



THE 21 QUESTIONS ALL AGENCIES SHOULD ASK ECOMMERCE CLIENTS

By Mitchell Callahan, CEO and Co-Founder, Saucal

WHAT'S INSIDE

INTRODUCTION	2	12. DO YOU NEED TO PRESENT CERTAIN PRODUCTS, PRICES, DISCOUNTS, OR CONTENT TO SPECIFIC VISITORS, SUCH AS CUSTOMERS, WHOLESALERS, RETAILERS, OR DISTRIBUTORS?	11
1. IS THE PURPOSE OF THE WEBSITE ONLY ECOMMERCE, OR WILL THERE BE PAGES SUPPORTING OTHER ASPECTS OF THE BUSINESS?	3	13. DO YOU NEED TO TRACK LIMITS ON ITEMS BEING SOLD?	12
2. WHAT WILL YOU BE SELLING ONLINE?	4	14. DO YOU NEED YOUR ECOMMERCE STORE TO INTEGRATE WITH ANY OTHER EXISTING SYSTEMS? AND IF SO, WHICH ONES?	12
3. ROUGHLY HOW MANY DIFFERENT PRODUCTS OR SERVICES WILL YOU BE SELLING ONLINE?	5	15. WILL YOU WANT TO IMPLEMENT AN AFFILIATE OR REFERRAL PROGRAM?	12
4. WILL THESE PRODUCTS OR SERVICES BE SEPARATED INTO DIFFERENT CATEGORIES OR SUBCATEGORIES?	5	16. WHAT SORT OF REPORTING FOR FULFILLMENT DO YOU REQUIRE?	13
5. WILL THESE PRODUCTS HAVE "ATTRIBUTES" ?	6	17. DO YOU REQUIRE YOUR SITE TO BE MULTILINGUAL?	14
6. ARE ANY PRODUCTS CUSTOMIZED FOR THE CLIENT?	7	18. DO YOU REQUIRE YOUR SITE TO ACCEPT MULTIPLE CURRENCIES?	14
7. DO YOU HAVE EXISTING PHOTOGRAPHY FOR YOUR PRODUCTS?	7	19. DO YOU REQUIRE US TO IMPORT OR MIGRATE OLD DATA TO YOUR NEW SITE?	15
8. WILL YOU BE SHIPPING PRODUCT?	8	20. WHERE ARE YOU HOSTING YOUR ECOMMERCE SITE?	15
9. WILL YOU NEED TO CHARGE SALES OR OTHER TAX SEPARATELY FOR THE ITEMS?	9	21. HOW DOES YOUR HOST HANDLE CACHING?	15
10. DO YOU HAVE AN EXISTING MERCHANT ACCOUNT OR ONLINE PAYMENT GATEWAY?	10	CONCLUSION	16
11. DO YOU SELL SERVICES OR PRODUCTS THAT REQUIRE REGULAR RECURRING BILLING?	11		

Ecommerce isn't an exact science. It takes research, logic, guesswork, and a bit of magic to launch a successful ecommerce store that is speedy and can scale. When your clients come to you asking to launch an ecommerce store, it's imperative that you're on the same page so expectations are properly set. Asking the right questions before digging into the design and development work could save a great deal of trouble, and probably heaps of cash.

How do you know if you're asking the right questions? Here are 21 questions every agency should ask its ecommerce customers from the get-go.



1. IS THE PURPOSE OF THE WEBSITE ONLY ECOMMERCE, OR WILL THERE BE PAGES SUPPORTING OTHER ASPECTS OF THE BUSINESS?

This is important because it not only influences design, but also the development of the site. It's important to consider your site's underlying architecture. Will there be supporting pages, like an about us page, a privacy policy, or terms and conditions? How about a blog? Getting the answers to this question early on in the process will help establish the framework from the start and define the full scope of the project.

Outlining the architecture and sitemap from the start saves time and headaches later.

