

Mastering Your B2B Replatforming

Your guide to success with exclusive insight from
replatforming experts



INDEX

- 1** WHAT IS REPLATFORMING?
- 2** MIGRATING SYSTEMS IN B2B ENVIRONMENTS
- 3** THE CHALLENGES OF REPLATFORMING FOR B2B
- 4** PLANNING AND METRICS
- 5** CREATING A SUCCESSFUL B2B TECH STACK
- 6** THE IMPORTANCE OF A REPLATFORMING PARTNER
- 7** THE ROLE OF PIM IN REPLATFORMING
- 8** HOW TO REPLATFORM AND MIGRATE DATA SMOOTHLY
- 9** YOUR MIGRATION CHECKLIST
- 10** MYTHBUSTING IN REPLATFORMING

1

WHAT IS REPLATFORMING?

Replatforming refers to the process of a company migrating their data storage and management systems to a new software or platform.

Businesses often replatform to gain access to new, up-to-date systems that provide a variety of functions that their previous legacy solution failed to offer. Implementing and maintaining a more modern platform can provide your business with an agile tool that scales with you as you expand.

One of the main aims of replatforming is to achieve a greater level of efficiency, both in the processing of data and in the data management responsibilities of the company's teams. Other advantages include improved security, greater control over data quality, and a reduction in cost. Modern, flexible systems typically work out cheaper by reducing the number of programs needed to perform data management. With a single, centralized platform, businesses can therefore reduce their MarTech stack.

Systems that your company can replatform to:

**ERP****PIM****CMS****OMS****eProcurement
platforms****eCommerce
platforms****Payment
platforms****Website**

2

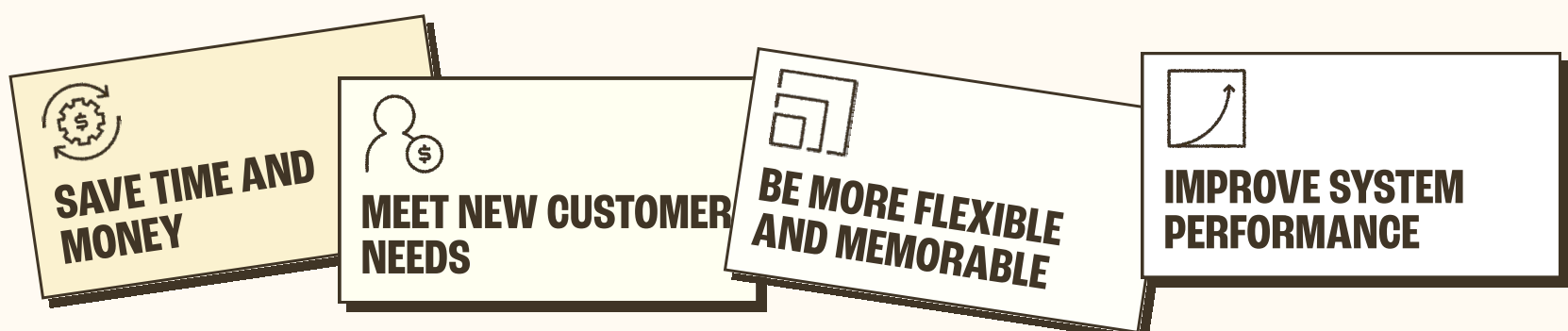
MIGRATING SYSTEMS IN B2B ENVIRONMENTS

What to consider when you are a B2B business looking to replatform

There are several factors to keep in mind when your business is considering replatforming. These include the cost-effectiveness of the move and of the new system, the time and resources required, and the internal processes that will need to be reviewed.

Replatforming requires you to have first analyzed which systems of yours are unable to provide the service and quality level you need. A new, more agile system will enable you to keep up with demand and competition as they grow. Once you've identified the systems you wish to migrate, you'll need to identify and consider the technological alternatives available. For example, it's common for a company to migrate an outdated on-premise system, due to the heavier and more costly maintenance that's required. These companies typically migrate to SaaS, cloud, or headless platforms, which are quicker to implement, can be accessed from anywhere, and can quickly adapt to the growing and changing needs of the team.

