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Ultimate Magento 2 **Upgrade Checklist**

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Community Insights

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Magento is proud to present 'Community Insights' to help merchants develop strategies and tactics to better serve their customers.

The Magento Partner Community is a trusted network of consulting and technology companies that help merchants grow their business, and create engaging customer experiences with the Magento Platform. These organizations provide valuable insights and practical takeaways from their real world experiences with merchants like you.

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THE ULTIMATE MAGENTO 2 UPGRADE CHECKLIST

FOUR STEPS TO A SUCCESSFUL MOVE

Upgrading your digital commerce site from Magento 1.x to Magento 2 may seem like a daunting task. However, the many benefits of this platform, including optimized web pages, accelerated response times, increased efficiency for backend operations, and more database flexibility and scalability, outweigh any perceived hurdles of making the switch.

For merchants considering this upgrade, the inherent concern is that the transition comes at a higher price tag. With strategic and thoughtful planning of your upgrade, you will reduce cost, mitigate risk, and maintain business continuity.

This guide provides you with a general overview of Magento 2, steps to prepare you for the move, and an actionable checklist to help you through the process. From start to finish, this checklist will keep your project on track and allow you to reap the benefits of out-of-the-box features – with minimal customization – at a budget-friendly cost.

RICH OPPORTUNITIES IN COMMERCE

$445B
ESTIMATED IN U.S. RETAIL
ECOMMERCE SALES IN 2017[1]

$1T
## FORECASTED B2B
ECOMMERCE
SALES BY 2020[2]

WHY MAKE THE MOVE
TO MAGENTO 2?

The competitive stakes are high when it comes to digital commerce. More than 11% of retail shopping happens online.[3] While in B2B, 68% of buyers prefer to research purchases online, and expect a seamless, compelling digital-first buying experience across all channels.[4]

Improved performance, increased security, and new features are among the many benefits to upgrading your eCommerce platform. Making the move provides the ability to adapt your digital strategy for your growing business.

The latest version of Magento Enterprise (version 2.1) makes it possible to elevate the shopping experience and take your commerce site to the next level. Let's take a closer look at the key benefits to upgrading , which include:

/ **Improving performance for a frictionless experience**

/ **Boosting conversion rates and sales**

/ **Improving efficiency and agility for business users**

/ **Faster, easier customization for developers**
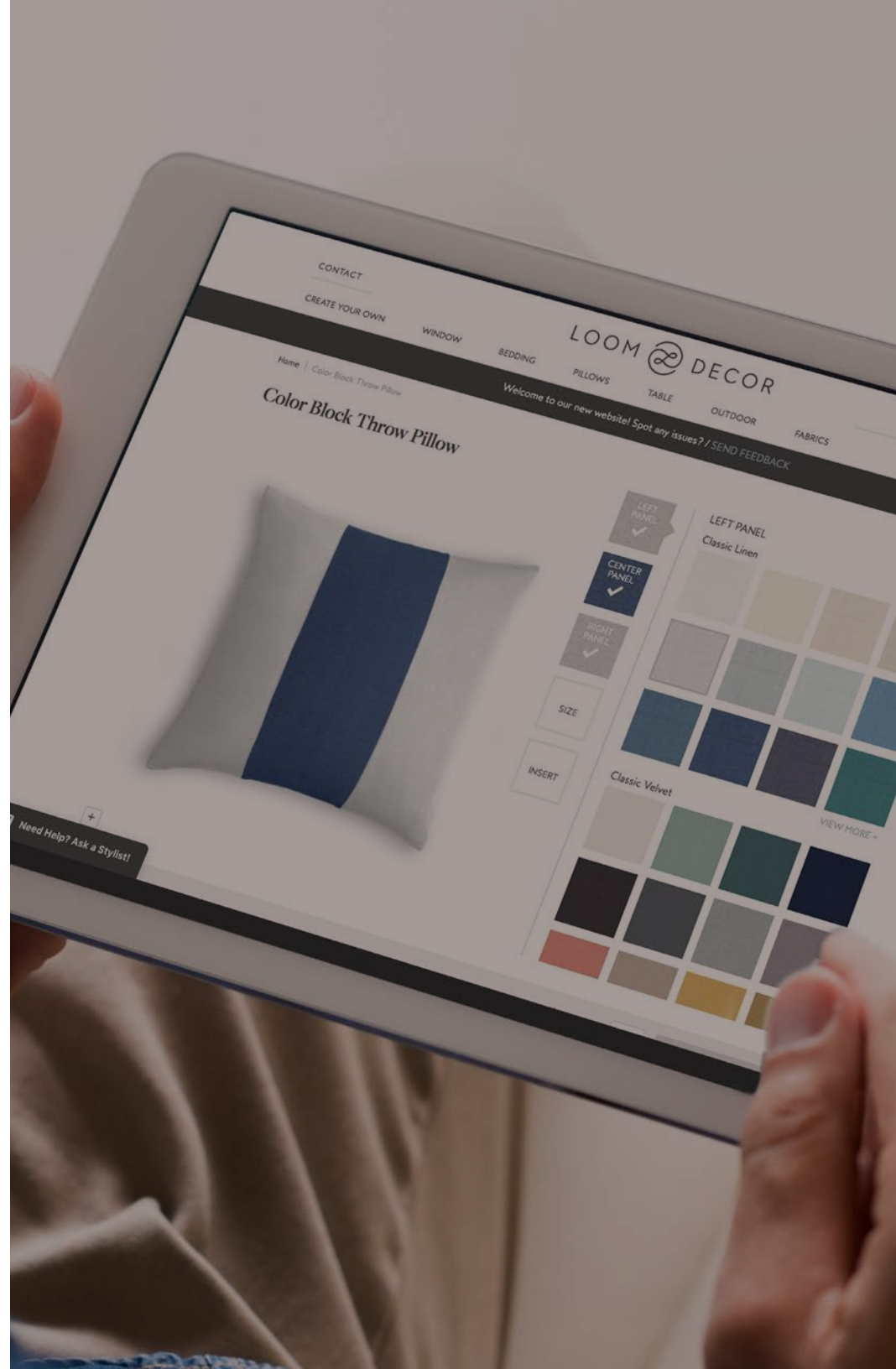
IMPROVE PERFORMANCE FOR A FRICTIONLESS EXPERIENCE

