

# ECOMMERCE PLANNING GUIDE

18 Key Questions to Address for  
Ecommerce Success



# Introduction

If you're new to Ecommerce or aren't reaping the rewards of your current Ecommerce efforts, then this eBook is for you.

While WSI has advanced knowledge of Ecommerce platforms from those created for small businesses to solutions for much larger national or multi-national retailers, we wrote this ebook especially for those ready to migrate to more robust solutions or launch an Ecommerce site for the first time. We're on a mission to help every business we can survive and thrive.

The fact is, purchase behavior continues to evolve, and Ecommerce experts agree that two things have accelerated online selling growth. First, traditional retailers and producers of consumer products have a limited ability to sell face-to-face in the current climate. Second, the broad swath of society that had historically been slow to order things online has been forced to grow comfortable with the process of online shopping almost overnight.

We have been catapulted five years into the future, and it's doubtful that things will ever revert to exactly the way they were before. Every business selling products, goods, and even services must have a means of offering online purchases or face the threat of extinction.

Ecommerce allows your business to generate revenue, at any time of day, from anywhere in the world, increasing year-on-year growth and building your company's revenue. It can help your business meet its sales goals, and here are some stats to back that up:

- 80% of Internet users in the US have made at least one purchase online. (Statista)
- Consumers worldwide will spend up to \$4.8 trillion online in 2023 (Statista)
- Ecommerce sales opportunities are expected to grow by \$4.5 trillion by 2021 (Kinsta.com)
- The #1 reason people shop online is because they can shop 24/7 (KPMG)
- 30% of consumers say they would rather buy from a website they've bought from previously (KPMG)

Many brick and mortar businesses believe digital commerce is the enemy. Don't be one of these businesses! An Ecommerce store – in combination with your physical store – can help you find new revenue streams and breathe life into your business. Your customers now expect a seamless, user-friendly buying experience, and we're here to help.

If you want to improve your online shopping experience, our Ecommerce Solutions may be just what you're looking for.

# 1

*Establishing the framework from the start will facilitate the entire scope of the project.*

## Is Ecommerce the only purpose of the website?

This first step is critical. Building the site's underlying architecture will depend mainly on the answer to this question, especially if the website will serve multiple purposes. Not only will it influence design and content, but it will also inform the development of the site, including what platform to use.



# 2

*Remember, ecommerce comes in many different forms. If you've ever paid for and downloaded a piece of software, that's an ecommerce transaction.*

## What type of products or services will the site be selling?

Don't laugh. I know this may seem like an easy question to answer, but many transactions happen online that you may not think are ecommerce-related but are.

If you've ever downloaded a piece of software and paid for it before you download it, that qualifies as ecommerce. The same thing applies to the digital versions of books on Amazon for your Kindle, or even audiobooks from Audible; all are considered ecommerce transactions.

With electronic products and even services, you will need to think of the delivery methods, formats, how many steps in the process (either directly on-page or via email confirmation, security during transfers, etc.). Other things to be mindful of are assigning inventory to online vs. in-store, shipping costs, taxes, credit card processing procedures, and more.

# 3

*No one wants to have to redesign a site having failed to think of this step.*

## How many different products will you be selling online?

This question answers how large or small your site will be. If you're using an ecommerce platform, database size requirement is going to matter. Just because you have 100 products doesn't mean you'll have a 100-page site.

You will need to gauge how many pages and how many assets you'll have. When it comes to cloud hosting costs, size matters a lot.

Generally, the larger your site's footprint, the more exact you need to be, and the more you'll need to project your growth, so you'll know when you need more bandwidth.

# 4

*Think of it this way: If they cannot find it, they cannot buy it.*

## Will these products be broken down into different categories?

This step is critical when setting up your site structure and allows for easy categorization of your products and determining a customer-friendly product navigation.

Here's a quick example:

- Women's clothing [category]
  - Dresses [sub-category]
  - Blouses and tops [ sub-category]
  - Lingerie [sub-category]
- Men's clothing [category]
  - Shirts [sub-category]
  - Ties and belts [sub-category]
  - socks [sub-category]
- Children's clothing [category]
  - Girls [sub-category]
  - Boys [sub-category]
  - Babies and toddlers [sub-category]

Logical categories and sub-categories help you know where your products are and help your customers navigate them. They also make it easier to showcase related products, which could entice shoppers to purchase more items.

