

Ecommerce Replatforming

Project governance, management and delivery checklist

Written by James Gurd, Owner & Director

<https://digitaljuggler.com/ecommerce-replatforming/replatforming-video-series>

/ Index

| | |
|---|-----------|
| / Summary | 3 |
| / Introduction to your checklist | 5 |
| / Stage 1: Project set-up & governance | 6 |
| / Stage 2: Project budget and scope | 8 |
| / Stage 3: Project management essentials | 10 |
| / Stage 4: Business requirements capture | 12 |
| / Stage 5: Platform evaluation & selection | 14 |
| / Stage 6: Building your TCO model | 16 |
| / Stage 7: Platform due diligence | 18 |
| / Stage 8: Partner selection RFP | 20 |
| / Stage 9: Partner due diligence | 22 |
| / Stage 10: Risk management & mitigation | 24 |
| / Contact | 26 |

/ Summary

Hello,

This downloadable guide accompanies the free 10 part video masterclass series on project managing your ecommerce replatforming project.

Ecommerce replatform projects are complex by nature and often compromised by planning and project management issues. Having worked on a wide range of projects both as a Head of Ecommerce and as an independent consultant, for organisations including House of Fraser, Victoria Beckham and RSPB, I've first hand experience of the dos and don'ts of effective project delivery.

This checklist is a culmination of more than 16 years' experience in ecommerce project delivery for small and large organisations. It gives you a set of standards against which to evaluate your own project set-up and delivery, helping you ensure you've applied the right discipline and attention to detail to help drive a successful outcome. In this guide you'll get:

1. Step-by-step actions for your ecommerce replatforming project
2. Good practice insights to boost your project management expertise
3. A structured checklist to evaluate your current approach and identify gaps that need filling.

If you have any questions or would like to discuss a replatforming project, my contact details are at the end of this guide. If you'd like to watch or find out more about my video masterclass series, please visit <https://digitaljuggler.com/ecommerce-replatforming/replatforming-video-series>

Many thanks, James Gurd



Owner & Director, Digital Juggler

/ About Digital Juggler

I'm James Gurd, Owner of Digital Juggler, an ecommerce consultancy. I'm an experienced ecommerce professional with more than 16 years' digital experience both Client and Agency side. I have managed ecommerce & customer service teams in-house as well as working with Client teams to help them plan and evolve their ecommerce strategy. Ecommerce is more than work, it's something I have a genuine interest in, which is why I'm active in the industry and constantly learning.

A quick summary of my relevant experience:

- 4 years as Head of Ecommerce in Retail – Robert Dyas & Betterware (getting people excited about Tupperware!)
- 2 years as Head of Client Services/Ecommerce Consultant at EIBDigital – Clients included New Look, Conran Shop and Rymans
- Independent Consultant since 2009 – Clients include Pangaia, Dr. Barbara Sturm, Victoria Beckham, RSPB, Sage, Mars, Samsung, House of Fraser, Sweaty Betty, Rocco Forte Hotels & Econsultancy (for whom I act as an associate consultant)

How I contribute to the industry:

- Founder and co-host of [#EcomChat](#), a weekly industry Twitter chat on ecommerce topics
- Founder and co-host of the [Re:platform Podcast](#), focused on ecommerce CX and technology
- Author of popular best practice guides for Econsultancy and Smart Insights.

How does Digital Juggler work?

I take full ownership of Client projects and act as lead consultant. I have a network of subject experts who help me deliver projects. I have built this community steadily over many years and involve consultants, freelancers & agencies to deliver project components where their specialist skills will add value to the Client.

Why does this work?

The people I work with are specialists in their field – they have hands-on experience of implementation as well as providing strategic consultancy. This means they understand the trading pressures that digital teams are under, helping them to provide solutions that are realistic and achievable.

/ Introduction to your checklist

From experience, I know it pays to have an over-arching set of principles that a replatforming project must adhere to, and capabilities that need to be satisfied within the project team. To help ecommerce teams plan for a business critical project, I've translated my multi-project experience into a structured checklist, outlining the key capabilities you need to provision for. There are 10 sequential stages:

1. Project set-up & governance
2. Project budget & scope
3. Project management essentials
4. Business requirements capture
5. Platform selection
6. Building a TCO cost model
7. Platform due diligence
8. Partner selection RFP
9. Partner due diligence
10. Risk analysis and mitigation.

