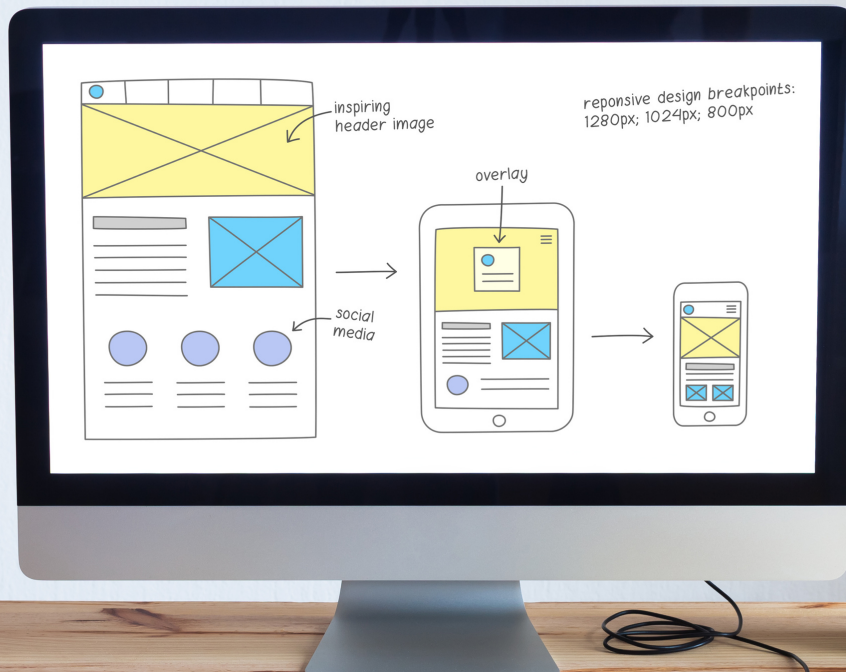


# THE WHO, WHAT, WHEN, WHY AND HOW OF MOVING TO SHOPIFY PLUS

THE KEYS TO A SUCCESSFUL PROJECT



While Shopify Plus is user-friendly and an easy platform setup, there are still important factors to consider ensuring a successful launch of your new site. We will cover factors including design, investment, staffing, and content. In this white paper, we hope to give you an introduction to the resources you will require and how to create a solid plan for your launch. These important aspects take place pre-, during, and after your launch. Our goals is for you and your company to feel confident moving platforms to Shopify Plus.

## WHO NEEDS TO BE INVOLVED IN THE PROJECT?

Platform changes will affect IT, Warehouse, Customer Service, and eCommerce teams. Make sure that roles and responsibilities are clear during the project. Determining who needs to be involved in which decisions upfront will make your project move smoothly and reduce risk of delays. If the right people aren't part of important decisions, you could end up wasting time

and effort on unneeded rework.

When planning, keep in mind not just team skills and responsibilities but also availability. If a key stakeholder is going to go on a two-week vacation right before launch, make sure they have a backup who has been involved and is informed enough to take their place.



## WHO IS GOING TO KEEP YOUR SITE UP, RUNNING & REFRESHED AFTER LAUNCH?

Consider what team members and skills you will have available after launch. It's easy to get so focused on the short-term build project that you lose sight of what happens after go-live. Existing team members will need to do training on the new tool and processes. You may find all your needs are covered with your existing team members, or you may find you need to hire or partner for certain skills.

One of the most commonly outsourced skills is technical development. Your competition will be constantly updating their sites, so your website will need ongoing enhancements to remain current. If you don't have website development skills in-house, you may want to look for a Shopify Plus partner who provides ongoing services versus those who only do builds.





## WHAT NEEDS TO CHANGE & WHAT SHOULD STAY THE SAME?

Most teams focus on the look, feel, and functioning of their eCommerce site when asked this question, but for your project to succeed, you need to think beyond the customer experience. Consider all the surrounding technologies, operational processes and the partners with which you work. Start by making a list of all the partners and systems that touch your website.

You will probably be shocked to see how many affiliates, plug-ins, and third-party providers you work with regularly. Take stock of which ones need to be kept, which ones could potentially change, and which ones must go. Incorporate these partners, or new partner searches, in your overall project timeline to ensure you have everything needed for launch. Realize that some change is unavoidable.

Changing platforms means new site administration tools. This will have ripple effects on site operations – how products are added to the site, how customer service agents find and update orders, and how fulfillment ships orders. By planning with early training and alerts, it will make the transition easier and less jarring for team members.

*“Consider all the surrounding technologies  
and partners with which you work.”*



## WHAT EXISTING CONTENT NEEDS TO BE MOVED TO THE NEW SITE?

**CLEARLY, YOU WILL WANT YOUR PRODUCTS ON YOUR NEW SITE.**

*“Talk to a Shopify Partner or your  
Shopify Launch Engineer”*

Will the product images be the same aspect ratio or are you switching from rectangles to squares? You may want to add additional images or re-shoot current product images – allow time and resources for that effort. What about Customer accounts? If they are stored in an external CRM, make sure that you have integration included in your initial site build plan.

Customer accounts stored in the current website management system can sometimes be moved as a one-time import, but be mindful of security concerns around personally identifiable information (PII). Always remember to keep it private and keep it safe. For either option, you should talk to a Shopify Partner or your Shopify Launch Engineer about what is technically possible as well as what makes sense for your business. In some cases, it's best to simply start fresh on the new site.

Consider what product content you can pull over from your existing site and what you may need to recreate. For example, will you be changing your category structure? If so, allow additional time for your team to re-merchandise.





