

Migrate to Magento 2

Introduction

All good things must come to an end—this is sad but true. For Magento 1, its time has come. The newly adopted Adobe partner marked the official end of M1 support for June 2020. This ensures that by the summer of next year, all retailers remaining on the platform will no longer receive support for Magento 1. You have to make a change, and make it quick.

Every eCommerce team understands the challenges of replatforming, and with such a short window to make the switch, retailers have to start exploring their options now. You're reading this because you need to make that change. This guide is the ultimate replatforming resource, created by our team of experts, for migrating your store to Magento 2.

Let us break down what is in this guide:

- Look at the Big Picture
- Establish your Business Goals
- Set the Requirements
- The Top Benefits of Magento 2
- Build It and They Will Come

Chapter 1

Look at the Big Picture

Every eCommerce business knows that replatforming is no small undertaking and often times the first question retailers ask us is, “where do I start?” Though there are many answers to the question, the simple one is to look at the big picture.

Many retailers think “features first” which is important, but can derail the intention of the project itself. Your goal should be to successfully move your team to your new platform, not add every feature and extension possible. It’s about hitting the pause button, taking a 30,000

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foot view of your business, and understanding where you are and where you want to go. The only way to do so is to assemble the proper foundation for growth.

You’re probably asking yourself, “how do I do this?” and it’s easier than you think.

Start by asking your entire team the big questions. What do we struggle with? What do we like about our platform? Where do we see room for improvement? These foundational elements are the references for your goal setting that comes later in this guide and in your project.

We took some time to flesh out these ideas for you and put them into beautifully simple statements at the end of each chapter. This will help you organize your ideas, thoughts, and questions which can be used as your replatforming bible for the rest of this journey.

Understand what your customers like and dislike.

- The customer is king, plain and simple. Thus, it is imperative to ask them what they love about your site and what they don't. Take the time to conduct some user testing and get feedback that can spearhead your direction moving forward.

Ask your internal team what they like and dislike.

- Don't assume you know the struggles of other departments. This requires your entire team, not just eCommerce or development. Ask your designers, strategists, and HR— hell, even the interns have valuable insights you will need to make informed decisions.

Keep early discussions focused on the big picture.

- We discussed this earlier, but it's so important we are saying it again. Don't get "feature hungry" and flood your appetite with wants over needs.

Don't expect this project alone to increase revenue.

- A replatforming is not a silver bullet. It is a long-tailed investment that empowers you to run your eCommerce business more effectively.

Chapter 2

Establish Your Business Goals

If you're an eCommerce director, lists are probably your best friend. They're our best friend too, and when it comes to establishing your business goals, a list is the perfect place to start. The primary purpose of this list is to solidify clear goals for the project. These goals are not a

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list of technical requirements, but rather a collection of practical ideas, derived from the questions you asked your team and customers. These ideas consider the 5-year plan of your business and where you want to be at that time.

As we all know, lists can become daunting when they are over complicated or drawn out. Our recommendation is to keep it simple, brief, and easy to remember. Nobody likes trying to remember their entire grocery list when they get into the store and your team shouldn't have to either. Keep each bullet

between 5-7 words and don't add more than 5 major bullets. This goals list will drive all decisions as you move forward in your project. Creating something simple is not easy, but starting your project this way will ensure your priorities stay grounded.

Fulfill your customer's needs first.

- Yes, your internal team is important—as they will be working on your site daily—but your customers keep the business growing. So put their needs above all else!

Keep technical requirements or specifications off the list.

- Patience is a virtue—the time will come to focus on the technical needs that will compliment your Magento store. For now, keep it top-level.

Solidify your goals before the project starts.

- Nothing is more annoying and derailing than change. Once your list is established, commit to not changing it and seeing it through to the end.

Take your time in the critical and foundational stages.

- It's easy to get excited and want to jump right into the building process, but cementing your foundation is essential to your project's success.

Chapter 3

Set the Requirements

We've arrived at the place that gets most eCommerce teams fired up: the technical requirements. Often times the technical requirements—paired with your preferred extensions and integrations—are what make up your store's unique experience. These requirements come from a variety of sources, both internal and external, and demand that you take an honest look at your operations.

**Focus on your needs, not your wants.
Clear technical requirements reduce
headaches and keep momentum going.**

We've said it before and we will say it again, focus on your needs, not your wants. If every team member had all of their technical desires satiated, you would have a

Frankenstore on your hands. Again, keep it simple but detailed—without clear technical requirements, your project will experience headaches fast. As your team jumps into the Magento 2 ecosystem, you should pair your requirements with the new features Magento has put into their platform. Whether that be streamlined product management or improved site indexing, which Magneto has noted both as stellar, aligning your technical needs with the benefits of M2 makes for clear direction and intention for your project.

When formulating your technical requirement list, it is helpful to know Magento 2, so exercise the time to educate yourself on what's new and awesome. Magento has boasted a slew of features and upgrades that will benefit retailers greatly, but you can hear all about that in the next chapter. For now, here are some helpful tips for setting up your technical requirements.

Keep the customer's voice in your mind.

- Though the technical tends to fall on the internal team, it's imperative to keep your focus on the customer in every stage of this project.

Eliminate wish-list items.

- Everyone has wishes, but they don't always come true. Eliminate these as they will slow you down and be distracting.