However, a B2B replatforming plan has some major differences from the replatforming that a B2C company would carry out. While both might opt to replatform to certain key systems, such as a PIM or ERP, manufacturers often have different needs. B2B companies require a system more suited to managing large amounts of complex product data. This information needs to be synchronized to numerous internal teams and external participants along the supply chain and to multiple B2B channels. In addition, the new platform needs to enable the integration of supplier networks, provide the capabilities for scaling and internationalization, and combat the difficulties of managing taxes, prices, catalogs, and customers in different markets and languages.



When is replatforming necessary?

- The systems you have in place fall short of the functionality and security levels you require for day-to-day operations and business strategy expansion.
- You need specific features that your current platform does not include and does not have on the roadmap for an upcoming release.
- You are looking to reduce costs by simplifying maintenance and system support teams, without relying on the IT team or complex technical solutions.
- You are at a stage where it is essential to integrate all your systems and need a platform with connectors and facilities to streamline processes and accelerate your digital shelf strategy.

The 3 pillars of replatforming

FINANCIAL PLANNING

One of the main deterrents for companies considering a replatform is the investment it requires. However, the migration typically offers greater ROI in the long run, streamlining your work and reducing your dependency on multiple platforms and the need to hold multiple licenses. A successful replatform will reduce your MarTech stack and align your platforms with the needs and KPIs of your teams. Whether it's to improve the shopping experience, generate more sales, build customer loyalty, or expand to new markets quicker, replatforming to an agile platform should be a vital part of your strategy.

TECHNICAL OPTIMIZATION

The goals of your company can eventually become hindered by the technological limitations of your legacy systems and processes. Tools such as spreadsheets and siloed storage systems are not adapted to the high demands of the B2B digital shelf, and persevering them can have a negative impact on internal and external communication, and performance. A change of platform should always pursue a better data architecture, one that's able to facilitate your day-to-day operations and which includes features missing in legacy systems. Common advantages of migrating from a legacy system include increased speed of updating, loading, and syndicating data, as well as a customizable interface with more user-friendly functionalities.

MARKETING AND PROCUREMENT NEEDS

As market demands continue to rapidly grow, marketing teams must be prepared to communicate these needs to product teams, synchronize with sales, and respond with actions that will give customers the experience they are looking for. Any delay in this addressing purchasing needs can quickly translate into project delays and damage to brand image, ultimately creating a dissatisfied customer base that is difficult to recover from. Shifting to platforms that make agile and flexible working possible is the best investment in today's B2B environment, where classic supply chain processes are becoming more aligned with those that were previously B2C-exclusive.

3

KEY REPLATFORMING CHALLENGES FACING B2B BUSINESSES

Migrating systems is a significant undertaking for any company, but is arguably even more delicate in the B2B sector where there is the crossover of internal and external buying and selling processes to consider.

With that in mind, there are a number of hurdles that need to be overcome for B2B companies looking to replatform. Firstly, a lack of development resources is commonplace for businesses relying on legacy software, while problems also often exist surrounding ERP integration and connectivity between systems. These problems can arise when using systems that don't facilitate centralization, integration, and a headless model.

Analyzing in detail the difficulties that may arise both in the search and selection process and in the implementation and final launch of the new platform is essential for the transition to be as smooth as possible.

DATA MIGRATION

Transferring large amounts of data from the old platform to the new one can be a long and complex process. With the goal of replatforming being to move to a more efficient system, it can be frustrating and detrimental to have to endure a long period of technical testing and adaptation. Therefore, it's advantageous to find a platform that includes agile onboarding and adequate support.

INTEGRATION WITH EXISTING SYSTEMS

Companies within the B2B landscape might have a suite of programs that will need to be integrated with the new platform. These can include: ERPs, CRMs, OMS's, sales channels, ecommerce platforms, CMS's and procurement platforms, to name a few. These rely on regular and effective synchronization with each other, and as such require you to find a platform that includes its own connections with any other system. This is in contrast to legacy systems that can rely on multiple vendors and regularly experience internal technical developments that require significant testing and maintenance time.

DOWNTIME

Replatforming typically requires you to disable your old platform for a period of downtime. Having this platform offline can, however, affect your operations and lead to revenue losses if the appropriate temporary replacement protocols are not taken. It's important to ensure a quick and smooth transition to have your new platform up and running in a few hours, days, or weeks, depending on your application. You'll also need to ensure a backup protocol in case you need to make any last minute adjustments. To do this, you'll need to evaluate which integrations will be crucial from the outset and which can be done on a secondary basis.

