

THE ROAD TO REPLATFORMING

A STEP-BY-STEP GUIDE TO TACKLING
YOUR NEW WEBSITE PROJECT

twentysix



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Glossary of terms

Technology Platform: *The website platform software*

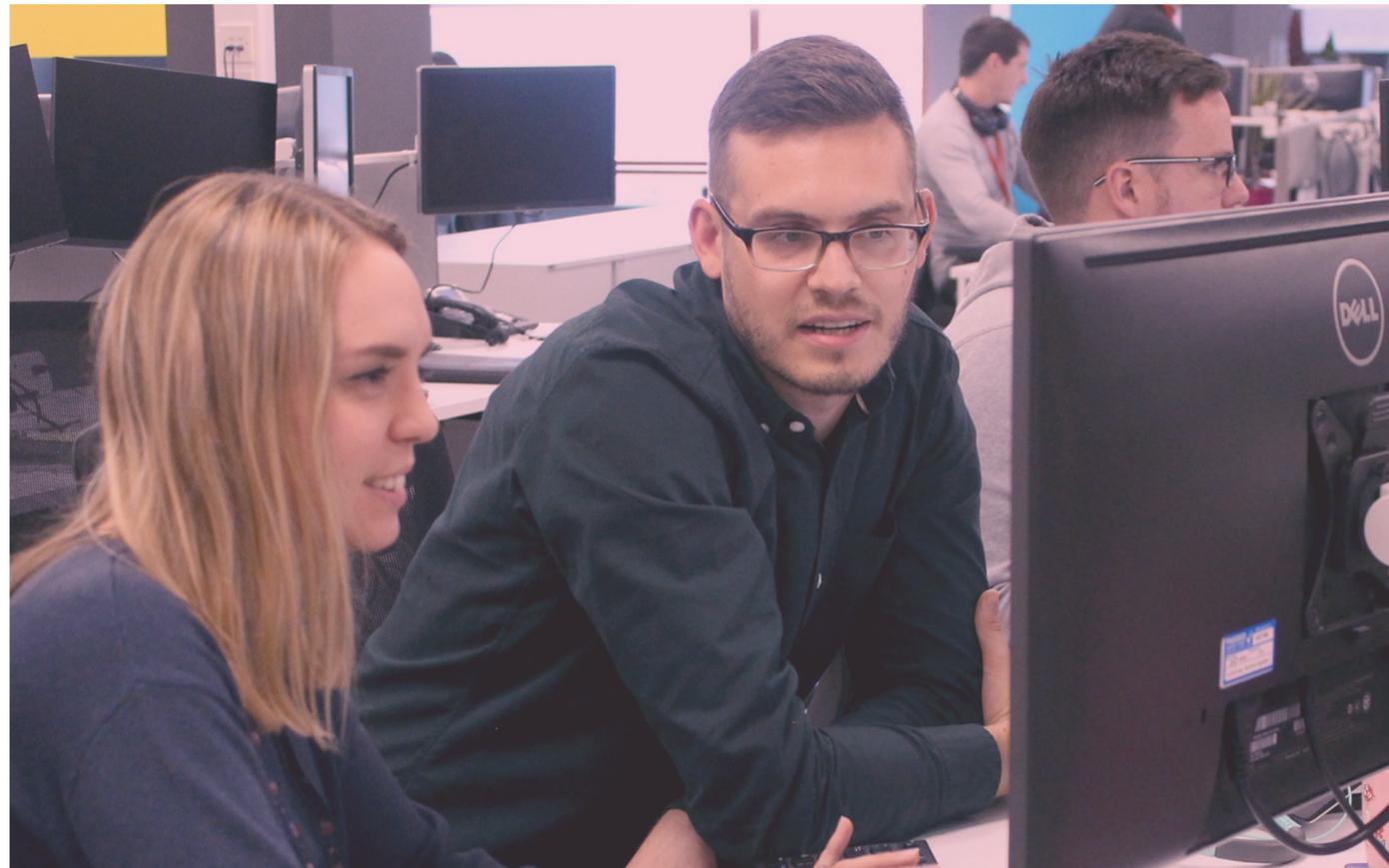
Technology Partner: *The website platform software provider*

Implementation Partner: *The agency enlisted to build the website for the client using the technology platform*

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INTRODUCTION

The decision to design and build a new website on a brand-new platform is a huge one, and not to be taken lightly. Whether replatforming is an absolute necessity for your business, or you're making a conscious decision to level-up your marketing efforts, a new website is an exciting opportunity to enhance both your digital presence and customer experience.



WHERE DO I START?

Knowing where to start with a replatforming project can be overwhelming. That's why [twentysix](#) and [Optimizely](#) have joined forces to bring you this 4-step guide to kick-starting your website replatforming project. This guide contains tried and tested tips from the brains of replatforming experts and helpful advice from brand-side marketers who've recently completed a replatforming project.

Optimizely is a Leader in [Gartner's 2021 Magic Quadrant of Digital Experience Platforms](#), providing award-winning content management, ecommerce and optimisation capabilities within one, single platform.

[twentysix](#) is a UK-based digital agency specialising in user experience (UX), development and performance marketing. As a trusted [Optimizely Platinum Partner](#), [twentysix](#) is the Implementation Partner of choice for many businesses wanting to enhance their digital and customer experiences.

ROADMAP OVERVIEW

The biggest hurdle to replatforming is knowing where to start and how to get the wheels in motion. Based on our experiences with the many brands we've worked with, we've identified the four core steps it takes to get your website replatforming project off the ground. We call this the replatforming roadmap.

UNDERSTANDING YOUR REQUIREMENTS

In the first step, we seek to guide you through a number of requirements gathering exercises designed to help you understand what you really need from your new website. We will discuss everything from identifying your true business, marketing and customer needs, to building your business case based on predicted ROI.

