



Transforming Commerce: How to Navigate Vendor Selection for Ultimate Success.

Tips for Navigating a Replatform Project

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Tips for Navigating a Replatform Project

Embarking on a commerce replatforming project can be overwhelming. In a quest to turn your objectives into technology that propels business growth, you may be left thinking that every vendor sounds the same.

How do you cut through the noise to avoid unexpected outcomes?

The key is to understand how vendors will deliver the core of your needs and provide a platform for your future innovation and growth.

Focus on your organization's absolutes, and then understand each vendor's capabilities and strategies to help set the framework of what you can expect today and moving forward.

In this guide, we'll help you ask the right questions to avoid over-analyzing RFP responses and make the best selection for your organization.

To meet ever-rising customer expectations, 57% of retail digital business decision-makers have made the painful decision to replatform their eCommerce system within the next 18 months.¹

How do you ensure that you're buying the right solution for your specific business needs?

The Prep Work

40% of CIOs state that unclear objectives are a primary reason that IT projects fail,² but some basic principles can help you keep the selection process on track. One is to work with business and IT stakeholders to build out clear objectives and goals from the very beginning stages.

Clear objectives should include a blend of absolute and 'nice-to-have' business and tactical platform needs. Some of these guiding principles include:

¹Forrester Research, *Best Practices For Commerce Platform Migration*, Bruce Eppinger, March 2018

²[The Harvey Nash / KPMG Survey, 2018](#)

1. Articulate your vision and strategy

Outside of today's requirements, think about where you want your business to be headed. How should your customer experience strategy evolve? Innovation takes on many forms: acquisitions, organizational transformations, shifting business models, new market entries, product diversification and so on. To be successful when the customer experience is constantly shifting requires a forward-looking view of the next 3 to 5 years.

During the consumer and business transformation itself, the flexibility of the platform is critical. Throughout the evaluation, determine if the platform can handle multiple business models, enables the rapid roll-out of new capabilities, and is modern enough to scale for aggressive growth.

2. Fulfill the end-to-end customer experience

Understanding how the commerce platform fits into your specific ecosystem from both a business and technical integration perspective should be at the heart of your evaluation.

As you know, end-to-end customer experience requires more than just an eCommerce platform; it requires an ecosystem of applications that are either interconnected or can be easily tied together through web services. Be sure your greater organization has alignment on the overarching purchase and ecosystem strategy. Begin the evaluation by asking if you are looking for an ecosystem of complementary applications, or if you are buying a point solution to integrate with a collection of existing third-party solutions.

3. Visibility guides budget and prioritization

Begin by determining a ballpark budget for the must-haves: annual platform fees, solution implementation, and any design agency work. Consider if you will need to evaluate adjacent systems. Implementation projects can be plagued by prioritization and budgeting missteps when eCommerce projects include broader needs, such as order management, content, front-end technologies, PaaS, and others.

4. Build a complete, prioritized requirements list

Every business has their own set of circumstances, pain points, and triggers for starting a commerce platform evaluation. Relentlessly focus on the main priorities of the solution: it's where most replatforming mishaps can be avoided. Ensure that business and IT stakeholders influence the main priority, and contribute to a comprehensive requirements list. Prioritized requirements should include absolute needs, nice-to-have features, features in line with Y1, Y2, and Y3 business objectives, and any wish-list items requiring extra budget or partner work if possible. *(Specific platform questions are listed in Section Two).*

5. Evaluate your existing tools

Getting input from the business and IT on what they like and what's lacking from current tools is critical to understand what has worked in the past and what's needed. Keep skill levels in mind when evaluating platforms. Continually revisit how business users will use each of the evaluated platform tools, and if developers will need to acquire any new skillsets.

6. Evaluate your current site and compare to others'

Replatforming is a great opportunity to look at your site with fresh eyes. What do you like about your site experience? What would you change? Are there some characteristics of other sites that you like that you would want to consider for your own? Have your customers or partners voiced any suggestions for improvements? It's important to consider consumer feedback on the usability of your site and the end-to-end fulfillment experience.

7. Create a short list of vendor options

If you've been in the eCommerce industry, you likely know which platform vendors are of interest – but keep in mind this space is changing rapidly. An excellent place to start is looking at the latest third-party analyst reports that rank vendors based on product capabilities, strategy, and conversations with their customers. For example, the [Gartner Magic Quadrant for Digital Commerce](#)³ and the [Gartner Critical Capabilities Report](#)⁴ are both good places to start.



