

TRIBE



Mitigating the risks for successful platform migration

How to maintain Customer Experience
throughout your re-platforming project



Customer Experience is King

Don't let it slip when re-platforming

With escalating customer expectations and rapid changes in technology, online businesses need to deliver better personalisation, improved user experiences and increased engagement across all channels. Sooner or later it's inevitable that your online platform will fall short and the business risks of replacing or upgrading your platform are vast. From the short term impact of reduced conversions and lost revenue to the longer term damage to customer loyalty and adverse PR, it's crucial to avoid re-platforming pitfalls.

It's estimated that 7 out of 10 IT projects fail to meet deadlines and result in unplanned costs. Research with UK retailers shows that ecommerce platforms fail to live up to expectations because ecommerce projects are rushed in 50% of cases and due to budgets and costs in 47% of cases. Moving to a new platform is one of the largest, most complex and stressful undertakings for any online organisation but there's no need to feel intimidated by the dangers.

Whether it's a platform upgrade, a re-platform to a cloud solution like SAP Commerce (formerly Hybris) or Sales Commerce Cloud (Demandware), or the launch of a brand new in-house platform we've experienced it before.

In this eBook we share our experience over the last 15 years, working with the UK's largest brands to reduce the risk and sustain user experience.



Learn for our experience

The most common re-platforming mistakes we see

Planning that omits PWA and future needs

Platform migration projects need to incorporate activities well beyond the launch, in order to develop a solution with the best system and architecture in place, to support future developments when the time arises.

Of course no single solution is likely to encompass all of your desired outcomes and you may end up trading improvements in a few key areas for compromises in others. Assess your needs, define a successful outcome and identify areas in which you're willing to make compromises.

And with technology changing so rapidly your planning need to account for external market developments as well as internal changes. For example ten years ago everybody was replatforming to the ATG platform, a company who having been acquired by Oracle, no longer exist today. And what are the risks to those on IBM Websphere following its' recent sale to India's HCL?

With every product development no matter how big or small, Customer Experience is king - performance testing and monitoring is essential: too many companies add new features but slip back on Customer experience.

Testing the CX performance of new features both before and after they go live and ensuring those new developments don't impact your existing platform performance is essential. We've seen clients successfully develop PWAs for mobile only to fall by the way when integrating the same technology for desktop. Only with testing was it possible to predict the negative impact on the customer experience.



Of course nobody has a crystal ball to predict these outcomes but in our experience organisations often fail to incorporate all business priorities, such as PWA, from the outset of their re-platforming project, costing time and money in the long term. Often, all the resources for effecting a platform migration are channelled into the development and transition stages.

It's important to ensure that processes including usability testing, performance testing and staff training are included in the plan and the budget early on. This will allow any business problems, technical issues or unmet requirements to be identified early in the project when changes are less disruptive and easier to accommodate.

Bolting on CX performance testing at the end of the project

A well-managed platform migration should result in a better online experience, as well as more efficient workflows and – hopefully – a boost to the bottom line in the long run. So, it's important that nothing is left to chance and there's no substitute for real-world performance visibility from your customers' perspective.

A mistake many businesses make is to think of testing as an optional extra bolted on at the end of their re-platforming project. Leaving testing too late into a migration project can prove costly in terms of time and money. Ideally testing is proactive not reactive and should take place at a number of iterations throughout your plan while it's easier to rectify problems. At the very least make sure to load test well before launch, leaving enough time to make changes and test again. It's also important to test after launch, to measure the impact of migration on UX and performance.





Managing migration as 'just an IT project'

CX is crucial to the business but as a non-functional requirement it is often handled poorly compared to the rest of testing, as it goes through Agile teams.

One of the greatest re-platforming dangers many organisations fall into is thinking of platform migration as an IT project. The most successful migrations are those where internal departments and external partners work collaboratively, and in particular business and IT work closely together from the off. At the beginning of a re-platforming project it's crucial to agree a Minimum Viable Product that will maintain CX that is acceptable to both IT and business.

