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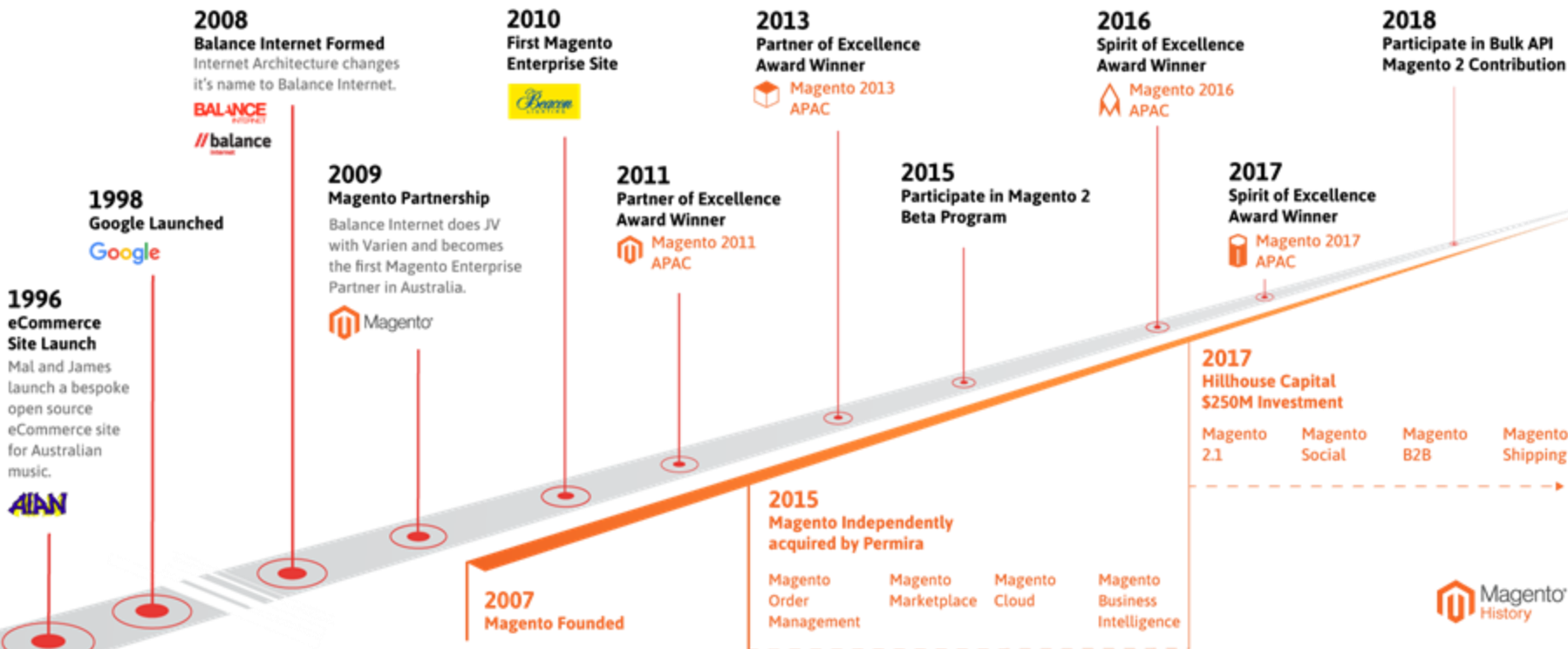# Optimising Magento 1 to Magento 2 Migrations

James Horne and Mal Williams

Balance Internet

Balance Internet & Magento History

2008
Balance Internet Formed
Internet Architecture changes it's name to Balance Internet.

2010
First Magento Enterprise Site

2013
Partner of Excellence Award Winner
Magento 2013 APAC

2016
Spirit of Excellence Award Winner
Magento 2016 APAC

2018
Participate in Bulk API Magento 2 Contribution

1998
Google Launched
Google

2009
Magento Partnership
Balance Internet does JV with Varien and becomes the first Magento Enterprise Partner in Australia.
Magento

2011
Partner of Excellence Award Winner
Magento 2011 APAC

2015
Participate in Magento 2 Beta Program

2017
Spirit of Excellence Award Winner
Magento 2017 APAC

1996
eCommerce Site Launch
Mal and James launch a bespoke open source eCommerce site for Australian music.