Don't sort through requirements alone.

- Use your team! Everyone knows the struggles and successes of your site, so curate your list around group knowledge, not just your own.

Technology isn't everything.

- It's easy to get caught in the technological loop. Don't exhaust yourself over perfecting your technical needs, as they are constantly in flux.

Chapter 4

The Benefits of Magento 2

Ok, you've waited long enough. It's time to talk about the benefits of Magento 2 and why it absolutely kicks ass. Before we do, we want to clarify the current status and potential risks that those who remain on Magento 1 will encounter.

If you keep your site on Magento 1 it will work, but Magento will no longer offer security patches for Community and Enterprise 1.x. This leaves you vulnerable to malware scripts that can slow your site at best, and completely cease functionality at worst. Similarly, you put your [customer's payment information](#) at risk. Without proper security measures in place, your customers are defenseless to personal data breaches. This leads to potential lawsuits and brand distrust that spreads like wildfire.

None of these are enjoyable for any retailer, and the longer you wait, the harder you will have to fight for an agency that can migrate you before June 2020. But that's enough about Magento 1, let's dive into Magento 2.

Speed. Security. Simplicity.

The name of the game for Magento 2 is the Big 3. We would argue that these three items—speed, security, and simplicity—are the trio to any successful eCommerce store. Magento honed in on these three characteristics and from it has come a flexible and extensible platform solution in Magento 2. Here's why:

Speed

Out of the box, Magento is wicked fast, we mean wicked fast. With improved and reduced indexation times, retailers have seen an average of 50% faster load times. Its new and improved browser caching and Javascript stacks allow M2 to deliver expeditious speed throughout its platform. When it comes to keeping customers on-site and engaged,

the faster your store moves, the longer they will stay.

Security

Security is imperative to any eCommerce operation. Magento has buffed up its security through a variety of measures that fight off and prevent digital threats. This is done through the addition of ReCAPTCHA, Two-Factor Authentication, ACL Cache, and WAF for Cloud. All of these combined keep your stored locked down and ready for any kind of attack.

Simplicity

The most common struggle retailers experienced with M1 was the admin interface. It was clunky, chaotic, and complicated. But gone are the days of disorganized product inventories and arduous categorizing. Magento 2 is set up for simplicity. With streamlined product adding and categorization, admins have full control over their site and can manage product info with ease.

This simplicity is mimicked on the front-end, with a reduced number of steps to checkout. Rather than customers hopscotching through multiple buying pages and CTAs, Magento 2 flaunts a one-page checkout system. This enables buyers to make purchasing decisions faster and execute with fluidity, which translates to less cart abandonment, and we all love to see that.

Paired with the Big 3, are an assortment of other features that benefit retailers across the board.

Page Builder

“Page builder has been massively beneficial in our projects. For teams looking to have more control of their content and get it out faster, this allows them to do so. It is simple and intuitive, which gives any admin the ability to make changes quickly without the need for development work.”

Dani Reinking, Magento Certified Developer

PWA Studio

“With Magento’s PWA Studio, brands can offer stronger mobile experiences to their customers. As mobile traffic increases in eCommerce, this feature allows retailers to meet customers where they are on any device.”

Chris Roach, Magento Certified Developer

Multi-Source Inventory Tool

“Multi-Source Inventory is great because it lets you to manage stock on a website basis. If you have multi-store/multi-warehouse operation, it simplifies the stocking process by allowing you to associate multiple stores to the same inventory. This makes managing your inventory stock much easier.”

Jonathan Willingham, Magento Certified Developer.

Chapter 5

Build It and They Will Come

So if you haven't caught on that Magento 2 is the way to go, just hop back to the beginning of Chapter 4, adjust your spectacles, and give it another run through.

Welcome back! Now that you've decided to smash your competition with your new Magento 2 store, it's important to figure out the finer details. This starts with establishing who will build it. There are a variety of Magento certified design and development agencies with plenty of experience in migrating teams to Magento 2. The team writing this guide that you are gazing upon at the moment, is [one of the best](#)—but that's just a personal opinion.

Keep in mind, the team you choose will be your partner in the replatforming journey. You will be working with them over the course of 3-9 months to evaluate your needs, create concrete goals, and bring your store to life. That is a lot of hours spent on the phone and in meetings, so be picky about who you want to work with. Clear communication is the lifeblood of any successful replatforming project.

One thing you must remember when you start the replatforming process is that this is a commitment. A commitment to your team, to your agency partner, and to your customers. This means your primary focus should be this project. Starting other initiatives, or trying to overlap this process with major holidays or time off will delay progress and put your team behind. Once your plan is in place, commit!

Oh and one more thing. Celebrate the hell out of this project when it's done. You've put in the time, effort, and energy to create an extraordinary Magento 2 experience, be proud of that.

This replatforming project is a commitment to your team, your agency partner, and your customers.

About Gauge

Gauge is a boutique design and development agency that crafts better eCommerce websites. Our certified experts have worked on Magento for over a decade, migrating retailers across all Magento ecosystems and empowering growth for our customers. With a number of Magento 2 builds under our belt, we understand what it takes to ensure a successful and stress-free migration that puts your team in the position to move with speed and precision.

Looking to start your Magento 2 replatforming project?

[We are ready for you.](#)