Failing to prioritise customer experience

Concerns over preserving existing workflows can sometimes override the drive to make improvements that ultimately enhance user experience and benefit customers. When considering the migration plan, of course it's important to ask staff how processes could be improved and to suggest ways of incorporating more efficient workflows into the new platform but remember to put your customers' needs firmly at the forefront. It's more important that you ensure customer experience prior to launching and plan to bolt on systems that aren't crucial to customer experience later on.

We all know the old adage - on time, on budget, on spec - but in the real world something has to give just make sure it's not your customer experience!





Top tips for overcoming platform migration dangers

So what can you do to mitigate the risks, protect your online business and ensure a successful re-platforming project? Based on our experience here are our top tips.

1. Unite the tribes

No matter whether your organisation is fully Agile or maybe it's not quite got there yet, clearly communicated CX goals across the business is vital.

So involve all teams IT, Business, Operations, SEO and external partners in your planning process, understand their needs and outline your expectations at the outset. Include development and testing costs in your budget both prior to and beyond launch. You will need to plan for resources and budget after launch, until your new platform is delivering your desired customer experience and staff are up to speed.

Don't overlook business activities in your bid to get to grips with technology planning at the outset. There are many business activities to include in a migration plan including content building, SEO planning, marketing email impact, merchandising and more.

And once your new platform's up and running share performance and customer experience data across the business in a customer-centric language that all teams can understand.





2. Call in the experts - for CX testing that's specialist

When you undertake an unfamiliar task it rarely goes to plan. Call in experts you can trust who do this on daily basis, so your team can spend time growing your business and serving your customers.

Don't be afraid to use multiple niche experts for different aspects of your re-platforming project, for example performance testing or usability testing, and budget for these early on. A single partner often won't adequately cover your needs.

The new site should be tested fully; both load testing to check it will meet demand in the real world and usability testing to ensure customers are happy with the experience. Test before and after launch also help minimise the risks of new usability and the impact on user experience.

Don't get hung up on finding a partner based on platform technology at the risk of overlooking your wider business needs. Once you've researched, reviewed and selected your partners it's important to agree each team member's accountability at the start of the process. And if you need to combine multiple specialist partners make sure you join up the back and front-end teams.





3. Run a scheduled programme of testing to maintain UX

Perhaps the riskiest re-platforming factor is the effect on your customers.

How can you be sure the new platform will meet their needs?

Falling conversions and customers struggling to get to grips with new online journeys are all too common. A migration may well be implemented to enhance the customer experience but how can you be sure that that all aspects of the site such as mobile integration and performance will be improved?

Optimising the performance and resulting user experience of your new platform or upgrade should be a top priority.

Ensuring minimum disruption to daily operations is a key objective for any re-platforming project. The only way to know how your new platform or upgrade will perform is by realistic testing and monitoring before launch, and thoroughly monitoring afterwards to measure the impact of migration on performance. These are not steps to be skipped - it's far better that errors and slowdowns are picked up by your testing than noticed by unhappy customers, venting their frustration on social media.

The only way to know that your new site is ready to roll is via a scheduled programme of nonfunctional requirement CX testing – load testing to ensure it can stand up to the rigours of realworld demand and monitoring to check the user experience is flawless. Give yourself some cold, hard facts to work with throughout the process you don't want to uncover big issues further down the line. Commission a thorough programme of realistic load testing – preferably during staging, and again when you go live, to measure the impact of migration on performance.

You won't be able to measure performance improvements if you don't have an appropriate yardstick. Make early plans to monitor performance of realistic user journeys on your existing platform and also on the new one to make sure you're operating at optimal levels. Testing too late in the day can result in more costly and time consuming fixes and impact end user experience as well as stressing your operations teams.

Once your completely happy with your testing and your platform goes live it's important to continue measuring the performance of key journeys 24/7. If errors do occur it's crucial that they're picked up by specialist monitoring, rather than by frustrated customers.

The only way to truly understand CX performance is to walk in your customers' shoes

To truly understand your CX performance, and which technical issues your end users encounter, it's imperative to test and monitor in a way that behaves like real users, making selections from page content at each stage of the journey, replicating real user behaviour and testing the performance of all aspects of your site. When businesses don't monitor website performance in the same way that users experience a site, errors can go un-noticed leading to abandonment, reduced conversions and directly impacting ROI.

