WEBSITE MIGRATION

A SOLID APPROACH TO MIGRATING WEBSITES AT SCALE WITH MONO

MONO

TABLE OF CONTENTS

INTRODUCTION TO WEBSITE MIGRATION

Are you currently using an older, outdated website platform and struggling to keep up with technology and design trends? And are you therefore considering changing to a new website platform? Then one of your biggest concerns is likely if the migration of your existing sites is possible and even more importantly, how the sites will turn out in terms of quality of content, data and design.

This white paper aims at providing you with the necessary knowledge about the migration process with Mono and to answer all the questions you may have. How does migration work? How long will the entire process take? And how efficient is the migration process in terms of including all existing website content and design in the new software? While migration may seem like an intimidating part of switching website platform, it is actually the opposite - the process can be managed to ensure little or no downtime for existing sites and websites migrated to the Mono Platform are of top quality.

KEY CHALLENGES

Migration can be a complex process that requires changes across the organization.

Therefore, in order for a migration to be successful - the technical, design and management aspects of the project must all come together in order to ensure a smooth transition for not only customers, but also your organization.

Thus it is incumbent that the entire process is closely monitored and managed to ensure a clear migration process for all affected stakeholders.

Below are some of the most common challenges:

TECHNICAL

Technical challenges of a migration are normally related to the actual migration of sites, as well as the integrations of any third-party systems, such as a customer-relationship management (CRM) system, with the new website platform.

Thus technical challenges are very dependent on the extent of the migration.

DESIGN

Design challenges normally stem from the inability to make a perfect design conversion, where the migration design goal is to get as close as possible to the original site design.

Another design challenge can be that functionality existing in the legacy system is not available in the new system, and may thus therefore require additional custom development to meet customer needs.

MANAGEMENT

In terms of management, migration poses several challenges.

First of all, there is the internal management and re-training of your fulfillment team in the new system.

Secondly, there is the external challenge of communicating and ensuring customers that their website will be successfully migrated to a new platform.

This is more difficult with DIY customers, who require more help resources and support.

In the following we will ease your mind by taking you through the overall migration processes with Mono and show you how our structured approaches help overcome common challenges.

SUMMARY
There are typically three types of challenges in migration that you should be aware of before initiating a migration process: Technical, Design and Management.

MONO'S APPROACHES TO WEBSITE MIGRATION

With years' of experience in site building and migration, Mono has identified three approaches to ensure a smooth transition when switching to our platform.

Choosing the right approach depends on the amount of sites that needs to be migrated, the goals of the migration, and the expectations to costs and timeline.

THE UPGRADE

This approach focuses on a pure upsell opportunity for the reseller, whereby customers who are currently using an older version of the Mono Site Builder are offered to upgrade to the recommended Mono Platform.

This is done in a combination with the Content Transfer approach, allowing for a content transfer from the old platform into a modern template.

In this approach, giving end-customers a preview of their site on the newest Mono Platform, helps facilitate a greater number of migrations/upgrades.

CONTENT TRANSFER

From a technical point of view, this approach is a fast, easy and affordable way to migrate website content from a legacy platform to the Mono Platform and focuses on fully migrating the website content (text, images, meta data, tracking codes).

However, the site design will have to be adjusted by the reseller's fulfillment team after the content transfer, which can be done for either a single website or at scale.

For resellers with a lower number of sites to be migrated, this can be a great and fast alternative to manually copy-pasting content from one site to another and thus save time on fulfillment.

SPECIALIZED AT SCALE

The most popular but also most complex migration approach is aimed at transferring content along with the original site design to the Mono Site Builder.

Moving the design is always the complicated part of a migration and therefore this approach requires Mono to complete a detailed analysis of all existing templates, styles and designs available on the platform currently used by the reseller.

The result is that Mono team can effectively address how each individual item should be migrated.

While this approach is less noticeable for end-customers, it is often a longer and more cumbersome process for the reseller.

For resellers with a large number of sites, this is the preferred approach in terms of quality, cost, and efficiency.

In general for larger migrations, we recommend a phased approach where we migrate batches of sites one-at-a-time.

This helps ensure that any migration challenges are detected early on in the migration process and ensures that the remaining batches are smoothly processed.

In order for this approach to be successful, site content and design information in the site XML must be well-structured, which will make scraping from the site HTML unnecessary.

