



Scope & Intake

Research: Questions & Answers list



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General

What ERP/CRM/... are you using?

...

Can we access/how can we access the system from outside your organisation?

...

How can we access the required data from your ERP/CRM/... ?
(Do they have an API or Webservices available?)

...

Is there official documentation on this?

...

Who can we contact regarding questions about your ERP/CRM/...?

...

Marketing

Positioning

What kind of products will you be selling online?

...

What makes your company remarkable?

...

Who is your main target group? Who is your secondary target group?

...

Where will you be active (in terms of geo)?

...

Do you have brick-and-mortar stores? If so, how many?

...

Which are your current sales sources? Offline and online.

...

Do you have resellers? If so, how many? Where? Provide some details.

...

What kind of categories/brands/producers/... will you be offering?

...

What do you consider the strengths and weaknesses of your products? (From your point of view + from the point of view of your customers)

...

How do you want your customers to think about YourCompany?

...

What are the perceived disadvantages of your products/services?

...

Do you offer seasonal products?

...

Who are your competitors (online and offline)?

...

What are the strengths and weaknesses of your competitors?

...

What distincts you from your competitors? Please add any specific differences between you and your competition that might be helpful. (I.e. you offer free service calls vs. they charge)

...

What kind of promotions will you have?

...

What turnover targets do you foresee for the first year? (cfr. Business plan)

...

What's the average basket size and the value?

...

Which are your best sold products? What about the most niched?

...

Marketing & Digital advertising

Are you already doing online advertising campaigns?

If yes:

On which channels?

What are your goals for the digital marketing campaign?

- receive calls, have users visit certain pages of your site, share, download your app, use a coupon, make a reservation, leave your their e-mail address, buy specific products, etc

What's the average CPA for ongoing campaigns? How about for seasonal campaigns?

...

What's your webshop's conversion rate, in the past 6 months?

...

What's your overall marketing budget?

...

Is there a specific set of keywords you (want to) list on?

...

What e-mail marketing solution do you use?

...

Do you have automatic marketing e-mails implemented? (eg. when a customer has an anniversary)

...

What e-mail campaigns do you have and how often?

...

Marketing & SEO

Do the products have optimized SEO data? Do you plan to use dynamically generated data or add the SEO content manually for the products and categories?

A SEO optimised product means its (meta) title and meta description are focused on a specific keyword, which is usually the product itself and some particular info.

Eg. for a backpack for children, the product page can have the following info:

Title: Stellar Backpack for pre-school

Meta title: Stellar Backpack for pre-school · School supplies | Baldwin

Meta description: [Should contain keyword variations like "kids backpack" / "toddler backpack"]

The info above can be added/updated either manually, either via dynamically generated data.

Manually: You add each part of this info manually, to every product => provides more control over the information you add.

Dynamically: You use variables to create the meta title and meta description => faster for big shops with hundreds of products. In our example, in Admin, the input would be: {title} · {sub-category} | {webshop name}, while the output is: Stellar Backpack for pre-school · School supplies | Baldwin

Do you have a keyword strategy for your pages?

--

Which pages bring in the most organic traffic?

--

Which pages have the best conversion rate, from organic?

--

Which are the pages you'd like to see in the 1st page in SERP?

...

Marketing & Tracking

Apart from the checkout behavior of users and e-commerce data, is there a specific action you'd like to track?

...

Are you aware about the GDPR policies and the user's right to select the cookies placed?

...

UX/UI

What entry points do you want to offer to your target groups (Search, Category, Brand, Theme, ...)

...

What kind of webshop styles / webshops do you perceive as top shops?

...

What kind of product images style will you be using?

...

Do you have a brand book or a brand description or examples of current print & webdesign?

....

What are the most important things to show on a home? + which CTA's have to be implemented?

...

Can you provide your logo in Vector Format?

...

Content

How do you envision the webshop structure?

(example)

Webpages	Elements
<ul style="list-style-type: none">Home Log In<ul style="list-style-type: none">Create new accountAccount overviewAccount details Shopping Cart<ul style="list-style-type: none">Cart overviewProceed order Wishlist<ul style="list-style-type: none">Saved wishlists Search<ul style="list-style-type: none">Search results FAQ About Contact<ul style="list-style-type: none">Chat function Blog/Vlog<ul style="list-style-type: none">Article CategoryArticle Jobs<ul style="list-style-type: none">Job overviewJob detail Newsletter subscribe field	<ul style="list-style-type: none">Logo

Sales Conditions Privacy Disclaimer Cookies ODR Platform Social links	

What elements do you consider crucial and what secondary?

