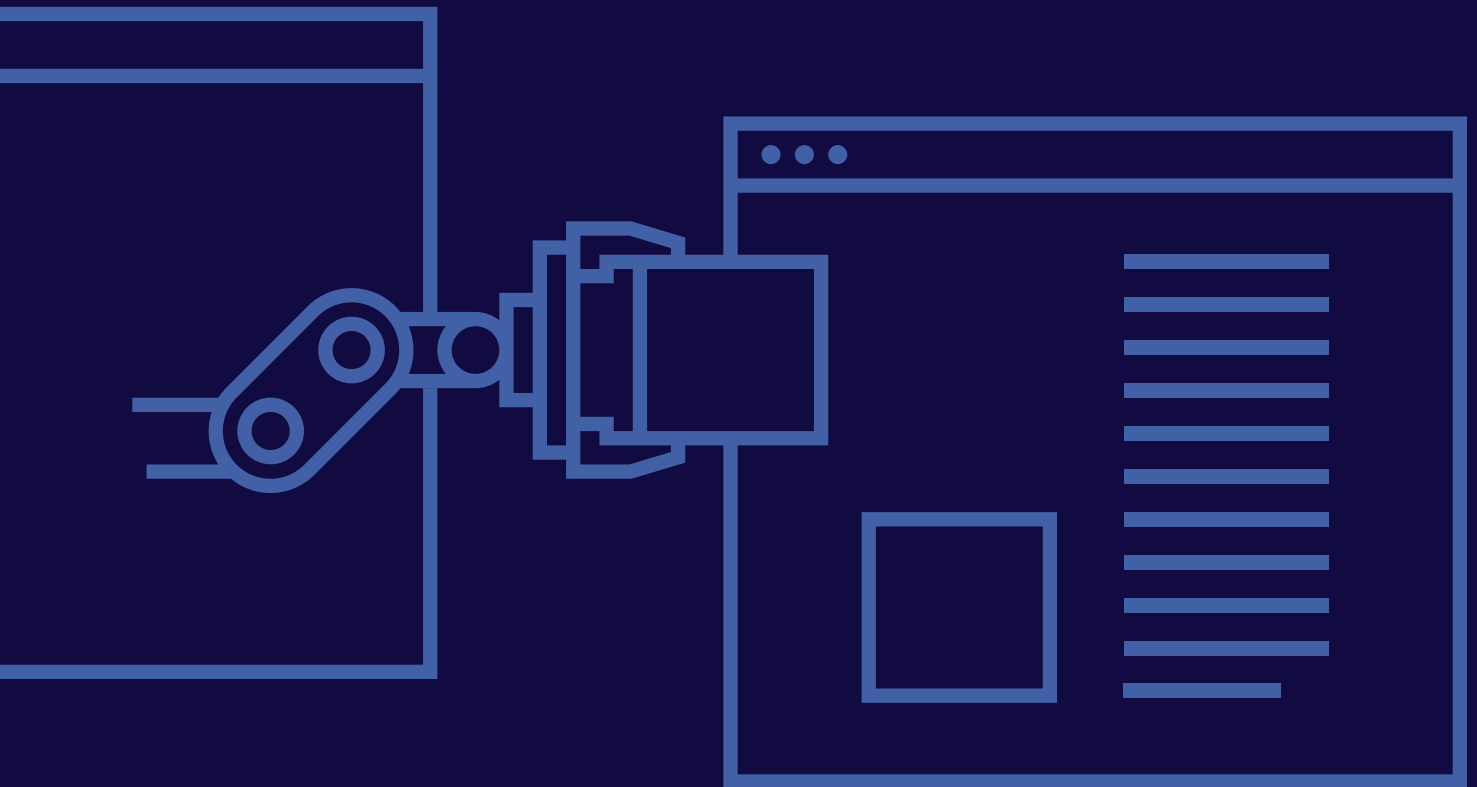


WHITE PAPER

# Website Migration

Migrating small business websites at scale



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# Part 1: Introduction

The migration of websites from one platform to another can be a truly challenging process. Add in the factor of doing this for thousands of websites - and it requires an immense amount of structure, technical expertise and ideally experience.

As a technology company, Mono Solutions has a long and proven track record of facilitating large-scale website migration projects for our partners around-the-world. Mono can facilitate website migration from a variety of different approaches, ensuring that we meet your needs as well as consider the experience for your small business clients.

This white paper is intended to provide insight and guide you on Mono's approach to website migration, including important considerations and processes, as well as setting expectations with clients, quality assurance and overall minimizing risk. All our large-scale migration projects are managed with the utmost professionalism, and conducted without any downtime or disruption for your existing small business clients.

Our aim is that this white paper should provide you with an extensive overview of the website migration process, as well as answer any questions that you may have about migrating your websites to the Mono Platform.

# Part 2: Why migrate websites?

## 2.1 WHAT IS WEBSITE MIGRATION?

Websites are the foundation of any small businesses digital presence. And while the website might have originally been built on one platform several years ago, technology is constantly evolving. Moving to an updated website platform can be crucial for the performance of a small business' website, as well as ensuring the modernization of the website and the user experience.