For each stage, you'll find a checklist and a summary explanation of what is required. Each stage has an accompanying masterclass video, which you can view for free on the Digital Juggler website.

Like what you read?

It takes a lot of time to produce a video masterclass series and free downloads. If this information has been useful, I would be most grateful if you could share the link to this guide and/or the video series via social media and on your website or blog.

Thanks in advance, James

/ Stage 1: Project set-up & governance

Before any work is done, it's important to ensure your project has a clear structure, with a board-level sponsor appointed to ensure it gets the buy-in needed from across the business, as well as ensuring external providers take it seriously.

The age-old saying, "Act in haste, repent at leisure" applies here. Think carefully about the guiding principles for your project and ensure that decisions made at this stage are agreed unanimously, are realistic and achievable.

[Take my 3-minute video masterclass:](#)



<https://digitaljuggler.com/ecommerce-replatforming/replatforming-video-series/project-governance/>

Your checklist:

| Item | Summary | Completed? |
|------|--|------------|
| 1 | Appoint board level Project Sponsor. | |
| 2 | Appoint senior stakeholder with ecommerce experience as Project Owner. | |
| 3 | Define and agree the project goals and objectives. | |
| 4 | Define success outcomes and how they will be measured. | |
| 5 | Define KPIs to measure success and benchmark where applicable. | |

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| 6 | Define the project stakeholder groups and individual stakeholders. | |
| 7 | Define the project governance structure and process. | |
| 8 | Agree which stakeholders will be on the Steering Group. | |
| 9 | Define reporting mechanisms and frequency. | |
| 10 | Define escalation path and responsibilities. | |
| 11 | Define communication requirements, processes and tools. | |
| 12 | Create a governance charter for the project and distribute to stakeholders. | |

/ Stage 2: Project budget and scope

With a clear structure in place, you now need to define the parameters for the project.

Start with budget. Identify all the cost streams applicable to the project, get the maximum amount signed off with the Project Sponsor and Finance Director, and communicate this to the project team.

Next define the scope of the project. Think about what must be delivered for phase 1, and what else you want to be included in scope but which can be deployed in later releases.

Take my 3-minute video masterclass:



<https://digitaljuggler.com/ecommerce-replatforming/replatforming-video-series/budget-scope/>

Your checklist:

| Item | Summary | Completed? |
|------|--|------------|
| 1 | Define project cost streams <i>e.g. initial build, licensing, hosting etc.</i> | |
| 2 | Agree and sign-off realistic budget for each stream with Sponsor and Finance Director. | |
| 3 | Document which budget pots each cost stream is allocated to, and who owns the pot. | |
| 4 | Agree a contingency budget to cover project scope creep or unforeseen issues. | |
| 5 | Create a high-level definition of the project scope. | |
| 6 | Agree prioritisation criteria for scope items <i>e.g. MoSCoW.</i> | |

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| 7 | Review scope with key stakeholders and refine to create an approved scoping document based on the agreed prioritisation criteria. | |
| 8 | Get scoping document approved and signed-off by Project Sponsor. | |
| 9 | Review project phasing and define your MVP (minimal viable proposition) version of the project scope. | |
| 10 | Use prioritisation criteria to define priority order for non-MVP scope items. | |
| 11 | Flag high-level requirements in the scope that need further business case justification. | |
| 12 | Work with appropriate stakeholders to assess business case for each requirement. | |
| 13 | Make recommendation to Steering and Project Sponsor based on the outcome of business case assessment. | |

/ Stage 3: Project management essentials

Project management discipline will make or break your project. The most successful projects I've worked on have had brilliant, experienced project managers in control of delivery.

Appoint an internal project manager with experience in complex technology projects and who has a track record of working with stakeholders at all levels, right up to board level. The project manager will be responsible for the project charter and setting up your project office to ensure there is a clear process for getting you from set-up to go-live as efficiently as possible.

