

PAKAM GLOBAL

FOR THE CFO · FOR THE HEAD OF ECOM · 20-MIN BUILD

The Plus Migration ROI Template.

Build the internal business case for moving off Magento, BigCommerce, or basic Shopify
— with numbers your CFO will defend in a board meeting.

FOR
\$1M–\$50M GMV brands

BUILT BY
Pakam Global · Dallas

VERSION
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HOW TO USE THIS

Read it once. Fill it once. Defend it twice.

This template is built to do one job: give a mid-market ecommerce operator the numbers required to walk into a CFO conversation and propose a Shopify Plus migration with confidence — not enthusiasm.

WHO FILLS IT IN	TIME REQUIRED	WHAT YOU'LL HAVE
Head of Ecom or COO, with 15 min of CFO input on cost-side rows.	20–30 minutes if you have last year's spend in front of you. 60 minutes if you need to dig.	A defensible 3-year cost case, payback period, and a clear go / no-go signal.

How the document is structured

- 01 **The Visible Cost of Staying** What you're spending on the current platform today.

- 02 **The Hidden Cost of Staying** What the platform is costing you in revenue you don't capture.

- 03 **Plus Migration Investment** What a credible Year-1 migration actually costs.

- 04 **Plus Migration Savings** What comes off the P&L when the platform changes.

- 05 **The AI Automation Multiplier** The ops-side savings most agencies don't include.

- 06 **The 3-Year Picture** Payback, NPV, and a clean go/no-go signal.

Industry benchmark ranges are pre-filled for orientation. Your real number is what matters. Be honest.

SECTION 01 · CURRENT STATE

The visible cost of staying.

Most brands underestimate this number by 30–50% because the cost is split across three budgets — engineering, infrastructure, and ops. Pull all three into one row total.

COST LINE	INCLUDE	INDUSTRY RANGE	YOUR ANNUAL \$
Platform license	Magento Commerce / Adobe Commerce / BigCommerce Enterprise.	\$22K – \$125K	\$ _____
Hosting + DevOps	AWS / managed hosting + DevOps engineer time, CDN, backups.	\$40K – \$180K	\$ _____
Engineering team	In-house devs + agency retainers maintaining the platform.	\$150K – \$600K	\$ _____
Third-party plugins	Search, reviews, loyalty, B2B modules, ERP connectors.	\$30K – \$90K	\$ _____
Site reliability cost	Estimated lost revenue from downtime + failed checkouts.	2–6% of GMV	\$ _____
VISIBLE ANNUAL COST			\$ _____

Most-missed line: in-house engineering. If you have 2–3 devs maintaining Magento at \$120K–\$200K loaded cost each, that's \$300K–\$600K/year — bigger than the platform license itself.

SECTION 02 · HIDDEN COSTS

The cost you don't put on a P&L.

These are the revenues your current platform *prevents you from earning*. Most brands have never quantified them. They are usually 2–4x larger than the visible cost line.

COST LINE	HOW TO ESTIMATE	TYPICAL IMPACT	YOUR ANNUAL \$
Velocity tax	Features that sit in backlog for 6+ months. Estimate revenue not earned.	5–12% of GMV	\$ _____
Conversion drag	Slow site, poor mobile UX, checkout friction vs. modern Plus benchmark.	10–30% lift on migration	\$ _____
International ceiling	Foreign traffic you don't convert because multi-currency / VAT is broken.	Shopify intl. GMV +42% YoY	\$ _____
B2B / wholesale leakage	Orders coming in by email / spreadsheet vs. captured through a real portal.	Shopify B2B GMV +140% YoY	\$ _____
Ops headcount drag	Hours/week your team spends on manual work AI should be doing.	8–20 hrs/week per FTE	\$ _____
HIDDEN ANNUAL COST			\$ _____

The reframe: these costs don't go away when you renew Magento. They compound. Every quarter you delay is a quarter your competitors close the gap.

SECTION 03 · MIGRATION INVESTMENT

What Plus actually costs in Year 1.

An honest investment line. Ranges below reflect mid-market projects (\$1M–\$50M GMV) with B2B, international, or custom integration scope. Bare-bones Plus replatforms run lower.

INVESTMENT LINE	INCLUDES	TYPICAL RANGE	YOUR YEAR-1 \$
Shopify Plus license	Base \$2,300/mo, scales after \$800K/mo GMV (0.25%).	\$28K – \$48K	\$ _____
Implementation	Migration, design, integrations, B2B/international setup.	\$60K – \$150K	\$ _____
Apps + integrations	Klaviyo, Gorgias, ERP connector, search, reviews, etc.	\$15K – \$40K	\$ _____
Internal team time	Your team's hours during the 12–20 week build.	\$10K – \$25K	\$ _____
Training + change mgmt	Onboarding ops, marketing, customer service teams.	\$3K – \$8K	\$ _____
YEAR-1 INVESTMENT			\$ _____

What's not on this list: agency retainers after launch. Year-1 implementation is one-time. Year-2 onward, the only recurring line is the Plus license + apps — typically \$50K–\$90K/year all-in.

SECTION 04 · MIGRATION SAVINGS

What comes off the P&L.

For each line, estimate the annual savings starting in Year 2 (post-launch full-year). Year 1 partial savings will depend on go-live timing.