2017
Hillhouse Capital $250M Investment

| Magento 2.1 | Magento Social | Magento B2B | Magento Shipping |

2007
Magento Founded

2015
Magento Independently acquired by Permira

| Magento Order Management | | Magento Marketplace | Magento Cloud | Magento Business Intelligence |

Magento History

Agenda

Top Ten Tips

1. Build a 3yr Digital Transformation Strategy
2. Rescope and Descope
3. Go MVP and optimise use of OOTB
4. Learn from the past and your data
5. Choose the right extensions
6. Follow the global roadmap with Magento
7. Technical Tip 1 - Data migration
8. Technical Tip 2 - Infrastructure
9. Technical Tip 3 - Automated testing
10. Technical Tip 4 - M2 framework

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1. Build a 3yr Digital Transformation Strategy and Plan

Build your Digital Transformation Pillars and engage key internal stakeholders

- Develop Digital Strategy Pillars that align with Merchant Business Plan.
- Envison > Align >Enable
    - Envision > data driven, global benchmarking, stakeholder interviews and workshops
    - Align > Agree growth KPI's and Tactical strategies
    - Enable > Scope and Specification of Project
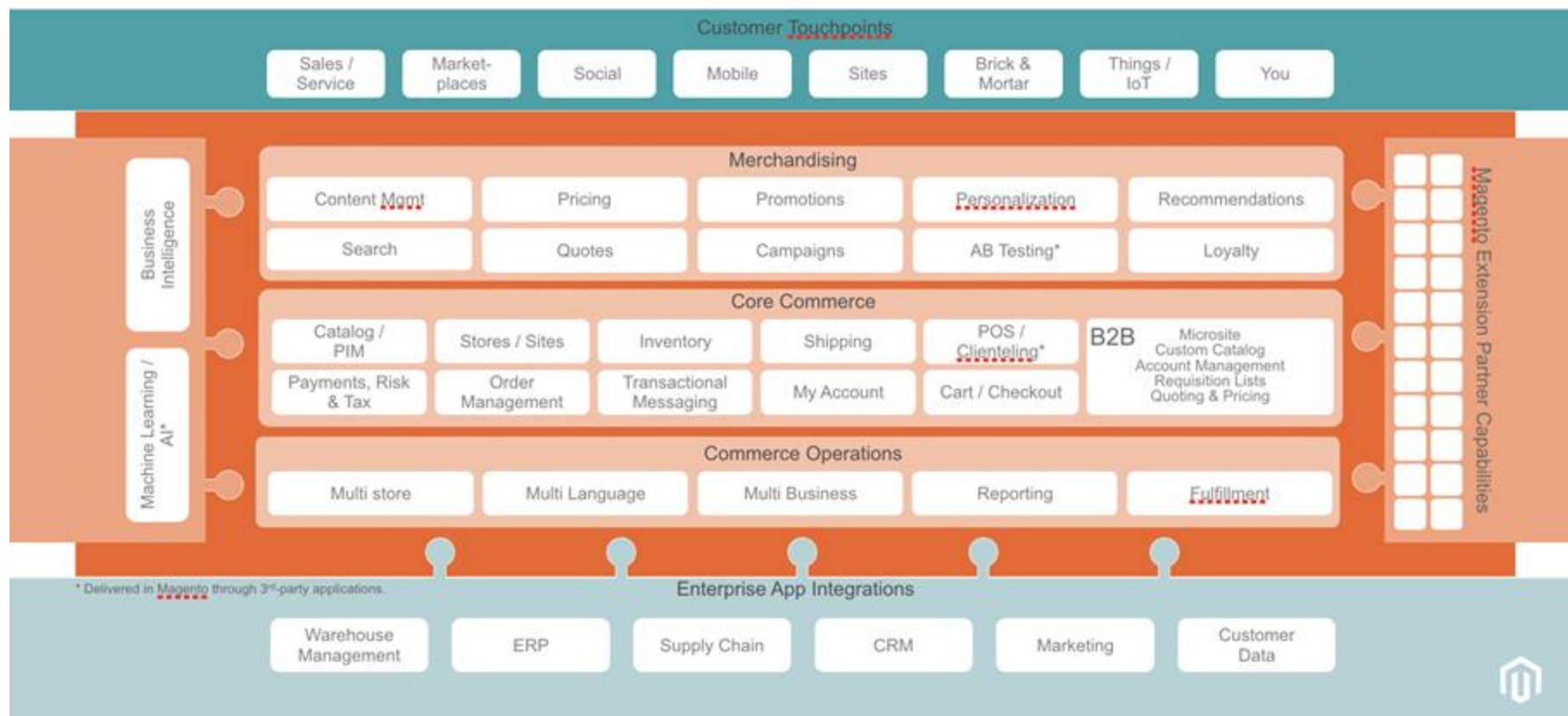- Use "mined data" from M1.X DB, GA, New Relic, ERP and POS.