2. WHAT WILL YOU BE SELLING ONLINE?
(E.G. PRODUCTS THAT SHIP, ELECTRONIC
PRODUCTS, SERVICES, ETC.)

***Ecommerce takes a lot of forms.
If you've ever paid for and
downloaded a piece of software,
that's an ecommerce transaction.***

Same goes for digital versions of books. Physical products that ship add a different wrinkle, as your store has to calculate shipping costs, and you have to store and ship the physical items to complete the transaction. You also have to manage inventory (we'll touch on that more later). Electronic products and services require special attention, as you have to determine the delivery method and format (direct from the page or via email), all of which will influence how your ecommerce site functions.



3. ROUGHLY HOW MANY DIFFERENT PRODUCTS OR SERVICES WILL YOU BE SELLING ONLINE?

Or, more simply put, will your ecommerce site's footprint be small or large? The number of products and services you sell directly relates to the number of pages you'll need, the number of files, and the size of the database. A large site with a lot of different products is going to have a huge footprint and should be accounted for at the start of the project. That is also going to influence the amount of storage and other architectural components.

It's a good practice to estimate a large footprint, which leaves room for growth and eliminates the surprise when you have to re-design a site to accommodate the additional new items.

4. WILL THESE PRODUCTS OR SERVICES BE SEPARATED INTO DIFFERENT CATEGORIES OR SUBCATEGORIES?

A. If so, roughly how many?

Examples:

- I. Women's clothing <category>
 1. Shirts <subcategory>
 2. Shoes <subcategory>
- II. Men's clothing
- III. Children's clothing

It's important to set up a site structure that allows two things: (1) easy categorization of your products, and (2) easy navigation of your products for your customers.

Think of it this way: If they can't find it, they can't buy it. Logical categories and subcategories help you know where your products are, and also help your customers navigate them. They also make it easier to showcase related products, which could entice shoppers to purchase more items.



5. WILL THESE PRODUCTS HAVE “ATTRIBUTES” (E.G. A SINGLE “T-SHIRT” IN RED, BLUE, OR GREEN, AND SMALL, MEDIUM, OR LARGE)?

A. If so, do you need the website to keep separate track of stock based on these attributes?

Attributes are like an additional layer beneath product categories and subcategories. Now that we know how your products are sorted, how does each individual product vary? Some common examples are sizes and colors. If you sell t-shirts, each color and each size would represent a unique SKU, despite all being the same product category.

Additionally, do you need to account for stock based on sizes, colors, and other attributes? That will impact how your site operates.

6. ARE ANY PRODUCTS CUSTOMIZED FOR THE CLIENT (E.G. A T-SHIRT OR PEN WITH THE COMPANY NAME OR LOGO)?

While this is pretty straightforward, it requires an additional layer of programming, as the site likely requires a field to input a company name or unique text and an area to upload an image of a logo.

7. DO YOU HAVE EXISTING PHOTOGRAPHY FOR YOUR PRODUCTS?

A. Will your product manufacturers or distributors provide professional photography?

The saying “a picture is worth a thousand words” is repeated ad nauseum for a reason. Excellent photography is key to success. Great product photos help sell. It’s highly recommended to have professional product shots for every item you sell on your site, and from multiple angles. This creates a large number of files and a huge demand on bandwidth, however, so it’s important to consider ways to compress product photos to ensure page speeds don’t suffer under the weight of loading those beautiful product shots.



8. WILL YOU BE SHIPPING PRODUCT?

A. Will you need to charge shipping separately from the product?

B. Which shipping methods would be the best fit (you can choose more than one)?

- I. Exact shipping costs through a real time direct link with a shipper such as USPS, Canada Post, UPS, FedEx
- II. Flat rate depending on location
- III. Free shipping over a certain dollar amount (or number of items ordered).

C. Do you need to provide shipping details (tracking number) to the client automatically?

D. Do you require any special shipping cut off times and dates?

E. Which countries will you be shipping to?

Shipping is frequently called the “least sexy part of ecommerce,” but we love it. Excellent order fulfillment goes a long way. When done well, it creates a great customer experience, inspires loyalty, and reduces shopping cart abandonment.

Most often, people integrate their ecommerce store directly with the shipping companies (USPS, Canada Post, etc.) for live shipping rates

based on product weight and location. All of these shipping companies have excellent APIs, and they'll let you print a shipping label.