A website migration is the process of moving a website from one technology platform to another. This means not only moving the technical infrastructure and set up, but also the content and design - and often also involves refreshing these aspects of the website. What's more, website migration at scale ensures that this process can be executed in a structured and replicable manner for thousands of websites.

## 2.2 WHY MIGRATE?

Are you struggling to keep up with the latest website design trends? How are your websites performing from a technology perspective? Are you struggling with the limitations of an old and outdated website builder? Is the old website builder inefficient and slowing down website delivery time for your customers?

There may be multiple reasons that you are considering a large-scale website migration, but most often it's related to streamlining internal processes and choice of technology, as well as offering a higher-quality offering to your small business clients. In this section, we'll look at the most common considerations for pursuing a large-scale website migration:

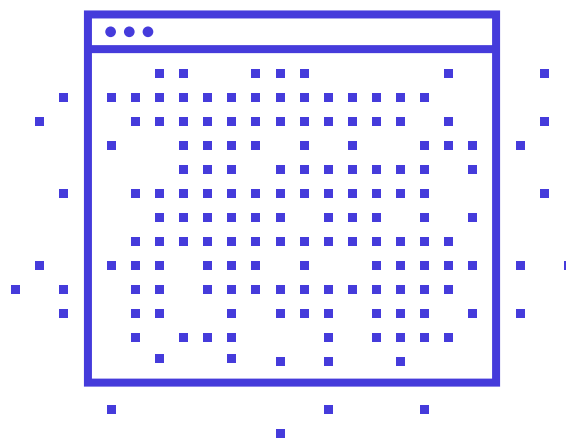
**Improved customer satisfaction:** As with any technical project, there is some cost and effort associated with a website migration. However from a business perspective, a website migration is more than just an investment in upgrading your technology. It's also an important investment in maintaining (and potentially even improving) customer satisfaction. Offering a high-quality solution is key to building and maintaining a strong customer base, and by providing a new product and/or service offering (be it via a migration) can lead to happier and more satisfied customers. Especially considering that the alternative of not investing may lead to

increasing churn over time, increasing customer dissatisfaction and ultimately the slow bleeding of your once healthy customer base.

**Consolidation of cost:** Another reason website migration is relevant for your organization is if you're looking to move all your website production to one platform. Operating several different platforms in order to offer the same type of website offering is not only expensive, but also cumbersome for your entire organization. IT and operational teams need to support and maintain several platforms, website designers need to master several user interfaces and design systems, and sales and marketing teams must learn the differences (pros, cons & technical limitations) between each platform in order to clearly communicate the benefits to customers. In addition, small business clients may feel overwhelmed being asked to switch between different user interfaces and platforms. As such, migrating all websites to a single platform does not only consolidate cost of maintenance and operation - but can also significantly lower the complexity across the board.

**Website modernization:** First impressions last, and an outdated website can be detrimental to gaining consumer trust and driving conversions on small business websites. Website design has changed over time, and as trends come-and-go - consumers expectations for engaging with small business websites has also evolved.

A website is a dynamic space that represents an SMBs public image and brand in the digital world (much like a storefront in the brick-and-mortar world). Migrating to a platform that offers modern design principles, up-to-date templates and mobile optimization can offer a significant upgrade both in the look-and-feel of the website's design, but also offer a technical modernization of the website.



**Improved SEO quality:** Search engine optimization (SEO) is one of the most important aspects of a website, and without proper SEO small business websites may underperform with regards to organic traffic. Generating organic traffic is key to driving online business, and ultimately driving revenue. Migrating websites to a platform that can offer both high-performance in terms of speed, technical SEO and the opportunity for great on-site SEO is therefore crucial to the long-term ranking of your small business clients' websites.

**Churn prevention:** A common misperception is that a migration project can provoke unwanted customer churn due to unsatisfied or dormant customers that seize the opportunity to terminate their contract. However in our experience, the opposite often turns out to be the reality. While

some customers may terminate, most are happy to receive an upgrade in website quality and the overall general website health check that a migration project provides. In fact, in our experience customer churn can potentially be reduced by 10-20% post-migration.

**Upsell opportunity:** Lastly, a website migration can be a great opportunity to explore new ways of driving more value to your small business clients. With the implementation of a new platform (such as Mono), migrated websites will benefit from an elevated level of technological performance and website design. But what other digital offerings and services can you sell? Migration presents a natural opportunity to upgrade the SMBs entire digital presence, for example boosting traffic with an added SEO service or adding new add-on products, such as online appointment booking, e-commerce or email marketing. And this will not only provide more value for your SMB clients, but also more recurring revenue with the addition of more subscriptions per user for your business.

