

ampersand.

Magento Enterprise Re-Platforming Checklist.



A list of key questions to gather your requirements for a successful re-platform to Magento Enterprise.

Call us **+44 161 236 5504**

Learn more **ampersandcommerce.com**

Making the Switch.

We've put together a list of key questions to gather requirements for a successful re-platform to Magento Enterprise.

Five years ago, ecommerce solutions were focused solely on getting the infrastructure in place to sell effectively through one channel: **online**.

Today, objectives have changed and the online channel has become the hub for activities across all channels and the shopfront for your brand on a global level.

This major shift from channel-specific to operational-centric means that before undertaking a major re-platform, there is an even longer list of business processes to confirm and preparations to make.



5 Things to Think About.

1. Visualise your current processes

Ask your IT department to map out what your current ecommerce process looks like including the types of data that each system needs. It's really helpful to visualise your current solution so you can understand how it works and what systems rely on the others. When you are in the planning phase of your new solution, you can use this map as a talking point for what needs to be changed or updated.

2. Who is responsible for what?

Make sure to build a project team that is balanced with your company's IT experts and business decision makers. During a project, your team ideally needs to have the authority to make the decisions. Also, involving decision makers heavily in the beginning of a project will lead to far less change and angst later on.

3. Where does your current site and/or solution fall short?

Ask your customers. Facilitating user testing doesn't have to be costly and the data you get from doing those tests will help mould your goals, both for design and operations, on your new site. Ask your employees. The people who manage the back-office systems will know a thing or two about what is working and what could work better.

4. Determine your success criteria at the beginning

Looking at both financial and non-financial, list the points in order of importance and get agreement from your team. This exercise is good not only to fine-tune your requirements and also set test plans for user acceptance testing (UAT) at the end of your project.

5. Create a roadmap

Make a plan of the technology and services you want to provide to your customers over the next 24 months. Giving this information to your agency will help guide the project so it coincides with future plans, marketing efforts and business goals.

Let the Checklist Begin...

1. About the Project

What is your current solution? _____

What is your desired go-live date for new project? _____

Who are the market leaders in your sector who you consider your benchmark competitors?

Please list any bespoke features previously developed for your current solution.

What are your top 3 priorities for this re-platform? (e.g. improved back-office integration, business growth, ownership of platform, etc)

In your current solution, what currently restricts you in achieving your objectives? (List 3 real-life situations that you find difficult with your current solution, or tasks you'd like to simplify.)

Re-Platforming Checklist.

2. ERP (Enterprise Resource Planning)

Do you have an ERP solution? (circle one) **YES** **NO**

If yes, which one? _____

Do you want your current ERP to be integrated into your ecommerce solution? (circle one) **YES** **NO**

Do you need end-of-day reports for your sales ledger? (circle one) **YES** **NO**

Does your ERP provide product detailed data? (circle one) **YES** **NO**

Does your ERP provide product tax and category information? (circle one) **YES** **NO**

3. CRM (Customer Relationship Management)

Do you currently have a CRM system? (circle one) **YES** **NO**

If yes, which one? _____

Do you want it integrated with Magento Enterprise? (circle one) **YES** **NO**

Re-Platforming Checklist.

4. WMS (Warehouse Management System) / OMS (Order Management System)

Do you currently have WMS / OMS? (circle one) **YES** **NO**

If yes, which one? _____

Is your WMS or OMS part of your ERP system? (circle one) **YES** **NO**

Where does stock level information come from? _____

Do you have more than one warehouse? (circle one) **YES** **NO**

5. Orders and Delivery

Which countries to you ship to?

What are your delivery service level agreements for each country?

Who are your delivery providers for each country?

Re-Platforming Checklist.

6. Payments

What types of payments do you accept?

Which countries do you accept payment from?

Which currencies do you accept payment in?

Which bank is your merchant account with for each country?

Re-Platforming Checklist.

7. Marketplaces

Do you sell on marketplaces like eBay and/or Amazon? (circle one) **YES** **NO**

Do you want those marketplaces integrated into your ecommerce solution? (circle one) **YES** **NO**

Do marketplaces use shared or siloed stock? (circle one) **SHARED** **SILOED**

Do you use the same or different pricing on marketplaces as on your website? (circle one) **SAME** **DIFFERENT**

Do you want products to only feed out to marketplaces? Or do you want the order fed back and captured within your systems as well?

(circle one) **OUT ONLY** **OUT & IN**

8. Email

Do you use an email marketing software? (circle one) **YES** **NO**

If yes, which one? _____

Do you want your email marketing software integrated? (circle one) **YES** **NO**

Do you want your email marketing software to send transactional emails? (circle one) **YES** **NO**

What other email marketing triggers do you have, in addition to purchase and shipment confirmation (e.g. abandoned cart)?

