



1DIGITAL®

PLATFORM MIGRATION CASE STUDY

A Case Study on Sagebrook Home

BUILDING YOUR PLATFORM FOR B2B ECOMMERCE

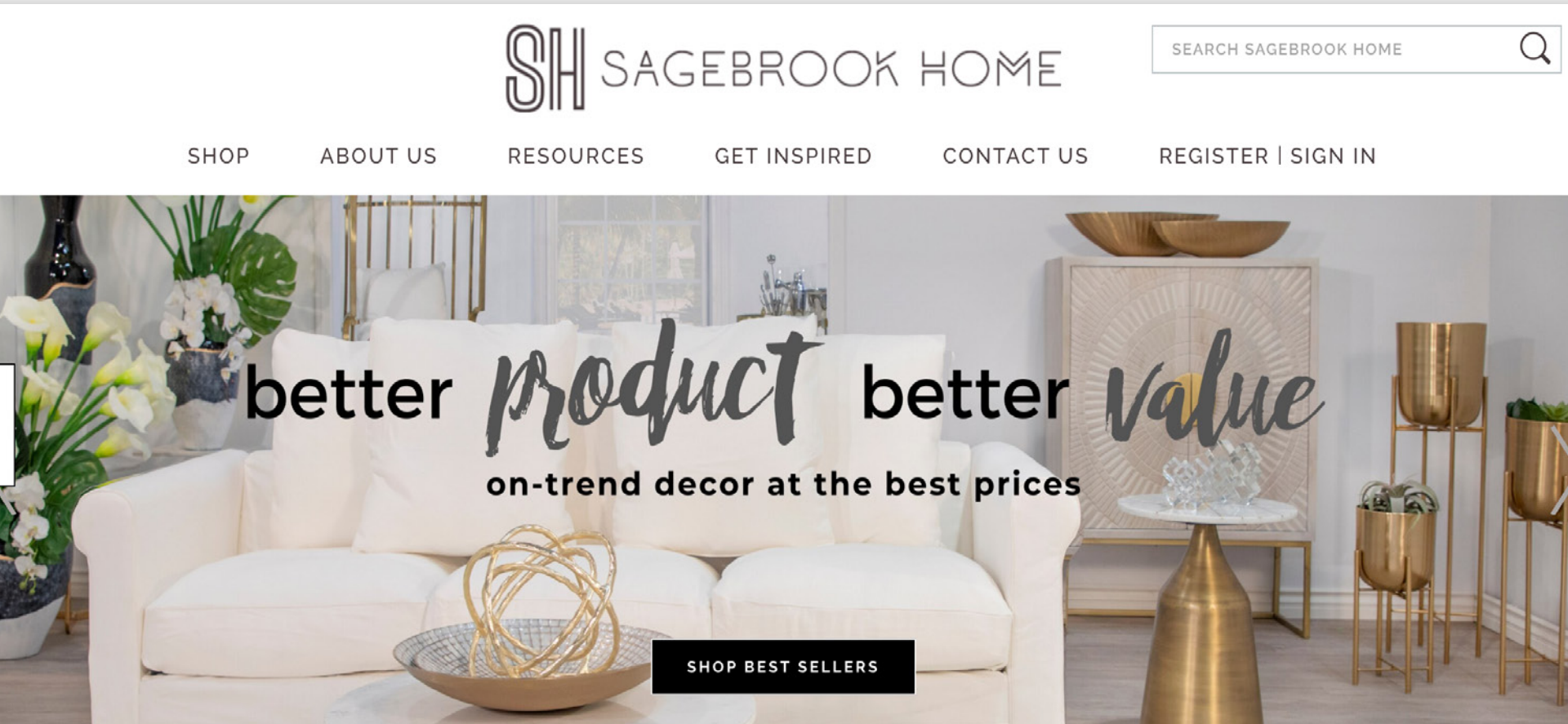
In my experience, B2B eCommerce (business to business) retailers are like lefties. I'm left-handed and I can tell you that when you're a lefty the world just isn't made for you in a bunch of small ways. Your desk at school is on the wrong side. Your left hand is either smudging pen ink or covered in grey pencil markings. You need a specialty guitar, baseball glove, and scissors. A simple can opener will become a daunting spatial reasoning puzzle. I could go on. In eCommerce, it's the same way. B2C (business to consumer) retailers so vastly outnumber B2B retailers that almost all major eCommerce platforms are designed with the needs of B2C retailers in mind. This leaves B2B retailers doing their best with a tool that wasn't exactly made for them. That's where an agency like 1Digital® comes in. We use customizations to standard eCommerce platforms to take these very useful tools and make them a little more well-fitted to the needs of a B2B eCommerce business.