Page load times matter to the overall customer experience because they seek convenience and ease when shopping online. The latest Magento enhancements will boost your site's performance:

/ **Pre-integrated page caching (Varnish) for faster out-of-the-box performance with minimal tuning**

/ **Extensive backend improvements for faster admin performance and support for more concurrent product and order updates**

/ **Master databases for key subsystems – including order management, product management, and checkout – so they can scale independently to meet different load requirements**

34%

OF CONSUMERS SAY THEY WOULD ABANDON A WEBSITE THAT TOOK OVER 10 SECONDS TO LOAD[5]

BOOST CONVERSION RATES AND SALES

Mobility, transparency, and an endless supply of choices allow customers to be more informed when they're ready to buy. Magento has added several features to enhance your site's experience:

/ **Responsive design reference themes to create seamless shopping across any mobile device**

/ **Content staging and preview to efficiently create, schedule, and preview site changes, such as testing promotions before they go live (new feature)**

/ **Elasticsearch enables high-quality search results, supports 33 languages out of the box, and is easier to set up, scale, and manage (new feature)**

/ **Enriched product merchandising with the ability to add high-quality video from YouTube and Vimeo**

/ **Faster checkouts with PayPal in-context checkout and saved credit cards as well as easier PCI compliance**

IMPROVE EFFICIENCY AND AGILITY FOR BUSINESS USERS

Improvements in customer and product administration put more power into the hands of business users. Take advantage of new and enhanced business tools that include:

/ Intuitive Magento Admin experience that saves time when managing daily tasks and is easy for new team members to learn

/ Drag-and-drop tools to customize and save admin panel views to important product, customer, and order data

/ Step-by-step product creation tool makes it easier to manage new and existing product information

/ Improved product importing and exporting to support upsell and cross-products

65%
OF CONSUMERS SAY
THEY WON'T RETURN TO WEBSITES
THAT DON'T PROVIDE A
SATISFACTORY CUSTOMER EXPERIENCE[1]

FASTER AND EASIER CUSTOMIZATION WITH OPEN, FLEXIBLE DEVELOPMENT

By capitalizing on the advanced architecture of Magento 2.1, you will be able to deliver more customized experiences to the market faster with enhancements that include:

/ Enhanced theming and layout framework to quickly create and maintain site variations for seasonal campaigns, new product lines, and market expansions

