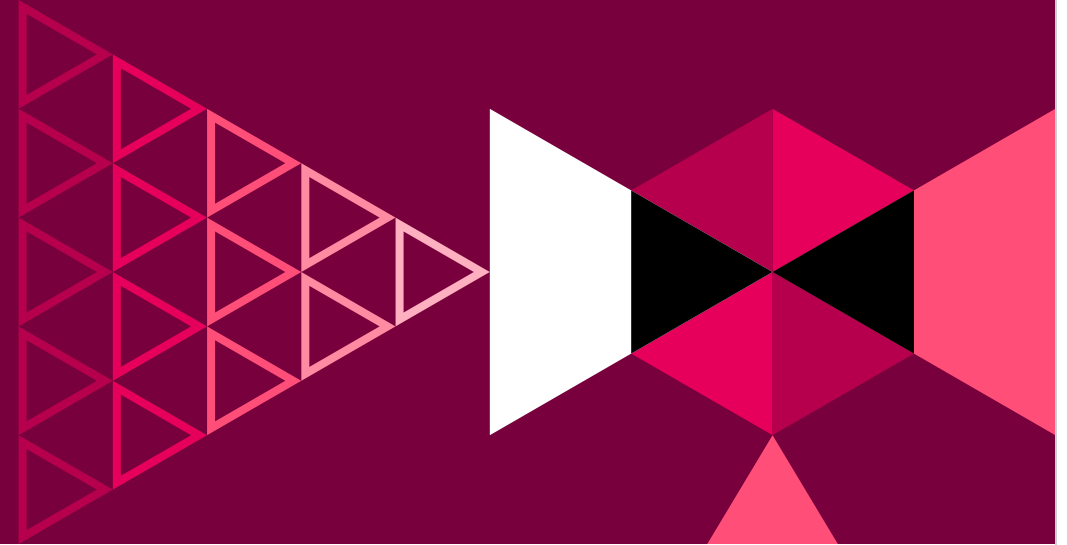
- Functional silos
- Fear of risk-taking
- Lack of data fluency

This requires an honest self-assessment of where your organization is in terms of its digital maturity:

- 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.



## How will you invest in change management and communication?



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:

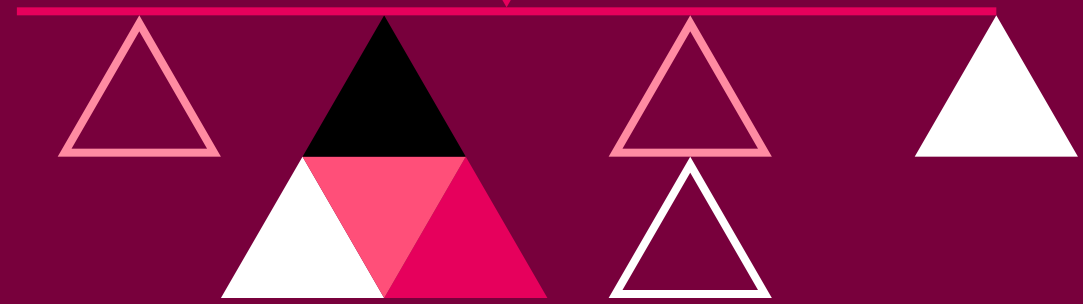
- Confusion, resistance, and pushback
- Delayed implementation
- Increased errors
- Lack of governance
- Delayed training and onboarding
- Missed customer expectations
- Lost revenue and opportunity

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

- **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.
- **Communicate a charter** that outlines business goals and 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—making the risk seem less risky.
- **Establish regular steering committee meetings** to keep stakeholders aligned, continuously elevate the business case, and keep the organization energized. Resistance can derail a transformation effort.



