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Planning your migration from Magento Commerce 1 to **Magento Commerce 2**

A successful migration from Magento Commerce 1 to Magento Commerce 2 is an opportunity to update your knowledge of your business and its needs. The following suggested review is intended to guide you through the evaluation of your organization's needs, which will in turn help you develop an efficient, effective transition to Magento Commerce 2.

Review Your Organization's Profile and Needs

Preparing for a transition to Magento Commerce 2 is a great opportunity to reflect on the current status of your needs and how you plan to evolve over the coming years. We suggest developing answers to the following questions:

1. What does my business look like today?

- Do we serve B2C, B2B or both?

2. What are our plans for the next 1, 2, and 5 years?

- Do those plans require a flexible software platform that can expand, or will my needs be more constant?
- What are the future opportunities we hope to take advantage of that could benefit from technology?
- What size platform will we need for those goals?
- Will we expand into new countries or currencies?
- Will we bring on new product lines?

3. What is the profile of my current system (i.e. ERP, PSP, OMS, CRM)?

4. What is currently connected to my IT landscape?

5. Who manages my IT or leads my IT team?

6. How well do I know the ins and outs of our current digital solutions?

7. What is my Total Cost of Ownership (TCO) for the organization's digital presence?

8. What is my organization's digital Return on Investment (ROI)?

- To calculate digital ROI, we suggest the following calculation:

Digital ROI = Net Profit from Digital Sales / TCO x 100 = % Performance Results:



Define Your Migration Team



It's important at this stage to know who will fill key roles in the migration:

- **Your Magento Customer Success Manager (CSM)**
- **Key Stakeholders in your Organization**
- **Your IT Leader / Team**
- **Project Manager or Product Manager for Migration Development Team**
- **Business Analyst for Requirements Gathering**



Gather Requirements

Based on your review of your business, work with your Business Analyst to define a set of requirements for your new implementation of Magento Commerce 2. These requirements are best when they reflect quantifiable, relevant expectations of the users of your system. Users in this case include both your clients or customers, as well as internal users who might depend on information provided by Magento Commerce 2. **Some requirements that you should remember to consider in this phase:**

Hosting

Will a cloud solution be best for your needs, or will something else be a better fit, such as Dedicated (hosted/on-premises), clustered, headless, or FaaS (Function as a Service)?

Integration

Migration is an opportunity to upgrade a number of systems, and updating or renewing your connector or integration could reduce your TCO or custom/bespoke build hours. For example, is the current ERP, PIM, or WMS integration ready for Magento Commerce 2 or is there a built-in legacy? Magento Commerce 2 natively includes a great set of API's which can be connected to integrations without any custom work most of the time.

Metrics and KPIs

Get a sense of your current baseline metrics and what information you will want or need to measure success post-migration.

Timeline and Key Dates

Are there key seasons or dates for your organization that migration should be completed before or that act as a blocker on starting migration?

Partnerships and Third Parties

Are there services, third party platforms, or Magento partners that can help your business thrive? If so, work with your Magento CSM to identify ideal partners to integrate into your Magento Commerce 2 migration team.

Below are some techniques that you can utilize to gather requirements:

Brainstorming

Document Analysis

Focus Groups

Interface Analysis

Interviews

Observation

Prototyping

Discovery Workshop

Reverse Engineering

User Surveys



Develop Key User Stories

A User Story is a requirement expressed from the perspective of an end-user goal.

Using the requirements developed above, work with your Project / Product Manager and Business Analyst to develop one or more key User Stories. For example:

Customer Change in Order:

Customer with an existing order may want to change the order contents or its shipping destination; or completely cancel the order. The Customer will likely expect to find this option from both their order confirmation email and from their account settings on the site. Completion of the change should result in a confirmation to the customer.

Contact your Magento Customer Success Manager

The final step before starting migration is to reach out to your CSM to review your migration plan. As part of this discussion, the CSM will work with you to develop the best plan to execute your migration. Don't know your Magento CSM? **Contact us at 1-800-685-3624 (US) and we'll help you get started!**