/ Automated testing to improve code quality and speed up the QA process

/ Easier upgrades so you can quickly add new functionality as it becomes available in future releases
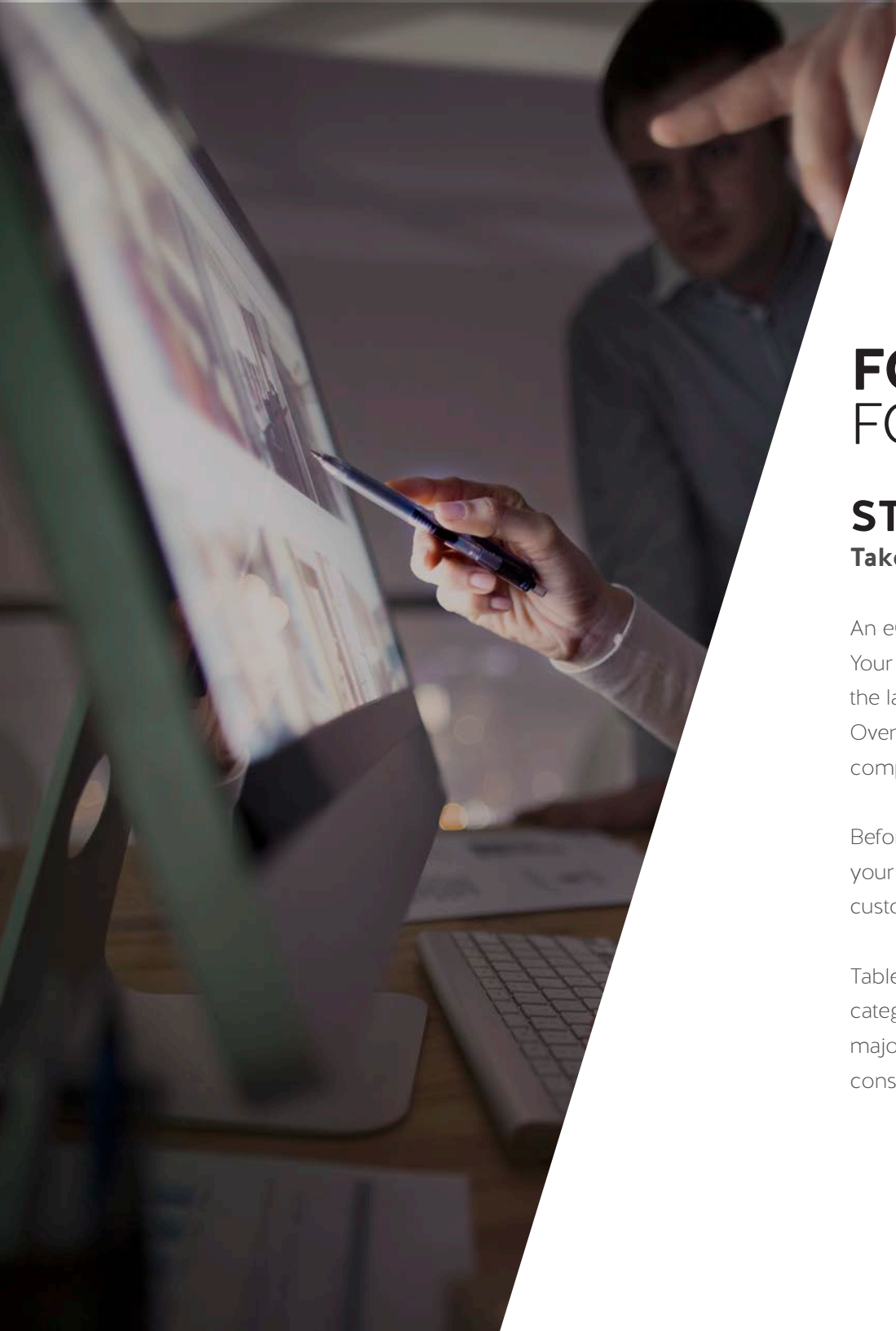
FOUR STEPS TO PREPARE
FOR THE MOVE

STEP 1:
Take inventory of your current implementation

An eCommerce implementation is an evolution – it's never truly finished. Your business needs to remain one step ahead of trends by introducing the latest capabilities and functionality that will keep customers engaged. Over time, these additional capabilities increase the footprint and overall complexity of the implementation.

Before upgrading to a major platform release, the first step is to review your current state from the perspective of user experience, configuration, customization, and extensions.

Table 1 provides guidance on how best to classify your upgrade into three categories – Simple, Medium, and Complex. At a glance, you can see the major factors that influence project scope, cost, and effort to take into consideration as you plan your upgrade.

SIZING UP YOUR CONVERSION **TO MAGENTO 2.X**

Prepare for your upgrade to Magento 2 by considering these aspects of your current implementation.