[Sagebrook Home](#) is a B2B retailer of interior design and decorative accessories. They had been on a very niche custom platform, but it was older, not as widely recognized and connected to other systems, and they were locked into a hosting contract. Sagebrook wanted to leave for a more standardized, more open system, and they had their eyes on BigCommerce. BigCommerce is used by thousands of merchants across the globe. It's updated more often. It has a robust ecosystem of apps and support documents that are made for it. It's more likely to connect to any other system Sagebrook might want to use. However, like all major eCommerce platforms, BigCommerce got to be so widely used by designing for the majority of its customer base, and that means B2C. We talked to Ansley Stephenson, the



Marketing Director at Sagebrook. She told us, “I researched the top-4 eCommerce platforms, looked into BigCommerce, Shopify, Magento and Woocommerce. I made an entire list of the things that we needed to do, and what platforms had those things out the box. Then looked at what they didn’t have.”

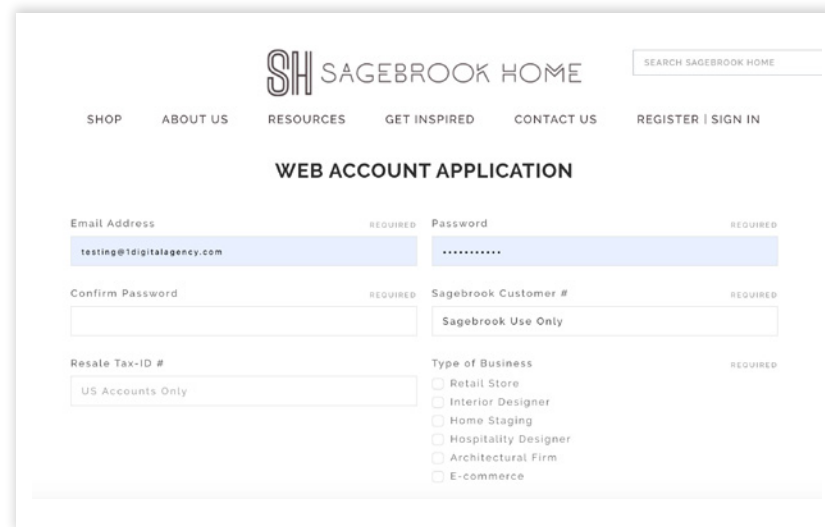
That’s when Sagebrook Home got in touch with us at 1Digital® Agency. There were serval items that they needed their eCommerce store to do, that BigCommerce just wouldn’t do out of the box. Working together with a custom checkout development team called Be A Part Of, Sagebrook’s database developers S Metric, and the team over at BigCommerce, we were able to bring some of those requirements to the BigCommerce platform and make it more friendly to Sagebrook’s B2B operation.