³Gartner, *Magic Quadrant for Digital Commerce*, June 2018

⁴Gartner *Critical Capabilities for Digital Commerce*



Questions to Ask During your Vendor Evaluation

Fully understanding TCO

Budgets are always a part of the evaluation process. Be sure to build out the full picture of what your annual costs will be; from there, you can begin to understand the differences between vendors especially if your evaluating cloud, hosted and SaaS technologies.

Include variable budget figures such as network traffic costs and forecasted revenue growth. If you are looking at revenue share models and your business has a high rate of returns, including the impact of GMV vs. NMV.

Look at subscription + hosting + 3rd party services + upgrade costs + developer costs + implementation + ongoing partner costs to calculate TCO.

Ask:

- What is your pricing model?
- What's included in my subscription?
- Can you model what my costs will be Y1 - Y5? Are those in line with our growth goals?
- Do you have minimums?
- Are there penalties?
- Will fees change? If so, by how much?
- How do I gain visibility to potential costs?
- What features do your customers augment with other vendors?
- What does a typical deployment cost?
- What does your average customer pay on an annual basis?
- What is the model for ongoing partner involvement?
- What comes included with the subscription concerning R&D and support?



Understanding architecture and future strategy

Getting to the core of the platform: Understanding the architecture of each platform and how it was built will directly impact what you as a merchant can do. Platforms and the supporting infrastructure are designed in precise ways; any changes made are typically large-scale projects that require vendors to make significant investments. Modern technology is critical –narrow in on platforms that use the latest technologies which can scale for enterprise and customer demands.

Ask:

- When was your platform built?
- What is the architecture model?
- Are there any plans to rearchitect?
- Is your platform API-first / fully API enabled?
- Are APIs available for all commerce functionality? Describe any platform functionality not exposed via API natively.
- Do you leverage REST Web Services to more easily integrate into other systems?
- Is your platform mobile-first? Is it fully Responsive and Adaptive, or does mobile require an additional project?
- Does the platform leverage any proprietary languages?
- Does IT need to know any special development or scripting language to use the platform?
- How have you handled acquiring/being acquired by different technologies?
- Can you handle multiple, distinct business models? (i.e., B2C, B2B, etc.)



Product vs. “Product”: What lies beneath the demo

Demos are a necessary part of the sales process, meant to showcase the product features in an honest, yet extremely favorable light. While a great demo certainly speaks to the best-case possibilities of a platform, it's important to separate what is possible and what is feasible in your own organization. Be sure to discuss with your sales contact all the scenarios showcased in the demo and have them walk through what's likely within your organization given your current situation.

To deliver sustainable experiences that are within your budget, you will want a full understanding of what is productized out-of-the-box and what required by a third-party implementer effort. While virtually every commerce site requires some custom work, understanding budget implications and the realities of supporting desired features is critical to a successful project.

Ask:

- What in this demo is “product” and what requires extra implementation work?
- If extra work is required, what are the additional costs we should expect?
- Is it possible to see a demonstration of how the solution is managed within your UI?
- Is there a feature list of what comes out-of-the-box?
- How long are typical implementations?
- What is the breakdown of out-of-the-box vs. custom work for most customers?
- Do you offer commerce as a standalone or do you support other touchpoints? (i.e., stores, call centers, pop-up shops, field, etc.)

Where the rubber hits the road

It's important to understand how the product will work outside of a controlled demo. To achieve full transparency of how each platform will work within your organization, ask for a series of flows of how to complete critical daily tasks.

Merchandisers, category owners, and other business leaders need to be more agile and take control over day-to-day tasks to achieve future success. Developers need more ability to innovate and build differentiating experiences, moving beyond the basic daily updates and bug fixes. Ask business and IT stakeholders to make lists of critical daily tasks, including some nice-to-have wish-list capabilities.

Ask:

- What do your out-of-the-box tools look like?
- Can a business user make visual changes without involving IT?
- Is there a drag-and-drop interface to make updates quickly and easily?
- Can we update and preview the entire experience in one view?
- Do we have to go into multiple UIs to manage the site?
- How to create, edit, and publish a page – whether it be a homepage, PDP, or checkout page?
- Which pages can be created or performed by the business user without IT or developer involvement?
- What is the handoff between IT and the business? Who can do what?
- To walk through business user workflows.
- To walk through Developer workflows.