2. Rescope and Descope

Don't just rebuild what you have in M1.X use the opportunity
to do some housekeeping!

- Remove any unwanted extensions
- Check ROI and Business Case on Legacy approach
- Descope redundant or problematic components
- Understand Magento roadmap
- Deliver Functional and Technical Specification based upon Strategy and ROI
- Use MoSCoW

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Magento capabilities map to our client's needs

Customer Touchpoints

Sales / Service	Market-places	Social	Mobile	Sites	Brick & Mortar	Things / IoT	You

Business Intelligence

Machine Learning / AI*

Merchandising

Content Mgmt	Pricing	Promotions	Personalization	Recommendations
Search	Quotes	Campaigns	AB Testing*	Loyalty

Core Commerce

Catalog / PIM	Stores / Sites	Inventory	Shipping	POS / Clienteling*	**B2B** Microsite Custom Catalog Account Management Requisition Lists Quoting & Pricing
Payments, Risk & Tax	Order Management	Transactional Messaging	My Account	Cart / Checkout	

Commerce Operations

Multi store	Multi Language	Multi Business	Reporting	Fulfillment

Magento Extension Partner Capabilities

* Delivered in Magento through 3rd-party applications.

Enterprise App Integrations

Warehouse Management	ERP	Supply Chain	CRM	Marketing	Customer Data

3. Go MVP and optimise use of OOTB

Magento 2.X native is a huge leap forward from M1.X and has heaps of great new features and functionality. Use these OOTB as default and un-bloat your ecosystem

- Drive towards OOTB as a default
- Minimise customisation
- Fully understand advances and improvements from M1.X to M2.X
- Examples :
  - Staging and Preview
  - Elastic Search
  - CMS (Bluefoot)
  - Magento BI (Essentials and Pro)

Magento 2.2.2 OOTB Capabilities

Feature	Magento Commerce
Content Management	✓
Merchandising & Segmentation	✓
Search Engine Optimization	✓
Modern Business User Tools	✓
Order & Inventory Management	✓
Promotions & Coupons	✓
Integrated Shipping & Payment Options	✓
Responsive Design Reference Themes	✓
Detailed Reporting	✓
Global Currency, Language & Tax Support	✓
Layered Navigation & Search	✓
2-step Checkout	✓
Multi-Site / Store / Brand under one account	✓
Business Intelligence / Advanced Analytics	✓
CMS Capabilities	✓

Magento 2.2.2 OOTB Capabilities

Feature	Magento
Advanced Content Management	✓
Private Sales	✓
Gift Registry & Multiple Wish Lists	✓
24x7 Support & Account Management	✓
Rule-based Related Products	✓
Additional Payment Gateways	✓
Automated Email Reminders	✓
Return Management (RMA)	✓
Reward Points	✓
Advanced Regular Feature Releases	✓
Advanced Segmentation & Targeting Tools	✓
Elasticsearch	✓
Staging & Preview	✓
Flexible Pricing Rules, Coupons and Promotions	✓

Feature	Magento
Virtual & Physical Gift Cards & Store Credit	✓
Drag-and-drop Visual Merchandising Tools	✓
Scheduled Import/Export	✓
Customer Attribute Management	✓
Detailed Permissions & Logging	✓
Add to Cart by SKU	✓
Catalog Access Controls	✓
B2B Support	✓
B2C, B2B and B2B2C selling models	✓
Unlimited 3rd party integrations	✓
Separate Checkout, Order Management & Product Databases	✓
MySQL Cluster Support	✓
3rd party Extension Availability	1,000s
API Coverage	Robust

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Magento 2.2.2 OOTB Capabilities

Social commerce is the next frontier.

75% of consumers have purchased a product because they saw it via a social channel.

Increase your revenue

Unleash all of your products

Increase brand recognition

Enable social sharing

Reach your target audience with ease

Key Features:

- Streamlined Social Store Creation
- Magento Digital Commerce Product Catalog Extraction
- Simplified Ad Creation
- Intelligent Ad Optimization
- Simplified Third-Party Content Integration

86% of people follow brands on social media

57% of consumers are more likely to buy from a brand they follow

60% of consumers need to see something 2-4 times on social before purchase

4. Learn from the Past and from your Data

Find the Gold in those hills. You know Magento 1.X,. You have data in GA, Magento 1.X and Data Warehouse that you should use to scope functionality in your upgrade.

