Project Management Case Study:
Navigating Unfamiliar Waters - Transitioning from Shopify to BigCommerce

Note: client and agency names have been removed for NDA reasons.

An Ecommerce Agency, renowned for its e-commerce prowess, embarked on a project with a client looking to transition their online presence from one platform to another. However, the project soon unraveled into a complex web of cost overruns and developer skills deficits.

Introduction: An Ecommerce Agency, a distinguished Shopify specialist with seven years of experience serving Shopify Plus and Shopify DTC customers nationwide, is known for its success in enhancing conversion rates, average order values, and revenue across various industries. As one of Shopify's key partners, their track record speaks for itself.

Client Background: A brick-and-mortar business based in Martha's Vineyard approached Ecommerce Agency seeking their expertise. Impressed by Parkfield's previous success with a similar pet treat company, the client was keen to collaborate. At the time, the client had an e-commerce site on BigCommerce, self-developed, and was eager to take it to the next level.

The Challenge: The challenge was clear - the client needed to elevate their self-built BigCommerce site, and they turned to this Ecommerce Agency for help. However, before accepting the proposal, Ecommerce Agency's executive members and lead developer engaged in internal discussions to evaluate the opportunity.

Technical Expertise: The Ecommerce Agency boasts a talented team with diverse technical skills, including proficiency in HTML, CSS, Javascript, and various programming languages like Java, Ruby, PHP, and SQL. The lead developer identified similarities between the platforms, sparking interest in exploring BigCommerce's potential.

Project Decision: While the Ecommerce Agency had previously declined BigCommerce projects, this one, estimated to be completed in six weeks, presented a unique opportunity. The CEO recognized the need to diversify capabilities beyond

Shopify, mainly to cater to enterprise-level clients. BigCommerce, renowned as an enterprise-level e-commerce solution, was viewed as a strategic stepping stone towards embracing a new platform outside the familiar Shopify ecosystem.

Background:

Ecommerce Agency typically begins its client engagements with a site audit before proposing solutions for site migration, rebuilding, or creating new sites, primarily within the Shopify platform. Clients turn to this Ecommerce Agency when they seek to enhance their direct-to-consumer (DTC) websites, addressing issues like low conversion rates, modest average orders, and checkout challenges. It's worth noting that most clients already operate on the Shopify platform. In cases of migration, these typically involve transitioning from platforms like WordPress or Magento to Shopify. Over the past two years, Ecommerce Agency has specialized further, focusing primarily on Apparel Brands, Lifestyle Brands, and Food and Beverage Brands.

Client's Need for BigCommerce:

The client in question, based in Martha's Vineyard, specializes in organic and natural pet foods, which they sell both at their physical store and through their online BigCommerce site. Their physical store operates during the spring to fall seasons, while online sales sustain the business during the winter when the physical store is closed. In addition to pet foods, the retail store offers pet accessories like leashes, collars, bowls, and flea and tick control products, all available online. The client also operates as a wholesalers, serving retailers in New England states, making them a B2B business as well.

The main reason for the client's choice of BigCommerce as their platform was the ownership structure. The client had two partners with 49% and 51% ownership stakes, respectively. The majority owner preferred BigCommerce because it did not charge platform fees, unlike Shopify. In response, Ecommerce Agency informed the client they could use their preferred credit card company and avoid Shopify's fees. However, the majority owner needed to be convinced that switching to Shopify would result in cost savings.

Challenges Faced: The project encountered challenges due to the shift from Shopify to BigCommerce. These challenges encompassed differences in technology, features, and user interface between the two platforms.

1. *Technical Challenges*: One of the foremost challenges was the technical aspects of transitioning from Shopify to BigCommerce. This involved adapting to a different technology stack, understanding BigCommerce's architecture, and dealing with potential compatibility issues during theme setup and customization.
   a. *Mitigation*: To mitigate these technical challenges, the project team conducted comprehensive technical assessments and testing before implementing changes. Skilled developers were on hand to promptly address any unforeseen technical issues.