# 5

*All these things need to be thought out because they will impact the way your site operates and affect user experience.*

## Will your products also have special attributes of any kind, such as the same shirt in different colors and different sizes?

If they do, will the website be required to track stock variations based on these attributes?

Attributes are like an additional layer beneath product categories and sub-categories. Once that's established, we need to determine each variation of the same product. Some of the more common product attributes are sizes and colors. For example, if you sell shirts, each color, and each size will represent a unique SKU (short for 'stock keeping unit,' it is a term used by retailers to identify and track inventory), despite all being the same product category.

Additionally, it helps to account for your product stock related to sizes, colors, and other attributes. The last thing you want is to have an order come through, and that specific item is out of stock.



# 6

*Compress product photos to ensure page speeds don't suffer under the weight of loading product shots.*

## Do you have existing photography for your products?

Outstanding photography is key to your online success. Great product photos help make the sale. It's highly recommended to have professional product shots for every item you sell on your site and from multiple angles.

However, this does create a large number of files and a massive bandwidth demand, so your web developer must know how to compress your product images and make them responsive, so they are compatible with all devices.

# 7

*Shipping should never, ever, under any circumstances be an afterthought for an ecommerce store.*

## How will you ship to the customer?

You need to ask yourself if you will charge shipping separately and, if so, (which is usually the case) what shipping methods will work best for your order fulfillment process. There are a variety of options to consider:

- Exact shipping costs through a real-time direct link with a shipper such as USPS, Canada Post, UPS, FedEx
- Flat rate shipping depending on geolocation
- Free shipping over a certain dollar amount, number of items ordered, or when you need to move inventory more quickly and want to add free shipping as a special offer.

Once you have your shipping options figured out, next think about how you want to provide the shipping details to your customer:

- When will they get the shipping tracking number? Will this be emailed to them automatically upon shipping confirmation?
- Are there any special shipping cut-off times on any given days?
- Will you be shipping internationally?

The shipping experience directly impacts the user experience. When it comes to online shopping, the customer experience doesn't end until they have received their merchandise, and ideally, promptly and on time.

Excellent order fulfillment goes a long way. When done well, it creates a great customer experience, inspires loyalty, and mitigates cart abandonment.

More often than not, merchants choose to integrate their online store with a widget provided by their shipping company. All the big players like USPS, Canada Post, UPS, FedEx, and the like have stellar API integrations. Almost any shipping need can be pre-programmed in your system. You just need to think about it carefully. For example, think about not only where you ship but also where you do not.

You're going to want everything to be fully automated properly from the beginning. "Measure twice and cut once," as the saying goes.

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## 8

*Taxes are just as crucial in ecommerce as they are in brick and mortar retail and wholesale.*

### **Will you need to charge sales tax on your orders? Think of all the scenarios.**

The general rule of thumb is you charge taxes based on where the product is delivered. So, as you can imagine, depending on where you sell and where you ship, this could be a logistical nightmare if not planned out accordingly.

To correctly build an ecommerce site where sales tax laws need to be observed, the agency developing your website must know where and how you want to charge tax to set-up the tax tables and reports appropriately.

# 9

*Keeping shoppers on your site during the payment process has definite benefits like building trust and confidence in your business.*

## Do you have a merchant account or online payment gateway?

Payment gateways provide an alternative payment option for customers cautious about sharing their credit card info with every site they purchase from. They can store that information securely with a service like PayPal.

Letting your web development agency know upfront that you plan to use an online payment gateway ensures this is properly set-up from the beginning.

As part of this process, you should give your customers options to stay on your site to complete their transaction, or if they are comfortable doing so, process their payment with a third-party site like PayPal. The payment process is part of your considerations around user experience, and the more integrated it can be with your site, the better.

Keeping shoppers on your site has definite benefits in building trust and confidence in your business. How you will process payments certainly must be part of the planning and requirements conversation.





# 10

*Your payment gateway provider needs to be able to handle ongoing payments if you have recurring billing cycles.*

## Will you have any recurring billing?

Beyond the initial order, will your client need to self-manage recurring payments in any way?