Alternatively, providers like ShipStation, Veeqo, and Ordoro integrate with multiple shippers and can make this experience even easier. Saucal often recommends these for our customers. They also provide tracking numbers, which make for an improved experience.

Flat rate shipping is also very popular. It's easy for the customer to understand, and can often lead to increased total order value.

Other considerations to make when it comes to shipping include: Will shipping be determined by weight, by dimensions, or both? If so, this is a lot of work, as each product will need this information added into the backend system. Also, do you offer free shipping after a certain dollar amount is spent? Is there free shipping across the board? Do certain items need to ship separately? Are there flat rates for specific parts of a country or city? All of this can be programmed in, but it needs to be specified, and it's much easier to do this up front than to go back and update every detail to ensure shipping is calculated correctly.

Another consideration is some services, say catering or food delivery, have cut off times for ordering. So if your customers want an order, they need to place that order by a certain time the previous day.

Lastly, you must determine if you will restrict shipping. Are you only going to ship products domestically? Or will you ship internationally? Are there certain states or countries where you won't or can't ship your items? All of this plays into how your site is programmed to work. Shipping should never be an afterthought for an ecommerce store.

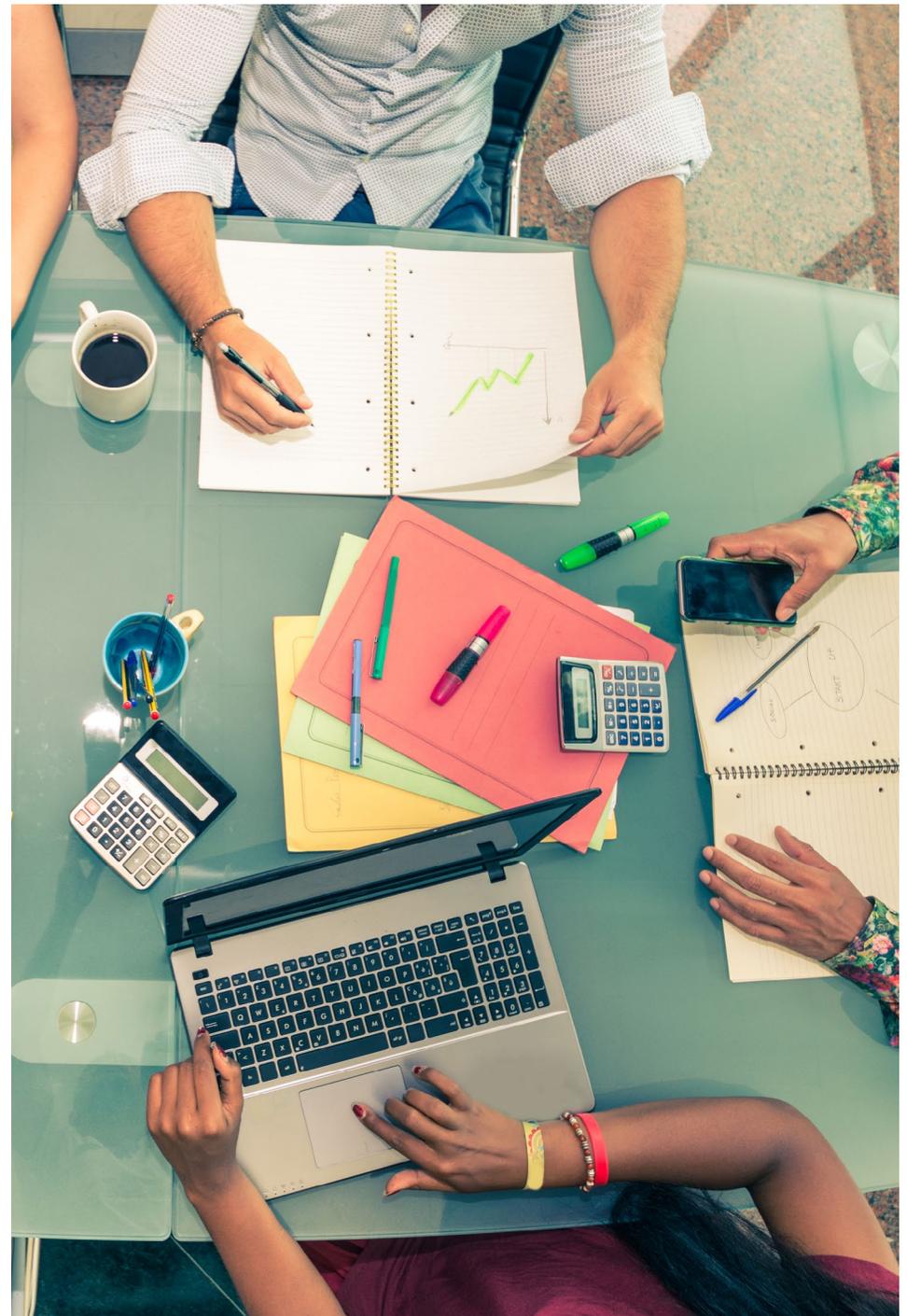
9. WILL YOU NEED TO CHARGE SALES OR OTHER TAX SEPARATELY FOR THE ITEMS? IF SO, PLEASE DESCRIBE THE TAX RULES.