2. *Resource Availability*: Having developers willing to work with a new platform, especially one outside their comfort zone, was a challenge. Fluctuations in resource availability could impact project progress. This included recruiting a web developer with expertise in BigCommerce.
   a. *Mitigation*: To mitigate this challenge, the project team looked beyond their immediate resources and sought freelancers with experience in BigCommerce to join the team.

3. *Access to Documentation:* Ecommerce Agency needed help obtaining comprehensive documentation related to the BigCommerce platform, themes, and development support.
   a. *Mitigation*: To tackle this challenge, the project team contacted the BigCommerce partnership program for support and access to essential documentation. They also sought assistance from BigCommerce for development support, including access to videos, tools, and a dedicated support person.

Results and Outcomes: The BigCommerce project achieved several notable results and outcomes, showcasing both successes and areas for improvement:

- *Launch Success*: The BigCommerce website was successfully launched, albeit one week past the initial launch date. At the time of launch, it was

approximately 90% functional. While there were some challenges, including issues with two apps (Recharge and the store locator app from POWR), font management, and icon formatting, the site went live.

- *Substantial Improvement*: The new BigCommerce website considerably improved over the previous site. It introduced enhancements in design, user experience, and the overall clarity of the message conveyed to visitors.
- Client Satisfaction: The client expressed satisfaction with the results. The improved design and user experience were well-received, aligning with the client's goals and expectations for the project.
- *Post-Launch Work*: Following the launch, there remained some post-launch work to address. This included resolving issues related to app integration, font management, and icon formatting. Additionally, the client sought training to understand how to use the new theme effectively for content updates.
- *Future Phase*: The project entered a subsequent phase focused on taking the customization work and developing a user-friendly page builder within the theme's backend. This phase aimed to empower the client to make content updates independently.

Overall, while the project faced some challenges and post-launch tasks, the successful launch of the BigCommerce website marked a significant achievement. It delivered a visually improved and more user-friendly platform that aligned with the client's objectives—the ongoing work in subsequent phases aimed to enhance the site's functionality and content management capabilities.

Retrospective: ***Navigating BigCommerce Transition - Learning from Challenges.***
Identifying Root Causes: During the BigCommerce project, Ecommerce Agency faced critical challenges. Despite our developers' expertise in various areas, they needed help navigating the intricacies of BigCommerce. This unfamiliarity resulted in unexpected hours overages, significantly impacting our project's budget.

Unassessed Bias in Developer Skill Assumption: In our recent project, Ecommerce Agency encountered an unanticipated risk that we needed to have assessed or adequately mitigated. The Agency assumed that their developers, who possessed

years of experience, would quickly adapt to the new skills and platform due to the perceived similarities in code requirements between the two platforms.

Impact and Consequences: This assumption affected the project's progress and budget. The developers' struggle to adapt to the nuances of BigCommerce led to unexpected hours overages and increased costs, which could have been prevented with a more thorough risk assessment.

Strategies for Mitigation: In response to this pressing issue, the Agency swiftly implemented a series of strategic measures:

- *Specialized Training*: We recognized the need for upskilling in BigCommerce. The developers were enrolled in specialized training programs to bridge the knowledge gap efficiently.
- *Enhanced Supervision*: The project managers took a more hands-on approach. They provided closer supervision and guidance to the development team, instituting regular check-ins and reviews to ensure tasks stayed on track.
- *Resource Reallocation*: Acknowledging the importance of specialized expertise, the Agency decided to bring in external BigCommerce developers. Collaborating with the internal team, this resource reallocation streamlined the project.

Lessons Learned: This project served as a valuable learning experience, yielding essential lessons:

1. *Early Skill Assessment*: The Agency realized the importance of assessing their developers' skills early in the project. Anticipating knowledge gaps proved crucial in preventing challenges down the road.
2. *Proactive Skill Enhancement*: The Agency learned the value of proactively addressing skill gaps through training and external resources. This proactive approach is essential for project success.
3. *Resource Flexibility*: The Agency discovered the significance of resource flexibility. Being able to reallocate resources efficiently is vital for overcoming unforeseen challenges.