 **COSTS**

Changing platforms can be expensive, particularly if your new platform needs to be customized. This itself involves complex technical knowledge for which you'll need a specialized and dedicated team, as well as longer preparation and testing time. Choosing flexible and scalable systems, such as cloud-based SaaS solutions, greatly reduces these initial costs and removes the dependence on on-premise systems, which are more expensive to hire, maintain and adapt to any technical changes you require. It's worth analyzing up front what the fixed costs will be and which additional expenses you may need to pay for e.g external resources, support agencies, and upgrades.

 **RETRAINING**

Getting all stakeholders, including employees and customers, to accept the new platform can be a challenge. It's a proven fact that people are change-averse, and in a professional environment, distrust, skepticism, and resistance to the idea of changing the way they work can also be a factor. Solutions that include their own onboarding and training services will build confidence and prepare your team earlier, without requiring them to have specialized knowledge beforehand. In addition, opting for a platform with an intuitive and easy-to-use interface ensures you can cater to users of all levels.

 **RISK OF FAILURE**

Platform change is a complex process that always carries a certain risk of failure. If the new platform doesn't work as expected, the company may lose customers, revenue, and time. Nowadays it's quite straightforward to compare the existing solutions on the market and identify the ones that are best valued by their customers and guarantee the ideal conditions of onboarding, functionalities, uptime, and support. Choosing a well-known and trusted platform adapted to the B2B sector can greatly reduce the risk involved.

 **EVOLVING TECH**

The technology landscape is constantly evolving, so it's worth appreciating that replatforming may only provide you with a temporary solution or one that will need to continue to be updated and revised from time to time. Again, opting for solutions that allow the company to choose the functionality it needs and scale as it grows or needs to expand its multichannel strategy is much more cost-effective over time. Choose vendors that offer useful tools for B2B digitization, such as analytics capabilities, artificial intelligence, automation, and instant integrations.

4

PLANNING AND METRICS

Why replatform?

B2B ecommerce is on the rise. Ecommerce currently accounts for around 18% of all B2B transactions and is predicted to increase to around **24% of all B2B transactions by 2027**. This huge growth reflects the changing needs of B2B buyers who are now mostly millennials and prefer a seamless online shopping experience.

The result of this is that merchants currently have a window of opportunity. By proactively picking the right platform, optimizing your tech stack, and taking control of your data, you can be an industry-leader, providing the excellent experience your buyers are looking for. However, by waiting a few more years, during which ecommerce will have continued to grow, your competitors will have made the transition before you and left you behind.

Planning your replatforming project

Whether you are being held back by legacy design, you have outgrown the capacity of your old store, or you need the flexibility to integrate the latest technology, replatforming can solve these issues and transform your business.

Replatforming offers a chance to rebuild and redesign your entire online store as well as your tech stack. That's why it's important to thoroughly plan your project and fully understand the possibilities. Working with an agency allows them to help scope out the project, and understand your business needs, your strengths, your weaknesses, and your goals.

Metrics to measure before and after replatforming

The first important step of planning your replatforming project is to take stock of your current ecommerce site's performance. Measuring these metrics before you start will help you, and your replatforming partners, to understand which areas need attention for improvement. By tracking these key metrics before and after replatforming, B2B merchants can gain valuable insights into the effectiveness of the new platform. This data will help in making data-driven decisions both during the project and after the migration is complete.



CONVERSION RATES

For B2B merchants, the conversion rate doesn't necessarily mean a purchase occurred. It could also be a warm lead or a request for a quote. Comparing conversion rates before and after replatforming can help determine if the new platform is more effective at turning visitors into leads or requests.



CUSTOMER RETENTION

In B2B, customer relationships tend to last longer than in B2C, as B2B customers are more likely to make repeat purchases of the same products or services. Therefore, nurturing relationships and retaining existing customers is critical for B2B merchants. Improving the customer experience on the new platform will increase customer retention and loyalty.



AVERAGE ORDER VALUE (AOV)

AOV measures the average amount customers spend per order. There are many adjustments to the buyer journey that can be brought in during replatforming which will help increase AOV. So it is important to understand your starting point for comparison.



