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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?
  (Is there an API or Web services 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?

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Marketing & Digital advertising

- Are you already doing online advertising campaigns?

  If yes:

    - On which channels?
    - What are your goals for the digital marketing campaign?

      Eg.: 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" / "todler backpack"]

The info above can be added/updated either manually, or 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.

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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 image style will you be using?
- Do you have a brand book or a brand description or examples of current print & web design?
- What are the most important things to show in 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? Eg.:

Webpages	Elements
Home Log In 　　　Create new account	Logo

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Account overview
  Account details
 	
Shopping Cart
 Cart overview
 Proceed order
 	
Wishlist
 Saved wishlists
 	
Search
 Search results
 	
FAQ
 	
About
 	
Contact
Chat function
 	
Blog/Vlog
 Article Category
  Article
 	
Jobs
 Job overview
  Job detail
 	
Newsletter subscribe field
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?

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- 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 a 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 many orders are done outside of the webshop?
- What should happen if a product is out of stock? (customers can place orders 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)

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- 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

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Let's work together

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