Re-Platforming Checklist.

9. Products

How many products do you have on your website?

What is your current category structure? Do you want that to change or stay the same?

Do you have product bundles? (circle one) **YES** **NO**

Do your products have size and colour combinations? (circle one) **YES** **NO**

What kind of imagery do you have (e.g. 360 views, how many images per product)?

Do you use a CDN (content delivery network)? (circle one) **YES** **NO**

How do you expect product image zoom to function?

Do you currently integrate with Scene 7 or similar software? (circle one) **YES** **NO**

Do you use rich content, like videos, on your product pages? (circle one) **YES** **NO**

Do you have simple or complex product descriptions (e.g. do you need an area separate from description for product specifications?) (circle one) **YES** **NO**

Do you use an external system for product reviews? (e.g. Reevoo) (circle one) **YES** **NO**

Re-Platforming Checklist.

10. Search

Is 'product only' searching sufficient? (circle one) **YES** **NO**

If not, what other search definitions do you require (e.g. CMS, blog, forums)?

Do you want a search function to auto-complete or suggest products and categories? (circle one) **YES** **NO**

11. International

How do you present different currencies and stores online?

How do you handle translations?

Re-Platforming Checklist.

12. Multichannel

Do you need a store locator? (circle one) **YES** **NO**

Do you want the ability to ship from store? (circle one) **YES** **NO**

Are you interested in Click & Collect? (circle one) **YES** **NO**

Will you provide in-store kiosks for store customers to shop from the web catalogue? (circle one) **YES** **NO**

Can in-store customers order in-store for home delivery? (circle one) **YES** **NO**

Do you have a mobile site? (circle one) **YES** **NO**

If not, do you want one? (circle one) **YES** **NO**

13. Front-End Functionality

What information do customers need to provide for account creation and what is the process for data storage?

Do you have an email newsletter sign-up? (circle one) **YES** **NO**

If so, what are your opt-in preferences?

Re-Platforming Checklist.

Define the scope of features you require in the 'My Account' area.

Do you use post code look-up in the 'My Account' area and the checkout? (circle one) **YES** **NO**

Do you want a breadcrumb trail? (circle one) **YES** **NO**

If so, specify the role of CMS in turning this on/off for specific pages.

Do you use a mini-basket? (circle one) **YES** **NO**

Do you use interactive technology, such as product carousels? (circle one) **YES** **NO**

On product pages, do you want to include recently viewed items? (circle one) **YES** **NO**

Customers who bought also bought...? (circle one) **YES** **NO**

Related products? (circle one) **YES** **NO**

Add to wishlist? (circle one) **YES** **NO**

Customer reviews? (circle one) **YES** **NO**

Product videos? (circle one) **YES** **NO**

Do you want your customers to have the ability to place back orders and re-orders? (circle one) **YES** **NO**

Do you require faceted navigation? (e.g. sort products by attributes like colour, size) (circle one) **YES** **NO**

Do you have non-product content such as buying guides? (circle one) **YES** **NO**

Do you have multiple price lists for different audiences? (circle one) **YES** **NO**

Re-Platforming Checklist.

13. Other Systems, Processes and Requirements

How do you handle customer service requests?

How do you promote personalised shopping and recommendations?

How do you handle returns?

Who is your current hosting provider / plan?

Anything Else?

Ampersand Commerce is a multi-award winning, **Magento Gold Solution Partner** with extensive experience designing, developing and supporting scalable ecommerce solutions for international multichannel retailers. We are passionate about helping our customers maximise return on investment and meet key business objectives through the strategic use of technology.

We're a technical agency that takes pride in our ability to produce elegant, scalable software solutions to highly complex requirements. We're not a full-service agency; rather we programme manage a project from beginning to end, working with partners like design and UX experts to produce the best results. We have extensive experience delivering and supporting complex integrations between business systems and have strong relationships with 3rd party service providers, building products that add value to the Magento platform.

Our team of seasoned developers, analysts, project managers and creative thinkers live and breathe Magento. From years of delivering some of the most challenging and innovative projects on the Magento platform, we have gained a reputation in the United Kingdom for being one of the most technically able agencies in the Magento ecosystem.

Call us **+44 161 236 5504**

Learn more **ampersandcommerce.com**

Happy Customers



Luxury fashion brand optimises for Christmas shoppers



Iconic streetwear brand re-platforms on Magento Enterprise



Compression sportswear brand takes the globe



High-end retailer optimises ecommerce operations



Luxury fashion brand optimises for Christmas shoppers



Media giant expands into daily deals



**Say
Hello**

ampersand.

*3C Tariff Street
Manchester M1 2FF*

+44 161 236 5504

ampersandcommerce.com

@AmpersandHQ