TIME ON SITE

Measuring the amount of time visitors spend on the site can provide insights into how engaging the site is. For B2B merchants, a longer time on site may indicate that visitors are more engaged in researching products or services. Comparing time on site before and after replatforming can help determine if the new platform is providing the information and experience that customers want.



CART ABANDONMENT RATE

This metric measures the percentage of visitors who add items to their cart but do not complete the purchase. For B2B merchants, this may be less of a concern as purchases may require additional steps such as approvals or POs. However, a decrease in cart abandonment after replatforming can indicate that the new platform has addressed issues that were causing visitors to abandon previously.



SITE SPEED

Slow loading speeds can cause visitors to leave a site before completing a purchase or request. Comparing site speed before and after replatforming will determine if the new platform is faster and more responsive. This can be critical for B2B buyers who are often time-sensitive.

5

CREATING A SUCCESSFUL B2B TECH STACK

Why replatform?

Changing your ecommerce platform gives you the opportunity to assess your tech stack and integrate the right set of technology partners for your business needs. By creating an optimized tech stack, your new store will not just be better for your customers. It will also free up your time to focus instead on what really matters - growing your business.

Planning your replatforming project

ECOMMERCE PLATFORM

Choosing the right platform is critical to the success of your ecommerce store. It will provide the foundation for the online store, including features, functionality, scalability, and security, and can significantly impact your success and growth potential.

PIM

PIM (Product Information Management) centralizes and streamlines product data management, improving data quality, consistency, and time-to-market. This results in better customer experiences and increased sales.

SEARCH AND MERCHANDISING PLATFORM

AI-powered search and merchandising helps to improve product visibility, and increase the relevance and accuracy of search results. It personalizes the shopping experience, resulting in increased conversion rates and customer satisfaction.

ANALYTICS AND REPORTING, BI (BUSINESS INTELLIGENCE) PLATFORM

In-depth analytics and reporting provide valuable insights into customer behavior, sales performance, and marketing effectiveness. This enables data-driven decision making and continuous improvement

INTEGRATION BETWEEN PLATFORMS AND APIS

All of the right platforms and systems won't help if they are siloed. It is essential to enable seamless connectivity and data synchronization between different systems. This reduces manual work and errors and improves the efficiency and accuracy of your operations.

6



THE IMPORTANCE OF A REPLATFORMING PARTNER

Replatforming is a complex process involving both technical and strategic aspects. Specialist knowledge and expertise is required to plan out and execute the project effectively. Working with an ecommerce agency, to support you in the strategy and take on the development, can significantly improve your chances of success and help you achieve your business goals.

EXPERIENCE WITH B2B ECOMMERCE

Replatforming requires a thorough understanding of the ecommerce platform and its functionality. An ecommerce agency with a proven track record will have the technical expertise and experience to help you select the right platform, migrate your data, and ensure that your store is up and running smoothly.

UNDERSTANDING OF COMPLEX SALES PROCESSES

B2B sales processes are often complex and require personalized attention. Look for an agency with experience in creating custom workflows, automating sales processes, and integrating customer data. They will be able to help streamline online sales so your sales team can focus on building customer relationships.

DATA MIGRATION AND INTEGRATION EXPERTISE

Data migration is a critical component of platform migration, and it is essential to choose an agency with expertise in migrating large volumes of data. Including product information, customer data, and transactional history. The agency should also have expertise in integrating the new platform with existing back-end systems. Ensuring data integrity throughout the migration process.

CUSTOMIZATION

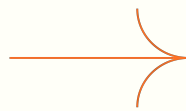
B2B businesses often have specific requirements that differ from B2C ecommerce. Such as customized catalogs, pricing structures, and customer groups. It is important to find a team of developers with the expertise to customize the new ecommerce platform to meet the technical needs of your business.

ONGOING SUPPORT AND MAINTENANCE

While replatforming is a finite project with an end-point, a good ecommerce store will need ongoing maintenance to ensure it remains up-to-date and secure. Consider the cost to your business if there is a problem that halts trade and you do not have an agency ready to step in and fix it immediately. An ecommerce agency can provide ongoing support and maintenance services, such as security updates, software upgrades, or bug fixes. This service helps to ensure that your store operates smoothly.