1

CRAFTING THE BRIEF

In this section, we will help you prioritise your website requirements (including technical and platform considerations) to form an official brief for any potential Technology or Implementation Partners. Here we offer guidance on how to qualify partners and shed light on the process around RFIs and RFPs.

2

CHOOSING A PARTNER

Selecting an Implementation Partner to bring your new website to life is a crucial part in the replatforming journey. In Step 3, we share tips on what you should really be looking for in a Partner and discuss the importance and value of building long-term partnerships.

3

ENGAGEMENT & KICK-OFF

The final step of this guide marks the kick-off stage of your new website project. We prepare you with advice on engaging with your chosen Partners to help guide you through the day-to-day running of your project. We speak to several experts who have overseen large-scale website projects to get valuable insights from their experiences that you can learn from along the way.

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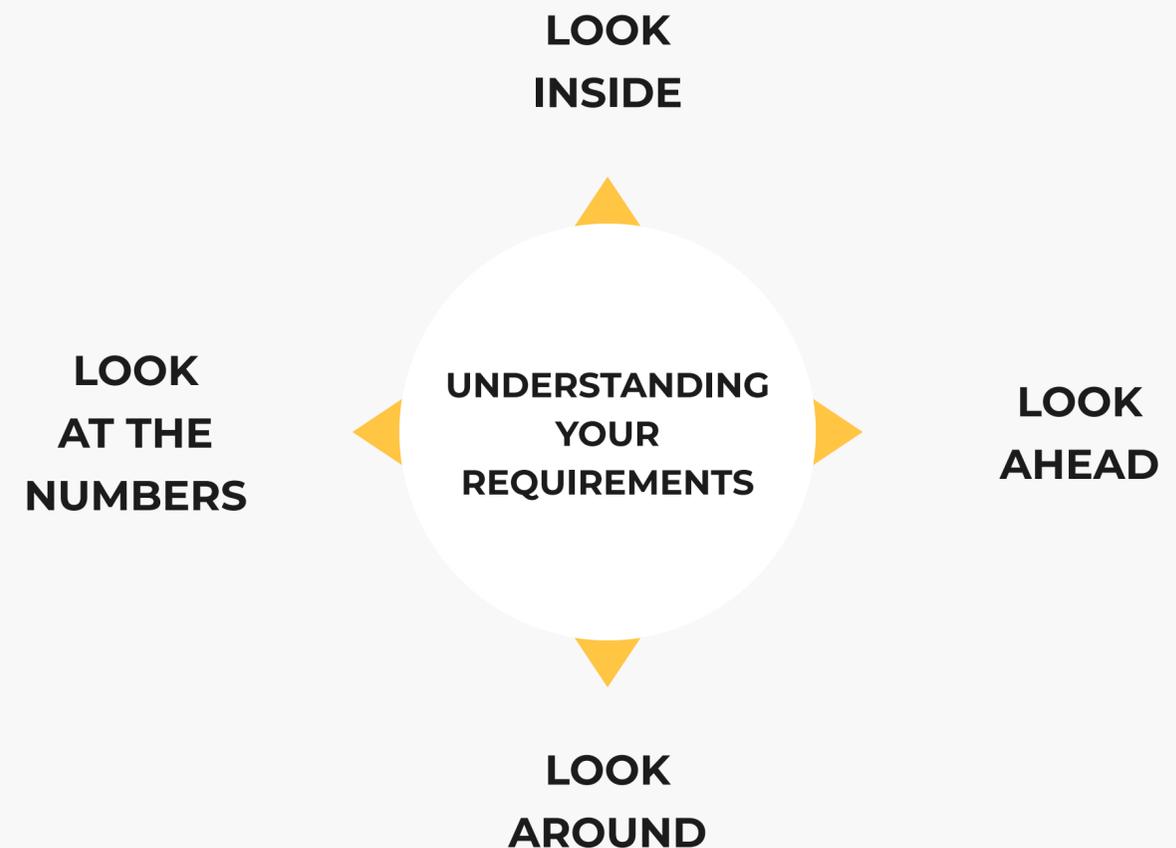
**UNDERSTANDING
YOUR REQUIREMENTS**

UNDERSTANDING YOUR REQUIREMENTS

To ensure your investment in a new site is worthwhile, you must firstly understand and prioritise your full requirements. Organisations interested in replatforming will often reach out to their agency of choice early on for support with these initial steps. We support businesses with stakeholder and user research, sector insights and technical analysis to help brands better understand their needs. Although time consuming, it is better to consider your full requirements upfront before the project begins.

You'll gather key insights by looking inside your organisation, speaking to key teams and exploring what your data tells you. But don't forget that a 360 view involves looking at the digital landscape more broadly and taking note of trends and innovations. Crucially, you'll also need to look around at what your customers want from your organisation/website and what brands competing for their attention are doing. This section of our guide will help you plan the requirements gathering process.

01



LOOK INSIDE

Looking inside your organisation is a great place to start gathering requirements. You'll have your own thoughts of course, but so will the teams around you including any departments that interface with your website sales or service fulfilment process.

ORGANISING & PRIORITISING REQUIREMENTS

A key thing to consider is that digital is an evolving landscape and many people that you speak with will suggest significant change or ambitious requirements. Your new website is the start of your digital journey and it may be that you can't give everyone everything they need in phase 1. We recommend that you use this exercise to build a roadmap for ongoing development too.

DECIDE ON A FRAMEWORK

Engaging with multiple stakeholders and wider research requires an objective framework so that structured decisions can be made and justified. There are a number of frameworks out there to help you capture and assess your findings and it's worthwhile considering a digital maturity model.

DIGITAL MATURITY MODELS

These types of models support a future facing approach to requirements gathering, helping businesses plot their current performance and where their organisation is on their digital journey. They can also be a helpful tool in assessing future potential, as well as assessing where your competitors are performing too. You will need to adapt the model to your organisation to ensure relevancy, but models such as the one designed by Optimizely are readily available online.