Taxes are a huge piece of ecommerce, yet it is still somewhat of a gray area and a place governments need to do some work. Today, the web is the wild west, with very few ecommerce stores charging sales tax or other taxes, aside from big corporations like Amazon.

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.

The EU has started crafting regulations and has formed a body for accepting taxes. However, unless your country has a treaty with the EU, you're not obliged to follow this. So, most people charge for their country, yet don't charge tax for anything outside.

To correctly build an ecommerce site, an agency has to know where and how you want to charge tax so it can setup the tax tables and reporting to make sure you're in compliance with the correct tax laws.



10. DO YOU HAVE AN EXISTING MERCHANT ACCOUNT OR ONLINE PAYMENT GATEWAY?

This is super important. The two most popular gateways, Stripe and PayPal, are free with WooCommerce, and provide your customers an easy, familiar, and secure way to pay for items bought from your store. Additional gateways can be configured and the Woo extensions library likely has what you need.

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 info securely with a service like PayPal. Letting your agency know up front that you plan to use an online payment gateway ensures this is properly setup from the beginning.

As part of this, you'll have to ask the client how important it is for their customers to stay on their site when checking out versus jumping to a third-party site like PayPal to finalize the transaction. This is really up to the client's preference, and is mostly a UX issue.

From our perspective, the more integrated the better, and keeping shoppers on your site has its benefits from a stickiness perspective. Either way, this should be something that comes up in planning discussions.



11. DO YOU SELL SERVICES OR PRODUCTS THAT REQUIRE REGULAR RECURRING BILLING?

A. Other than the initial order, does this recurring billing need to be self-managed by the client through the website?

This really pertains to subscription sites and licensing purchases. Recurring billing requires the payment provider to do additional work, and also requires the addition of the Subscriptions module from WooCommerce. We've seen a lot of sites move toward subscription models lately, so this is sure to come up in initial conversations.



12. DO YOU NEED TO PRESENT CERTAIN PRODUCTS, PRICES, DISCOUNTS, OR CONTENT TO SPECIFIC VISITORS, SUCH AS CUSTOMERS, WHOLESALERS, RETAILERS, OR DISTRIBUTORS?

Sometimes store owners offer discounts to wholesalers. From a development perspective, we can add discounts based on a user's account type. From there, these discounts are often a fixed percentage off, say 20 percent, or they're taken off on a per item basis.

Somewhat similar to specific discounts, are there layers, or categories, of customers?

For example, sometimes membership sites only allow certain customers to view specific products. Or, some sites offer products that are age-restricted. Consult your dev team about how to implement this on your ecommerce site.

Or perhaps you want to offer some products only to wholesalers and some only to end-users.

All of this can be accomplished—just make sure you make it clear ahead of time what you're looking to accomplish.

13. DO YOU NEED TO TRACK LIMITS ON ITEMS BEING SOLD (E.G. INVENTORY OR SPACES AVAILABLE IN A CLASS)?

A. Do you need your website to indicate items out of stock, class full, etc.?

B. Do you want to allow backordering or waiting lists?

This is another big one for physical retailers. What level of inventory management do you require? Is stock displayed to the customer (e.g. will they see if an item is out of stock)? More importantly, do you offer back-orders so visitors can still purchase an out of stock item? Then there's the question of having a waiting list for a hot item, or a notification when an item is back in stock.