At Calashock we have been helping merchants to grow their businesses online for over 14 years. We specialize in replatforming and building bespoke websites tailored to the unique requirements of B2B merchants. As one of the first BigCommerce partners, we know the platform inside and out. With unparalleled platform knowledge, our team can build intuitive solutions for even the most complex of business needs.



BOOK A CALL WITH CALASHOCK TODAY

7

THE ROLE OF PIM IN A MIGRATION PLAN

One of the keys to a successful replatform is to opt for new technologies that are more adapted to the needs of your sector and capable of offering flexibility and gradual renewal. However, replacing all of your legacy systems with multiple solutions can continue the issue of siloed management and dispersed data, in addition to high maintenance costs.

When it comes to modifying the systems structure of a business and optimizing internal processes, the solution that has become the B2B technology mainstay is a PIM (Product Information Management). A PIM system acts as a single source of truth for all teams and centralizes all product data management processes.

A PIM solution is the most versatile and customizable option for data management, with a direct impact on the B2B buying experience, profit and growth objectives, and the ROI of the MarTech stack. This agile and cost-effective platform typically offers a fast implementation period, a high level of adaptability to the requirements of each B2B project, and the convenience that the SaaS provider will include new features on a regular basis and with additional technical support, which frees your teams from a heavy workload.

PIM solutions help manufacturers more efficiently manage and organize product data such as descriptions, images, and technical specifications. By using a PIM solution, B2B manufacturers can benefit from the following:

Improved data accuracy

PIM solutions ensure that product data is accurate, consistent, and up-to-date, improving customer confidence and loyalty. B2B catalogs are made up of many complex attributes that pose an added challenge.

83% of B2B buyers prefer to use digital channels, but **33% of B2B transactions** are hindered by difficulties in understanding product information. In addition, **80% of B2B purchasing decisions** are driven by the product experience, so the quality of product information is key in determining the success or failure of a B2B business on the digital shelf. Through a PIM system, it is possible to provide buyers with enriched product data, and complement each product with all the information that today's buyers demand, such as user instructions, CAD data, 3D renderings, augmented reality options, price listings, real-time stock updates, and more.

A PIM provides reliable data that helps B2B buyers make informed purchasing decisions, reducing the rate of returns and exchanges. This saves effort and time for both your team, who can customize product catalogs for each customer or sales channel in a few clicks and for your buyers, who don't need to track untraceable data.

Increased efficiency

PIM solutions automate many manual tasks, such as data loading and validation, which saves time and increases your team's productivity.

Fast response and reaction times are critical in day-to-day B2B projects, where meeting objectives and deadlines require relying on a large and reliable supplier network. PIM systems with PunchOut cXML capabilities enable the creation of purchasing portals between B2B businesses and suppliers, offering a win-win for both parties. Buyers save costs and time, receiving enriched and complete product catalogs, while suppliers get more visibility for their products and greater agility when processing orders.

Enhanced data management

PIM solutions provide a centralized repository for product data, making it easy to manage, update, and maintain over time.

A PIM platform up to the demands of a B2B business will include features such as data quality analysis to detect omissions and errors, mass edits executed in seconds, drag & drop templates, change history and workflows with customizable permissions and validations, DAM for centralization and editing of digital assets such as images, videos, and graphics, instant data syndication on B2B platforms and artificial intelligence support via ChatGPT to automatically generate differentiated content.

Streamlined omnichannel sales

A PIM solution synchronizes product information across all sales channels, including ecommerce websites or platforms, printed catalogs, online marketplaces, and eProcurement platforms, improving the customer experience.

B2B purchases via mobile devices have grown by 250%, as well as with voice assistants and search engines for product queries. With this in mind, it's vital to use a platform that allows for the quick and easy addition of new touchpoints with B2B customers. A PIM system allows you to add automated, pre-configured connections to dozens of B2B channels and portals, always ensuring that the product information shared everywhere is equally consistent, accurate, and up-to-date.

Better product experience and visibility

PIM solutions help improve product visibility by facilitating the distribution of information across multiple channels and platforms.

Personalized shopping experiences increase satisfaction and can be a more impactful influence on customer loyalty than product price, helping you nurture long-term business relationships. It's worth remembering that **89% of B2B customers** would leave a brand after a bad experience. Only through a platform where all product data is unified is it possible to select content tailored to each buyer profile, marketplace or sourcing platform.