TABLE 1

	SIMPLE	**MEDIUM**	**COMPLEX**
Definition	Single site/store with a relatively simple catalog that takes advantage of existing out-of-the-box Magento capabilities, with no major customizations	• 1-3 sites/stores that take advantage of existing out-of-the-box Magento capabilities • User experience may be somewhat customized • Standard extensions/ interfaces are being use with light integration	• Multiple sites (3+) with a highly-customized user experience and capabilities • Complex workflows and integrations
Multi-Channel	B2C or B2B	B2C and/or B2B	B2X
Number of sites	1	1-3	3+
Number of extensions	0-5	5 -10	10+
Integrations with other platforms/systems (ERP, PIM, OMS, etc.)	2-4 interfaces	3-5 interfaces, low customization	5+ interfaces/customized
Data types to migrate	Customers, product catalog, and orders	Customers, product catalog, and orders with some customizations	Customers, product catalog, orders, custom data, and custom product types
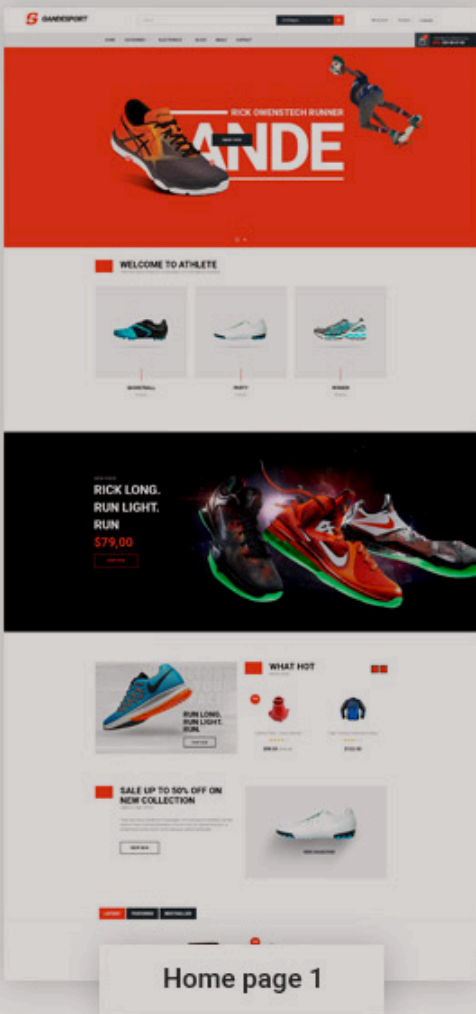
Home page 1
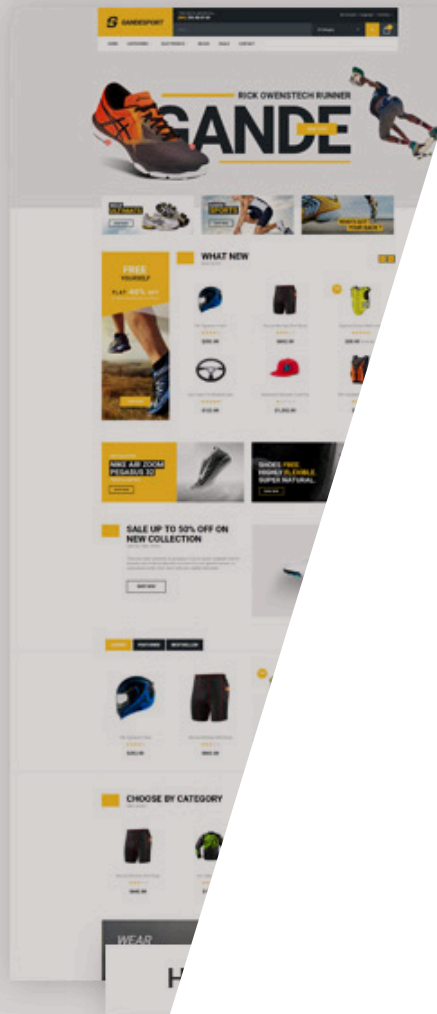
STEP 2:
Review Magento 2 templates to jump-start UX design

Responsive, out-of-the box design templates offered in Magento 2 can drastically reduce front-end UX/UI design efforts and costs. Whether your company is considered startup, mid-market, or enterprise, the underlying themes provide a framework that will optimize your site for SEO and mobile. And, with the ability to drop your content into one of two standard themes, the information is ready to go and will present well on both desktop and mobile devices.

WHY MOBILE MATTERS

MOBILE COMMERCE GREW
47% IN 2016
SIGNIFICANTLY OUTPACING ᴇCOMMERCE AND BRICK-AND-MORTAR RETAIL[6]

GOOGLE
PLACES MORE IMPORTANCE ON MOBILE VERSIONS OF SITES FOR INDEXING AND RANKING[7]

STEP 3:
Review the Magento Marketplace for new and upgraded extensions

Simply put, extensions expand the native capabilities of the Magento platform. Some extensions may supplement or replace custom development used to support your specific business requirements, while others may link to or integrate with systems that support the customer shopping experience, such as sales tax and shipping calculations, payment processing, and address verification.

Taking time to evaluate your extensions is similar to doing spring cleaning. Which extensions are you currently using? Which ones are collecting dust or outdated? Are these extensions adding any value, or simply creating performance issues?

As we guide you through the conversion process, we help you identify any extensions or custom-built applications on your commerce platform. First, we work with you to establish a baseline that determines which extensions are necessary to upgrade, or if these customizations are native features in the new version.

Making use of available extensions in the Magento 2 Marketplace can provide some cost savings. Replacing your customizations with Magento 2 extensions accelerates the conversion process and can reduce support costs because your developers no longer have to maintain custom code.