## KEY REASONS TO CONSIDER A WEBSITE MIGRATION

- Improve overall customer satisfaction
- Consolidate operation and maintenance costs
- Better alignment on website offering across your teams
- An overall better platform for your internal fulfillment and website design teams
- Improve the user experience for your SMB clients
- Offer a more modern website experience
- Improve SEO quality to help more drive traffic
- Reduce the risk of customer dissatisfaction and churn
- Creates a natural upsell opportunity for other value-driving services and digital offerings

# Part 3:

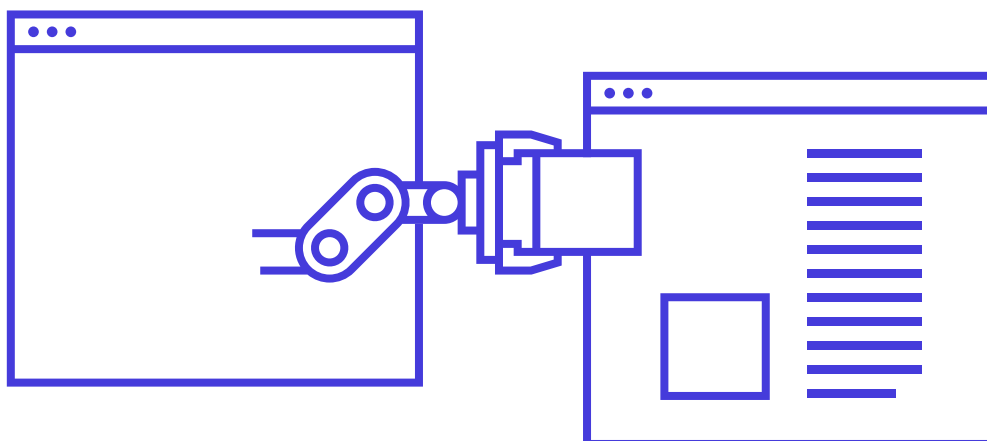
## Migration objectives & success criteria

### 3.1 CHOOSING A MIGRATION OBJECTIVE

At Mono, we believe it's important to understand the objective of a migration, in order to craft the most successful migration approach. The most common objectives are:

**Rebuild:** The most common objective for a website migration is to rebuild all your clients' websites on a new and more modern platform. This objective has minimal impact on the website design and content, while changing the entire technical performance and backend. The rebuilt website will benefit from all the technical and design features of the Mono Platform, including mobile responsiveness, site performance and technical SEO. The appearance of the website will be kept as close to the original as technically possible, however some minor visual changes will occur.

**Upgrade:** Another objective of a website migration is to be able to offer your users an upgrade (or redesign) of the overall website offering. Older websites often suffer from outdated content, belated design, lack of mobile responsiveness and poor SEO. By offering a website migration as an upgrade, the user will not only benefit for the technical performance of the Mono Platform - but also benefit from updated website design, content and overall website structure. Depending on the age/condition of the legacy sites and the customer's need and willingness to invest in



upgrades, this option offers plenty of opportunity to drive additional new revenue from your existing customer base and may very well be combined with the “Rebuild” objective explained above.

**HTML hosting (interim):** This setup is based on the objective that a quick website migration is a last resort for the safe keeping (backup) of legacy sites. This option can buy time in cases of extreme urgency, for example if the legacy platform is suddenly disabled or being discontinued. In this scenario, Mono takes over the hosting of the existing websites’ HTML. By taking over the hosting, Mono keeps the websites alive while you decide the next step. However, certain backend features on the websites may stop functioning and sites will not be editable. In other words, this option should only be thought of as an interim - not a sustainable solution. Please note that this option will not give the websites any of the technological benefits of the Mono Platform.

## COMPARING MIGRATION OBJECTIVES

	Hosting changes	Platform/ feature changes	Content changes	Structural changes	Visual changes (Design & UX)
Upgrade	Yes	Yes	Yes	Yes	Yes
Rebuild	Yes	Yes	No	No	Minor*
HTML hosting (interim)	Yes	No**	No	No	No

\*Visual changes will vary depending on compatibility of the old platform and the tolerance for change by the client. The closer the visual resemblance - the higher the migration cost, as extra quality assurance will be required. It’s important to stress that there will be some visual changes, and that a complete pixel-to-pixel copy is impossible and expensive to achieve.

\*\*The legacy platform will be deprecated and no longer used after the migration of the HTML

## 3.2 MIGRATION SUCCESS CRITERIA

As a technology company, Mono is committed to delivering the best possible quality for all migrated websites. As part of the migration process, we’ve defined the following migration success criteria and that all websites are migrated to the Mono Platform will adhere to the following general success criteria:



## GENERAL SUCCESS CRITERIA

- All migrated sites are responsive
- All pages and their content (including images, additional language versions and hidden pages) are migrated
- XML sitemap and robots.txt are correct
- SEO tags and descriptions on all pages
- Google Analytics should be enabled, and historic traffic data imported or available
- 301 redirects should be in place
- Domains and emails are working for client

### Migration impact on SEO

In some cases the migration of websites can have a negative impact on the SEO of websites, and resulting in a loss of traffic and potentially revenue for the small business.

However, with years of experience and in-depth knowledge, Mono has refined our migration process to ensure no negative impact on SEO. Our team fully acknowledges the complexity of migration, and therefore takes a detailed and thorough approach to transfer all content that impact SEO, incl. meta tags, descriptions, titles, alt tags and 301 redirects.

In addition, the Mono Platform provides strong technical SEO (schema.org mark up, W3C, page speed and more) and our team will ensure all aspects of the website are performing post-migration in terms of performance, technical SEO, page speed and mobile responsiveness.