Basing decision on simplified testing tools can be dangerous

With today's site complexities automated testing and self-service tools like JMeter are no longer of value to realistically measure CX. They lack realism and oversimplify testing which can be dangerous; you won't uncover all issues and you'll be relying on inaccurate data when making decisions.

Likewise record and playback approaches and automated, shift left approaches generally lack the sophistication necessary to realistically assess performance and ensure a satisfactory UX.

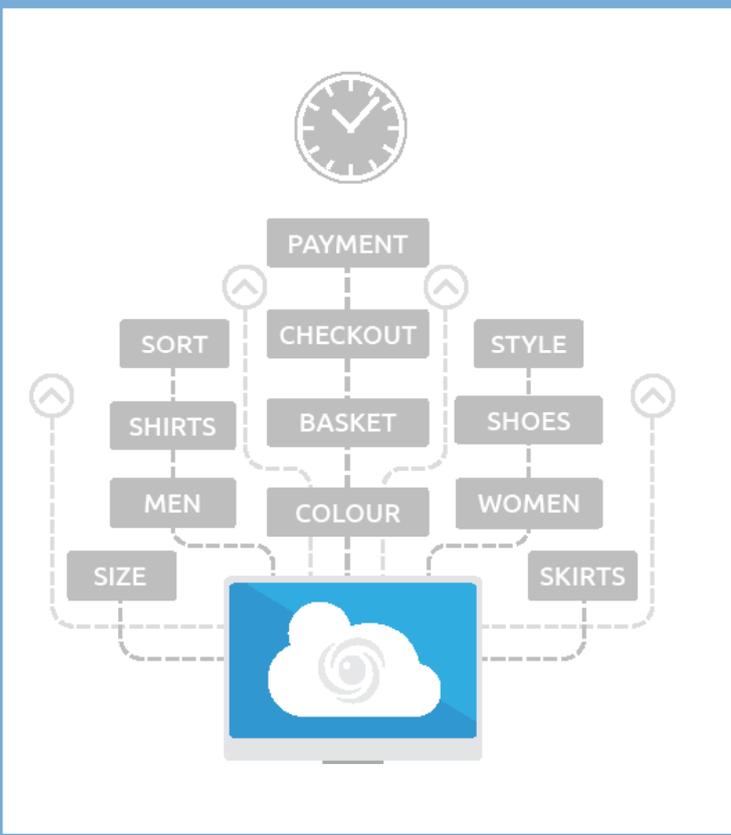
Automated & self-service tools



Your new site may be responsive but don't assume that mobile CX is covered

When it comes to mobile visitors, your new site may be responsive but for a true picture of your mobile CX, you must carry out monitoring that runs on the same real iOS and Android browsers as your customers use.

Anything less could leave you blind to the true CX and the performance of page elements 24/7.