Customer Data Migration

Sagebrook Home works directly with designers and decorators and so their relationship with their customers is not only crucial but also intricate. The details of each designer’s discounts, access, and order history were all wrapped up with their customer data. So when Sagebrook decided to move platforms, they knew it would be imperative to find a way to make this customer data work in the new system. The rest of their data (products, categories, etc) was housed in their external ERP but customer data was in their platform. We knew this platform was unique, so we had to devise a way to see where all this customer data would end up when transferred into the BigCommerce system. Because the platform they were coming from did not have an open API connection, we needed to do this migration via a CSV file. CSV migrations are highly versatile but less reliable. Anyone can export their data into a CSV and upload it into a new platform the same way. But because it’s coming from an Excel sheet, there’s no guarantee the data will know where to go when it gets into its new platform. On the other hand, when you have an API connection between two platforms, the migration won’t always be perfect, but the systems usually have an easier time communicating and matching like with like. We combatted this

though an initial data evaluation of the CSV sheet that Sagebrook provided. Any data migration will have some massaging to do after the fact, but if we can identify some of the places that the sheet will be incongruous with the new platform and fix it before the migration script runs, we can save both teams a lot of time testing the data before launch.

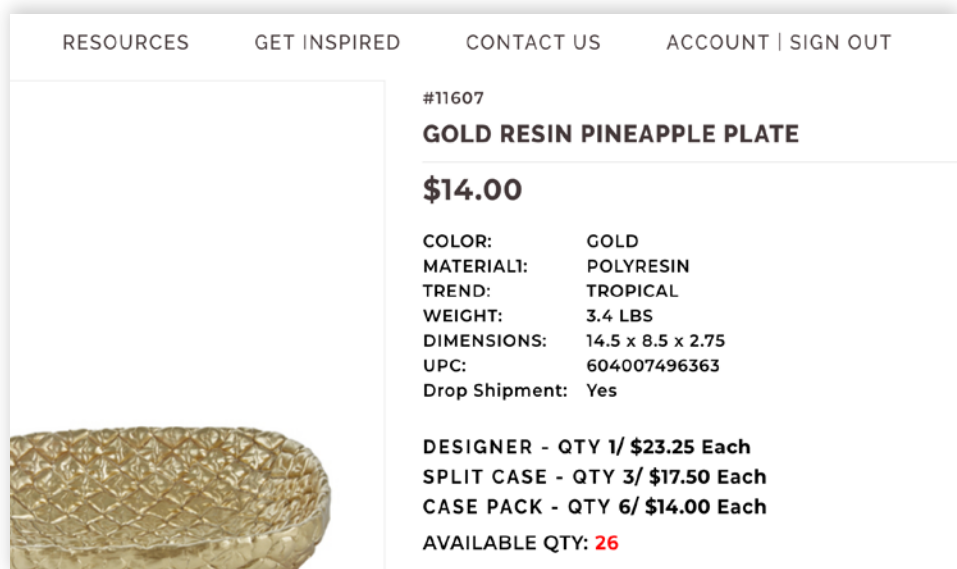
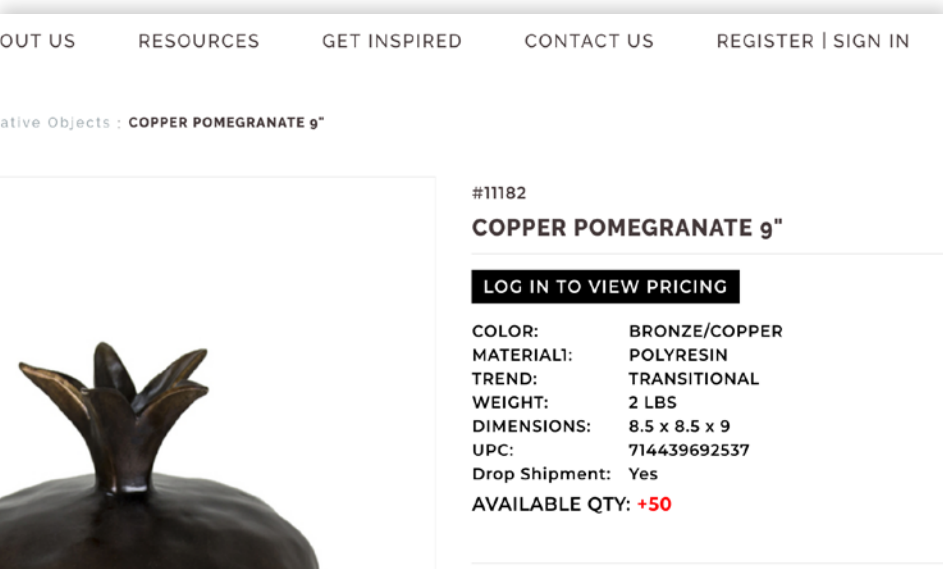