## SUMMARY OF PART 3

- Choose a migration objective that suits the needs of your organization and the expectations of your SMB clients.
- Ensure you have defined a clear set of success criteria, and the impact on SEO is monitored. All migrations to the Mono Platform uphold in the high-quality success criteria documented in the box above.

# Part 4: Migration approaches

## 4.1 CHOOSING A MIGRATION APPROACH

The large-scale (or bulk) migration of websites can be approached in several different ways.

**Manual migration:** A manual migration requires that every individual website be manually rebuilt from scratch. This is a time-consuming and extremely costly approach that requires many man-hours to complete and in most cases, Mono does not typically recommend this approach.

**Technically assisted:** A technically assisted migration can be performed where a site import script automates the rebuild of websites on the Mono Platform. The effort of developing a script outweighs a complete migration process and in most cases, investing in this type of automation pays off as it reduces the number man-hours required to complete the migration. However, some manual effort will be needed for certain aspects, e.g. quality assurance.

In Mono's experience, most large-scale migration projects require some level of automation to make sense from a cost, speed and quality perspective. The Mono Team are experts in migration engineering and will always offer the best path to success for our partners with the right mix of automation and manual effort, as well as operate with full transparency on the processes around cost and development of the migration script, as well as minimize any potential risks.

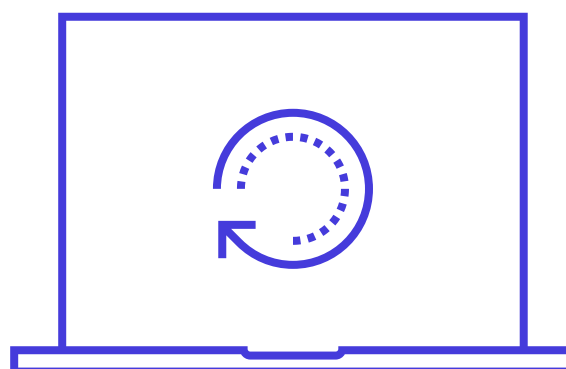
In a technically-assisted migration, it's all about reducing the cost and effort of a manual process by as much as possible. Our team will assist you in weighing the cost-effort of a manual and technically-assisted processes against each other. Our suggested migration paths will always employ a balanced level of automation to ensure a balance between the cost-effort, as well as account for other factors such as speed and quality. In addition, our migration paths always take into account the need for manual processes, such as quality assurance.

## 4.2 DETERMINING MIGRATION COST

**Calculating the cost of migration:** When migrating thousands of sites, the cost per website may vary because the websites themselves vary. Mono's approach is to be as transparent as possible and calculate the total cost of migration on an average per site basis. Provided that the quality of migration is a constant, our aim is to determine the best and most cost-effective way to reach your chosen migration objective. When tasked with a migration project, Mono will deliver a proposal and quote per site for the technical migration. This quote is calculated based on analysis of all sites that are in the scope for migration.

**Analysis of websites:** Before providing an estimated migration cost, Mono will analyse all sites in scope for migration via a proprietary analysis script. The analysis looks for size and complexity of sites. How many pages are on each? Is the content available in a structured format? How much does the design and templates vary? Is there extensive use of customized code or CSS? For accurate analysis, Mono will require a complete list of the URLs of the websites that need to be migrated. Along with the URL list, Mono will also investigate other technical aspects and ask for relevant information about your current platform, such as the available feature set, domain name system (DNS) set up and more.

Ultimately, the analysis of the websites will conclude how complex they are to move and how compatible your legacy platform is with the Mono Platform. The greater the compatibility - the higher the degree of possible automation of the migration process. The quote for building the migration scripts will be based on this analysis.



**Quality assurance:** Based on the analysis, Mono will also provide an estimation to the partner of the expected manual quality assurance time per site on average after the technical migration has been completed. Manual quality assurance is not included in the quote. However in our experience the higher the compatibility and lower the complexity, we can significantly reduce the quality assurance time per site.

## 4.3 MIGRATION SCRIPT & MANAGEMENT SYSTEM

The cost of migration with Mono includes a migration script and migration management system. The section below details exactly what is included.

## MIGRATION TO MONO: WHAT'S INCLUDED?

- ▶ Almost fully automated migration of websites, including the movement of website data assets, project management and analysis
- ▶ A white-labeled migration management system to help manage the migration project and quality assurance process
- ▶ Project management based on a migration project model perfected in previous migration projects
- ▶ Real-time reporting
- ▶ Quality assurance system and response
- ▶ An SSL certificate will be automatically provisioned within the first 24 hours of the website being live
- ▶ DNS automation (optional and requires API access to DNS provider)
- ▶ Customer communication (optional) in which the system sends automated emails to the end customers as the site moves through different stages in the migration process

Note: Quality assurance is not included in this quote. The partner is fully responsible for quality assurance processes (e.g. checking the migrated website's quality and fixing potential issues before publishing). Want to outsource quality assurance? Mono is happy to recommend one of our trusted fulfillment partners for this task.

### White-label migration management system

To facilitate a smooth migration process, we provide our partners with full access to a white-labelled migration management interface. This system also includes built-in quality assurance functionality, that automatically alerts if the migration of certain functions fail. For example, if the script is unable to add a receiver email address to a contact form (e.g. it's missing for a specific website) then an alert will be raised on that website in the system, so that it can be corrected.