...

What kind of copy do you already have right now?

...

What kind of copy will you have to start writing?

...

Products

How many SKU's will you sell on the webshop?

...

What types of products do you have and are there relations between them?
(colors, sizes, variants, packaging, ...)

...

If there are relations between products, how can we identify these relations?

...

Are there other links between products?

(related products, up sells, cross sells, ...)

...

What fields should be foreseen to describe a product?

...

We require some fields, how would you match them with the ERP product data?

SKU (should be unique)	
Name	
Description	
Status (enabled/disabled)	
Price	
VAT	

What fields do you have in the ERP regarding products?

...

What fields are available in multiple languages?

...

What fields are not in the ERP?

...

Do you have a categorisation?

...

Is the categorisation suited for public use (on the webshop)?

...

Can a product be in multiple categories?

...

What fields should be visible on the product list view (based on design)

...

What fields should be searchable

...

By what fields should a client be able to filter the products in the product list view?

...

What fields should be visible on the product detail view (based on design)

...

Are there images provided for products?

...

What should be the base, small, thumbnail image for a product ?

...

Do product images have certain order?

...

Are the product images optimized for use on the web:

- File format (jpeg, png, gif)(*To optimize page load we recommend using jpeg images*)
- RGB color profile
- Maximum file size (...?)
- Minimum dimensions (...?)

...

Do the products have optimized SEO data?

...

Are there specific product groups/indications?
(*new products, special products, ...*)

...

What is the default position/sorting of products in product list views?

...

What product price should we display on the webshop?

...

Are there special prices, tier prices, ... that we should display on the webshop?

...

How frequently should we update the webshop product and category information?

...

Is there a first time import that's different from the synchronization?

...

Are prices the same for all customers/stores?

...

Should we consider showing real time product information?
(*real time stock, real time prices, ...*)

...

When should products be online/offline, removed from the webshop?

...

Stock

Do we have to take into account stock for the webshop project?

...

How many stock locations are you using?

...

Will you have a dedicated stock for the webshop?

...

How much orders are done outside of the webshop?

...

What should happen if a product is out of stock?
(customers can place order with/without a warning, customers can't place orders, ...)

...

How frequently are your stocks changing or being refilled?

...

How frequently should we update the webshop stock?

...

How should we indicate the stock level on the webshop?

(color indication based on the stock level, current stock count, ...)

...

What stock count do you consider as out of stock?

(it might be safer to put a product online to out of stock if the same stock is used in shops or if it takes a while to get new stock in house)

...

Should the webshop stock decrease when an order is placed in the webshop?

...

Clients & prospects

Should we import customers into the webshop?

(We can import customers from existing systems into the webshop and for example send them a welcome email)

...

Should we allow customers to register on the webshop?

[CUSTOMER REGISTRATION FLOW]

...

Does a customer needs to be approved before getting access to the webshop or parts of the webshop?

...

Do we need to verify customers when they register on the webshop?

...

Do we need to export or sync customers between the webshop and your ERP/CRM/...?

...

Do all customers you want to synchronize/import in the webshop have a valid and unique email address?

...

How do we identify a customer between the webshop and your ERP/CRM/...?

(Usually we use the email address to identify a customer)

...

Should we limit the available transport options for certain clients based on your ERP/CRM/... settings?

(For example: some clients could be allowed to pick up at certain destinations while others don't)

...

Should we limit the available payment methods for certain clients based on your ERP/CRM/... settings?

(For example: some clients could be allowed to pay after the delivery while others always have to pay before you ship the order)

...

Are there organisations or other customer structures?

...

Orders

When an order is places on the webshop, should we import it into your ERP?

...

Should only Paid for orders be imported into your ERP?

....

When the status of an order changes in your ERP, should the status in the webshop change?

...

Should a client be able to view his total order history (incl orders that are not made in the webshop)

...

Shipments

Who should trigger shipment notes? the Webshop Software or the ERP?

...

If it is the Webshop Software, do you have specific fields/requests ?

...

Invoices

Who should send invoices to the customer? the Webshop Software or the ERP?

...

If it is the Webshop Software, do you have specific fields/requests ?

...