The screenshot shows the 'WEB ACCOUNT APPLICATION' form for Sagebrook Home. It includes fields for Email Address (testing@1digitalagency.com), Password, Confirm Password, Sagebrook Customer # (Sagebrook Use Only), Resale Tax-ID # (US Accounts Only), and Type of Business (Retail Store, Interior Designer, Home Staging, Hospitality Designer, Architectural Firm, E-commerce). A search bar at the top right says 'SEARCH SAGEBROOK HOME'.

Another crucial part of this migration was making sure all these dealers and designers knew that their account info with Sagebrook Home had just been changed. This is an essential part of every migration. No platform will allow customers private passwords to be transferred somewhere else. So when a store relaunches on a new platform, the customers may keep their usernames but will need to set a new password for the new store. For this, we teamed up with Klaviyo, a well-regarded email service specifically built for eCommerce. We built an email list in Klaviyo out of all the customers we migrated and sent them an automated reset password email as soon as the new site had launched.

Bulk And Dealer Pricing

One of the main reasons Sagebrook Home was interested in BigCommerce was the platform's robust customer group functionality. They could separate their dealers into groups with different prices and levels of access to the site. Customer groups are one of the ways that BigCommerce, in particular, has kept B2B retailers in mind when building their platform. But even though they outclass the competition in this area, the functionality still needed some help to meet Sagebrook's requirements.

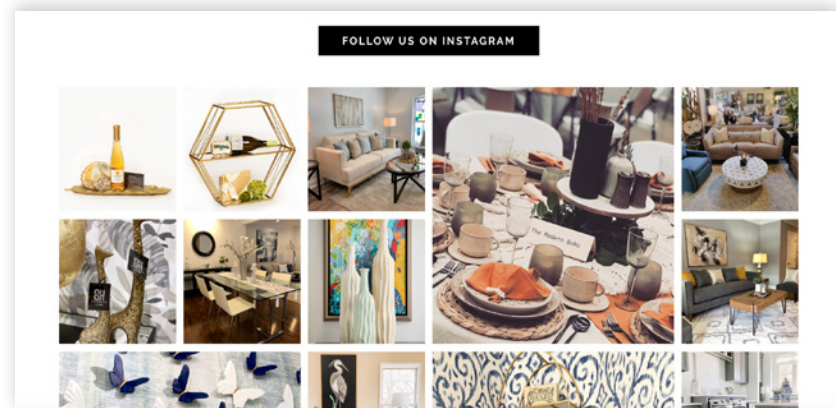


First, we needed to customize the store so only logged in customers could access pricing. Sagebrook only works with dealers they've already approved. We wrote a custom script to keep prices and the Add to Cart buttons behind a lock screen on the product and category pages until the user is logged in and their account is placed into an approved customer group by the Sagebrook team. These customer groups also allow Sagebrook to control the prices a new dealer sees, as compared to a designer who has been working with them for a long time. "We want our customers to be able to access it easily," Ansley told us. "It's nice because I can come in in the morning, see who applied, approve them in two seconds, and then they are off and shopping."

We also needed to customize the prices to show based on how much any given customer was buying. Sagebrook Home sells its products by the case, but customers don't necessarily need to buy by the case if they are willing to pay a little more to split up a case pack. The trick is that the size of a case will be different for every different product. Our customization uses BigCommerce's custom field functionality to allow the Sagebrook team to set a product's Case Pack Quantity. They then used BigCommerce's native bulk pricing tiers to set different prices for customers who want to buy a single unit, half a case, or a full case. We also customized the product page to default it's quantity to a full case when any customer enters the product page. The customer can then edit their quantity manually if they want something other than the full case of the product in question.