Optimizely's [Digital Maturity Report](#) provides guidance on how you can assess your current digital positioning before planning a methodical approach to increasing digital maturity and improving customer experiences and operations over time. Crucially, Optimizely points out that whilst these models can spark digital transformation within an organisation, you should be selective on what to improve now and use your roadmap to tackle wider opportunities in a structured approach.

LOOK INSIDE

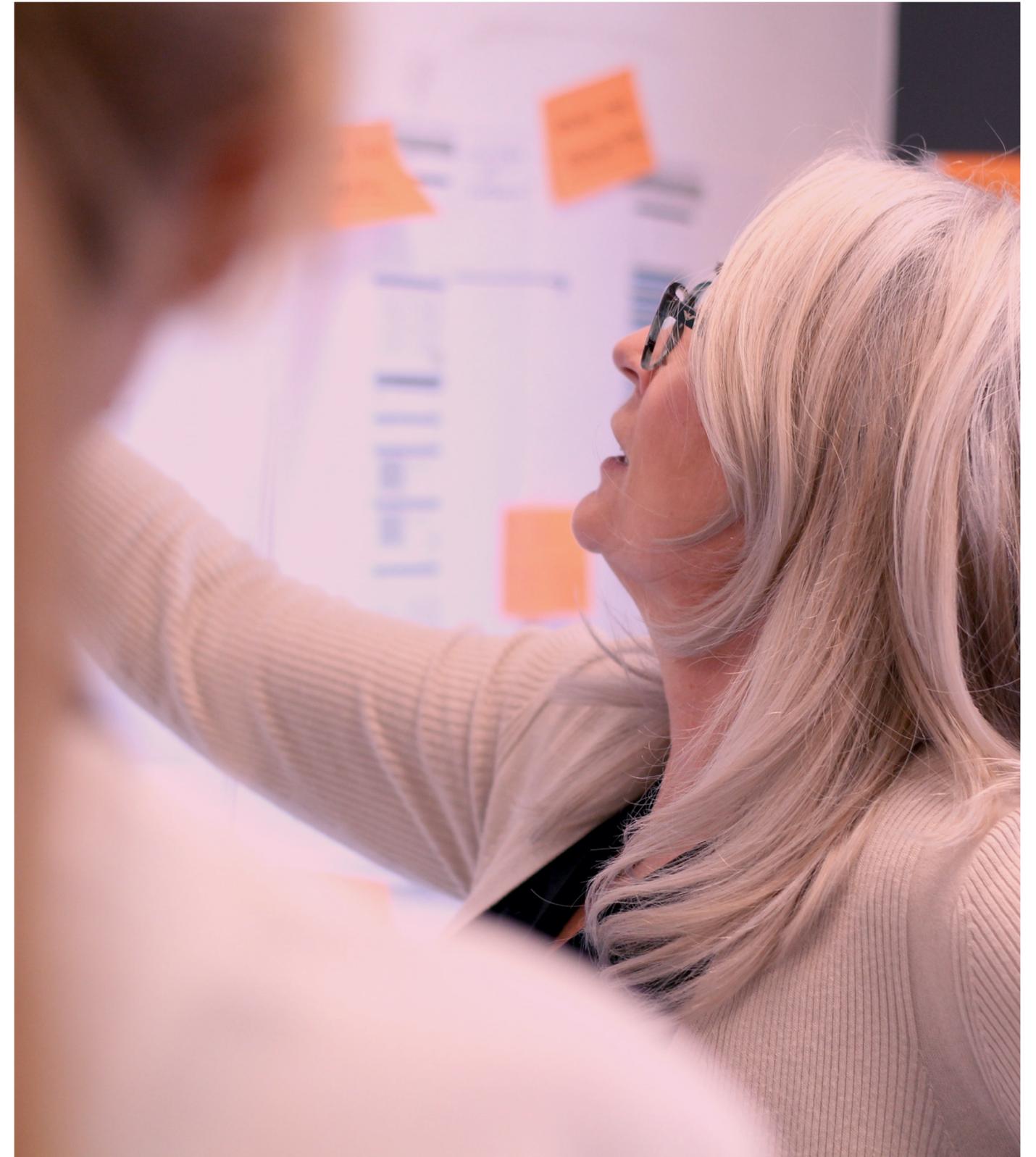
Now that you put frameworks in place for assessing requirements, let's consider ways that we can rapidly understand our current position, set the project vision and get stakeholder buy-in.

UNDERSTANDING THE CURRENT POSITION

Our first port of call is to understand what insights are currently available. Have you conducted past website or customer research that should be reviewed? Has the organisation previously built a case for website development that didn't get off of the ground? It's worth starting the process with understanding what's come before and what is relevant to bring forward into future requirements.

WHAT ARE THE GAPS?

After you have reviewed the existing insights available to you, you'll be able to identify what gaps there are in your understanding. This will not only inform the next stages of requirements gathering but this will also flag which of your internal teams need deeper consultation.



LOOK INSIDE

VISION SETTING & INTERNAL STAKEHOLDER ENGAGEMENT

Now that you have immersed yourself in known insights and past discussions around the website, you can start to engage internal teams in project vision setting.

To know what you need to do at the beginning of your replatforming project, you need to visualise the end. What do you want your website to do? What features does it have and how does it enable your business goals? To get the most out of your investment, you must map your requirements to the outcome you wish to achieve.

Gaining a clear vision is not a task undertaken by an individual but by the business as a whole. Setting the vision collaboratively is a great way to generate enthusiasm and garner buy-in early on in the process. A new website affects and benefits a whole host of departments, from HR, Finance and Sales, right through to Customer Services. To set your vision, it is helpful to ask one question of your internal teams: How can our website support your department?

It is those outcomes that will help you form the clear vision for what your business wants from a new website and set strong requirements for the platform you will build it on.