Next, it's important to identify third-party system integrations, such as order management, enterprise resource planning (ERP), and customer relationship management (CRM), because these supporting systems feed data in and out of the commerce platform. Compatibilities between systems should be reviewed carefully to ensure they continue to function well, or will be enhanced after the implementation. If you do not account for all your integrations, you could break something that is vital to the overall customer experience.

Finally, Magento 2 currently provides conversion scripts for data migration of customers and orders (i.e., legacy orders) from Magento 1.x platforms. Conversion scripts can improve implementation efficiencies and reduces cost because they automate the migration of data to Magento 2.
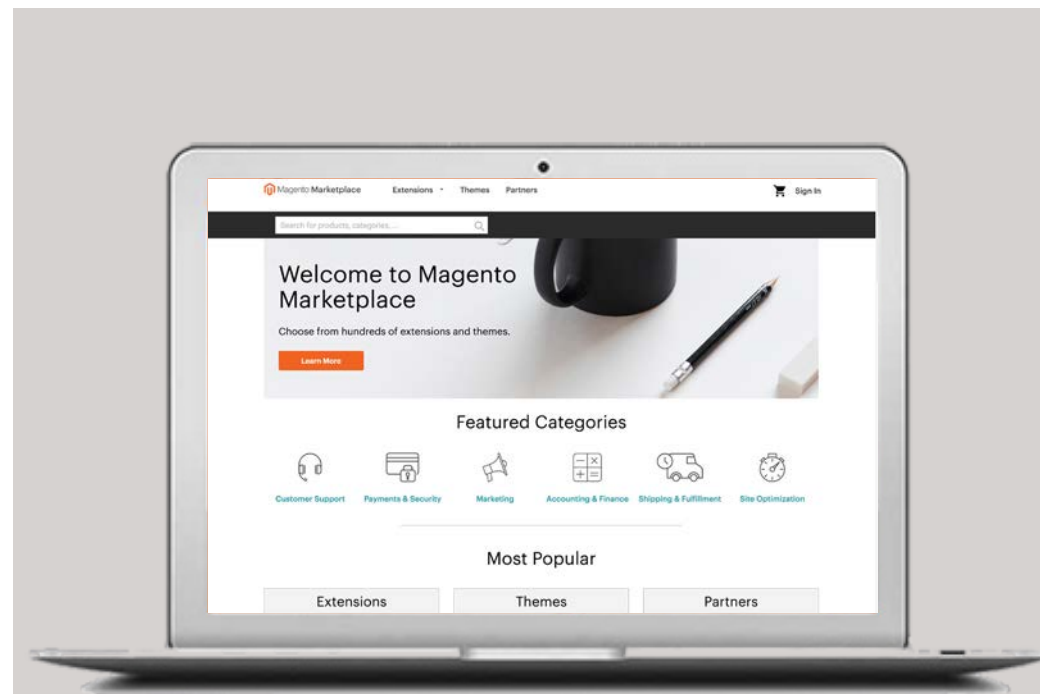
STEP 4
Time your move

Timing is everything – especially when it comes to an eCommerce implementation. As you prepare for your move to Magento 2, don't underestimate the importance of the following four areas to keep your project on track:

/ **Project goals and scope**

/ **Corporate objectives**

/ **Proper timing and avoiding conflicts**

/ **Communicating change**

PROJECT GOALS AND SCOPE

Review your project scope to determine whether you have too many requirements or changes to deliver, and what impact these may have on your business. Consider a more agile method where you can deliver a smaller set of changes, but at a greater frequency, to make an immediate business impact.
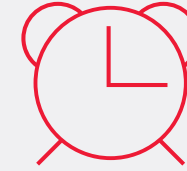
PROPER TIMING & AVOIDING CONFLICTS

Avoid events (like the holiday shopping season) or seasonality within your business that may delay a deployment or introduce unnecessary risk.

Additionally, if your conversion spans several months, you should anticipate intermediate platform releases that may occur during the upgrade. You will want to evaluate each release to make sure the benefits of the new capabilities align with defined corporate objectives.

CORPORATE OBJECTIVES

When deploying a major software release, such as Magento 2, you also need to think about what else is happening at your company such as:

/   **What other (if any) technical upgrades are planned or in progress?**

/   **Is your company launching a new product that requires added functionality to support it?**

NOTIFY IMPORTANT PARTIES

As the deployment date draws near, communication is essential. If more people know about the change on the horizon, how it will impact them, and how they need to address it, then you're more likely to have a successful launch. And, don't be afraid to over-communicate every step of the way – it increases the likelihood of glowing reviews from everyone involved once you go live!