This question mostly pertains to businesses that sell subscriptions, licensed products, or services that can be paid for over a period of time. Recurring billing will require the addition of a subscription module to be added to your ecommerce site. If you need to process regular payments, be sure to bring this up in your initial conversations with your ecommerce developer.

Payment gateways will usually allow for multiple payments via all major credit cards and even direct bank transfers. Your web development agency should guide you in this area if you are unsure.

# 11

*Consult your web development agency on how to implement this type of set-up on your ecommerce site.*

## Does your store need to present the same products at different prices for wholesalers or distributors?

Many store owners offer discounts to wholesalers. From a website development perspective, special pricing based on a user's account type is a feature that can be accommodated. Wholesale pricing is often a fixed percentage of 20% (as an example) on a given volume or discounted on a per-item basis.

Similarly, are there layers to your discounted prices based on volume purchased?

At times, membership sites only allow certain customers to view specific products. Or they offer portals to wholesalers or distributors that cannot be accessed by retail clients.

Although it's best to discuss all scenarios upfront and have precise requirements for everything you want to do, these options are all possible.

# 12

*Weigh out all these questions before building the site. Upset customers remember.*

## Do you need to track limits on the items you're selling and indicate when products are low on stock or out-of-stock on your website?

Retailers must think about their inventory levels. It needs to be decided upfront what a customer sees when an item is out-of-stock on your site and how you will notify them when stock is replenished or is no longer be available. Will you be offering backorders so customers can still purchase an out-of-stock item? Will you offer a waitlist? And if so, will the item be shipped once received, or will the client have to complete a new order?

# 13

*Plan your technology stack carefully and deliberately. Your web development team should guide you on integrations.*

*Ask the question.*

## Do you need your ecommerce store to integrate with other systems?

- Accounting system
- Inventory system
- Client management system
- Marketing communications system

We can't stress enough the importance of integrated systems to conduct ecommerce successfully. Integrations must be planned for and done correctly. Failing to do so will damage your ecommerce business.

Does your ecommerce site's data need to sync with internal systems, like inventory management, accounting, or email?

Are you looking at QuickBooks, Salesforce, or an email platform? There are hundreds, if not thousands, of potential integrations. Plan your technology stack carefully and deliberately. An intelligent marketing agency can walk you through your options before your website goes into development and help you select the best solutions for your particular business.

# 14

*This decision determines what email workflows you require, so, it's an important one to spend time on.*

## What sort of reporting and email workflows for fulfillment do you require?

- An email per order
- Manual review of orders in backend
- Daily picklist summary with printable shipping labels

This question will help you outline:

- What emails your customers receive when they place an order
- What emails they get when you fulfill that order
- What emails get sent to your website visitors that abandon the shopping cart
- And more

After all, an informed customer is a happy customer, making these emails an important part of having a good user experience.

These types of emails can be built into the website's functionality, and you can customize the copy and the design to your specific needs. Emails to your customers can be an excellent opportunity to upsell or tell them about other items they may be interested in as well.

The same is true for internal notifications to your team.

- How are you and your team notified of a purchase? How do you review orders?
- Do you receive an email, or is it a manual pull on the backend?
- Do you receive a summary with printable labels?

It is often a task that can be forgotten but is incredibly important.

# 15

*A language barrier could kill a sale in a “New York minute”.*

## Do you require your site to be multilingual?

You want your customers to have a unique and regional experience and not feel left out. You should investigate whether you need to serve your site in different languages.

You can set your ecommerce site up to serve in a specific language based on city, state, country, zip code, or any other parameters you see fit. You can also leverage a dropdown menu through which visitors self-select their language preference or can change it. Our favorite way to do this is to allow the customer to decide their language preference. However, remember to handle language and currency separately; the one doesn't necessarily determine the other—more on currencies in the next step.

Ultimately, if your customers feel welcome and included, they're more likely to make a purchase.

# 16

*There is a lot to consider here, but the rule of thumb, automate everything that can be automated.*

## Do you need your site to accept multiple currencies?

- Will currency be based on IP address? Or the final shipping address?
- Do you require a dropdown to change the currency?
- Will currency be based on one price, or will you fix the price in each currency (using no exchange rates).