“Creating a unique eCommerce experience may require custom coding. However, the bottom line is that your new commerce platform must let business users easily innovate, iterate, test, and generally control the customer experience.” – Forrester⁵

⁵Forrester Research, *Best Practices For Commerce Platform Migration*, Bruce Eppinger, March 2018

Integrations: Merging with the rest of your ecosystem

One of the most critical elements of an evaluation is how the new platform will integrate into your existing technology stack – and the ability to connect to future solutions.

Ask:

- What framework is used to integrate with other systems?
- Would engaging a partner be required to build integrations?
- Is there the ability to create integrations between commerce and other systems via low or no code integrations (i.e., drag and drop)?
- What integrations to other systems come out-of-the-box?
- Can we reuse integrations across sites, business models or touchpoints? This will be relevant whether it be across multiple international or brand sites, across B2C and B2B, across store and call center technologies.
- Are Cloud Services (IaaS, PaaS) offered to help manage integrations, testing, and development – or are third-party applications like AWS or Microsoft Azure required?
- What is the standard time and cost for core standard integrations? (i.e., integration to order management, ERP, content repositories, etc.)

Flexibility: Understand your implementation options

Your platform needs to be flexible. Many merchants are looking to simplify and modernize their stacks and processes by purchasing an all-in-one platform, while others with larger development teams and mature stacks go with a headless commerce model to avoid a total replatform. The reality is that no matter what approach you take, you'll want a platform that can be run in a variety of ways to anticipate change ahead.

Ask:

- Can your platform be deployed in a number of ways?
- Does your platform have the APIs and REST web services in place to support a headless architecture?
- Is there flexibility to choose front-end tools or external experience tools?

How are product updates done?

Be sure to receive new features and functions quickly to meet ever-evolving business and customer experience needs. Most commerce platforms are feature-rich, and still continually release new functionality with each of their new releases. The challenge is for businesses to understand the nuances of how these features are prioritized and delivered.

An understanding of how updates are delivered is critical, as is the overall vendor roadmap and strategy. Another consideration is to understand the vendor's target audience and industry focus because the depth of features and functions will vary depending on these. Most vendors offer similar core features, but differences come from the depth of functionality as well as their future roadmap.

Ask:

- What is your upgrade model? (i.e., automatic/push, or pull)
- Where is the solution hosted/deployed? Do you use your own datacenters?
- What is involved with taking an upgrade? What are the time and cost?
- Is partner involvement required to make upgrades?
- How many upgrades are delivered a year?
- What types of features and functions are being released with each upgrade? Can we see examples from the last 12 months?
- How does the platform support updates without impacting front-end customizations, backend extensions, or integrations?
- Are there limits on what we can customize? Will we face rollbacks for heavy customization?
- What is your roadmap?
- What drives roadmap prioritization?
- What verticals and business models do you support?

Activating revenue streams: Scaling and expanding

In the ultra-competitive world of commerce, many firms are looking to activate new growth engines and revenue streams. Further, expanding to different regions, adding brands, testing markets, and entering / modernizing different business models may be part of your evolving strategy. Be sure the platforms you're evaluating can support growth – wherever it may come from.

Ask:

- How does the platform support international expansion?
- How many languages and currencies does it support out-of-the-box? (both in tooling and in storefront capabilities)
Does the platform have multisite?
- Can you run multiple sites off of a single instance of the platform?
- Can central or distributed teams control the unique look and feel of their site and content?
- Can multiple sites reuse content, assets, and integrations?
- Can your platform natively support multiple business models? Such as B2C for direct to consumer, B2B for wholesale distribution or custom contracts, support to stand up new channels like pop-up stores, brick and mortar stores, field sales, etc.
- Are B2B and B2C supported in a single platform with a single UI and single pricing model?
- Can B2B and B2C leverage the same integrations, content, and data – with bespoke site experiences?

Support, implementation, and success

The sale is finalized, now should begin a strong, partner-like relationship with your vendor. This includes support for implementation, feedback sessions with product management, and community forums. If you want a direct communication line to your vendor, ask the right questions to understand if you're just buying a software product or a solution that's backed by a service-oriented organization.

Ask:

- Do you offer an in-house option for implementations, or only rely on third-party partners?
- How will product development support our implementation and go live?
- How are roadmap requests managed?
- How is customer success managed?
- Do you have user events and advisory boards?
- How do we know what's coming in each release?



Critical Features to Focus On

While most mature commerce solutions include core functionality, you'll want to understand the nuances and how each will impact your business. When it comes to understanding the critical features of your commerce platform, dig a level deeper to gain full visibility – and to avoid surprises.