THE ULTIMATE MAGENTO 2 UPGRADE CHECKLIST
CREATE YOUR ROAD MAP FOR IMPLEMENTATION

UPGRADE DATE: _____

SCOPE PLANNING

- ☐ **Determine the number of sites to convert** _____
- ☐ **Review user experience (UX):**
  - o Mobile compatibility
  - o Identify must-have UX capabilities to convert
  - o Identify new UX capabilities to consider
- ☐ **Document data conversion requirements:**
  - o Content
  - o Customers
  - o Products
  - o Pricing
  - o Inventory
  - o Orders
- ☐ **Identify and document customizations driving business logic/customer experience**
- ☐ **Identify and document current Magento extensions in use**
- ☐ **Review system integrations needed for conversion:**
  - o Payment processing
  - o Order management
  - o Sales tax
  - o Address verification
  - o Product information management (PIM)
  - o Enterprise resource planning (ERP)
  - o Customer relationship management (CRM)
  - o Email and marketing campaign management
  - o Logistics
  - o Analytics
- ☐ **Pre-conversion – Benchmark current metrics/key performance indicators (KPIs)**
  - o Current conversion rates
  - o Order velocity
  - o Site traffic
  - o Average order value (AOV)
  - o KPIs specific to your business

BUDGET PLANNING

- ☐ **Confirm total cost of the upgrade:**
  - o Initial platform setup and implementation
  - o Changes or enhancements to the current user experience
  - o Platform integration and customization
  - o Testing and quality assurance (QA)
  - o Platform licensing costs
  - o Licensing costs for other supporting platforms
  - o Costs of hosting options
  - o Ongoing platform and application support
  - o Internal resources needed to support the conversion effort

DEPLOYMENT PLANNING

- ☐ **Develop project team responsible for supporting the deployment**
- ☐ **Confirm resource availability**
- ☐ **Develop timeline and set milestones for implementation:**
  - o Define conversion requirements
  - o UX conversion
  - o Platform configuration
  - o Customization development and extension configuration
  - o Data conversion
  - o User acceptance testing
  - o Go/no-go decision criteria
- ☐ **Create and deliver a communication plan about the conversion**
  - o Internal team and broader organization
  - o External customers
- ☐ **Develop plan to roll back in the event of deployment challenges**

POST-DEPLOYMENT PLANNING

- ☐ **Post-conversion – Standardize metrics/KPIs**
  - o Current conversion rates
  - o Order velocity
  - o Site traffic
  - o AOV
  - o KPIs specific to your business

REMODELING ᴇCOMMERCE
TO SUPPLY TOOLS OF THE TRADE

A specialty online retailer that caters to woodworkers, residential contractors, and DIY-ers is a one-stop shop for purchasing woodworking supplies. With more than 18,000 items in its catalog, including drawer slides, kitchen cabinet hardware and accessories, and furniture hardware, this unique eCommerce site claims a 99.5% order fulfillment rate within one business day of receipt.

Because the business desired a mobile-responsive site and overall performance improvement, including enhanced SEO and user experience, upgrading to a new commerce platform was a priority.

We implemented Magento 2 and moved the site from an older version of Magento Community Edition. By building upon a Magento foundation, we facilitated a simple platform upgrade, taking full advantage of Magento 2 out-of-the-box features, design themes, and data migration tools, and migrated only business-critical customizations.

Since the implementation, the business has seen a significant increase in mobile traffic to the site with a 10x increase in revenue from mobile purchases.

INSPIRING DIY INTERIOR DESIGNERS
WITH UPGRADED COMMERCE SITE

Loom Decor provides affordable custom window treatments, bedding, pillows, and more. The business wanted to upgrade its eCommerce site to continue providing customers with accessible and affordable designer-quality home décor.

We initially launched an eCommerce site using Magento 1.12. In the second phase, we upgraded the site to Magento 2.1 to capitalize on mobile-responsive site design, improve site performance, and enhance merchandising capabilities on the back end.

In the interior design industry, ordering custom products was traditionally handled offline, resulting in time-consuming paperwork, logistics, and uncertainty of what the finished products would look like. By upgrading to Magento 2, customers can create online inspirations, and then design and order home décor items in hundreds of high-end fabrics at a fraction of the price.

Since the site launched, business users noticed a 20% improvement in efficiency to add new products to the site, and native product uploads are 20% faster on the latest platform. Additionally, the overall conversion rate for the site has increased by 50% with a 14% lift in mobile organic traffic.

Moving to a major commerce platform release can be seen as a business growth strategy rather than a risk-avoidance strategy. Thoughtful planning of your upgrade will reduce cost, mitigate risk, and maintain business continuity so that the transition has minimal impact to the overall shopping experience and your bottom line.

When you take inventory of your current capabilities, understand what's working well, and focus on the whole customer journey, you are on your way to creating a truly customer-centric commerce business.