## How will you balance competing priorities?

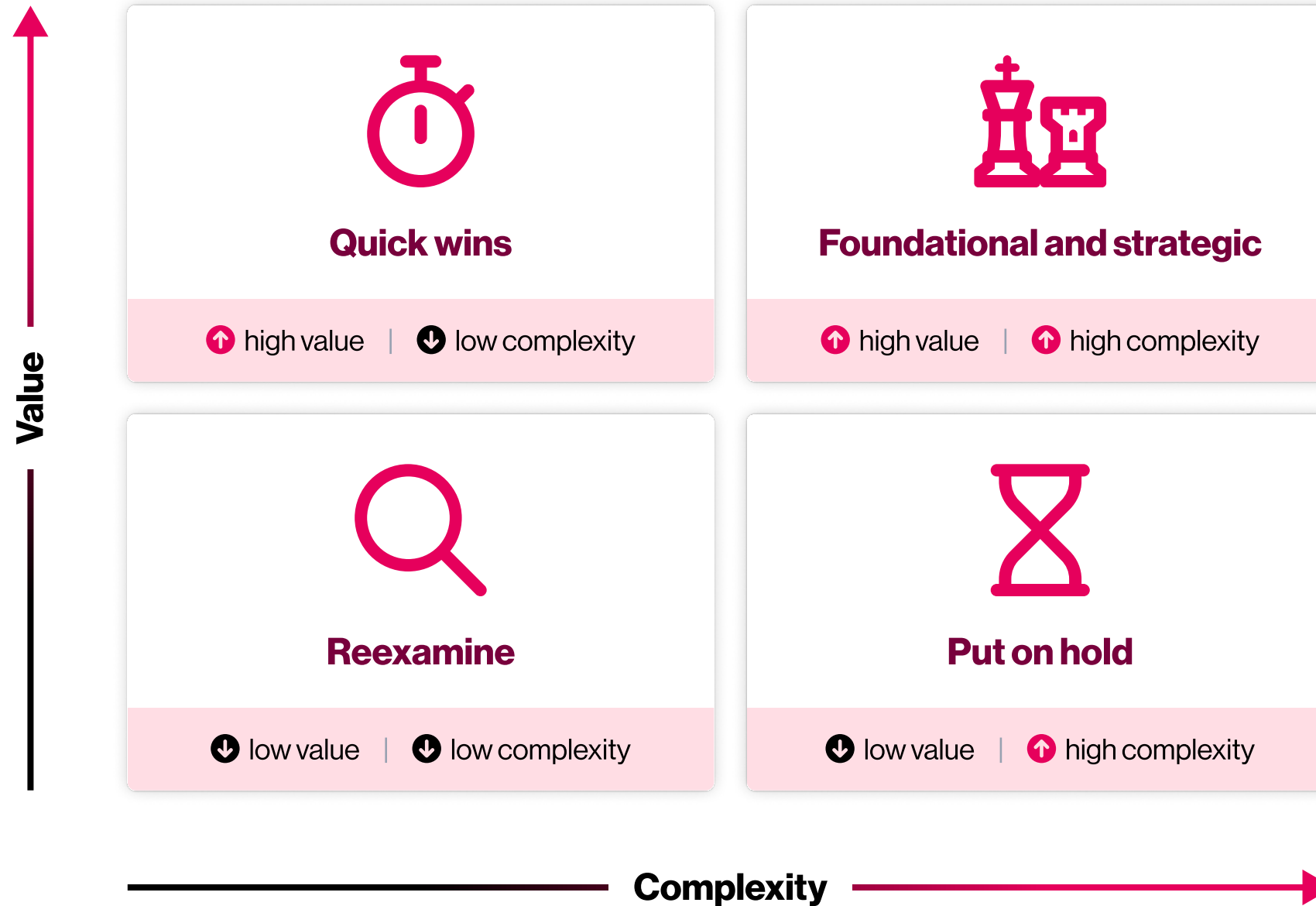


With so much in flight, there'll be plenty of competing priorities—and friction. Having multiple balls in the air and being forced to choose can be a frightening prospect. Here are a few strategies to help your teams prioritize:

- **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. Separately, create one that measures urgency based on date-driven priorities.
  - Assign value in terms of both company and customers. 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 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.

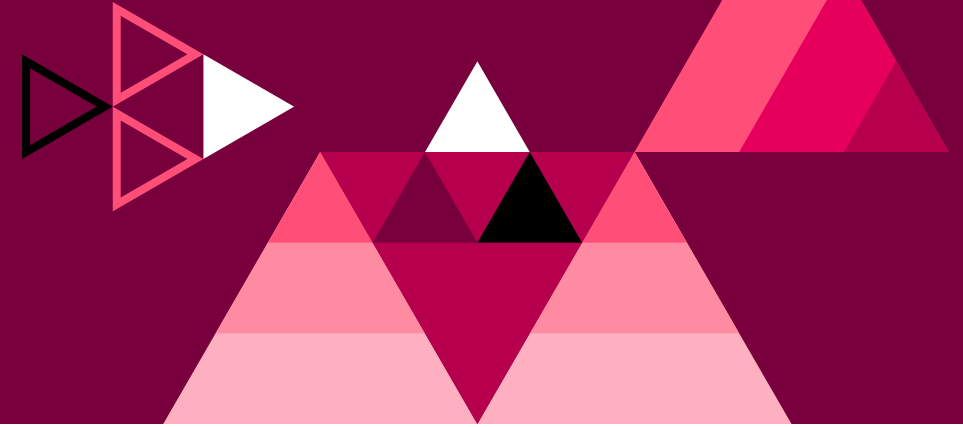
## Sample quadrant: Prioritize replatforming backlog.