## WHEN IS THE RIGHT TIME TO REBUILD YOUR WEBSITE?

Well, never and now. It's easy to put off a change like this, because it can seem overwhelming or like too much of an investment. If you find yourself dragging your feet, remember, there is a cost to NOT updating your site. If your current website isn't responsive, you could be losing a significant percentage of sales on mobile devices.

If your site administration tools are clunky or difficult to work with, you could be paying a huge cost in people's time due to the inefficiencies. When figuring out your total cost of ownership, consider benefits beyond 'increased conversion rates'. Operational efficiencies in fulfillment can result in increased customer satisfaction: from quicker shipping, fewer returns and cancels – all of which drive better bottom lines.

While a move like this is an investment in time and money, it's an investment that can yield big returns. Working with the right partner can make the process smoother and get you the most bang for your buck.

*“It's an investment that can yield big returns.”*

## WHEN IS THE WRONG TIME?



While there are no truly great times to re-platform, there are really bad times to make the move. Consider seasonal fluctuations in your business and schedule to avoid your busy seasons. Right after you go live, there will be an adjustment period for your team as their day-to-day operations change and they get comfortable with a new tool. Make sure you have support ready for questions and adjustments.

Shopify Plus clients have access to a Client Success Team Member, who can help answer questions about how to use the Shopify Platform. Leave some buffer time after launch to baseline your site performance metrics before kicking off any major sales or promotions. Keep in mind that many things need to happen right around launch to ensure a smooth migration – and some of those things will involve coordination with other internal teams or outside partners. Before locking in a launch

date, make sure that key partners are available when you need them, and can meet the timeline required for any changes they need to make to support the new initiative. If your site is ready, but your inventory management system hasn't made the needed updates to get you inventory updates, your project is dead in the water. Launch dates are only useful if they can be met by all teams involved.





## WHY IS YOUR COMPANY DOING THIS?

It seems like a simple question, but each company will have a very different answer. For some, it's because of technical issues with current platform or available integration. For others, it's driven by changes needed in the customer experience on the website. Many companies are looking at a combination of operational issues, such as budgets or challenges with eCommerce processes, like fulfillment, or product merchandising.

Project leadership should agree on the primary and secondary goals for this project. It's important to have clarity around the expected outcomes at the highest levels, and ways to measure that success.

Having a clear goal will help drive consensus when decisions need to be made, both before and during your launch.

*It seems like a simple question,  
but each company will have a  
very different answer.*

## WHY IS THIS IMPORTANT TO YOUR TEAMS?



It's important to ensure that you and your team are all on the same page about why you are making the move and what the end goals are, both at the corporate AND departmental level. Having detailed internal discussions with a variety of departments across the company about needs and priorities can be enlightening. You may be surprised at what success looks like from another team's point of view.

The IT department may be primarily concerned about work their overworked team needs to contribute. The marketing team may consider the project a success if they can create new campaigns without needing support from technical resources. Your merchandising and warehouse teams may desperately desire a more efficient process for getting products live on the site and packages out the door.

It's possible to meet all these goals with the right platform and the right partners, but it's not uncommon for there to be some trade-off. For example, perhaps a big efficiency improvement for the warehouse team requires some additional work from the IT department. If everyone involved in the project understands the overarching end goal, they are more willing to do what they can to ensure a successful launch for everyone.





## HOW ARE YOU PLANNING TO GET YOUR NEW SITE UP AND RUNNING?

The biggest decision you need to make about this project is should you DIY or should you work with a partner to build your site. When making this choice, consider your in-house skills and the scope of your project. If you have a low volume site with few products and your technical needs are simple which can all be serviced by existing apps or team members, you could be a good candidate for DIY.

On the other hand, there are many reasons to consider a partner. For example, if you have third party integrations or complex technical needs, you will nearly always be better off with an expert's help.

Building new integrations and setting up the more complex existing apps requires deep technical skills that often aren't found in a standard eCommerce team. Another skill that isn't always available in-house is User Experience and Conversion expertise. These are specialists who can offer vital input into the site design. Even if your technical or design needs aren't complex, you still may benefit greatly from a partner's help.

New site builds can be time intensive and require a lot of additional one-time merchandising, set-up and configuration. Adding this work on top of your business's day to day operations can overwhelm team members, and cause your business to suffer. Having some additional helping hands can be well worth the investment.



## HOW WILL YOU GET THE MOST FROM YOUR INVESTMENT?

*“Don't cut corners where it matters, but don't waste money on things with minimal return.”*

New site builds aren't cheap, but there are ways to make sure you get your money's worth. First, budget smart. Don't cut corners where it matters, but don't waste money on things with minimal return. For example, investing dozens of hours in building a custom cross-sell function, when a \$30 a month app will likely serve the same purpose, may not have the ROI you want. Make sure that you choose your partners carefully. While your friend's cousin who knows some HTML may be inexpensive, hiring cheap is high risk.

Inexperienced resources can quickly get in over their heads when it comes to the complexities of eCommerce, and bad code can result in lost sales. Know that you aren't done when you launch, and plan accordingly. Consider what your plan is for ongoing updates and enhancements. Some partners offer ongoing development and optimization support that can help you continue to add value to your website investment.



## HOW CAN WE HELP?

Moving to Shopify Plus can feel like an insurmountable project. With over 20 years of ecommerce experience and as a certified Shopify Plus Partner, we know how to develop a site that is the best fit for your business.

### **Our experience is your strength.**

We have the technical expertise of a software company and the results-oriented support of a professional service group with over 20 years of experience in ecommerce. We are here to help you understand the gaps in your ecommerce site and how to best solve them. Whether your site needs a rebuild, design changes, or optimizations, we have a wealth of expertise in all aspects.

Find out more at [www.virid.com](http://www.virid.com)