The migration management system can also help manage any changes to which websites need to be migrated and any website data that needs to be updated. This is especially useful in the following scenarios:

- ▶ **Terminations:** As a natural part of the customer cycle, some customers may terminate their contracts during your migration process, and their sites shouldn't be migrated.
- ▶ **Updated data:** Customer contact data might change (for example, a customer may move to a different address). These changes can be updated in the migration management system. For example, you could produce a CSV file and put it on a server that the Mono team is given access to for the migration.

- ▶ **New sites:** During the migration process, you may identify and/or locate additional sites that you were unaware of. With the migration management system, these sites can easily be manually added to the migration list.

## 4.4 MIGRATION PREREQUISITES

As part of the technically-assisted migration, there are some prerequisites that must be acknowledged as part of the preparatory work of a migration.



**Special features:** Automatic migration will only support features that are used on at least 20 sites. More unique features used on less than 20 sites can be added to the migration at an extra charge. Alternatively, they can be skipped and not included in the new site at all or manually recreated by the partner during the QA phase. The client will receive a list of the features in question so that individual feature

decisions can be made based on data. Details on how a specific feature on a site will be migrated will be agreed on a case-by-case basis during the project. A good general rule is that the migration will aim for 1:1 if it doesn't negatively affect usability or edit ability.

### Additional data needed

To complete the migration successfully, there are data that must be considered in the migration scope beforehand, including:

- ▶ **Non-scrapable data:** There are certain things that can't be scraped and must be delivered to Mono by the partner. This includes 301 page redirects, domain redirects and form receiver emails.
- ▶ **Global Data:** The script tries to identify contact data on the site and add it to the Mono global site data. If you have customer contact data in some other system and that data could be used for global site data, that will improve the accuracy significantly (if your data is accurate).
- ▶ **Account data:** Depending on how much information the Partner wants the script to add to Mono when the customer account is created, these (or others) might also be needed: Customer company, Customer contact person name and Customer email

**Scripts:** The default is that no header, body or footer scripts are migrated as they usually are related to platform-specific features like carousels or form validation. Since these features are replaced by Mono features the scripts are redundant.

However, there might be some tracking scripts or similar that you want to move to the new platform. If so, we'd like a list of them so that we can create a whitelist.

**Analytics code:** By default, we migrate Google Analytics and Google Tag Manager codes, but if you have some standard code on all pages and you don't want to migrate that, please let us know and we'll filter it out.

**Colour scheme:** Let us know if you want us to create the global colour scheme in a certain way, for example, "colour 3 is always the main heading colour". Identifying global colours in a WordPress site that doesn't necessarily follow any colour scheme is not fool proof, but we'll give it a try.

**Font style scheme:** Same thing as with colours. Let us know if you want to follow a specific scheme, for example, "the logo text always uses the style company name".

## SUMMARY OF PART 4

- ▶ Choose between a manual or technically-assisted migration approach. Most partners of Mono prefer a technically assisted approach to streamline migration and find a balance between the cost and effort of manual and automated process
- ▶ Mono will help determine the migration cost by performing an analysis of all websites that need to be migrated, as well as an estimate of the time and resources needed for quality assurance
- ▶ Mono provides a migration script and migration management system to help the partner manage the migration project. See table above for more details.
- ▶ Prior to migration, Mono may ask partners to deliver information as a prerequisite. This will help strengthen the overall migration process and improve the finished result for your SMB clients

# Part 5:

## Migration resources & planning

### 5.1 TIMELINE

Migration of thousands of sites requires resources. Mono has a high bandwidth and is geared to handle multiple large-scale migration projects simultaneously, but it is important to acknowledge that the partners own organization will also need to reserve resources to complete the migration. Since resources are involved, planning is required (see section 5.3 for more)

Once the analysis is complete and the scope of the migration clear, a realistic timeline will be agreed up on between Mono and the partner. A typical timeline could look like shown in the table below, but it is important to understand that timelines always depend on each individual migration project:

#### MIGRATION TIMELINE

Time	Migration activity
Week 1-6	The first 6 weeks will be dedicated to script development with little visual progress
Week 7-12	Weeks 7-12 will be dedicated to testing of the first migrated sites and perfecting the migration script
Week 13	Week 13 and forward is where the quality assurance of the migrated sites can start and published to customers if approved. Note this is done by the partner

To keep the agreed schedule, the partner will need to reserve sufficient quality assurance resources to check approx. 50-100 sites/day on average. If a designer can process about 20 sites/day that would require 4-5 designers on the project.

If you'd prefer to outsource the quality assurance process, Mono works with a network of fulfilment partners around the world and we'd be happy to connect you with their services. Additionally, if the partner cannot find internal resources to manage the quality assurance work, Mono can also facilitate the outsourcing of this work.