Just like supporting different languages, supporting various currencies is becoming more critical in the ecommerce space. Customers will feel more comfortable buying their local currency.

There are a lot of ways to handle multiple currencies on your ecommerce site, but the main two ways are:

1. Fix all prices in USD (or your base currency) and then using a live exchange rate to serve other currencies
2. Set the prices for each currency individually, meaning if you set an item's price at \$10 USD, then it's \$12 CAD, and so on.

In the second example, exchange rates are not factored in, so prices may have to be changed manually if they fluctuate too far one way or the other. We always recommend automating everything that can be automated to avoid manual interventions, which are time-consuming and error-prone.

Furthermore, it would be best if you determined which factors will influence which currency a customer sees. Will it be based on an IP address? Shipping address? Or some other aspect entirely? Will this be automatic, or will visitors select their currency preference manually? And if so, can they change their currency at their end?

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# 17

## Do you need to import or migrate data to the new site?

*Anyone handling your data should be highly experienced as a data engineer.*

Data—it's business gold. A data import/migration has the potential to be a significant and exacting job depending on the size of your site. It involves migrating all your data, including customer information, order data, product data, images, and any number of other data points you need to have access to within your ecommerce site.

We highly recommend you complete a data back-up before you migrate anything to your new website platform.

An ecommerce site can have a relatively large footprint (larger than you can imagine). Enlist your web development agency's help to complete your data migration to ensure a smooth transition for your business and your customers.

# 18

*Ecommerce platforms come with varying hosting options. Understanding the key differences from platform to platform is essential to your online business strategy.*

## How to choose an ecommerce hosting provider?

Choosing the wrong ecommerce hosting service can cost you money, time, and headaches.

Whatever works for you now may not be ideal in the future.

Because creating or migrating your website can be frustrating; it's important to find a host that strikes a balance between your budget, website development needs, support requirements, and growth potential.

There are several ecommerce hosting providers, from enterprise-grade services like Salesforce Commerce Cloud, mid-range solutions from Woo Commerce and Shopify, to small business solutions like Wix and Weebly.

The bottom line is that whether you are migrating or launching your site, you have to find the one suitable for your business today and into the future as you scale. Helping you decide which hosting company to use is a choice your marketing agency can help you with.



## Conclusion

As we prepare for what the future of commerce holds, there's only one thing that's certain: the in-store shopping experience has changed irrevocably. Businesses must be mindful of how consumer behavior has shifted and what services and experiences are now expected of all brick-and-mortar shops.

To give you just one example, Shopify merchants had recovered 94% of lost in-store revenue by moving online and using features like curbside pickup as of early May.

Interest in a curbside pickup option will continue to grow as shoppers opt for a model that's somewhere between delivery and in-store, referred to by some as the "retail-to-go" model. This model allows customers to place an order online and get same-day pickup at a nearby physical retail store.

And there's more change coming with augmented reality taking hold. Customers can view your products in their own space online. Messaging apps have started to outpace social networks when it comes to where we spend our time, and conversational commerce is beginning to take hold.

## About the Author



### Heidi Schwende

Heidi is a WSI Consultant focused on marketing technology. She is a Salesforce Accredited Consulting Partner, Google Global Premier Partner and Google All Star. She has worked in digital marketing, systems integration and ecommerce for Global Fortune 500's for over 15 years. She was also in the high-tech consulting sector for 10 years prior to that.



*We're a powerful network of marketers who strive to discover, analyze, build and implement digital strategies that win digital marketing awards and help businesses succeed online.*

Headquartered in Toronto, Canada, WSI was founded in 1995. After 25 years, we have hundreds of successful WSI Agencies spanning across the globe and the most extensive digital marketing network of its kind. In 2020, WSI was named the Top Agency for the second year in a row by the Web Marketing Association at their prestigious WMA WebAward competition.

For more than two decades, WSI has helped over 100,000 businesses develop their online marketing strategies so they can get more leads, generate more sales, and earn a better return on their online marketing investment. Overall, WSI strives to make a difference in the lives of the businesses they work with by fostering lasting, life-changing growth for their clients.

**Ready to bring your business online or even enhance an existing ecommerce website?**

Talk to us. We can help.

Book your [complimentary consultation](#) today.