Replatforming
Best Practices for a Seamless Transition

Before

- ❏ Share relevant information about your platform migration, including key success metrics, with your Contentsquare Customer Success Manager. This will help them support you and share relevant resources.

Examples of questions to cover with your Customer Success Manager:

- *Will your customers experience on the site be different as a result of the replatform? Will there also be a redesign of certain pages, sections, or key flows?*

- *Will the URL structure such as the paths on your site be changing?*

- *Are you adding any single page applications, modals or other dynamic content areas to the site?*

- *Are you going to be making updates to your CSP (Content Security Policy)?*

- *Will you be introducing new pages containing PII, or modifying existing pages where PII is entered or displayed to your customers?*

- *When will the replatform be happening? What does launch day look like?*

- ❏ Share your staging or Beta site with your Customer Success Manager at Contentsquare. They will check your tag functionality to avoid any data loss.

- ❏ If you are an Ecommerce client, verify the proper firing of the Ecommerce tag by placing a test order.

- ❏ Ensure custom variables are correctly defined in the Data Layer on new site.

- ❏ Ensure artificial pageviews are correctly implemented on modals / pop ups.

- ❏ Review PII Best Practices to Prevent Data Leaks and share with your IT team.

- ❏ Set up third party tool integrations for the new site.

- ❏ Share info about how to force the replatformed site using cookies or query parameters.

- ❏ Create zonings for your key pages and save them with names/dates to indicate they are the old site version.

- ❏ Rename any old mappings, goals and segments so you know they are related to your old site. (This will be helpful for pre/post analysis you do later on).

- ❏ Export the last 3 months' data from Page Comparator, with key goals for conversion, and micro-conversion.

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During

- ❏ Check that the Contentsquare tag is on the live site.

- ❏ If you are an Ecommerce client, verify the proper firing of the Ecommerce tag by placing a test order.

- ❏ Identify any Dynamic IDs on your site and apply a special attribute to accurately collect data.

- ❏ If you are testing your new site with a small amount of visitors first, make sure there is a custom variable or URL parameter to distinguish between old and new.

- ❏ Ensure your custom variables are defined correctly within the data layer for your new site—these are really helpful for setting up mappings!

- ❏ Create a mapping for your new site, and set up goals and segments for any behaviors or groups you want to analyze.

- ❏ Set up a Workspace to monitor pre- / post-performance, and create AI Alerts for key metrics, such as bounce rate, load time, and conversion.

- ❏ Create zonings for the main pages on your new site.

After

- ❏ After 5 days, ask your Customer Success Manager to run a data check to ensure the data within Contentsquare matches other Analytics tools.

- ❏ Run comparisons using Workspaces and Page Comparator to gain a high-level understanding of what's working well, and what could be improved.

- ❏ Apply old and new segments to journey analysis, to see where key drop off points are, and identify any unexpected behaviour. Within zoning, drill down into your key pages to see which elements are causing friction.

- ❏ Have a hypothesis? Use Impact Quantification to prove or disprove it and watch Session

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