## 5.2 MIGRATION MANAGEMENT

In addition to the timeline, it's important to define how you'd like to manage the migration process. Depending on your available internal resources, Mono can offer a fully-managed migration or work on a more integrated level with your internal team or a third-party. Below we've outline the different options for migration management:

**Turnkey, fully managed migration:** In a fully managed migration, Mono will provide migration as a turnkey solution where everything is managed by Mono from start-to-finish - including quality assurance. For quality assurance, Mono will contract a trusted third-party fulfillment partner to manage this process. In this option, the only process which the partner is responsible for during the migration project is customer communication.

**Jointly managed migration:** This is the most common management approach for migration, in which Mono provides the migration framework, technical migration and project management. The partner takes care of quality assurance work and the customer communication. In jointly managed migration, the partner can choose to either let their internal fulfillment handle quality assurance or alternatively, outsource it to a third-party fulfillment partner. If the preference is to work with a third-party fulfillment partner, please reach out to the Mono Team for recommendations from our trusted network of qualified fulfillment partners.

### MIGRATION MANAGEMENT

Migration management	Description	Technical analysis & migration	Quality assurance	Launching	Customer communication
Turnkey, fully-managed migration	Mono manages technical import & quality assurance by fulfillment partner (our selection)	Mono	Third-party fulfillment partner (contracted by Mono)	Mono with third-party partner	Partner
Jointly managed, technical migration with external partner	Mono manages technical import & quality assurance by fulfillment partner (selected by partner)	Mono	Third-party fulfillment partner (contracted by partner)	Mono with third-party partner	Partner
Jointly managed, technical migration with internal partner	Mono manages technical import & partner's internal team manages quality assurance	Mono	Partners own fulfillment team	Partner	Partner



## EXAMPLE OF RESPONSIBILITIES DURING JOINTLY-MANAGED, TECHNICALLY-ASSISTED MIGRATION FLOW

Process	Responsible party
Initial migration	Mono
Manual quality assurance, incl. Testing of pass or fail. If failed, partner must report a ticket to Mono	Partner
Fixing script & resolving tickets	Mono
Re-migrate when fixed	Mono
Manual quality assurance - Fixing	Partner
Updating site license in Mono	Mono
DNS changes	Partner
SSL provisioning	Mono
Customer communication	Partner

### 5.3 PLANNING & SETTING EXPECTATIONS

At Mono, we always work closely with our partner on planning and managing migration projects. The planning phase is important as it helps to set the right expectations for all parties involved, which ultimately delivers the best end results. Mono's project team will help set the expectations correctly based on the partners needs and the objectives of the migration project.

In the migration agreement between Mono and the partner, the timeline for the execution of the migration project is included in detail (see example in section 5.1 above). However within this timeline, it's also important to plan for the following milestones to be achieved within each phase:

## PROJECT MILESTONES

Phase (approximate time)	Milestones for technically-assisted migration
<b>Analysis</b> (1-2 weeks)	<ul style="list-style-type: none"> <li>▸ Full list of websites and relevant info must be delivered to Mono</li> <li>▸ Site analysis completed</li> <li>▸ Migration objectives defined</li> <li>▸ Quote delivered (incl. cost-effort evaluation and estimated timeline)</li> </ul>
<b>Planning</b> (1-2 weeks)	<ul style="list-style-type: none"> <li>▸ Agree upon migration approach</li> <li>▸ Agree upon migration timeline</li> <li>▸ Sign migration contract</li> </ul>
<b>Development</b> (estimated 6 weeks, but this can vary)	<ul style="list-style-type: none"> <li>▸ Script development begins</li> <li>▸ First version of script delivered for testing</li> <li>▸ Final version of script completed for deployment</li> </ul>
<b>Migration &amp; quality assurance</b> (dependent on partner bandwidth)	<ul style="list-style-type: none"> <li>▸ Websites are migrated in batches (flexible batch size)</li> <li>▸ Quality assurance begins</li> <li>▸ Websites handed over to customers</li> <li>▸ All websites are migrated</li> </ul>
<b>Retrospective</b> (1-2 hours)	<ul style="list-style-type: none"> <li>▸ Evaluation of project</li> </ul>

### A collaborative approach to script development

At Mono, we take an iterative and collaborative approach to developing and refining the migration script. The partner plays a key role in the development of the script as it is the partner who tests the site quality after it has been through the migration script.

The Mono Team's goal is to continuously improve the automated migration results (as much as technically possible within the allotted time frame) in order to ultimately reduce the amount of quality assurance needed. The development of the script is an ongoing process that continues during the entire project to refine the results of the automation and minimize manual quality assurance.

Therefore during the development phase, it is required that the partner set aside resources to check the quality of migrated sites and report potential bugs via Mono's ticketing system. This work is crucial for the best possible end result, as well as finding the 'sweet spot' between automation and manual work. As such, the start of the project will require more testing

resources in order to continuously test the sites that each iteration of the script has migrated. The need for testing will gradually decrease as the script develops.