SUMMARY
Choose the approach that matches the scope of migration:

• The upgrade: Migrating websites from an older Mono Platform

• Content-transfer: Migrating a lower number of sites to the Mono Platform

• Specialized at scale: Migrating a large number of sites to the Mono Platform

PREPARING FOR MIGRATION

When we enter the preparation phase of the migration, we go through four steps with you to ensure that your expectations and goals are aligned with our roadmap and planning.

1

FACT FINDING AND ANALYZING

The first step in preparation for the migration is ensuring that all the facts surrounding the existing system are available to minimize the risk of complications.

Among the information the reseller has to provide are facts that include domains, hosting, platform, reporting & tracking, and content structure & accessibility.

2

STRATEGIC GOALS & MIGRATION MANAGEMENT

Second, we set the expectations and the strategic goals of the migration together with the reseller.

This includes planning and managing customer expectations, internal and external communication, post-migration support, strategic up-sell opportunities, and timing.

3

MIGRATION SUCCESS CRITERIA

Third, in order to properly evaluate the success of the migration, a set of success criteria should be set to align expectations. The following are examples of 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
- There should be 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

4

TIMELINE FOR PROJECT

And finally, a timeline should be set with realistic time goals and objectives for the entire process.

Ideally, several weeks buffer time should be built-in to account for any unexpected delays.

A high-level project plan for migration of legacy sites could look as follows, but note that time consumption for each phase can vary greatly depending on complexity:

- Analyzing and technical preparation: 2-4 weeks
- Preparing designs, templates and migration scripts: 3-4 weeks
- Importing content and data: 1 week
- Manual quality check and design adjustments: 2-4 weeks
- Domains and 301 redirects management: 2 weeks

SUMMARY

Before beginning the migration process, Mono ensures that everything is in place through detailed planning:

- Analyzing the scope of migration and your legacy platform

- Setting expectations and strategic goals

- Agreeing on the criteria for success

- Setting the timeline for the process

INITIATING AND MANAGING THE PROCESS

A general migration process always begins with an analysis and evaluation of the existing legacy platform by the Mono team.

This evaluation includes a review of content and domains to determine the best migration path which will be suggested to the reseller.

Depending on what kind of migration approach Mono and the reseller has agreed upon, different challenges can occur when initiating the migration process.

OUTDATED CONTENT

A potential challenge in migrating content for a website is that the existing content is outdated and the end-customer wants to update their site at the same time as their website is upgraded to a new platform.

This creates additional work for fulfillment personnel in collecting and inserting content. Therefore, content updates should be included in the overall scope of the project and integrated into the overall migration or post-migration workflow, and could be embraced as an upsell opportunity for the reseller.

STYLING & FORMATTING

The challenge in migrating content is the formatting and styling.

Challenges can be reduced by ensuring that all content is run through a program that strips the text of all HTML styling and formatting before inserting it into the new website.

DOMAIN/EMAIL MIGRATION

Challenges with domain migration are to make sure that downtime is minimized and that security of the authentication and authorization data is never compromised or lost.

Thus, the approval for domain process must be prepared prior to the actual domain migration, ensuring that there are no delays once the migration has actually started.

CUSTOMER EXPECTATIONS

You cannot begin a migration process without communicating with your end customers. This is important in order to set their expectations to the coming changes and what it means for the site design, content and performance.

When the reseller fully understands the scope of the migration, account managers and sales representatives must communicate with end customer to minimize confusion, misunderstandings and an increase in support inquiries.

SUMMARY

Prior to beginning the migration process, be aware of the challenges that can occur:

- Outdated content (can be embraced as an upsell opportunity)

- Styling and formatting in content (can be prevented with stipping texts of HTML)

- Domain and email migration (ensure that customers are informed that they need to approve the domain process prior to migration)

- Customer expectations to migration (can be controlled with a communication strategy)

CUSTOMER MANAGEMENT & SUPPORT DURING MIGRATION

A main key to success with migrating websites at scale, is to be on top of customer management and support during and after migration.

In our experience when a migration process gets delayed, it is not due to any technical complications as the technical part of the migration is planned and executed down to the last detail. It is a lack of strategic overview and planning by the reseller of how and when to communicate what to whom.

In other words, getting a strategic overview of your customer segments and support resources available before the migration process begins is paramount for success as it allows you to plan all aspects of migration down to the last detail and timeline. Therefore we recommend that in the beginning of the migration process you thoroughly consider how you want to communicate the migration to your staff and customers.