All of these questions must be weighed before launch to avoid upsetting customers who order an item only to find it's out of stock.

14. DO YOU NEED YOUR ECOMMERCE STORE TO INTEGRATE WITH ANY OTHER EXISTING SYSTEMS? AND IF SO, WHICH ONES?

A. Accounting system

B. Inventory system

C. Client management system

D. Marketing communications system

Integrations are a really big deal, and if you don't plan for them or they are done incorrectly, it can truly damage your ecommerce business

Does your ecommerce site's data need to sync with internal systems, like inventory management or accounting? Or email? Are you looking at Quickbooks, Salesforce, or Mailchimp. There are literally hundreds of integrations that can be made, many of which are critical to an ecommerce site's overall success. If you don't have a plan in place, an intelligent agency can walk you through your options before your site is live and help you select the best solution for your needs.

15. WILL YOU WANT TO IMPLEMENT AN AFFILIATE OR REFERRAL PROGRAM?

While pretty self-explanatory, it's a necessary question. You have to have plans in place to pay affiliates for referrals, and you have to have an official program in place so your affiliates know what to expect. One popular option is [AffiliateWP](#), which features a ton of add-ons.

16. WHAT SORT OF REPORTING FOR FULFILLMENT DO YOU REQUIRE?

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

This is often a task that can be forgotten but is incredibly important. This accounts for the emails that your customers receive when they place an order, you fulfill that order, a customer abandons a shopping cart, and more.

An informed customer is a happy customer, making these emails a key to success.

These types of emails are built into WooCommerce by default, and you can customize the copy and the design to your specific needs. These emails, which also serve as a receipt, can be an excellent place to upsell or tell customers about other items they may be interested in.

The same is true for internal notifications. 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? This decision sets your workflow, so it's an important one.



17. DO YOU REQUIRE YOUR SITE TO BE MULTILINGUAL?

You want your customers to have a localized experience, and not feel left out. You should investigate whether you need to serve your site in different languages. There are a host of services that will help you do this (*WP Engine GeolP* is one).

You can set your site to serve in a specific language based on city, state, country, even 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.

If your customers feel at home, they're more likely to make a purchase. A language barrier could kill a sale.



18. DO YOU REQUIRE YOUR SITE TO ACCEPT MULTIPLE CURRENCIES?

A. Will currency be based on IP address? Or final shipping address?

B. Do you require a dropdown to change the currency?

C. Will currency be based on one price, e.g.: USD and then all others get a live rate? Or, will you fix the price in each currency (using no exchange rates).

Just like supporting different languages, supporting different currencies is becoming more important in the ecommerce space. Customers will feel more comfortable buying in the currency they use most.

There are a lot of variations that exist, but the main two ways are (1) fixing all prices in USD (or your base currency) and then use a live exchange rate to serve other currencies (2) you 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.

Furthermore, you must determine which factors will influence which currency a customer sees. Will it be based on IP address? Shipping address? Or some other factor entirely? Will this be automatic, or will visitors select their currency preference? And if so, can they change their currency?

There is a lot to consider here.

19. DO YOU REQUIRE US TO IMPORT OR MIGRATE OLD DATA TO YOUR NEW SITE?

This has the potential to be a big job, depending on the size of the site you're migrating. For the average ecommerce store, a full migration requires importing all of the data, such as customer data, order data, product data, images, and myriad other things. Do you have backups in place? What platform are you moving from?

An ecommerce site can have a large footprint, so there's a lot to move. There are tools that can help, but setting expectations at the start and can make for a smooth migration.

20. WHERE ARE YOU HOSTING YOUR ECOMMERCE SITE?

Now that you've broken down what your client needs for their site, you have to determine where it's going to live. Does your client have the time and the resources to host it themselves? Will you provide the hosting? Or does the site need the help of a hosting provider? Where a site is hosted is imperative.