### Planning the migration order

To secure smooth execution of the migration project, it is also important to plan in which order your websites should be migrated. In large-scale migrations, it is not possible to migrate all websites in one go. Rather, it's an iterative process where websites are migrated in batches to align with the bandwidth for quality assurance, as well as customer communication capability. Therefore, it's a valuable preparatory exercise to consider which types of websites you will be migrating, which order you'd like to migrate them, and when you want to migrate them. It is therefore important to consider the following:

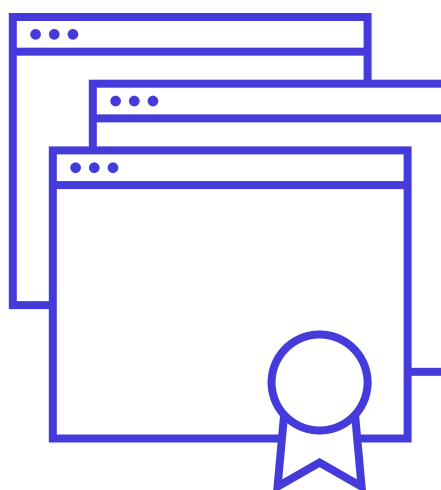
- Which segments of websites are low-hanging fruit that could be ideal to start with?
- Which segments of websites do you expect will require more support?

For large-scale migrations, our recommendation is typically to begin with websites that are simple and/or outdated. This helps prevent customer churn as the migration can be positioned as an upgrade and thereby functions as a more natural upsell opportunity for these clients. As new capabilities (example the ability to migrate more advanced features) are added to the migration script, you can migrate more advanced or complex websites. As part of the process, the Mono Team will provide an ongoing recommendation of which order the websites should be migrated based on the current technical capabilities of the script. It is highly recommended that this recommendation is followed to ensure the best migration results.

## 5.4 QUALITY ASSURANCE

In our experience, our partners most often want to manage the quality assurance work and the customer communication themselves. As part of the quality assurance work, there are a few important considerations to consider as part of the planning:

**Do your SMB clients frequently update their websites?** If websites are regularly updated by your SMB clients, it may need to be re-migrated (or migrated twice). This occurs most often when a website fails quality assurance upon initial migration, due to missing features. If the client makes updates before the new script is ready,



the website will therefore need to be re-migrated to include any updates. If no updates were made, the website does not need to be re-migrated.

In addition, there is usually a delay of a few days between when the website is migrated a second time and quality assurance. During this period, the customer should refrain from updating the websites as it will render the second migration obsolete. To manage this, we recommend that the re-migration is scheduled in advance and that affected clients are notified, for example “Your website will be migrated to a new and improved platform between (date) and (date). Kindly refrain from making any updates during this period, as they will be lost”.

**Do you want to streamline the quality assurance process or assign specific sites to specific designers?** For efficiency, Mono recommends that you streamline the quality assurance process so that designers can perform quality assurance on any website that is ready for review. Websites are continuously added to the “ready for review” list by the migration script, and aligning resources so that you have a steady stream of designers reviewing helps ensure an efficient quality assurance process.

Alternatively websites can be migrated in batches, for example 100 sites at a time. In the case of batch migrations, Mono delivers a list of sites in the upcoming batch to your internal project manager. The project manager can then assign the sites to individual designers and release them for review and manual fixes.

We recommend the first and more streamlined approach as it’s more flexible, less bureaucratic and works well - even if designers work at different speeds.

## 5.5 CUSTOMER COMMUNICATION

A central part of the migration process is customer communication. This is perhaps one of the most important elements of the migration process, as it helps set expectations for the overall customer experience - which is essential to the success of the entire project. Partners should therefore proactively manage customer expectations before, during and after the migration process. Mono’s recommendation is that prior to the migration process that a detailed plan is created and presented communicating the migration not only to your clients, but also your staff.

The most important part of the customer communication is the overall marketing messaging around the migration. A migration may seem like an intimidating message for SMB clients, and therefore we recommend that the positioning is framed in a more positive light. A few examples are:

- Tell customers that you’re moving their site to a new and improved platform to make their website faster (site speed) and more accessible on mobile phones and tables (responsiveness)

- Tell customers that you're running a limited time offer to re-design their website on a newer platform at special price

The overall messaging, positioning and communication strategy, is of course, dependent on your customers expectations, experiences with your legacy platform and the processes they are used to when working with your team.

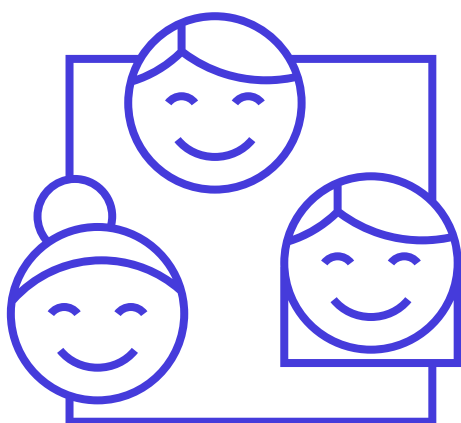
### **Communication to SMB clients**

Communication to SMB clients need to be segmented based on their type of websites and the duration of their contract. For example, there is a big difference in communicating to a customer whose website is a simple, one-page website that is 5+ years old, compared to a customer whose website is a custom design website with 20+ pages that was developed in the past six months. Therefore, knowing your customer segments is crucial to effectively targeting and optimizing your communication.

As part of your customer communication planning, you should consider which communication channels to use, what kind of communication each segment needs and when to send communication. To ensure credibility and reassurance, we also recommend that you provide information on how to file a complaint, in the unlikely scenario that they experience any problems.