3rd Party Connections

One of the main advantages of using a more common, standardized platform like BigCommerce is the extensive app ecosystem. Developers know that many merchants are using systems like Shopify Plus and BigCommerce so they invest in developing connectors to these popular platforms, while someone on a more niche system would have to spend time and resources developing a connector just for their store.



Sagebrook knew of a few services that they wanted to use once they were on BigCommerce. We helped them to get these services connected to their new store. For example, the new store has an integration with a social media display app called Candid. Sagebrook uses Candid on the site to highlight when and where folks are posting about their products as a gallery which displays seamlessly on their pages.

We also helped Sagebrook use a popular web page builder called Shogun. Shogun is an intuitive page builder that allows merchants to add pages to their site through a drag and drop design interface. This way Sagebrook can add simple content pages whenever they need to without having to call an agency like us to custom build them.

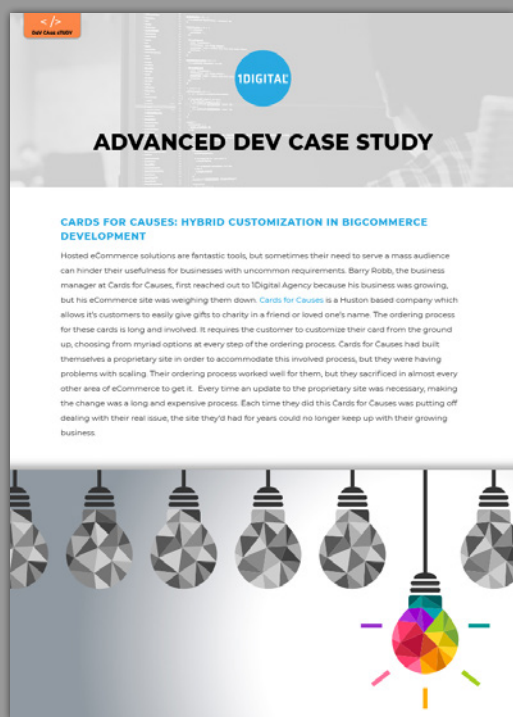
"It's easier one thousand percent," Ansley told us about installing apps on BigCommerce. "On our old platform, nothing was compatible. You had to use their system for everything. It's better now because we can just search for the connectors we need."

B2B eCommerce retailers, like Sagebrook Home, work very specifically. They have customer lists, bulk discounts, payment terms, and all manner of unique internal processes they've built out over the years. Big eCommerce platforms like BigCommerce and Shopify Plus are going to be easy to use, secure, and well supported, but they are made for a general audience. Chances are good that any B2B retailer that wants to get the benefits of one of these big platforms will need some changes made. When asked what advice she would give to merchants looking to move to a bigger platform Ansley told us, "Go to something bigger, but they didn't build their platform knowing what your industry needs. Go into with

a list of the things you need, the things you can't compromise on, and the extras you can get before you make a decision."

If you're finding that your eCommerce store works well enough, but could be better for the way you run your business, you owe it to yourself to see what changes are possible. With a little customization, we can help your eCommerce platform mold to fit your business, not the other way around.

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CONSIDERING OUR CUSTOM DEVELOPMENT SERVICES?

Using Expertise to Maximize Conversion Rate

If your site needs to be leaner, cleaner, and all around better at taking a visitor and turning them into a customer, you should rely on an expert. We've built hundreds of eCommerce sites. Our experience in this industry has built our sixth sense for what works best. When you partner with an eCommerce Agency like 1Digital® your site benefits from those decades of combined experience.

Reach out to our team for a site audit that can help you identify what about your site is working and what could be improved. Our team of great designers, developers and marketers can go over your online presence with a fine-toothed comb. When it comes to something as delicate, complex and important as your site's conversion rate, it helps to have a ringer in your corner.



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BEFORE & AFTER

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