- Use data insights to drive scope
- Mine the data you have in M1.X and apply it to M2.X build
- Undertake global benchmarking on ecommerce KPI's like AOV, CLV, and Abandonment …...not just traffic and conversion rates
- Understand ROPO behaviour if its relevant
- Scope with and from the data
- Choose a partner that has an experienced commercial digital strategist(s) not just a tech guru

Example : Develop Customer Cohorts and PIM attribute/taxonomy strategy to enable customisation, segmentation and dynamic product based rules

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Magento Business Intelligence (BI)

Advanced Analytics at a Competitive Price

Magento Business Intelligence (BI) empowers you to make better informed, data-driven decisions based on your data.

The Essentials offering is bundled into our Enterprise Cloud Edition and includes the following:

- 75 predefined reports
- Email summaries
- The ability to create and edit reports
- SQL Report Builder and visual report builder/editor
- Magento (five predefined dashboards) and Google Analytics data source integration
- Export raw underlying data to CSV and Excel
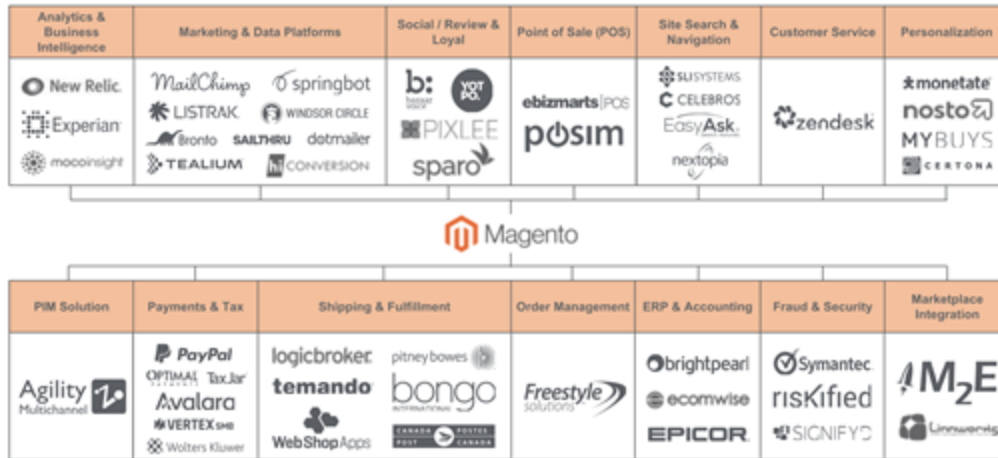- 10 user accounts with advanced user permissions
- Manage metric definitions

5. Choose the Right Extensions

Base upon our experience in deploying M2.X ecosystems we choose the best, stable and scalable extensions and plugins in the global Magento ecosystem.

World-Class Technology Partners

Extending the Overall Innovation of Magento

Analytics & Business Intelligence	Marketing & Data Platforms	Social / Review & Loyal	Point of Sale (POS)	Site Search & Navigation	Customer Service	Personalization
New Relic. Experian. moocinsight	MailChimp, springbot, LISTRAK, WINDSOR CIRCLE, Bronto, SAILTHRU, dotmailer, TEALIUM, CONVERSION	b: banner, YOTPO, PIXLEE, sparo	ebizmarts POS, posim	SLI SYSTEMS, CELEBROS, EasyAsk, nextopia	zendesk	monetate, nosto, MYBUYS, CERTONA

Magento

PIM Solution	Payments & Tax	Shipping & Fulfillment	Order Management	ERP & Accounting	Fraud & Security	Marketplace Integration
Agility Multichannel	PayPal, OPTIMAL, TaxJar, Avalara, VERTEX SMB, Wolters Kluwer	logicbroker, temando, WebShopApps, pitney bowes, bongo INTERNATIONAL, CANADA POST / POSTES CANADA	Freestyle solutions	brightpearl, ecomwise, EPICOR	Symantec, riskified, SIGNIFYD	M2E, Linnworks

6. Follow the Global Roadmap with Magento

Magento are investing heavily in the product and the product is evolving to keep up with customer demands. Understand this roadmap and plan your project with this in mind.

- Don't reinvent the wheel
- Undertake Digital Transformation work to plan your roadmap
- Dig into M2.X features you will be excited and surprised
- Many of your current frustrations and gaps have been thought about and fixed
- The roadmap for innovation and improvement is exciting and scalable
- Version upgrade is easier and cheaper if you setup right from the start
- For up to date roadmap attend Friday Session.

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7. Technical Tip - Data Migration

The **Magento 2 Data Migration Tool** was developed by Magento to help you efficiently move all of your products, customers, and order data, store configurations, promotions to Magento 2.