# 4

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



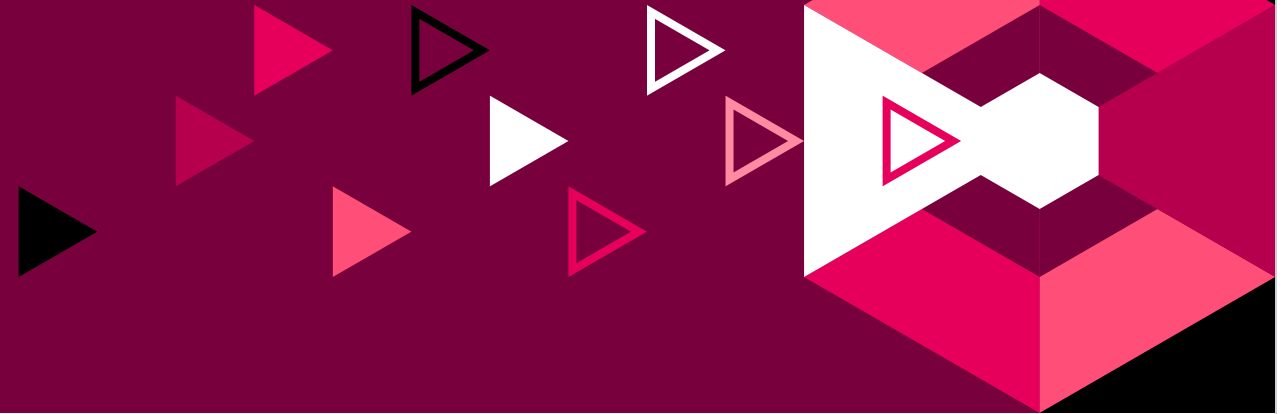
As you strategize your platform migration, there are pros and cons of lifting and shifting the application to the new platform with or without redesigning the user experience.

- A **full redesign of your site** 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** involves 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).

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. This can limit the impact of any defects or stability issues, allowing time for product teams to work out the bugs.

### FORRESTER®

Successful rollout strategy will depend on your maturity and competency and can be combined and applied at different phases of migration. [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



## How will you measure the impact?

Would you buy a car without auto insurance? Similarly for replatforming, you wouldn't invest in a major digital initiative without a robust monitoring and measurement strategy. It's critical for three reasons:

1. **To baseline legacy experiences against the new user experience** so that you ultimately realize your return on investment. Establish a baseline so you know what success looks like after the migration.
2. **To hold yourself, vendors, and partners accountable** for performance of the new platform and user experience
3. **To rapidly identify and resolve defects** that have a negative impact on customers and the business

Project teams monitor the rollout's progress, while product teams prioritize long-term feature success, defect fixes, and iterative improvements. Both 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.

# Pitfalls to watch for during replatforming.

1

## Missing baseline data:

Did you baseline so you can compare yourself pre- and post-migration?

2

## Unreliable QA environment:

Did you establish a safe QA environment to prevent issues in production? Are you able to find and size errors in QA?

3

## Stale data:

Are you relying on outdated data and how long does it identify and prioritize issues as they arise after each release?

4

## Failed cross-team communication/alignment:

How will you communicate and align your business and technical teams around high impact issues and proposed fixes as they occur? Are the issues and their ROI quantifiable?

# 5 ways Quantum Metric can help in a platform migration.

1

Make data-driven decisions on what to prioritize during your migration.

2

Leverage autocapture to establish a baseline and compare performance pre- and post-migration.

3

Identify errors in QA to minimize impacts in production.

4

Proactively monitor performance in real time and alert on anomalies.

5

Automatically quantify the impact of errors to speed feedback and iteration.

[Get a demo](#)

[quantummetric.com/request-a-demo](https://quantummetric.com/request-a-demo)



# About Quantum Metric.

As the pioneer in Continuous Product Design, Quantum Metric helps organizations put customers at the heart of everything they do. The Quantum Metric platform provides a guided approach to understanding the digital customer journey, enabling organizations to recognize customer needs, quantify the financial impact and prioritize based on the impact to the customer and business' bottom line. Today, Quantum Metric captures insights from 40% of the world's internet users, supporting globally recognized brands across industries including retail, travel, financial services and telecommunications.

For more information about Quantum Metric, visit [quantummetric.com](https://quantummetric.com)