With our deep knowledge and expertise in Magento, we have helped a number of clients successfully transition to Magento 2. Let us help you create an exceptional commerce experience.

SOURCES:

1 "Predictions 2017: The line between digital and physical retailing will vanish," Forrester
2 "B2B eCommerce Forecast, 2015 to 2020," Forrester
3 "US e-commerce sales grow 15.6% in 2016," Internet Retailer, 2017
4 "Death of a (B2B) Salesman: Two Years Later," Forrester, 2017
5 "How the AWS outage caused retailers to stumble," Internet Retailer, 2017
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7 "What Google's Mobile-First Index Means For Your SEO Strategy," Forbes, 2017
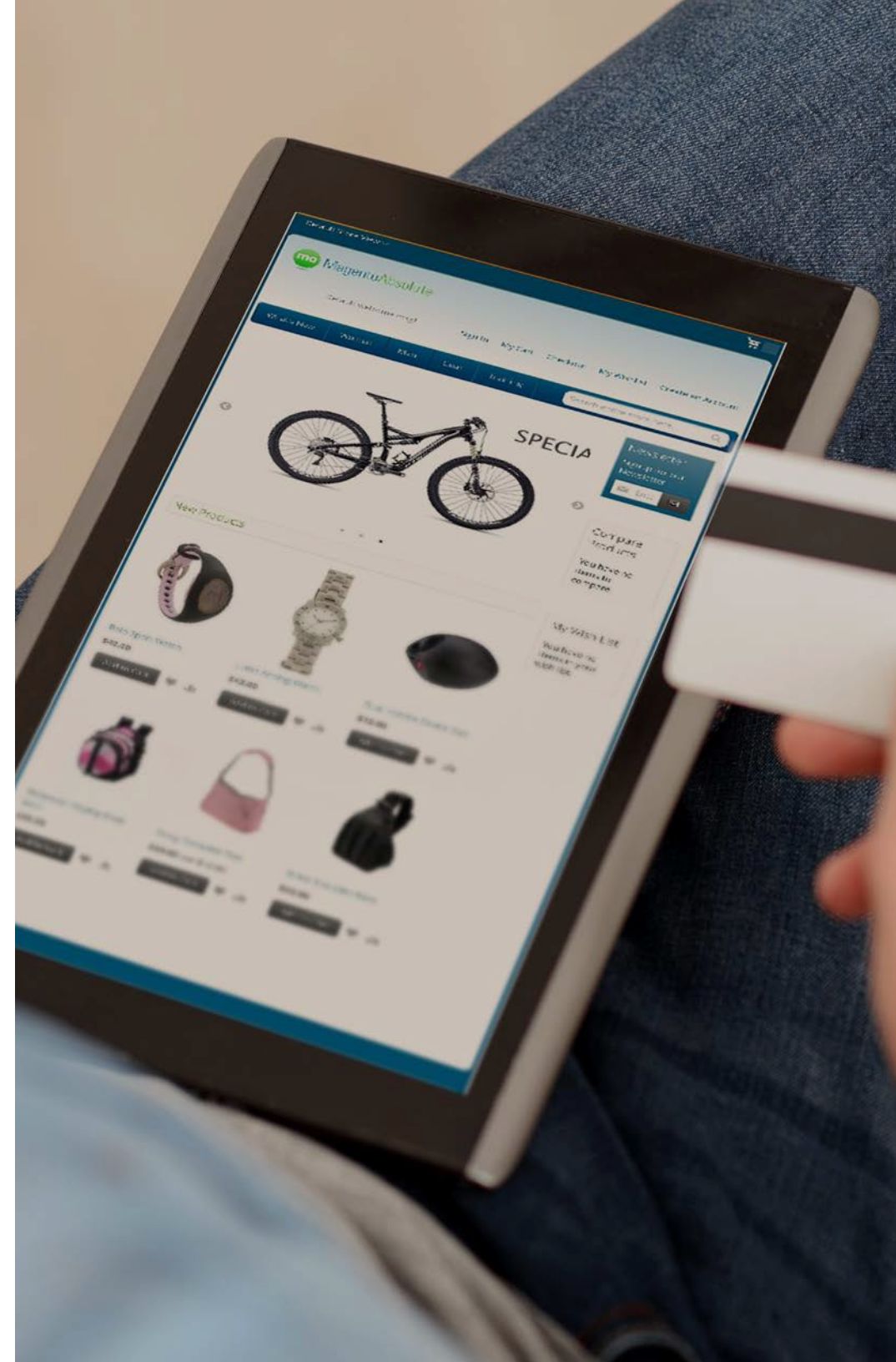
MEET THE CONTRIBUTORS

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John has 18 years of strategic and technical experience in B2B and B2C eCommerce. He has helped some of the best-known global brands develop, implement, and grow their eCommerce channels, including Fortune 100 clients in the consumer packaged goods, manufacturing, and entertainment industries.