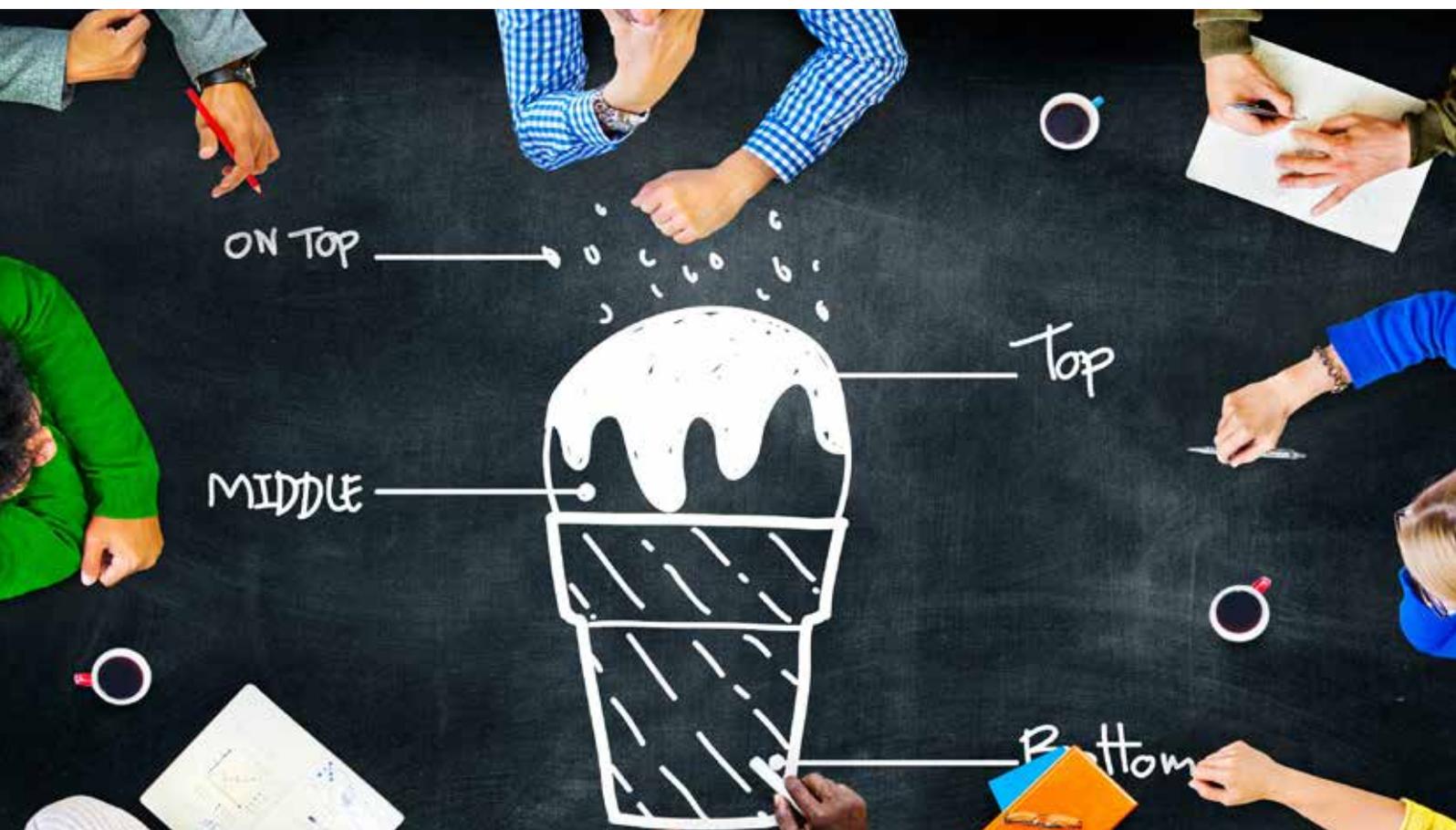


4. Don't overlook the front-end or middleware

Don't ignore the front-end in the rush to get the back-end working perfectly. If you're planning PWA for the front, great but keep it in focus. It's the visible face of your website.

With today's reliance on APIs and the move to a microservices architecture, your middleware is also critical. Middle software such as Mulesoft acts as a layer dedicated managing your APIs. Although the advantage of microservices is separating interconnectivity the architecture can also introduce weaknesses where systems join together. If any of the back-end, middleware or front-end is overlooked, you may be missing out on isolating a problem. With these multiple layers of complexity the only way to be sure your technology isn't damaging the user experience is to test and monitor your online customer experience 24/7.

One large UK retailer had a perfect back end - fast and error free, but left their customers with a sluggish website, through taking their eye off the middleware complexity and failing to measure pre and post launch from the front.





About Tribe

Our portfolio of “dynamic user journey” based synthetic monitoring and load testing services enable business wide understanding of the impact of online performance on user experience and the bottom line.

With over 15 years performance testing experience, helping clients such as Debenhams, Boden, Joules and Dixons to maximise user experience and protect their brand, our highly experienced team of test professionals help clients implement monitoring programmes and proactively oversee testing; automatically updating journeys as a website changes, highlighting performance issues and helping clients quickly pinpoint root causes - saving time and money.



To find out how Tribe can help you implement the best monitoring or load testing programme to suit your organisation please contact us on 01227 768276 or visit our website at www.thinktribe.com

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Together for better digital journeys