○ **Segment your customers depending on their type of website and how long they have had their subscription.**

For example, there is a big difference in communicating to a customer whose website is a simple, one-page website that is five or more 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 in order to effectively target and optimize your communication.

○ **Consider which segments you want to migrate, in what order you want to migrate them, and when you want to migrate.**

Which segments are low-hanging fruits that would be good to start with? And which segments do you expect will require more support? Remember that the more custom development and design there is to a website, the more resources it takes to migrate that site.

We strongly recommend that you begin your migration with sites that are simple or outdated to prevent customer churn and thereby turn the migration process into a huge upsell opportunity.

○ **When you have laid out a timeline for migrating the various segments, ensure 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, helps avoid putting too much stress on your support teams and it ensures that customers can get their questions and concerns quickly solved.

9

○　**Consider what message you want to send to your customers.**

For example are you giving them the message that you are moving their site to a new and better platform to make their website responsive and increase site speed? Or the message that that you are for a limited time offering customers the option to re-design their website on a newer platform at a special price?

○　**Consider how you will inform you sales representatives of the migration and how you can help them use the migration process as a sales advantage.**

○　**Consider how you will inform your support teams, and how/when you will educate them about using the new website platform.**

If you ensure that these considerations result in strategic decisions prior to the migration process, it will help ensure that the risk of any delays during the process is minimized.

PRE/DURING/POST MIGRATION SUPPORT RECOMMENDATIONS

As part of your customer communication planning, you should consider how to contact your different customer segments and with what messages.

In order to ensure credibility and reassurance, we also recommend that you provide information on how to file a complaints, should your customers experience any problems. We further recommend that you consider how you will communicate to your customers after the migration is done.

For example, creating a frequently asked questions (FAQ) for your support team to ensure that customers are provided with clear and concise answers, as well as feel reassured that the support team is competent in helping them with the new system.

SUMMARY
Ensure that there is a well thought-through process and control around:

- Communication management
- Customer expectation management
- Post migration support
- Strategic approach to up-selling opportunities etc.
- 3 steps to migration: Overview - Strategy - Process

MINIMIZING RISK

Whenever there are changes, there are risks associated with it. A large migration of websites from one platform to another that is not properly managed, can mean a heavier support load in the period during and after the migration, misinformed customers and employees, confusion among sales representatives about what they are selling, and a higher churn rate.

Based on our experience, we can help you plan your migration process and minimize the most common risks associated with migration through an ongoing dialogue with the Mono team. To minimize risks for the beginning, 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?

To ensure you have everything covered, see our Migration Checklist in Exhibit 1.

TURNING RISK INTO A SALES OPPORTUNITY

In general, lowering the risk of a large migration requires the ability to reproduce existing site designs as close to the originals as possible.An alternative migration path could be to regard the transformation to a new platform as an upsell opportunity. In practice this would mean importing existing content assets from the legacy platform and create a new and updated website design on the Mono Platform to prevent customer churn.

In this situation, we recommend a phased/segmented approach in which we migrate sites in smaller batches over a defined period of time, allowing any issues that pop up to be quickly assessed and avoided for future batches if necessary/relevant. Mono Solutions will work very closely with your team to ensure that these batches are quality tested before moving forward to the next batch.

SUMMARY
To minimize any risks such as churn, a drop in sales, or increased work load in your support teams, we recommend a thorough planning of:

- Internal communication (sales, support, fulfillment)
- External communication (customer segments, other stakeholders)
- Preparing sales and fulfillment teams on how to use the Mono Platform
- Embracing migration as a sales opportunity

FINAL REMARKS

Migrating websites at scale is not something that can be quickly and easily completed - and it shouldn't be.

To ensure the best result possible the process needs to be well thought out and thoroughly planned. It is a very complicated task with many questions, considerations and back-and-forth communication.

The Mono team fully understands the complexity of migration and our approaches ensure that resellers, regardless of their requirements, can feel assured that their websites are in good hands. Furthermore, when we are done migrating them to the Mono Platform, our team will ensure that they are up to speed in terms of performance, technical SEO, site speed, responsiveness and ease of use.

DISCLAIMER
Please note that migration projects are always subject to individual agreements between the parties. Mono Solutions is not committed to migrate websites from a reseller if Mono developers assess that the migration process is too heavy in terms of resources for Mono and the reseller both. Some legacy platforms and extensive custom solutions will simply require more effort than overall expected value.

QUESTIONS & ANSWERS ABOUT MIGRATION

WILL MY TRACKING AND ANALYTICS CODE BE MIGRATED TOO?