In short, migrating to a PIM system unlocks the capabilities B2B companies need to meet changing buyer needs and adapt to the evolving competition. With PIM, you can:



8



HOW B2B BUSINESSES CAN REPLATFORM AND MIGRATE DATA SMOOTHLY

The modern B2B buyer is a tech-savvy, independent operator who wants to feel as autonomous as possible when it comes to all digital transactions. But this buyer also demands more from the process – a more personal buying experience comparable to the biggest names in B2C ecommerce. They demand sites that are speedy, ergonomic, and extensive.

For B2B businesses to adapt and thrive in this market, they need to learn to be more resilient and agile. If they are labored with outdated ecommerce platforms, they could be creating their own barriers to growth and allowing the competition to leave them behind.

Selecting a new B2B ecommerce platform

There's no doubt replatforming is a big undertaking but the B2B ecommerce landscape has shifted in the last decade to become much more streamlined and flexible. Inevitably, there's some disruption during the process but not nearly as much as you might expect.

However, choosing the right B2B ecommerce platform is still a major decision that will impact your future B2B sales so it's vital you really think about your needs. So, what things should you consider before you make your choice?



TYPE OF B2B BUSINESS

First off, what type of business do you run and what needs does it have? For example, a wholesale business that sells primarily in bulk will have different needs to a B2B2C business that has direct contact with the consumer. Consider your needs and if the new platform fulfills them.



INTERFACE

Every ecommerce platform will have a unique user interface that might require a certain amount of coding or developer knowledge. If your team is used to a less complicated and more streamlined platform and doesn't have many computer skills, accessibility is going to be a key concern. If your team is highly skilled, however, they might be better suited to a more comprehensive platform. Choose the platform that's best for your team, not just the one that looks best on paper.

 **ONBOARDING**

The transition from one platform to another is rarely seamless and there are bound to be teething problems. Before making the switch, have a clear onboarding plan for your clients with launch services and training packages that help to ease the process. This will always make the switch faster and less complicated.

 **INTEGRATION**

As a B2B business, you likely already operate on a digital stack or shelf of software solutions that need to be completely in sync to work properly. You don't want to invest time and resources into a new ecommerce platform that's incompatible with all the other software (from CRM to OMS) in your stack. The best solutions can simplify your digital stack and connect all the software in one centralized package that works right off the shelf.

 **FEATURES**

New platforms often offer new features, but you should always balance these new features with the cost of the new platform. You don't want to be paying for all the bells and whistles if you won't be using them. More modern platforms might also provide more opportunities for customization, with more options for bespoke designs, omnichannel sales, and specific features.

 **COST**

The cost will depend on several factors. For example, are you migrating from an on-premises platform to a SaaS cloud-based platform or from one cloud platform to another? Getting a cloud solution up and running from the ground up might prove more expensive in the short term but on-premises platforms also require on-site maintenance so that's one major expense you can remove from your bottom line.

Managing data during replatforming

Perhaps the biggest concern for all businesses when replatforming is what happens to customer data. Security is a major issue here as you'll be transferring some very sensitive first-party data from your old platform to the new one.

Dedicated, SSL-certified security programs can help during the process and might even help increase your SEO ranking. Security is of particular concern if you're migrating to a public cloud as they are more exposed to cyberattacks. Always analyze and structure your security efforts to minimize any risk before starting the data migration.

The other major concern is the process of data migration itself. The ideal solution is to "change platforms without stopping the train," as it were. This means keeping everything functional while information is being moved over, which is something not all solutions can cope with.

Far too many businesses are eager to completely ditch their old platforms, but you must preserve your old platform for as long as possible until you are 100% satisfied that all data has been moved over. This way, even if you've missed something you'll be able to make a new copy rather than setting up new code on the new platform.

There should also be a decent amount of post-migration support with a dedicated team and a clear strategy in place. This should include regular tests, evaluations, and changes, where necessary. SEO should also be considered as switching platforms can interfere with your ranking strategy. This means more than just setting up 301 redirect pages too, it means ensuring your design and performance are as strong (or stronger) on the new platform as it was on the old one.

Essentially, migrating data safely and efficiently all comes down to planning. Any challenges and risks should be discussed, and contingency plans and disaster recovery should also be a part of the conversation. Always prepare for the worst-case scenario, no matter how unlikely it might be.