SAVINGS LINE	WHAT GOES AWAY	TYPICAL RANGE	YOUR ANNUAL \$
Engineering reduction	Magento devs no longer needed for platform maintenance.	\$100K – \$400K	\$ _____
Hosting + DevOps	AWS, CDN, backups — Shopify Plus is fully managed.	\$30K – \$150K	\$ _____
Plugin consolidation	Native Plus features replace 30–60% of paid extensions.	\$15K – \$50K	\$ _____
Conversion lift	Modern checkout, faster site, mobile-optimized.	10–30% of GMV	\$ _____
International unlock	Markets enables UK/EU in 6–8 weeks vs. 9–14 months on Magento.	5–15% GMV growth	\$ _____
B2B revenue capture	Wholesale orders flowing through Plus B2B vs. email.	20–40% of B2B GMV	\$ _____
YEAR-2 ANNUAL SAVINGS			\$ _____

The conservative play: use the bottom end of each range for your initial CFO conversation. If the math still works at the floor, the upside becomes negotiating leverage — not the assumption.

SECTION 05 · THE MULTIPLIER

The AI automation layer.

This is the section most migration ROI templates skip — and the section that usually changes the answer. Custom AI workflows deployed alongside the migration handle the work your ops team is doing manually today.

WORKFLOW	WHAT IT REPLACES	HOURS / WEEK SAVED	YOUR ANNUAL \$
Order routing + tagging	Manual order classification, warehouse assignment.	6–12 hrs	\$ _____
Returns triage	CS team manually routing return requests, refund approvals.	8–15 hrs	\$ _____
Inventory sync	Spreadsheets / scripts keeping multi-channel SKUs aligned.	5–10 hrs	\$ _____
B2B quoting	Sales reps building custom price lists by hand for accounts.	10–20 hrs	\$ _____
Customer service triage	Tier-1 ticket sorting, response drafting, escalation logic.	12–25 hrs	\$ _____
Demand forecasting	Manual reorder calculations, Excel-based forecasts.	4–8 hrs	\$ _____
ANNUAL OPS SAVINGS			\$ _____

How to convert hours to dollars:

Loaded hourly cost x hours/week x 52 weeks. A \$60K/yr ops hire = ~\$45/hr loaded. 10 hrs/week x \$45 x 52 = \$23,400/year — off the P&L, on one workflow.

One-time cost to deploy:

Custom AI workflows from Pakam typically run \$15K–\$45K per scope, depending on integration complexity. Most brands see payback in 6–14 months.

SECTION 06 · THE NUMBER

The 3-year picture.

Pull your totals from the previous sections into one view. This is the slide you put in front of your CFO.

LINE	PULLED FROM	YEAR 1	YEAR 2	YEAR 3
(A) Migration investment	Section 03 total	\$ _____	\$0	\$0
(B) Ongoing Plus cost	Plus license + apps	\$ _____	\$ _____	\$ _____
(C) Platform savings	Section 04 total	\$ _____	\$ _____	\$ _____
(D) AI ops savings	Section 05 total	\$ _____	\$ _____	\$ _____
NET = (C + D) – (A + B)	The number that matters	\$ _____	\$ _____	\$ _____

Three numbers to compute and circle.

PAYBACK PERIOD	3-YEAR NET	ROI MULTIPLE
Year-1 net investment ÷ (Year-2 net savings ÷ 12) = months to recoup. Good: < 18 months Great: < 12 months	Add Year 1 + Year 2 + Year 3 from the NET row above. This is the cash number. If it's negative, don't migrate yet. If it's 2–5x the investment, move.	3-Year Net ÷ Total 3-year cost (A + B summed) = multiple. Good: 2.0x or higher Great: 3.0x or higher

THE DECISION

How to read your number.

You now have a defensible case. Use this framework to decide what to do with it.

<p>GO</p>	<p>If your numbers say: Payback < 18 months AND 3-year ROI > 2.0x</p>	<p>What to do: Migrate within the next 12 months. The cost of delay is now larger than the cost of executing. Start scoping in the next 30 days.</p>
<p>SCOPE</p>	<p>If your numbers say: Payback 18–30 months OR 3-year ROI 1.5–2.0x</p>	<p>What to do: The math works but the urgency is moderate. Start a discovery engagement to tighten the numbers and build the SOW for FY-next.</p>
<p>WAIT</p>	<p>If your numbers say: Payback > 30 months AND 3-year ROI < 1.5x</p>	<p>What to do: Don't migrate yet. Either your current platform pain isn't bad enough, your GMV is too small for Plus economics, or your AI ops case isn't built. Revisit in 12 months.</p>

A reality check before you present: Run the math at the conservative end of every range. If the case still works there, you have a defensible argument. If it only works at the optimistic end, it won't survive a CFO's cross-examination — and you'll lose credibility for next time.

THE NEXT 30 MINUTES

Pressure-test your number with us.

The math in this template is built from public benchmarks and our own implementation experience. It will get you 80% of the way. The last 20% — the parts of your stack we haven't seen, the customizations that change the scope, the AI workflows that map to your specific ops — that's the diagnostic.

What you walk away with — even if we don't end up working together:

- 01 A platform cost benchmark for your business**
Modeled against brands at your GMV tier and category. Sent as a one-page memo.
- 02 Your three highest-ROI AI automation targets**
We listen to how your ops team spends a week, name the three workflows that pay back fastest.
- 03 An honest answer on timing**
If your fiscal year doesn't have the budget or the bandwidth, we'll tell you. Sometimes the right answer is "wait six months." We'll say so.

BOOK THE P&L DIAGNOSTIC

30 minutes. Real numbers. No pitch.

Email the team at hello@pakamglobal.com
or book directly at pakamglobal.com

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