### **Communication & resources for staff**

In addition, providing your own staff with resources, for example a frequently asked questions (FAQ) page, can help team members feel reassured that they have the information needed to provide clear and concise answers and help customers with the new system. Another



consideration for your staff is ensuring that you have enough support resources in the periods where you expect more customer inquiries than normal, such as during and after the migration process. Ensuring the availability of additional support resources will help avoid stress on your support teams, as well as ensures that customers can get their questions and concerns quickly solved.

### **Customer handover**

Ensuring a positive customer handover is essential and should be a key objective for the whole project. One of the most important aspects of customer handover is creating and delivering login credentials to your clients. We recommend the following two options:

- **Option 1: Mono manages delivery of new login**  
Mono sends all customers with migrated websites an email with their username and a personal link to a page where they can set their password. That link only works once and the password is not saved anywhere.
- **Option 2: Partner manages delivery of new login**  
You set the username and password manually, and send these to your customer in any way you choose.

## 5.6 MINIMIZING RISK

Whenever large projects, such as migrations are initiated, there are risks associated with it. In this section, we outline some of the risks that may occur, if a large-scale website migration is not properly managed. Mono openly communicates these risks to our partners, in order to build awareness, educate and help our partners take a proactive approach to minimizing risk. Risks of a large-scale migration include:

- A heavy support load in the period during and after migration
- Misinformation around the migration amongst customers
- Misalignment around the migration amongst employees
- Confusion amongst sales representatives about the website offering
- Increased customer churn rate, for example due to inactive and/or dormant accounts

Based on our experience, we can help you minimize these common risks associated with migration process through an open and ongoing dialog with our team. In addition, we ask you to consider the following prior to the migration process:

- Have you communicated internally about the upcoming migration?
- Have you prepared your support, sales and marketing departments for the upcoming changes and what they mean for customers?
- Have you considered communicating the migration as a positive change in your company to make your sales and support teams happy about the products you sell?
- Have you considered scheduling training sessions for your supporters and sales reps to ensure they understand the new website platform?

Other potential risks that need to be mitigated are:

**Overall project risk:** There are some problems that recur in most projects and focusing on mitigating them in advance significantly improves the project's success rate.

**Quality assurance resources:** This is by far the biggest threat in a large-scale website migration. To keep the schedule, there needs to be enough designers dedicated to their project or the process must be outsourced to a fulfillment partner with the necessary resources.

**Frequent changes in website data:** The most time-consuming and error-prone scenario is ineffective management of updates to website data, for example emails and messages asking for updates to individual websites. It is therefore best to ensure an established, structured and automated process for website updates.

**Changes in migration specifications:** The change of specifications that were established at the beginning of the migration process may cause significant delay as it will require scripts to be re-created and re-run, adding extra time and additional cost to the migration process. Thus, it's preferable that all specifications are set in stone for migration.

## SUMMARY OF PART 5

- Mono and partner will agree on a realistic timeline prior to beginning the migration process, including outlining necessary resources for quality assurance. Quality assurance is an important process to ensure that fixes are immediately handled.
- As part of the migration process, you need to decide if you want Mono to fully manage your migration process or if you'd like to dedicate internal resources to help jointly manage the migration.
- Mono will work with you to plan and set clear expectations for the migration, including an iterative and collaborative script development process and careful planning of the order of website migration.
- For the quality assurance phase of the migration, you'll need to decide if you'd like to manage this internally or work with a partner. Mono works with a network of qualified third-party fulfillment partners, and we're happy to recommend one of our partners to you.
- Clear customer communication and expectation setting is key before, during and after the migration process. Part of the communication is also reassuring. your internal teams with clear communication, extra resources and dedicated information, such as an FAQ. Overall, ensuring a positive customer experience and seamless customer handover should be a key objective of the migration process.
- As with any large project, there are risks associated with the large-scale migrations of websites & Mono aims to work transparently and openly highlights potential risks to our partners, and will work with you hand-in-hand to mitigate any potential risk.

# Part 6: Conclusion

In conclusion, if you are operating on a legacy platform - the large-scale migration of your customers websites is possible. While it does require careful evaluation, planning, communication and resource allocation, it can provide a more streamlined experience both internally for your teams - as well as for your small business clients.

In addition, a large-scale website migration empowers you to consolidate the cost of operations to one platform, and secure a modern and secure technology stack for the future. In the long-run a website migration to the Mono Platform will help ensure more scalability and flexibility for you to better service the growing digital presence needs of your small business clients in a cost-effective and efficient manner.

If you'd like to learn more about the Mono Platform, please don't hesitate to reach out to us for a live demo and more in-depth conversation about your needs. Email us today at: [sales@monosolutions.com](mailto:sales@monosolutions.com)

## ABOUT MONO SOLUTIONS

**monosolutions.com** – Mono Solutions, part of Ten Oaks Group, delivers the ultimate white-label website builder and suite of digital products for small businesses across the digital landscape to drive their business online. As a SaaS-based solution, Mono empowers digital service providers with a true do-it-with-me (DIWM) approach to offer digital marketing solutions and deliver real value to their SMB clients.