In conclusion

Ultimately, as a modern B2B business, matching the expectations of your customers and clients (and surpassing them, where possible) is always going to be the desirable outcome. Replatforming can go a long way towards achieving this goal, but it can be intimidating and costly if approached in the wrong way.

By focusing on finding the right platform and making the migration process as safe and painless as possible you should be able to retain and even improve your B2B relationships by offering customers more features, better service, and more consistency across the business.

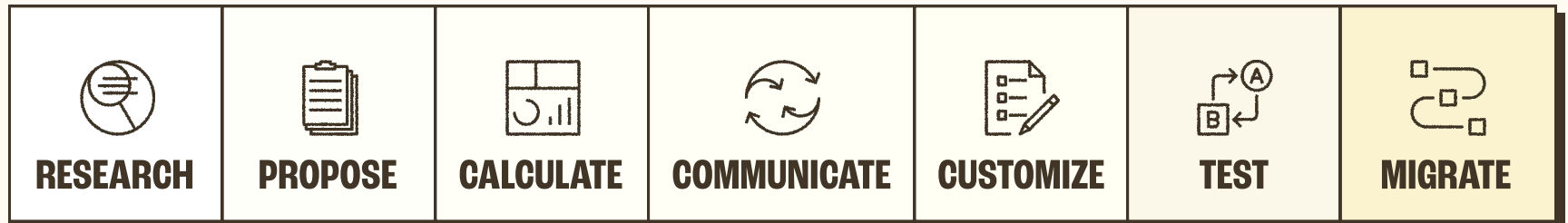
Get in touch with the BigCommerce team to find out more about our B2B commerce solutions.



GET IN TOUCH

9

A PRACTICAL CHECKLIST: STEPS FOR A SUCCESSFUL REPLATFORMING PLAN



1 Identify the right platform for you

Evaluate

- Cost
- Guaranteed average performance
- Scalability
- Functionalities
- UX
- Flexibility and customization
- Security
- Demos
- Support included

2 Perform a financial forecast

Include

- Fixed and variable costs
- Technical costs
- ROI forecast
- TCO forecast



3 Present your plan with an RFP template

It will help you explain to management teams the benefits of migration.

Elaborate

- Audit of costs, performance and issues identified
- Reasons to migrate and goals
- The best option
- Quantification of savings, benefits and expected growth rates
- Risk forecast
- Initial indicative budget
- Competitive analysis
- Benchmarks and KPIs
- Nomination of teams involved
- Project plan and communication channels

4 Report the change to all parties involved

Contact

- IT
- Sales
- Purchasing / Procurement
- Marketing
- Operations
- Logistics
- Customer service
- Finance and accounts
- Executives



5 Look for the perfect partner

Evaluate

- Specialism in your chosen ecommerce platform
- Past Experience and success with B2B merchants
- Understanding of the B2B sales process
- Expertise in data handling and migration
- Specialized platform support for complex implementations or large-volume catalogs
- Technical skills and expertise to meet your specific business needs
- Offer of ongoing support after replatforming

6 Set up a test environment

Test the new platform while maintaining the old one.

- User Interface and User Experience: Does the platform provide an easy-to-use interface for customers and a user-friendly experience? Check for consistency, ease of navigation, and intuitive design.
- Design customization: Can you customize the store to fit your brand?
- Technical customization: Can you build, customize or integrate all of the specific tools you need?
- Integration: Does the platform connect to all of your existing systems?
- Payment Processing: Does the platform support the specific payment types your B2B customers prefer?
- Security: Does the platform provide advanced security features to protect your customer's data and information? Check for security protocols such as SSL, PCI compliance, and two-factor authentication.
- Scalability: Can the platform handle the growth of your business? Check for the ability to handle large volumes of traffic, products, and orders without compromising performance.
- Mobile-compatibility: Check for mobile-friendly design, fast load-times and compatibility with different screen sizes.