[Take my 4-minute video masterclass:](#)



<https://digitaljuggler.com/ecommerce-replatforming/replatforming-video-series/project-management-essentials/>

Your checklist:

| Item | Summary | Completed? |
|------|--|------------|
| 1 | Appoint an experienced project manager. | |
| 2 | Set-up the Project Office (physical or virtual, the people and tech that the PM needs to deliver the project). | |
| 3 | Create the project stakeholder RACI matrix. | |
| 4 | Define the decision-making paths and stakeholders responsibilities. | |
| 5 | Create a PID (project initiation document) and distribute to all stakeholders (internal and external). | |

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| 6 | Create a RAID log (Risks, Actions, Issues & Decisions). | |
| 7 | Define and approve the project collaboration toolkit (systems, processes, people etc.). | |
| 8 | Set-up and test all systems and processes that will be used for project collaboration. | |
| 9 | Brief all stakeholders on their roles and responsibilities. | |
| 10 | Set-up project reporting tools and distribute draft reports for review and approval by Steering Group. | |
| 11 | Set-up key project meetings and invite required attendees. | |
| 12 | Agree process for on-boarding new project stakeholders with senior stakeholders and Project Sponsor. | |

/ Stage 4: Business requirements capture

In my experience, trying to select your platform by evaluating a full list of all functional requirements is fools gold. It adds unnecessary time and effort.

Most requirements are hygiene factors for ecommerce platforms *e.g. Wishlists*; they can all do them, to varying degrees. A sensible approach is to identify business critical requirements and make these the focus for your platform analysis *e.g. integration with your ERP, alignment with your RMA process*.

[Take my 3-minute video masterclass:](#)



<https://digitaljuggler.com/ecommerce-replatforming/replatforming-video-series/business-requirements-capture/>

Your checklist:

| Item | Summary | Completed? |
|------|---|------------|
| 1 | Agree with Project Sponsor and Project Manager the stakeholder interview set. | |
| 2 | Create stakeholder interview guides and pre-planning briefs. | |
| 3 | Brief stakeholders on interview requirements and format/style. | |
| 4 | Book all interviews into diaries and add a clear agenda. | |
| 5 | Run interviews and document key insights as meeting minutes. | |

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| 6 | Ensure any risks, actions, issues & decisions identified during the interviews are flagged to the Project Manager to add to the RAID log. | |
| 7 | Prioritise documented requirements using the agreed prioritisation criteria. | |
| 8 | Circulate captured interview notes to relevant stakeholders for review and comment. | |
| 9 | Update interview notes and submit draft set to Project Steering for review. | |
| 10 | Update interview notes based on Steering feedback. | |
| 11 | Submit signed off business critical requirements to the Project Manager to add to DMS (document management system). | |

/ Stage 5: Platform evaluation & selection

With your business critical set of requirements defined, you can now evaluate the market and shortlist ecommerce platforms.

I typically advise to shortlist a maximum of three platforms for detailed analysis. Based on your scope, budget and requirements, it's usually relatively straightforward to exclude some platforms. For example, if your initial build budget is less than £50k, then you can rule out enterprise platforms like Hybris.

Focus your efforts on the platforms that are best aligned with your project needs, budget and scope.

[Take my 4-minute video masterclass:](https://digitaljuggler.com/e-commerce-replatforming/replatforming-video-series/platform-shortlisting/)



<https://digitaljuggler.com/e-commerce-replatforming/replatforming-video-series/platform-shortlisting/>

Your checklist:

| Item | Summary | Completed? |
|------|---|------------|
| 1 | Review license costs for leading ecommerce platforms. | |
| 2 | Speak to vendors/system integrators for indicative project build costs. | |
| 3 | Run gap analysis for business critical requirements vs. native platform functionality <i>e.g. if B2B is critical, focus on platforms with proven native B2B capabilities.</i> | |
| 4 | Shortlist to a maximum of 3 viable platforms. | |

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| 5 | Create a weighted scorecard for the detailed comparison of shortlist platforms (you can download my template here). | |
| 6 | Define and agree scoring criteria for the weighted scorecard. | |
| 7 | Review all available documentation and professional reviews on each platform. | |
| 8 | Arrange focused product demos with vendors to deep dive into how they satisfy business critical requirements. | |
| 9 | Speak to industry contacts to validate platform assumptions <i>e.g. speak to another company using the platform.</i> | |
| 9 | Rate and score each vendor for each component of the weighted scorecard. | |
| 10 | Flag components where deeper analysis and due diligence is required. | |
| 11 | Carry out due diligence (research, calls, meetings etc.) and update the scorecard with notes. | |
| 12 | Identify your preferred platform based on the weighted scoring*. | |
| 13 | Present preferred platform rationale to Steering Group for approval. | |
| 14 | Approval for preferred platform from Steering Group. | |

* Please note that at this stage you've not formally accepted the platform as an investment decision. The goal of this stage is to provide an objective comparison of how well each platform satisfies your business critical requirements. In the next stage you'll run a detailed Total Cost of Ownership (TCO) cost model analysis to validate whether or not the platform with the best functional score is affordable and provides good value for money.