Yes, if identified then the tracking code can be migrated.

WILL MY WEBSITE LOSE ANY SEO VALUE AFTER THE MIGRATION?

No, we transfer all the same content including Meta tags, descriptions, titles, Alt tags, 301 redirects. Also since the Mono Site Editor is one of the strongest in technical SEO you may actually experience improvements.

CAN MY SITE'S DESIGN BE COPIED 100%?

No, it cannot be 100% copied. While website content can be transferred 100%, design will still have slight differences in appearance due to the differences between platforms. But it is possible to adjust the design in the Mono Site Editor following the migration to completely match any other website template.

HOW FAST WILL THE MIGRATION PROCESS BE?

While the preparation for migration requires collaboration, the actual migration is a process in which you can internally decide the tempo. Through our multi-site management system, batches of websites can be uploaded and migrated based on your preferred quantity and timeline. This helps ensure that fulfillment teams have time to adjust any design changes before sites are handed over to customers.

CAN WE MIGRATE WEBSITES FROM DIFFERENT LEGACY PLATFORMS?

Yes, but this will require more work and be more costly, as its requires custom development from the Mono developers for each individual legacy platform. Each platform has a unique code set and migration script to match each code must be developed. The more structured, in terms of codes, that websites are (e.g. made from the same website system), the easier it will be to migrate them.

CAN YOU MIGRATE WEBSITES WITH CUSTOM STYLING AND CODE, IF THEY ARE BUILT IN THE SAME SYSTEM?

Yes, it is possible to migrate website with custom styling and code but it requires more custom development. As custom development is needed for each individual custom feature, it greatly increases the workload for developers in moving them to the Mono Site Editor because of the added complexity, and overall adds to the cost, time and workload of the migration.

BENEFITS OF MIGRATING TO THE MONO PLATFORM

MONO - AN API-FIRST APPROACH

The big difference in migrating to the Mono Platform, compared to other software providers, is that the Mono Platform is developed on an API-first approach. This means that the Mono Platform can be altered to pull data from a variety of sources, including everything from your existing CRM database or an .xml file.

COMPATIBLE WITH THIRD-PARTY APPLICATIONS

The API-first approach means third-party applications can easily integrate with the Mono Platform to provide SMBs with all the functionality they need. While a wide variety of digital service providers and features are already available, our open API makes it possible for custom integration to match your specific migration or post-migration needs.

CREATE TEMPLATES THAT MATCH YOUR EXISTING DESIGNS

The Mono Platform has an extensive template library with a wide array of pre-made templates, as well as the opportunity for your in-house designers to create their own templates using the Mono Template System. By using a combination of base and style templates, designers can create templates that work for your clientele.

SWIFTLY CUSTOMIZE DESIGNS FOR CUSTOMERS

While the Mono Platform offers a wide variety of pre-made templates, we understand that SMBs want to have a unique look-and-feel. While an existing template can be used as the initial base for a website, it can easily be customized in the Mono Site Editor.

SECURE YOUR SITES

With online security of growing importance, Mono offers SSL certificates that create a secure and encrypted connection from the web server to the browser.

EASE OF USE FOR SMBS

The Mono Platform is an easy-to-use tool and SMBs at any skill level are capable of learning how to edit at least the basic details on their sites without using code.

EXHIBIT 1: CHECKLIST FOR MIGRATION

This checklist will help you get the best results from your migration process in terms of meeting your timeline, fulfilling your return-on-investment goals, and ensuring minimal support costs and internal and external communication issues.

1   Determine facts and provide to Mono Solutions team for analysis

- Domains
- Hosting
- Platform
- Reporting & tracking
- Content structure & accessibility

2   Meet with Mono to discuss strategic goals and migration management based on results of legacy platform analysis

- Decide on a realistic approach (upsell vs. migration) and timing
- Customer management (external)
- Partner management (external)
- Fulfillment management (internal)
- Sales & marketing management (internal)
- Post-migration support

3   Decide on the success criteria for the migration

- All migrated sites are responsive
- All pages and their content (including images, additional language versions and hidden pages) are migrated
- The sites look as close the original design as possible
- XML sitemap and robots.txt are correct
- There should be 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

4   Create a realistic timeline for the project including buffer time for delays

5   Ensure additional end-customer support during and post-migration

6   Migrate in batches to reduce the number of problems recreated in the migration of customer websites

MONO