7 Transfer all data

Migrate

- Identify your data: Determine what data you want to migrate to the new platform eg. product information, customer data, and transaction history.
- Data mapping: Map your existing data to the new platform's data fields. This ensures that data is transferred accurately and correctly into the new system.
- Backup: Backup your current data before starting the migration process.
- Test the migration process: Perform a test migration to ensure that data is being transferred accurately and without errors.
- Migrate data in stages: Migrate data in stages, starting with the most critical data first, such as product information and customer data. This allows you to ensure that everything is working correctly before moving onto the next stage.
- Test and verify data: After each stage, test and verify the data in the new system to ensure that everything has been migrated correctly.
- Data validation: Validate the data to ensure that the data is accurate, complete, and free from errors.
- Set up integrations: Set up any integrations with third-party systems, such as payment gateways, inventory management systems, and shipping providers.
- Team training: Ensure all team members understand the new platform and how to access and update the data
- When the entire technical team is satisfied and the rest of your teams have been trained on the new platform, make the final migration.

10

MYTHBUSTING IN REPLATFORMING

Insecurity is the main obstacle encountered by B2B companies when considering a change of systems for more effective ones. In many cases, these fears are not real or are based on an exaggeration of the potential risks.

Of course, if your company is less digitally mature or lacks a team specialized in the new platform, it is always possible to call on support partners, at least in the initial phase or during implementation, or as an extension of service and maintenance.

Let's debunk the most common myths linked to replatforming in B2B:

"Migrating my system is going to be very expensive for the company"

Monolithic and legacy systems mean more costs for B2B organizations, while a modern and specialized system means millions of dollars in savings.

FALSE

"We will have to wait months until the migration is ready"

A cloud-based SaaS solution is not only easier to maintain but can guarantee a successful implementation in a few weeks, without disrupting the rhythm of work and sales.

FALSE

"New technologies require more technical preparation"

Vendors more focused on B2B needs offer platforms that are intuitive, easy to use, and do not require complex knowledge or long training.

FALSE

"We will lose customers during or after the change"

Technology truly adapted to B2B brings better experience, more satisfaction, and more loyalty among B2B customers and brands.

FALSE

“Our current platform is deeply integrated with other business tools and applications, so switching to a new platform would cause significant disruption”

If you choose the right ecommerce platform, it will be built for flexibility. It will easily integrate with other tools and applications, minimizing disruption and ensuring a smooth transition.

FALSE

“Our industry has unique requirements, and no ecommerce platform will be able to meet all our needs”

There are specialized B2B systems that are designed to meet the specific needs of B2B industries. And a specialist ecommerce agency can help tailor the system to your specific requirements.

FALSE

“The decision to replatform should only be made by the IT department, as they are the experts”

The decision to migrate should involve key stakeholders from multiple different departments including sales, marketing, and customer service. They will be the ones using the new system on a daily basis and can provide valuable insights into what features and capabilities are needed.

FALSE

“Replatforming is only necessary if there is a major problem with the current platform”

Even if the current platform is functioning well enough, switching to a more modern system can provide new capabilities and features that can help improve efficiency and productivity, and stay ahead of the competition.

FALSE

“Our B2B customers prefer traditional communication methods, and won't use digital systems”

The majority of B2B buyers are now millennials and prefer to use digital platforms. While some B2B customers may prefer traditional communication methods, it will be easy to demonstrate to them the benefits of being able to use an online store to place orders anytime, anywhere without having to contact a salesperson.

FALSE

RAID template to mitigate risks during migration

The best practice is to have a RAID document to make an initial assessment of potential risks during a system migration and be prepared to deal with them without serious consequences for equipment performance and costs to the company.

RAID stands for Risks, Actions, Issues, and Decisions. Using RAID planning is the most effective way to organize all the risks and solutions of a replatforming process.

Note: keep in mind to make a risk scale. The major risks are the ones you should focus on, while there may be minor risks that do not need any kind of response, as their impact is minor and will eventually mitigate on their own.

What should the RAID document include?

- Key areas for potential concerns. Ask your teams for their input
- Scale of all risks, from most to least important
- Priority risks
- Action to be taken in the event of risks
- Action plan if the risk escalates
- Methods of communicating and recording risk status
- Emergency contacts and project managers
- Frequency of risk status reporting

* Sales Layer

GET STARTED FOR FREE NOW

Transform your data into product intelligence



Centralize and manage
millions of product SKUs



Quickest PIM to implement.
Onboard in under 6 weeks



Go-to-Market 4x faster
with PIM

CONTACT US

TRY A FREE DEMO

For further information visit saleslayer.com

 **BIG**COMMERCE

 **calashock**
commerce