Here are some areas to focus on:

IT tools / UI: What's available to empower developers to impact business results directly.

- What skills / languages do developers need to work with the platform?
- Describe the technology and frameworks used to develop the front-end storefront experience.
- Are APIs documented? Ask to review the documentation.
- Do developers have direct access to HTML / CSS?
- How can IT help set the business up for success, so they can focus on innovation and greater impact?
- Does your system expose all application functionality via REST APIs and web hooks? Describe any platform functionality not exposed via API natively.
- Is your platform part of a Cloud Services ecosystem? Do you offer PaaS, IaaS, and other services to develop and test faster?
- How can you help streamline the integrations process?
- Show us how to add a feature to the experience (i.e., user reviews, Instagram, video service, etc.).
- Show us how we can integrate with other applications / systems (i.e., order management, inventory, marketing, loyalty, etc.).

Business user tools / UI: Understand what interface that non-technical users will use to perform their tasks, ensuring they will have the daily autonomy outside of IT.

- Is there a single unified console / UI to manage the site?
- Is there the ability for business users to control and create all storefront pages and layouts via drag and drop?
- Can we update and preview the entire experience in one view?
- Do we have to go into multiple UIs to manage the site?
- Show me how to create, edit, and publish a page, whether it be a homepage, PDP, or checkout page. Which ones can be performed by the business without IT or developer involvement?
- What is the handoff between IT and the business? Who can do what?
- Do you have the ability for business users to create viewport-specific mobile layouts without coding?
- Is there an ability to restrict what content pieces can be used per layout?
- Walk us through our business user workflows.

Select a platform that empowers business users with tools that allow them to independently and flexibly create and deliver a world-class customer experience.
–Forrester⁶

Search: Understand how to manage and scale search experiences to accelerate sales.

- Is search configuration a business or IT exercise?
- How do you manage variations / permutations?
- What is the maximum number of permutations your search supports?
- How can we manage URLs?
- Do you offer out-of-the-box support for standard search needs? What are they?
- How do you support custom attributes? Can you do it for specific categories?
- How do you make a searchable term into a navigation filter / facet?
- Does your search leverage AI? How?
- Can we bias search results by statistical input? (i.e., ratings, margin, inventory, popularity, etc.)



⁶Forrester Research, *Best Practices For Commerce Platform Migration*, Bruce Eppinger, March 2018

Catalog Management: Invest in a platform that makes it easy to manage your products.

- What are the options for importing my catalog?
- Are there visual tools to see how catalog will be laid out?
- Is there embedded search to easily find what we need in the catalog?
- Can business users manage product types, custom attributes, variants?
- Can we create SKU properties at the base or custom product type level?
- Can we create SKU bundles?
- Do you support managing location-based inventory?
- Is there support for Add-on Products: additional features shoppers can select and add to cart, such as monogramming, product customization, or gift wrap?
- Does your platform support pre-order and back order?
- Can we manage list, sale, and VAT-inclusive pricing?
- Could we leverage external pricing, if desired?

AI: Understand how AI is used to drive real business results.

- Are AI features included as an option?
- What data sources drive your AI?
- What elements of the experience can be driven with AI?
- Do you have controls so business users have oversight over the AI algorithm and what is shown?
- Can we use our own data in conjunction with your AI?
- Does your platform have insights that report results that AI is delivering?

Personalization: Learn how you could deliver 1:1 experiences at scale.

- What personalization features are available and which are native to the platform?
- What is the best way to set up personalization
- List all criteria that can be used to define a segment or group.
- What can be personalized? Examples: content, layout, search results, promotions, merchandising, etc.
- Is there the ability to show different content to shoppers in different segments or groups?
- Do you support the ability to create a promotion segment or group?
- Can we run custom AB tests by segment or group?
- Can we get reports by segment or group?
- Do recommendations come included?
- Do we have control over what is recommended?

AB testing: Determine if there is robust AB testing native to the product.

- Does your platform have native AB testing or is a third-party required?
- Can we test functional site elements in addition to cosmetic ones? Examples: test layouts, checkout flow, conversion of content, etc.
- Can we set up custom goals?
- Can you AB test all components of the site experience?
- Is there a separate UI for AB testing?
- Can we target AB tests to specific audiences or segments?
- Can we see real-time progress of tests?
- Can we get reports on test results?

Content: Understand your options for creating inspiring content.