“We often find that stakeholders may list out every requirement in fear that something important will be missed. If you’re struggling to map out what you’re looking for from your new platform, it can be useful to think about outcomes rather than requirements. This helps open up opportunities for new or as yet, unknown solutions.”

For example, you don’t require a WYSIWYG editor with a built-in grammar check – you want non-technical users to publish high quality content quickly from your CMS. You don’t require a React/.Net/AWS based technology stack – you want your existing teams to work with your new system without having to add new core skills.”

John Prior, Solutions Director at twenty-six

LOOK AHEAD

It's critical that you consider future requirements and opportunities when vision setting and creating your digital maturity plan to ensure your investment is future-proofed.

TRENDS

Spend some time looking at the digital trends both within your industry but also amongst those who are engaging with your user base. Your users will be interacting online with a huge variety of services outside your industry too. What wider digital services are changing how users behave and what they expect? What systems are creating convenience, added value or frictionless experiences?

TECHNICAL DEVELOPMENTS

When exploring trends, it's also important to understand what platforms and services are out there. What platforms are embracing the functions and features that will best meet your digital vision and roadmap to digital maturity? What are the costs of ownership and expected return on investment for the period?



“Some decisions are singular and can't easily be iterated or reversed without discarding significant effort. Platform selection is one of those. Taking some time to consider your objectives and requirements, in the context of business and consumer needs as well as market landscape, before you choose your platform will help to ensure you don't commit resources to a path which won't let you achieve them.”

Richard Jones, Chief Strategy Officer at twentysix

LOOK AROUND

You've now understood what your organisation needs from your new website. Now it's time to turn our attention to our users and our competition.

TRENDS

It is widely accepted that a user-centric website solution will perform the best. A website that is optimised for users should present a frictionless experience, seamlessly connecting users to key outcomes and goals. In order to create an experience like this, we need to fully understand user needs. You will need to identify and explore:

1. Who are your users?
2. What do your users want from your organisation?
3. How do they use your website?
4. What do optimal user journey look like?

You can build this picture out using a mixture of surveys, interviews, workshops or even observational user labs. Building a strong understanding of user needs can help validate internal stakeholder requirements.

YOUR COMPETITION

When it comes to your industry, it's valuable to look around at what experience your customers are getting from your biggest competitors. Do you need to match or exceed this experience? Is there anything you can learn from them?



“We've learned that the ingredients for imagination and creativity are an understanding of customers, and the world in which they live - technology, culture, and all the products and services they use. The more data and insights we gather, the deeper our understanding of the landscape becomes. This enables us to create effective, imaginative work that makes a real difference to your business.”

Christine Osborne, Head of Experience Design at twenty6

LOOK AT THE NUMBERS

Replatforming is a large project for any organisation and requires significant financial investment. To unlock budgets, ROI forecasting is essential to prove the time and money will be worth it. Return on investment comes in many forms. Here, we've outlined some places replatforming could drive value in order to help you build your business case.

1 COST EFFICIENCIES

Higher site traffic from platform integration

When customers' movements on your website become visible from the top of the sales funnel through to conversion due to improved tracking capabilities, marketing campaigns and search rankings can be optimised, leading to an increase in site traffic.

Improved conversion from better customer experience

How quickly can your business adapt? An integrated website platform is essential for helping you change content quickly to keep up with market and consumer trends and convert customers by helping them easily find what they're looking for.

2 INCREASED REVENUE STREAMS

Simplified content deployment

An easy-to-use CMS will remove the developer's role in updating and deploying content on your website, allowing non-technical users, such as your marketing team, to speed up the process, saving time and money.

Improving site reliability to protect profits

Leased servers can cause occasional unplanned service outages which damage the overall customer experience and interrupt the purchase process for shoppers. Cloud-based servers reduce outages, protecting businesses from substantial profit loss from disrupted purchases.

Reduced IT costs due to cloud migration

Hardware-related costs from purchased or leased servers represent significant maintenance investment which can be avoided with a cloud-based website platform.

LOOK AT THE NUMBERS

At twentysix and Optimizely, we understand the difficulty and importance of building your business case. With extensive experience in replatforming, we can provide case studies which showcase the positive impact that migrating to a new technology platform can bring.

3 FUTUREPROOFING

SaaS means a continually updated and improved technology platform

A centrally hosted, Software as a Service subscription model like Optimizely eliminates the need for regular large Capex every few years to overhaul outdated systems.

■ CALCULATING ROI

Calculating return on investment usually depends on knowing the current KPIs for your website and the various costs associated with running it. This is easy for certain aspects of replatforming such as the current IT costs for running the legacy site vs a cloud-based web platform. However, calculating the current traffic to your site and conversion to compare against projected figures could be difficult; the lack of reporting could be one of the reasons for replatforming in the first place.



“Sometimes, figuring out ROI is just an unsolvable problem.

You need good metrics, identifiable conversions, and a way to value those conversions in financial terms.

It’s a minority of projects that have all those pieces fall into place.”