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Kaushal has more than 10 years of B2B and B2C eCommerce implementation experience, holding various roles from development, business analysis, and program management to his current leadership role within Perficient Digital's Magento practice. He has been involved with Magento products and ecosystem since its inception.

PERFICIENT DIGITAL & **COMMERCE**

Perficient Digital blends the strategic imagination of an agency with the deep technical acumen of Perficient's established consultancy background to deliver exceptional customer experiences for the world's biggest brands.

Driven by customer insights, we gather and analyze the data to determine the best approach for your omni-channel strategy. Our customer experience experts craft a journey that tells a story, enabling you to connect with consumers emotionally while providing utility that makes its way into their everyday lives. And with a deep understanding of business needs and extensive technical capabilities, our commerce solutions encompass multiple channels, providing a seamless and efficient experience across your entire enterprise.
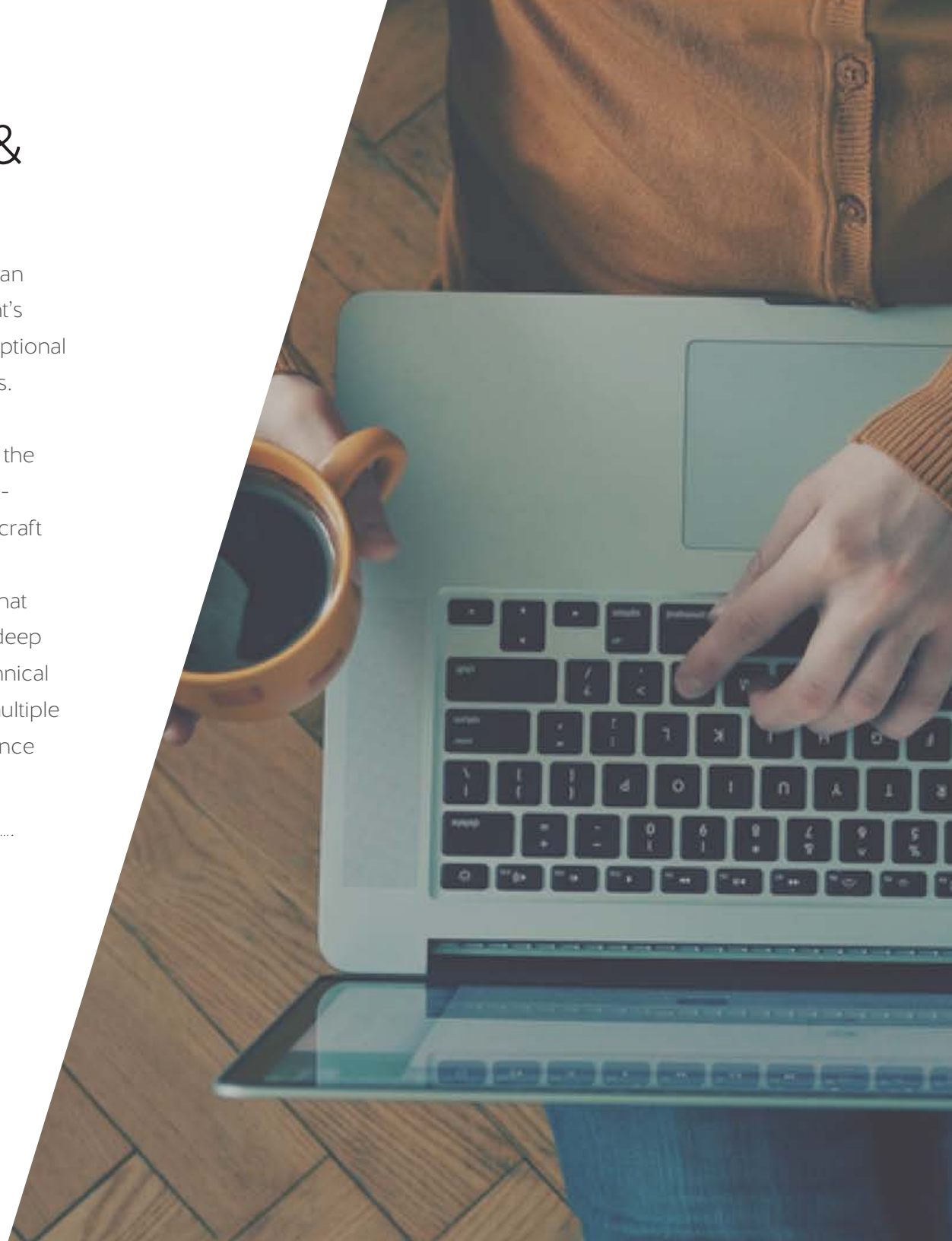
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