4. *Recognizing Assumption Bias*: The Agency and its team must acknowledge that assumptions, especially those related to skill acquisition, can introduce risks. It's crucial to identify and challenge such biases in our decision-making process.
5. *Comprehensive Risk Assessment*: The team's experience highlights the importance of conducting a more comprehensive risk assessment, particularly when transitioning to new platforms or technologies. This assessment should consider not only technical aspects but also the adaptability and learning curve of the team.
6. *Open Communication*: Encouraging open communication within the team is vital. Developers should feel comfortable expressing their challenges and seeking support when encountering unfamiliar territory.

Conclusion: The retrospective on this project underscores the importance of adaptability and learning from challenges. By enhancing our risk assessment processes, particularly regarding biases related to skill assumptions, swiftly addressing developer skill gaps, and implementing strategic measures, the Agency not only rescued the project but also enhanced the team's expertise.

Key Takeaways: The key takeaways from this retrospective emphasize the importance of recognizing and addressing assumption biases, conducting comprehensive risk assessments, and fostering open communication within the team, the importance of early skill assessment, proactive skill enhancement, and resource flexibility in managing projects effectively, even in the face of unexpected challenges.

Impact on Future Projects: The experience gained from the BigCommerce project has had a significant influence on Ecommerce Agency's approach to similar challenges and has expanded its expertise in handling new platforms. Here's how they plan to leverage this knowledge in future projects:

- *Proactive Partner Engagement*: In future projects involving platforms like BigCommerce, Ecommerce Agency will proactively engage with the platform's partner support team before entering the proposal phase. This early

engagement will allow them to outline a clear game plan for a successful project outcome.

- *Documentation of Lessons Learned*: Despite the BigCommerce project not being categorized as one of its most successful endeavors, the lessons learned from this experience have been carefully documented. Ecommerce Agency recognizes the importance of capturing insights and knowledge from challenges to better inform future projects.
- *Enhanced Decision-Making*: The experience has sharpened their decision-making process when considering new platforms or technologies. They will now approach such projects with a more comprehensive understanding of the potential challenges and the need for specialized expertise.
- *Improved Project Planning*: With a deeper appreciation for the importance of thorough platform research and resource allocation, Ecommerce Agency will incorporate these elements into its project planning and execution strategies.
- *Broader Expertise*: This experience has broadened Ecommerce Agency's expertise in handling transitions to new platforms and managing the complexities that may arise. They will apply this knowledge to future projects, ensuring smoother transitions and better outcomes.

In summary, Ecommerce Agency's approach to future projects will be marked by a proactive engagement with platform support teams, a commitment to documenting lessons learned, and a more informed decision-making process. This experience has not only expanded their expertise but also equipped them with valuable insights to navigate challenges effectively in their upcoming endeavors.

Conclusion:
In this case study, both Ecommerce Agency and I, as project manager, demonstrated remarkable adaptability and readiness to embrace new challenges. This experience showcased Ecommerce Agency's capacity to diversify its services and its commitment to delivering successful outcomes even beyond its original expertise. As a fractional project manager, I am ready to expand my capabilities and tackle projects outside my comfort zone.

Together, we navigated the transition from Shopify to BigCommerce, overcoming technical challenges and resource constraints. This project not only expanded Ecommerce Agency's expertise but also demonstrated its ability to adapt to evolving client needs.

These takeaways not only showcase Ecommerce Agency's commitment to delivering successful outcomes but also underscore my role as a project manager in contributing to the project's achievements. They emphasize recognizing bias, adaptability, expertise, and proactive engagement in managing projects effectively within the dynamic digital landscape.

Call to Action:
If you're seeking a fractional project manager with a flexible approach to project management and a commitment to taking on diverse challenges, consider working with me. Contact me today.