/ Stage 6: Building your TCO model

Now you have selected your preferred platform based on fit with business needs, it's essential to compare lifetime costs vs. the other shortlisted platforms.

A common mistake is to focus on upfront development and licensing costs only, and not factor in how costs evolve as you grow the business. I recommend creating a 5-year cost model that maps all Capex and Opex costs over the project lifetime and then calculates the annual cost as a % of the total GMV (Gross Merchandise Value).

By doing this you can compare the cost impact and affordability of each platform.

[Take my 5-minute video masterclass:](https://digitaljuggler.com/ecommerce-replatforming/replatforming-video-series/tco-cost-model/)



<https://digitaljuggler.com/ecommerce-replatforming/replatforming-video-series/tco-cost-model/>

Your checklist:

| Item | Summary | Completed? |
|------|---|------------|
| 1 | Define all cost streams associated with the project; flag which are Capex and which are Opex. | |
| 2 | Identify which budget pot each cost stream is associated with. | |
| 3 | Define your GMV revenue targets for Years 1–5. | |
| 4 | Create a TCO cost model template (Excel is ideal). | |
| 5 | Add in a provision for a detailed Discovery phase. | |

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| 5 | Add in Year 1 upfront costs – project build, licenses, hosting etc. | |
| 6 | Add in licensing and hosting fees for years 2–5 based on GMV growth targets. | |
| 7 | Add in Support & Maintenance costs for years 1-5*. | |
| 8 | Add in 3 rd party tool costs [^] . | |
| 9 | Add in a cost allocation for BAU enhancements (small/medium post launch development) <i>e.g. provision for 10 days' development per month.</i> | |
| 9 | Run a sensitivity analysis on the cost model for under and over performance <i>e.g. growth is -10%, -20% of GMV targets and +10%, +20%.</i> | |
| 10 | Calculate the % cost of GMV for each platform for each scenario and create a summary table. | |
| 11 | Present TCO cost model to Finance for review and approval. | |
| 12 | Present approved TCO model to Steering Group for review. | |
| 13 | Update TCO model based on feedback and submit approved version. | |
| 14 | Review preferred platform decision in light of TCO cost model – Green Light / Further analysis / Change decision? | |

* Please note that, depending on experience, you may not know what a realistic S&M (Support & Maintenance) annual cost is based on the platforms shortlisted. If this is the case, work with the vendors to ask them for indicative costs based on other client projects of a similar size. If they are unable to provide this, reach out to industry contacts or contact agencies that implement these platforms.

[^] Each platform will have a different set of native capabilities. It's likely you'll need to continue using or start using other 3rd party tools to provide the full set of ecommerce functionality you need. For example, using Ometria for automating personalised lifecycle marketing. Identify the additional 3rd party plugins that you'll need for each platform to satisfy the business critical requirements and then research any costs that will be incurred, and calculate a realistic annual fee.

/ Stage 7: Platform due diligence

You have already selected your preferred platform based on its fit-for-purpose against business critical requirements and cost of ownership.

Before you sign any contracts, it's important to do due diligence to iron out any concerns or uncertainties because no platform is ever a 100% perfect fit. There is always compromise, so make sure the business understands and accepts this compromise.

Platform investment isn't to be taken lightly; it pays to be cautious and do additional validation before signing contracts.

[Take my 4-minute video masterclass:](#)



<https://digitaljuggler.com/ecommerce-replatforming/replatforming-video-series/platform-due-diligence/>

Your checklist:

| Item | Summary | Completed? |
|------|--|------------|
| 1 | Identify platform functional areas that scored lower than alternative platforms. | |
| 2 | Create a demo brief for the vendor to address these concern areas. | |
| 3 | Run detailed demos for all the scenarios to learn how the platform will work in practise to achieve your needs. | |
| 4 | Get a written response from the vendor detailing what is OOTB (out of the box), what requires configuration and what would be bespoke development. | |

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| 5 | Get a written estimation from the vendor of the projected added cost to the project of enabling these functional areas and any risks they have identified. | |
| 5 | Request additional technical documentation from the vendor if required. | |
| 6 | Review additional documentation with a qualified technical specialist (internal or consultant). | |
| 7 | Identify and contact other Clients already using the platform. | |
| 8 | Interview other Clients on platform implementation, performance post go-live and quality of support & maintenance service. | |
| 9 | Summarise key findings into a report and present to Steering. | |
| 9 | Follow-up any red flags with the vendor to get assurances. | |
| 10 | Revisit platform decision in light of findings: Green Light / Further analysis / Change decision? | |

/ Stage 8: Partner selection RFP

Now the platform investment decision has been signed-off, you need to go to market to identify relevant systems integrators who can implement the platform for you.