Deane Barker,
Senior Director of Content Management Strategy at Optimizely

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— CRAFTING THE BRIEF

CRAFTING THE BRIEF

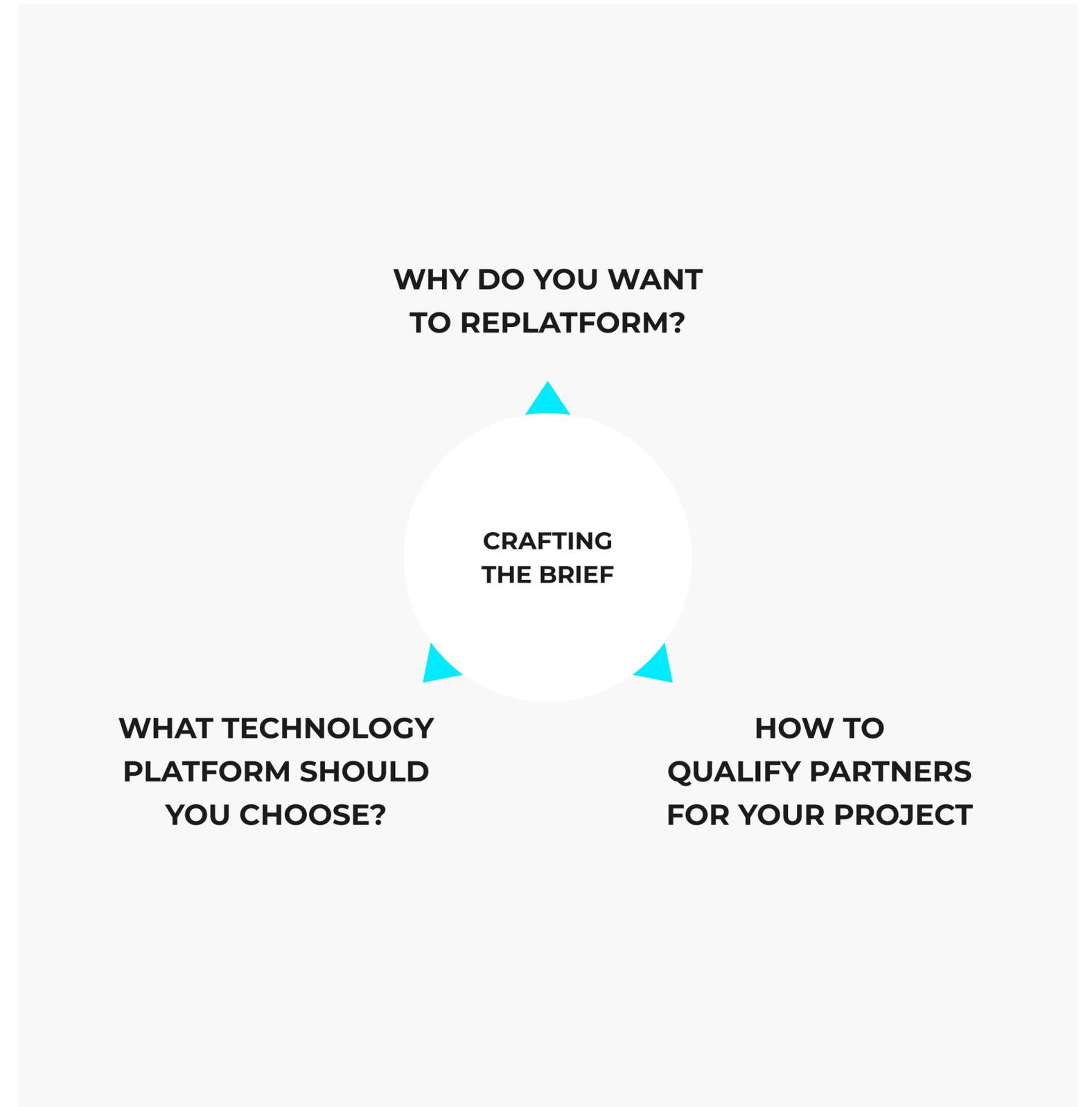
A brief shouldn't bury anyone in paperwork, but instead it should provide clear instructions on the what, how and why of your project.



“Throw a dozen tennis balls at a dog and, in all the excitement, it will likely catch none of them. Throw every single requirement your organisation has uncovered into a brief to agencies and watch them miss some of the most crucial objectives and requirements of your replatforming project.”

Laura Tipping, Insights and Planning Executive at twenty6

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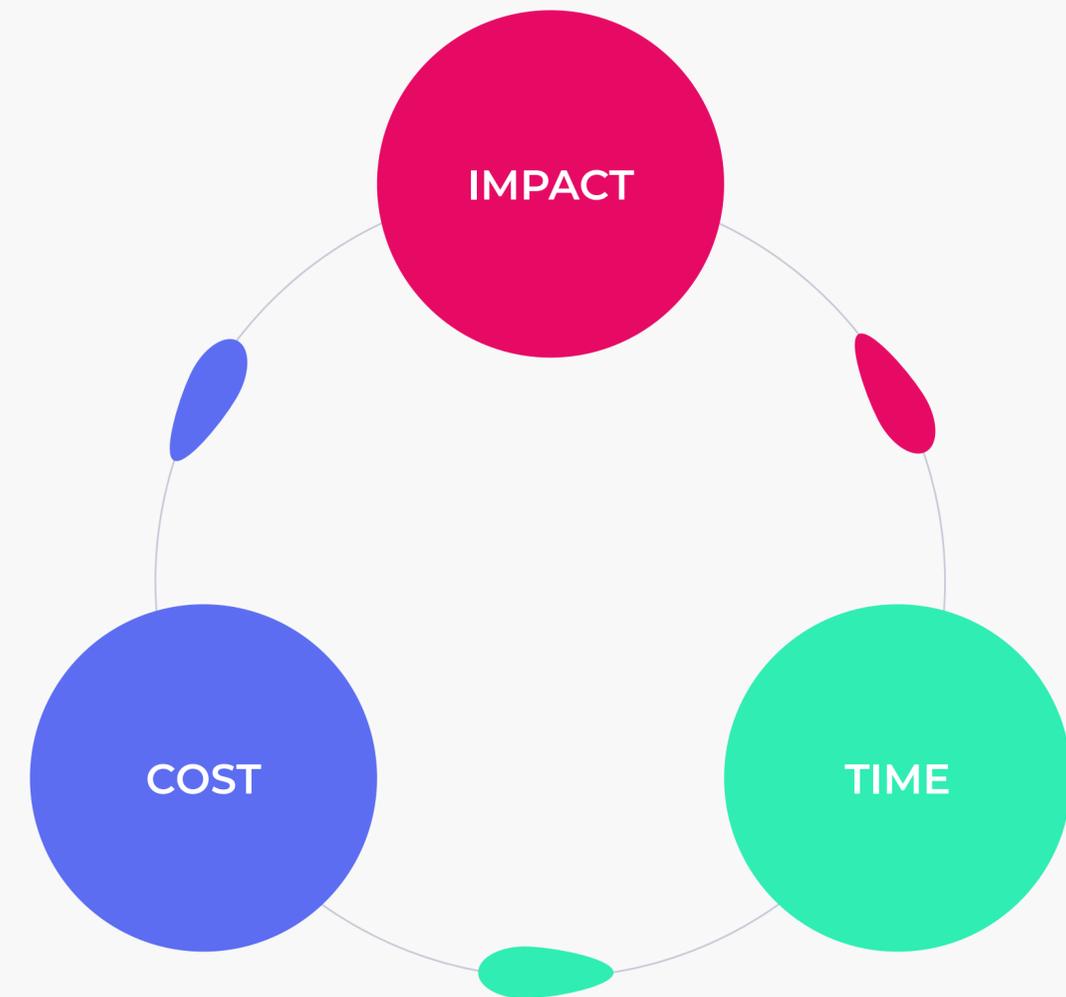


