

Whitepaper

E Commerce Planning checklist



E-commerce planning checklist

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Introduction

This checklist is intended to act as a driver for the workshop or meeting to produce the ecommerce plan for your website. We don't expect you to have all the answers, but in discussion around these areas we will get enough information to produce your plan.

While some of the answers are simply checkboxes or numbers. We have left space to expand upon that answer below the question.

Your project

Participants	Role	Email	Telephone
	Project mgr		
Start date			
Deadline			
Budget			
Notes / objectives / critical issues			

Your offering

Will you offer	
<input type="checkbox"/>	Your whole product range
<input type="checkbox"/>	A subset
<input type="checkbox"/>	A superset?
<input type="text"/>	How many products / SKUs
<input type="text"/>	Average value
<input type="checkbox"/>	Multiple SKUs per product (e.g. sizes / colours)
<input type="text"/>	How many SKUs per product (Min/Max)
<input type="checkbox"/>	Do we need to upload any images relevant to different SKUs for a product? For example colour swatches.
<input type="checkbox"/>	Do you have an established product / SKU coding scheme
<input type="checkbox"/>	Are the products very technical requiring exact specifications uploaded as pdf or word documents.
<input type="checkbox"/>	Do you offer added value such as warranties or after sales service.

Marketing

What unique benefits do you offer.
<input type="checkbox"/> Do you expect the Internet open a brand new market and get new customers
<input type="checkbox"/> Will the site service an existing customer base.
Does the site target the general public or business to business
<input type="checkbox"/> Is the audience technology-aware
<input type="checkbox"/> Are the audience going to be impressed by a graphic-rich site or will they be looking for speed and efficiency.
What regions / countries:
How will we attract customers to the site? <input type="checkbox"/> Brand recognition - people will look for your site. <input type="checkbox"/> Advertising - both on and off the net. <input type="checkbox"/> Postal mail shot <input type="checkbox"/> E-mail shot. <input type="checkbox"/> Search engines – people looking for your product type <input type="checkbox"/> Associates program <input type="checkbox"/> Pay per click – Google <input type="checkbox"/> Pay per click - other Other.

How will the site work

Search	Sort	Catalogue search / Catalogue page sort options
<input type="checkbox"/>	<input type="checkbox"/>	Product name
<input type="checkbox"/>	<input type="checkbox"/>	Product description
<input type="checkbox"/>	<input type="checkbox"/>	Brand / supplier
<input type="checkbox"/>	<input type="checkbox"/>	Price
<input type="checkbox"/>	<input type="checkbox"/>	Technical characteristics – how many per catalogue page? <input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	Product codes
<input type="checkbox"/> Have you identified the way in which the catalogue will be structured into different product areas to aid navigation		
<input type="checkbox"/> Will customers order by entering a product code directly from the paper catalogue		
How many (max per product):		
<input type="text"/>	Images	
<input type="text"/>	Technical specifications	
Do you want to make special offers from time to time.		
<input type="checkbox"/> Offer codes		
<input type="checkbox"/> Trade accounts		
<input type="checkbox"/> Discounts for multiple purchases (3 for the price of 2 or 10% off if you purchase 5)		
<input type="checkbox"/> Customer loyalty scheme		
<input type="checkbox"/> Do you want users to before they can place items in the shopping basket. <i>Note: this may only include essential information not a full registration.</i>		

Payments

<p>Payment methods</p> <ul style="list-style-type: none"><input type="checkbox"/> Credit card<input type="checkbox"/> Paypal<input type="checkbox"/> Other scheme (e.g. payment through mobile phone bill)<input type="checkbox"/> Pre-pay account with on-line top-ups<input type="checkbox"/> Pay on invoice<input type="checkbox"/> Account
<p>VAT</p> <ul style="list-style-type: none"><input type="checkbox"/> Prices include VAT<input type="checkbox"/> All products vatable<input type="checkbox"/> Mix of vatable / non vatable<input type="checkbox"/> Need to collect VAT numbers for non-UK EEC customers
<p>Currency</p> <ul style="list-style-type: none"><input type="checkbox"/> Single currency (which)<input type="checkbox"/> Multi-currency with prices quoted in different currencies<input type="checkbox"/> Provide indicative currency converter
<p>Your merchant account</p> <p>Which bank do you use</p> <ul style="list-style-type: none"><input type="checkbox"/> Do you have to run your merchant account from the same bank<input type="checkbox"/> Have you discussed your plans with the bank, Do they have special requirements.
<p>Online authorisation</p> <ul style="list-style-type: none"><input type="checkbox"/> Do you want to complete the credit card authorisation/payment process on-line,<input type="checkbox"/> Does authorisation of card payments need to be a separate step from find debiting of the cardholders account. (These two steps can often be combined because quick shipment of product can be guaranteed)

Operational issues

How is the product delivered	
What are the rules for calculating the shipping cost	
<input type="text"/>	What volume of sales are expected per day.
What is that estimate based on – degree of confidence	
<input type="text"/>	Value of sales total per year.
<input type="checkbox"/>	Can you keep the system up to date with availability to make that information available to customers. Can your back office system produce an export file.
<input type="checkbox"/>	Can you keep the system up to date with order progress to make that information available to customers. . Can your back office system produce an export file or could it be done manually.
<input type="checkbox"/>	Do you need to download orders to your internal systems – what format import file is accepted?
<input type="checkbox"/>	Can we synchronise customer information between the two systems? How flexible is your back office?

Fulfillment/ support

<input type="checkbox"/> Do you have a flexible administrative staff who will be happy to deal with on-line processing
<input type="checkbox"/> If your market is currently domestic, but you expect to sell overseas, will current fulfilment processes work
<input type="checkbox"/> Can you ship from the UK or should you set up overseas agents.
<input type="checkbox"/> Do you ship yourself or use a fulfilment house
<input type="checkbox"/> Can you support overseas users of your product
<input type="checkbox"/> Does your call centre operate round the clock
<input type="checkbox"/> Do you need to extend the working day or should you outsource to a call centre operation in other time zones.
<input type="checkbox"/> If you are selling to the USA can you offer a 1-800 number (legal requirement in some states)