Running an RFP requires a clear definition of goals and evaluation criteria for the agencies. It pays to pause for a moment and plan your RFP approach carefully before speaking to any external agencies.

Finding the right partner is just as important as selecting the best-fit ecommerce platform.

[Take my 5-minute video masterclass:](#)



<https://digitaljuggler.com/ecommerce-replatforming/replatforming-video-series/partner-selection-rfp/>

Your checklist:

| Item | Summary | Completed? |
|------|--|------------|
| 1 | Define need and expectations from a business partner. | |
| 2 | Review systems integrator landscape for your chosen platform. | |
| 3 | Shortlist potential partners (maximum of 3 or 4) based on experience, reputation and cost. | |
| 4 | Create a weighted scorecard to evaluate shortlisted partners. | |
| 5 | Create a briefing document for shortlisted partners. | |

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| 5 | Submit brief to shortlisted partners. | |
| 6 | Carry out initial phone interview with partner lead. | |
| 7 | Arrange face-to-face presentations for your top 2 or 3 partners following screening interview. | |
| 8 | Carry out interviews with partner testimonials. | |
| 9 | Carry out background research through your networks on the partners. | |
| 9 | Score partners objectively using the weighted scorecard. | |
| 10 | Select preferred partners based on scorecard ratings, testimonials and market reputation. | |

/ Stage 9: Partner due diligence

As with platform due diligence, before you sign any contracts, it's important to do due diligence to iron out any concerns or uncertainties because no SI (systems integrator) partner is ever a 100% perfect fit. There is always compromise, so make sure the business understands and accepts this compromise.

Investment in a business critical partnership isn't to be taken lightly; it pays to be cautious and do additional validation before signing contracts.

[Take my 3-minute video masterclass:](#)



<https://digitaljuggler.com/e-commerce-replatforming/replatforming-video-series/partner-due-diligence/>

Your checklist:

| Item | Summary | Completed? |
|------|---|------------|
| 1 | Document outstanding areas of concern and brief into partner for a final response. | |
| 2 | Carry out extended interviews with testimonial clients. | |
| 3 | Canvass market through your networks to speak to other clients (past and present). | |
| 4 | Flag any concerns to the partner for response. | |
| 5 | Provide a high-level final statement of project scope and deliverable to the partner. | |

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| 5 | Request formal project proposal including cost model and high-level project plan from partner. | |
| 6 | Request all documentation including SLAs and MSAs. | |
| 7 | Arrange legal review of documentation. | |
| 8 | Carry out negotiation with partner on agreements until both parties are happy to sign. | |

/ Stage 10: Risk management & mitigation

Ecommerce replatforming projects are complex, involving a wide range of stakeholders, business processes and technology systems. Risk is an inherent part of any project of this scale.

By approaching risk in a proactive manner, you can minimise the potential disruption to your project. It's essential that you ensure identified risks are properly defined and a plan put in place to mitigate this risk.

Take my 5-minute video masterclass:



<https://digitaljuggler.com/ecommerce-replatforming/replatforming-video-series/risk-management/>

Your checklist:

| Item | Summary | Completed? |
|------|--|------------|
| 1 | Solicit input from all stakeholders on potential project risks; collate information. | |
| 2 | Run a risk workshop with senior stakeholders. | |
| 3 | Prioritise risks based on likely project impact. | |
| 4 | Appoint owners for each risk & task them with creating risk mitigation plans. | |
| 5 | Create a Risk Charter (document summarising risks, owners & mitigation plan). | |

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| 5 | Submit Risk Charter to Steering Group for review and approval. | |
| 6 | Add approved risks to the project RAID log. | |
| 7 | Monitor impact of risks and provide updates via agreed project reports. | |
| 8 | Escalate risks to Steering Group when the mitigation plan isn't working on the risk impact is increased. | |



Thank you!

For more information, or to discuss your ecommerce replatforming project, please contact James Gurd:

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