WHY DO YOU WANT TO REPLATFORM?

At this point you'll probably have a considerable number of requirements and objectives for your replatforming project. To gain some clarity on the most important points which will form the basis of your brief to prospective Technology Partners and Implementation Partners, it is helpful to consider the following for each objective:

- The impact to business
- The cost to implement
- The time to implement

It can be helpful to score each objective so it is easy to prioritise in order of importance. Once you have done this, you will then have figured out the main reasons why you want a new website. Having this focus at the outset helps align everyone internally, and directs prospective partners towards the objectives that matter most to your business.



WHAT TECHNOLOGY PLATFORM SHOULD YOU CHOOSE?

Replatforming projects can be triggered by many scenarios, such as a new hire in your business recommending a platform they've used before, or an agency offering guidance. Whichever way the conversation begins, it is helpful to check your requirements against the platform features and ask for demos, to inform your shortlist.

Here we have included some example criteria that you could score against:

INTEGRATION REQUIREMENTS

- CRM platforms
- Knowledge bases, live chat, ticketing & other customer communications systems
- Digital Asset Management & other content repositories
- Product Information Management systems
- Enterprise Resource Management & other systems
- Analytics platforms
- Payment services or financial systems
- Authentication systems
- Monitoring systems

PLATFORM FEATURES

- Content editing features and editor usability
- Support, licensing models and hosting models
- SEO features
- Performance management features
- Security management
- Development flexibility
- Workflow management
- Multi-language/multi-culture support
- A convincing development roadmap
- Talent base for development and support

WEBSITE FUNCTIONALITY

- Address lookup
- Maps
- Social media
- Advertising support
- HR and vacancies
- Media streaming
- Stock information systems

HOW TO QUALIFY PARTNERS FOR YOUR PROJECT

In a replatforming project, you are typically looking for two partners; a Technology Partner who will provide the platform software, and an Implementation Partner who will build your website using your chosen website platform. Technology Partners will often recommend a list of trusted Implementation Partners and vice versa.

RFI VS RFP

To start the process, organisations typically send out an RFI. Following that, an RFP is often sent out. An RFI is a 'request for information', a preliminary stage which acts as a qualifying round for you to assess the offering from Implementation Partners before opening a discussion around the specifics of a project. An RFI typically includes an outline of timeframes, overall project scope and objectives. As well as allowing potential agencies to assess whether they are suitable for the opportunity, it is a chance for you to screen their suitability by asking key questions around an agency's business structure, financial situation, insurances, capabilities and other essential information around policies. Think of it as a 'speed dating' process before an RFP – which is more akin to a dinner date.

An RFP or 'request for proposal' invites Technology and Implementation Partners to suggest solutions based on their offering which is tailored to your specific project. We'll go through RFPs in more detail in the next step.



