

# **E-COMMERCE WEBSITE QUESTIONNAIRE**

Q. Do you need your eCommerce store to integrate with any other existing systems (ERP, CRM ... etc)? and if so, which ones? \_\_\_\_\_

Q. If yes, what information should flow between the eCommerce and ERP system?

- |   |  |
|---|--|
| <input type="checkbox"/> Product data: Pricing, details (description, images, etc.), inventory, manuals | <input type="checkbox"/> Customers                                     |
| <input type="checkbox"/> Orders, invoices, and returns  | <input type="checkbox"/> Tax (and tax certificates)                    |
| <input type="checkbox"/> Payments and credit memos  | <input type="checkbox"/> Reporting                                     |
| <input type="checkbox"/> Shipping and tracking  | <input type="checkbox"/> Promotions, coupons, specials                 |
|   | <input type="checkbox"/> Customer communications (emails, newsletters) |

Q. Do you have a PIM (Product Information Management) system? If yes, what is it? \_\_\_\_\_

Q. How many SKUs do you have? \_\_\_\_\_

Q. Roughly how many different products or services will you be selling online? \_\_\_\_\_

Q. Will these products or services be separated into different categories or subcategories? If so, roughly how many? \_\_\_\_\_

Q. Will these products have "attributes" (IS "VARIANT" A TERM TO REPLACE OF INCLUDE ) (e.g. a single "t-shirt" in red, blue, or green, and small, medium, or large)? \_\_\_\_\_

Q. Are there existing photography for your products? \_\_\_\_\_

Q. Will you need to charge shipping separately from the product? \_\_\_\_\_

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

Exact shipping costs through a real time direct link with a shipper such as USPS, Canada Post, UPS, FedEx

Free shipping over a certain dollar amount (or number of items ordered)

Flat rate depending on location

**Q.** Do you need to provide shipping details (tracking number) to the client automatically? \_\_\_\_\_

\_\_\_\_\_

**Q.** Do you require any special shipping cut off times and dates? \_\_\_\_\_

\_\_\_\_\_

**Q.** Which countries will you be shipping to? \_\_\_\_\_

\_\_\_\_\_

**Q.** Will you need to charge sales or other tax separately for the items? If so, please describe the tax rules. \_\_\_\_\_

\_\_\_\_\_

**Q.** Do you sell services or products that require regular recurring billing? \_\_\_\_\_

\_\_\_\_\_

**Q.** Do you offer coupon codes? \_\_\_\_\_

\_\_\_\_\_

**Q.** Do you need to present certain products, prices, discounts, or content to specific visitors, such as customers, wholesalers, retailers, or distributors? \_\_\_\_\_

\_\_\_\_\_

**Q.** Do you need to track limits on items being sold (e.g. inventory or spaces available in a class)?

\_\_\_\_\_

\_\_\_\_\_

Q. Do you need your eCommerce store to integrate with any other existing systems? and if so, which ones?

Accounting system

Client management system

Inventory system

Marketing communications system

Q. Will you want to implement an affiliate or referral program? \_\_\_\_\_

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Q. What sort of reporting for fulfillment do you require?

An email per order

Daily picklist summary with printable shipping labels

Manual review of orders in backend

Q. Do you require your site to be multilingual? \_\_\_\_\_

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Q. Do you require your site to accept multiple currencies? \_\_\_\_\_

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Q. What are your average monthly eCommerce sales/revenue? \_\_\_\_\_

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Q. Do you plan on doing a website redesign or maintaining the same design on a different platform?

I want to overhaul the look & feel

I want to maintain the same design, but just on a different platform

I want to change a few minor elements like photos and copy, but like the overall look & feel of the site

I want whatever is lowest cost out of the above

Other

Q. What is your ballpark budget for the platform change / having your store on a different platform? (this is a critical consideration for the right recommendation – please understand this is not what you want to spend, but the maximum monetary resources you can allocate toward this project.)

Under \$30k

\$50k - \$100k

\$30k - \$50k

\$100k +

Q. Do you have a merchant account? \_\_\_\_\_

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Q. If yes, what merchant account do you use? Do you have loyalty to this option, or are you willing to switch? \_\_\_\_\_

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Q. What edits do you require to be main in-house by your team, rather than relying on an outside resource? Please check all options that apply.

- |  |  |
|--|--|
| <input type="checkbox"/> Be able to change the pricing   | <input type="checkbox"/> Be able to edit notification bar copy (for sales, free shipping, etc) |
| <input type="checkbox"/> Be able to swap product photos in and out                             | <input type="checkbox"/> Be able to add and remove categories                                  |
| <input type="checkbox"/> Be able to edit the homepage banner to feature new sales and products | <input type="checkbox"/> Be able to add or remove products                                     |
| <input type="checkbox"/> Be able to handle customer returns and refunds                        | <input type="checkbox"/> Be able to edit menus / navigation                                    |
|  | <input type="checkbox"/> Other   |

Q. What integrations do you have? (Loyalty program, rewards, newsletter, CRM, marketing automation, 3rd party APIs) \_\_\_\_\_

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Q. How important is the search functionality to your sales?

- |   |  |
|---|--|
| <input type="checkbox"/> Customers use our search constantly, because they come to the site looking for a specific product  | <input type="checkbox"/> I am unsure   |
| <input type="checkbox"/> Customer don't use our search function much, because they are browsing our catalog and unsure of what they want to see until they see it | <input type="checkbox"/> This function matters very little to our business, and should not be considered in a feature requirement list |
|   | <input type="checkbox"/> Other   |

Q. Do you need a new customized checkout experience?

- |  |                                |
|--|--------------------------------|
| <input type="checkbox"/> Yes, we need to completely rethink the checkout experience                        | <input type="checkbox"/> Other |
| <input type="checkbox"/> No – as long as it follows best practices, we do not have any unique requirements |                                |

Q. Do you need a customized add-to-cart experience?

Yes, customers need to be able to specify specific configuration options before they add the product to cart

No, we only set it up that way due to platform constraints and are open to something simpler

No – as long as it follows best practices, we do not have any unique requirements

Other

Q. Do you have the technical capacity to maintain your website in-house? If not, what is your monthly budget for this type of support (security, updates, backups, etc)? \_\_\_\_\_

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Q. What is your average daily website traffic?

Less than 1000 daily sessions

1,000 to 10,000 daily sessions

10,000 to 50,000 daily sessions

50,000 to 100,000 daily sessions

100,000+ daily sessions

Q. What level of order and process automation are you looking to achieve? \_\_\_\_\_

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Q. Will the system allow back orders? \_\_\_\_\_

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Q. Please list out any additional features / requirements you need on the new platform. Please be as specific as possible in your answer. \_\_\_\_\_

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