For guaranteed scalability, uptime, support, and ease of use for your development team, a managed platform is the best choice--managed hosting providers handle the heavy lifting for you, and you can tap into their expertise if an issue arises. A good host makes sure the site is fast and is available when you need to scale up for planned, and sometimes unplanned, traffic spikes. A managed provider will also handle security, backups, and a whole lot more, ensuring your ecommerce site is a well-oiled machine. Plus, developers love a good host--it helps them focus on their work and arms them with the tools they need to do their job correctly the first time, without worrying about server maintenance and troubleshooting.

21. HOW DOES YOUR HOST HANDLE CACHING?

For speed and scalability, you'll want your site to be cached, but ecommerce sites add some trickiness to caching.

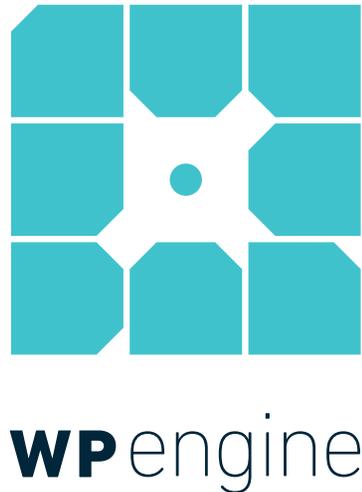
Caching shopping cart and checkout pages can throw things out of whack and cause unintended behavior.

Once you've selected a host for a client's ecommerce site, understanding their caching rules and making the appropriate adjustments will ensure smooth sales sailing.

CONCLUSION

This may sound like a lot to keep track of, but an ecommerce store is a major undertaking and having as much as possible ironed out at the very beginning will ensure the site is primed for success and scalability when it goes live. It also helps to set expectations early on and, from an agency perspective, flex your expertise and show you know your stuff.





ABOUT WP ENGINE

WP Engine powers amazing digital experiences for websites and applications built on WordPress. The company's premium managed hosting platform provides the performance, reliability and security required by the biggest brands in the world, while remaining affordable and intuitive for smaller businesses and individuals. Companies of all sizes rely on WP Engine's award-winning customer service team to quickly solve technical problems, and create a world-class customer experience. Founded in 2010, WP Engine is headquartered in Austin, Texas and has offices in San Francisco, California, San Antonio, Texas, and London, England.

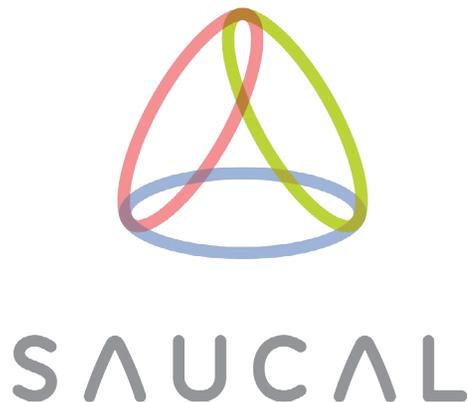
www.wpengine.com

ABOUT SAUCAL

To the leaders on a never-ending quest to grow business: Saucal is your solutions-based digital powerhouse. Saucal is all about building your business online; harnessing the power of the Internet to realize your true business potential in ways you've never thought possible. We design revenue-maximizing WordPress sites that actually drive the growth of your web-based sales; improve user experience; and tackle highly personalized and complex tasks related to your business. We also develop customized apps and plugins that succeed in capturing leads and increasing sales power.

While others may build you a beautiful looking website, Saucal builds websites that attract new business in the virtual world. Of course they look beautiful, too.

Follow Saucal on Twitter [@saucal](https://twitter.com/saucal).



ABOUT THE AUTHOR: MITCHELL CALLAHAN

Mitchell Callahan the Co-Founder and CEO of Saucal, an internet firm specializing in WooCommerce development.

He was born in Yellowknife, home of the Northern Lights, and the capital city of the Northwest Territories in Canada's arctic. As a child living in such a remote part of the world, he always believed his future lay in the universe just beyond his computer keyboard. He began building websites while still in elementary school and first showcased his work nationally at the age of 14 during a live broadcast of a Canadian television show.

He has travelled to 30+ countries and lived in India and South Korea. Besides the web, his interests include bitcoin, real estate, scuba diving and music production.

Follow Mitchell on Twitter [@ykcally](#).