03

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CHOOSING A
PARTNER

CHOOSING A PARTNER

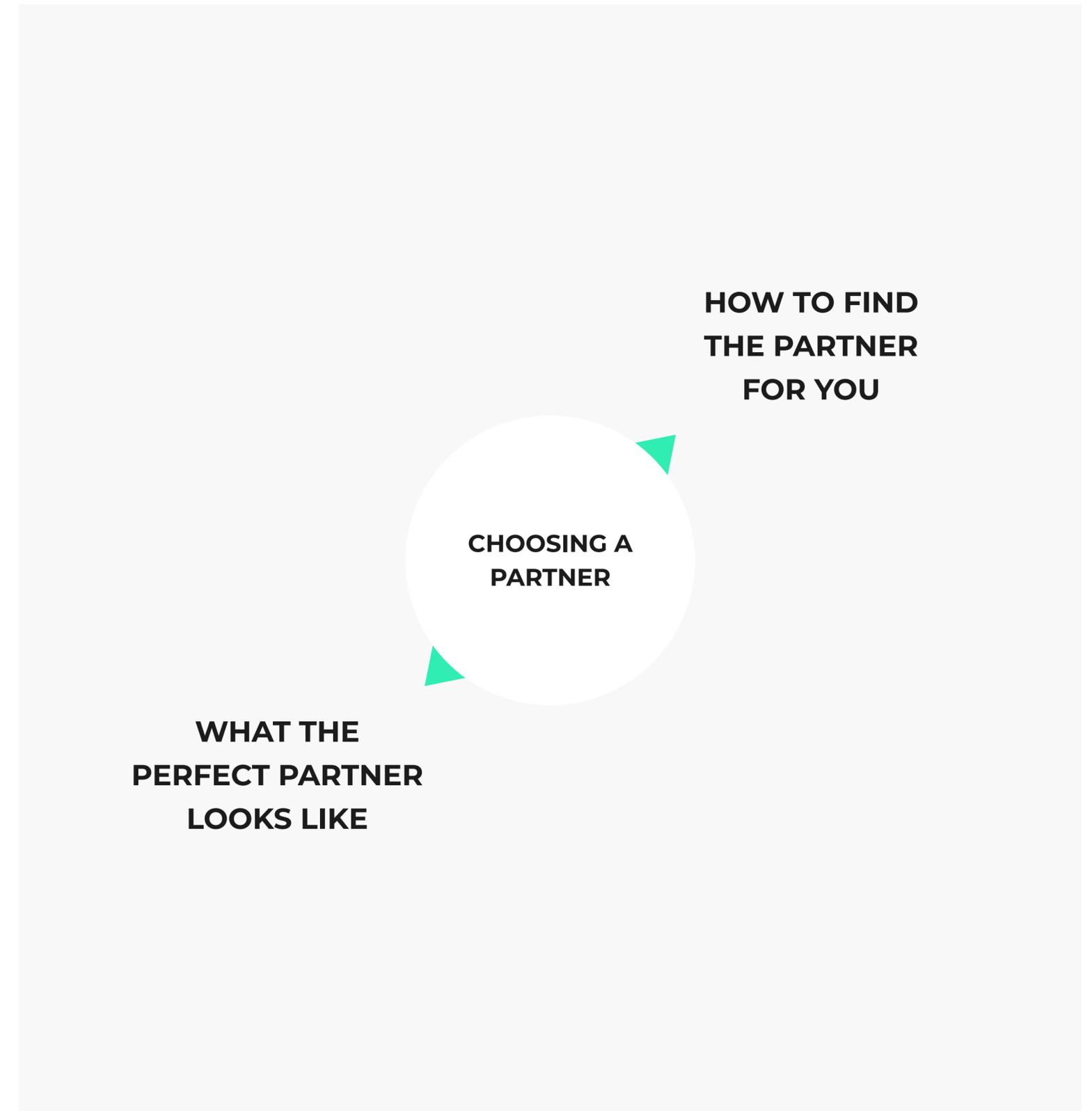
AN IMPLEMENTATION PARTNER ISN'T JUST FOR SET-UP, THEY'RE FOR LIFE*

There are various partners in a replatforming project but as Deane Barker, Senior Director of Content Management Strategy at Optimizely explains, **“the relationship between you and your Implementation Partner will be the longest and most intimate.”** An Implementation Partner will build your website using the technology platform that’s right for you and will be your ongoing point of contact, long after your new website launch, for any queries, updates, or for features you have planned to add in later phases.

Your task now is to choose one of the most long-term, professional relationships you’ll ever have, and we want to help you make the right choice. So, we decided to ask our clients and in-house experts for some relationship advice on what makes a good Implementation Partner and how to find them.

03

*Or at least the lifespan of your website build using your chosen technology platform.



WHAT THE PERFECT PARTNER LOOKS LIKE

1 A THREE-WAY PARTNERSHIP IS BEST

A successful relationship with your Implementation Partner thrives when they have a strong relationship with your chosen Technology Partner.

2 EXPERIENCE IS EVERYTHING

Look for proven technical capability on your platform of choice and relevant sector or practice (e.g ecommerce) experience. At twentysix, we find the Optimizely platform is a highly effective, flexible and scalable digital platform that is appropriate for so many different sectors which is why we've recommended it for so many projects. It enables us to apply our user design experience and sector knowledge (from travel and retail, to finance and manufacturing) to create delightful, market leading digital experiences.

3 LOOK FOR ACTIVE INVOLVEMENT IN THE TECHNOLOGY PARTNER'S ECOSYSTEM

From contributing to community forums to gaining formal accreditations that certify the agency's knowledge of the software, it shows enthusiasm for the technology and the confidence to use it to its full potential.

4 ASK ABOUT THEIR PROCESS & DIGITAL EXPERIENCE

"This really sets potential agencies apart. For example, the team at twentysix really understands the strengths of Optimizely and have the ability to implement successfully and ultimately ensure that customers make the right choice based on the goals for the business," said Matt Pilgrim, Partner & Alliances Director at Optimizely.

HOW TO FIND THE PARTNER FOR YOU

The overriding fear we hear from customers is the worry they'll be taken advantage of, especially when undertaking a large complex project like replatforming. Even organisations who are familiar with a pitch process can find it stressful due to the business-critical nature of finding a Technology Platform which needs to properly integrate into many areas of the organisation. Here are some points to consider to help you get the most from your prospective partners, and ultimately evaluate and choose the best suppliers for you.

ENLIST AN RFP CONSULTANT

If you are unfamiliar with the process, a consultant can help you write and review your RFP, and even offer administration and evaluation support.

GIVE RESPONDENTS FREEDOM

Rigid response criteria means limiting responses to areas you already know about. Let your prospective partners have the freedom to give you some insight into their process, mindset, and toolset.

INCLUDE A BUDGET

No one wants to overpay which is a common fear when including a budget, as the perception is that respondents could abuse this prior knowledge, but as Optimizely's Deane Barker points out, "After 25 years in this industry, I can count on one hand the number of times someone came to us with more money than they needed."

HAVE A CLEAR AND REALISTIC PROCESS

Make sure it is clear to respondents what the process is and set a realistic timescale for responses. Leaving too little time may leave you underwhelmed by the responses you receive and no closer to finding a partner.

SHARE YOUR CRITERIA

Create a scorecard to assess responses and, if possible, share it with prospective partners. If you can't share it in its entirety, sharing some information around how the scoring will work will be helpful for agencies.