- Look at what can be purged in Magento 1

- Extend to Customisations

- http://devdocs.magento.com

- Automate

- Trial Migration often throughout M2 build (incremental)

- Saves time in Magento 2 Configuration

- Other tools/Methods (Automate)

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8. Technical Tip - Infrastructure

Magento 2 now includes native support for Infrastructure that was an add on to Magento 1

- Varnish OOTB
- RabbitMQ - Integration/MQF (Message Queue Framework)
- Security (Magento Security Scan Tool)
- WAF (Web application Firewall)
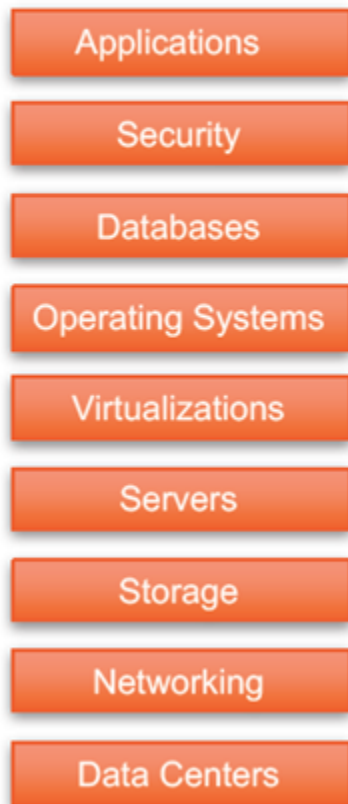- Development & Deployment Strategy (CI, Pipelines etc)
- Magento Cloud

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Cloud Service Models

| Customer Managed | Provider Managed |

On-Premises

- Applications
- Security
- Databases
- Operating Systems
- Virtualizations
- Servers
- Storage
- Networking
- Data Centers

IaaS

- Applications
- Security
- Databases
- Operating Systems
- Virtualizations
- Servers
- Storage
- Networking
- Data Centers

PaaS

- Applications
- Security
- Databases
- Operating Systems
- Virtualizations
- Servers
- Storage
- Networking
- Data Centers

SaaS

- Applications
- Security
- Databases
- Operating Systems
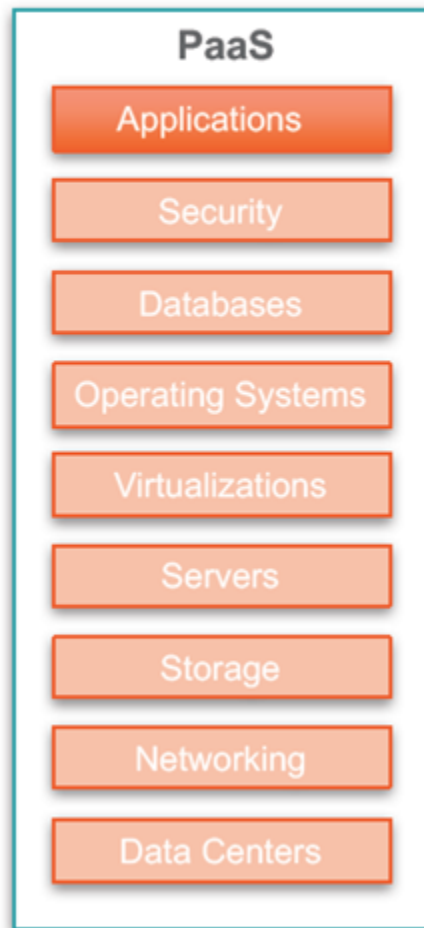- Virtualizations
- Servers
- Storage
- Networking
- Data Centers

Outstanding performance out of the box

Speed

- Magento-optimised and secured cloud infrastructure

- Global CDN

- Modernized code architecture

Scale

- Cloud elasticity

- Database scalability

- Peak volume allowances

Reliability

- 99.99% SLA

- Optional upgrades prevent inadvertent breakages

- Continuous software-hardware evaluation

9. Technical Tip - Automated Testing

Magento provides **Automated tests** around the core Magento 2 product. Don't stop there!

- Invest for the future

- 100% test coverage

- Use the new MFTF

- Core coverage OOTB

- Create Custom Coverage as you go

- Build the regression test suite

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10. Technical Tip - M2 Framework

Magento 2 is a **Modern framework** built on a
Modern Technology stack:

- Take advantage of Magento's investment
- Use DI
- Use Plugins
- Use Service Constructors
- Use Magento API (REST/SOAP)
- Use Message Queue for integration (RabbitMQ)
- Use Composer
- STILL: Don't touch the core!
- Magento Strength: Share with Others (Magento Community)

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Any Questions?

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