- Are there native content creation capabilities in the platform?
- Can the platform integrate with external content sources if desired? How?
- Does image scaling come with the platform?
- Can a single image be automatically resized for all needs? For example, thumbnail, large zoom, search results, mobile, etc.
- Can you centrally manage all content in the same tool as the rest of the experience? Can it be previewed together?
- Do you have scheduled publishing? Recurring publishing?
- Can we use a single piece of content across multiple layouts/pages in a single site?
- Could we manage a single piece of content as multiple components? For example, Heading, Sub Heading, Body, Image - and give business users the ability to choose which components should be rendered within the site experience?
- Is there the ability to use a single piece of content across multiple channels such as web, in-store, print, email, augmented reality?

Multisite: Does the platform support expansion?

- Does the platform have multisite?
- Can you run multiple sites off of a single instance of the platform?
- How does the platform support international expansion?
- How many languages and currencies could it support out-of-the-box - both in tooling and in storefront capabilities?
- Can central or distributed teams control the unique look and feel of their site and content?
- Can multiple sites reuse content, assets and integrations?
- Can sites share or customize catalogs, pricing, content, layouts, settings, and promotions?
- Can teams manage their own site personalization, search, and SEO strategies?
- Can we use a single piece of content across multiple sites?

Payments: Ensure easy support of a wide variety of payment options.

- Do you have out-of-the-box integrations with leading payment gateways? Which ones?
- Are there payment options for type or methods? How do we use APIs to set payment options up?
- Can you support various international payment needs? For example, cash currencies, VAT, etc.
- Do you have out-of-the-box integrations with leading tax providers? Which ones?
- Do you support custom payment terms for business purchasing such as invoice, P.O., net terms, etc.?
- Do you support payments in loyalty points? Or even mixed points and currency?

B2B-specific features: Understand capabilities to modernize B2B transactions

- Can your platform natively support multiple business models? For example, B2C for direct to consumer, B2B for wholesale distribution or custom contracts, support to stand up new channels like pop-up stores, brick and mortar stores, field sales, etc.
- Are B2B and B2C in a single platform with a single UI and single pricing model?
- Can B2B and B2C leverage the same integrations, content, and data – with bespoke site experiences?
- What is included in B2B account management?
- Can you support account-specific custom catalogs? Pricing? Bulk / volume pricing? Payment terms?
- Could your business support punch-out to integrate into a buyer's procurement system?
- Could you support account hierarchies and account hierarchy reporting?
- Is there delegated administration? Support for custom order approval workflows?
- Can you enable reordering?
- Can you support configure, price, quote?

Promotions: Are there flexible options for delivering and accepting promotions?

- How many out-of-the-box promotions templates are included? What are they?
- Is there the option to create unique promotions?
- Do you support batch coupons?
- Do you support tiered offers?
- Do shoppers need a code for every promotion?
- Is there support for stacking rules?
- Can we leverage single-use coupons?
- Can we issue promotions specific to segments / groups?
- Can that platform accept promotions from an external source?
- Is it possible to support promotions by credit card type?
- Can we clone promotions?

In-store capabilities: How does each vendor bridge the digital-store experience?

- Is there support for an in-store element...if required?
- What in-store shopping journeys are supported?
- Can your platform support new models such as pop-up stores?
- Can employees see a unified shopper's omnichannel order history, profile, and persistent cart?
- Do associates have the ability to find items and purchase for the customer? For example, an endless aisle, line-busting checkout, etc.
- Is there support for processing returns?
- Can associates see which segments or groups the shopper belongs?
- Does the platform support enabling associates with personalized recommendations to shoppers?

Call Center: How does the platform work to make customer service seamless?

- Is customer service part of the platform?
- Do call center agents have a 360view of cross-channel shopper behavior?
- Can agents access the customer shopping carts and profiles?
- Can agents create, edit, and delete orders, and initiate returns and refunds?
- Do you have support for customer-initiated returns?
- Can agents assist with completion of orders initiated in other channels?
- Can agents help shoppers reset passwords?





Conclusion

Throughout the replatforming process, business and IT leaders must manage requirements within the context of business value.⁷ Begin with your organization's absolutes, and then understand each vendor's capabilities and strategy to help set the framework of what you can expect today and into the future.

Your new platform should help you meet the core business objectives, whether those objectives be agility, cost savings, experience control, brand differentiation. Going forward, the new platform should offer innovation keeping you a step ahead of consumer expectations, and competitors for years to come.

⁷Forrester Research, *Best Practices For Commerce Platform Migration*, Bruce Eppinger, March 2018

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