04

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ENGAGEMENT &
KICK-OFF

ENGAGEMENT & KICK-OFF

THE FINAL STEP IS JUST THE BEGINNING

Step 4 is where this guide ends but the aim is to prepare you with advice which will live on beyond this guide and into the everyday running of your replatforming project. twentysix's Director of Clients, Ellie Foxton-Brown and Head of Project Management, Chantal Knox, have overseen many replatforming projects. We caught up with the pair to unpack some of their valuable experience.



ELLIE FOXTON-BROWN

Client Services Director

Ellie leads a highly experienced Client Services team of Account Managers and Directors. Ellie is the central pivot between all stakeholders; translating strategy and ensuring delivery stays in line with agreed objectives.



CHANTAL KNOX

Head of Project Management

Chantal leads twentysix's dedicated Project Management team, ensuring delivery excellence across the agency. Her wide-ranging experience and level head ensures projects are delivered on time, to scope and budget.

HEAR FROM THE EXPERTS

What advice would you give for organising efficient communication between the many parties involved in replatforming - the Implementation Partner, Technology Partner and the client?

Ellie: There are a lot of people involved in replatforming from our agency alone. We like to set ourselves up for ease of communication by allocating one key contact to liaise with you and the Technology Partner, and then have a team behind the scenes led by a project manager who handles the running of the project internally between departments. Our clients tend to follow a similar process, with one key client contact to oversee the project from start to finish supported by one key contact from each department who ensures the objectives of that department are met, provides any information required and holds the authority of that department to sign off at various stages of the project.

Give an example of a successful website project that worked particularly seamlessly. What do you think contributed to its success and smooth running?

Ellie: There is no such thing as a seamless replatforming project. There will be challenging conversations along the way, but building strong relationships are key. Implementation and Technology Partners should listen to client requirements and brands should listen to their partners. Good partners will challenge requests to find the best solutions for their clients. Inevitably, there will be hiccups along the way, but if stakeholders work together to find quick resolutions, the project will run more smoothly. We judge a replatforming project's success on whether it launches on time, meets requirements and achieves positive results.

Chantal: Customer involvement all the way through. Our favourite and most effective way to work is to become an extension of your team; understanding the nitty gritty of your business needs and being on the same page really helps us help you get the most from your new website.

HEAR FROM THE EXPERTS

Which working methodologies have you found work best for replatforming?

Ellie: The best methodologies are the ones that complement a client's way of working. Agile works best if a client likes to get in a room with us for numerous check-in points and review meetings and everyone can live and breathe the project from kick-off to launch. For others, a waterfall approach might be better suited if you have a large organisation with a lot of stakeholders involved, requiring time for amends and sign off. We can work with you to establish the methodology that works best.

Chantal: We often find that a hybrid of agile and waterfall approaches work best for clients. We can break the project down into sprints but also allow more time for sign off which can be especially useful when multiple stakeholders are involved.

What are the most common issues you've encountered running a replatforming project? Any advice on how to avoid these?

Ellie: Mismanaged expectations between the implementation agency and the brand, and then internally at the brand side too. We are as clear as possible from the outset about what will be delivered, when and how. Assumptions lead to frustrations and

confusion. Identifying ALL the stakeholders required in a project before project kick-off and getting the right people involved at the right point is also crucial to avoid costly revisits.

In addition to this, some of our clients opt for a catch-all training session after site launch, but we always recommend allocating budget for ongoing tailored training with your teams to get the most out of the new platform.

Chantal: Fear of the unknown can cause sticking points in a project like this. Inevitably, our client's will be wedded to at least some aspects of their current platform. Our job is to familiarise them with the new system and make the switch less daunting. Initial demos are crucial, plus access to frontend and backend environments as the project progresses can really help.

Technical understanding can vary between clients and staff within their organisation. This is not an issue unless the agency building the new website and the Technology Partner don't take the time to find out the client's level of technical understanding which will affect website configuration decisions and can cause miscommunication problems.

HEAR FROM THE EXPERTS

Which working methodologies have you found work best for replatforming?

Chantal: The length of project vastly depends on the scope. We've recently completed a replatforming project which took two years from discovery, where we helped the client understand their requirements to complete step 1 of this guide, through to launch. As a minimum, simple replatforming projects with limited integration require between 6 and 9 months from kick-off.

Any other advice you think that's important for clients when starting off a replatforming project and keeping it running smoothly?

Ellie: Invite the implementation agency to present work to your stakeholders. Allowing us to help you present work from the various phases from UX, design to development means we can field questions from stakeholders and increase efficiency by hearing the feedback from your organisation first-hand. As the people who have done the work, we're also in the best position to explain our thought processes.

Chantal: Don't be afraid to ask questions at every stage. Take advantage of the specialisms we have in-house. We can help support your business case for replatforming using evidence from user testing, along with case studies from our wealth of experience with web development projects.

SOURCES

In this guide, we have drawn inspiration and insights from the following materials:

[‘25 lessons I’ve learned about selecting content technology and services’ by Dean Barker \(Episerver, 2020\)](#)

[How to calculate ROI for your CMS project \(Episerver blog, 2020\)](#)

[10 steps of digital replatforming \(Econsultancy, 2016\)](#)

[De-risk your digital system migration \(Code Computerlove, 2016\)](#)

FURTHER READING

Here we have listed some additional resources that you may find useful:

[The ultimate guide to ecommerce replatforming for manufacturers \(Episerver\)](#)

[The distributor’s guide to ecommerce replatforming \(Episerver\)](#)

[Episervers rescue package for sitecore customers](#)

GET IN TOUCH

Whether you have a replatforming project on the horizon or would like to get an expert opinion on any marketing challenges you are facing right now, our team is on hand to help:

Contact **twentysix**:

- Telephone **0800 320 2626**
- Email **hello@twentysixdigital.com**
- Web **www.twentysixdigital.com**

Contact **Optimizely**:

- Telephone **0203 397 4940**
- Email **Matthew.Gay@optimizely.com**
- Web **www.optimizely.com**

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