



# An eCommerce Roadmap

**How to estimate, implement &  
manage a successful  
eCommerce project**



When planning a journey, there are many steps involved that can make the trip more enjoyable. The same holds true with an eCommerce project.

## Planning



## The Journey



## Roadblocks & Delays



## Arrival



## Unpack



## Post-Trip



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**We are going to go on a journey** to how to estimate, implement and manage an eCommerce project featuring the WooCommerce Plugin for WordPress.

**This is a guide for web developers who:**

- are actively building or has built an eCommerce website?
- are building an eCommerce or wants to build an eCommerce project for themselves?
- have built an eCommerce website or gotten into one and said “never again ????”

Most eCommerce projects go haywire due to not being as thorough as possible up front and therefore not estimating the project correctly or changing specifications and having to get more \$\$ to complete the project

We utilize a comprehensive questionnaire that helps us to ask the right questions, set the tone and expectations for the client and keep us on track through the project.

Who doesn't love a new  
And exciting journey?  
As long as there are no  
unexpected surprises.

**So, let's begin our  
Journey!**



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## PLANNING – PACK YOUR BAGS

First, understand that the WooCommerce Plugin is free but we have never built an eCommerce website just using the free WooCommerce Plugin.

We have always used other Plugins to give the online store the necessary functionality. These “extras” might include shipping, sales tax, bundles or other options that the client has specifically requested.

The estimate and the estimate process is the most critical aspect of the project. One missed question could result in dozens of extra hours or hundreds of dollars that need to be added after the initial proposal. The client won't be happy about these mistakes.

Make sure that your proposal uses specific quantities and dollar amounts for each feature or line item in your proposal.

MOST of the eCommerce projects that we have been called in to rescue have been the result of the original developer not accounting for the additional Plugins and the time to configure.



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**Project Management** – Depending on the scope, you may need weekly meetings until the site has launched and monthly status updates on-going. Plan for this. Your time is necessary and valuable. Get the answers to the following questions before providing an estimate. Sometimes, it can take 2 or more meetings. If you make an assumption in the proposal, make sure to talk that assumption over with the client. Remind them that everyone needs to be accountable and that this project will require 20-40 hours or more of *their* time. Ask them how they are going to manage adding all of this work to their already busy schedule.

**Theme** – What Theme will you be using? Is it compatible with WooCommerce according to Automattic – the WooCommerce developer? Is it flexible enough to make format and layout changes that the client requests as the site comes together? Is it regularly updated for security and compatibility? Is it loaded with features and Plugins that you don't need?

**Hosting** – Do you have control over the hosting environment? What type of support do the Host provide for you AND your client? How easy or expensive is it to increase performance? Sometimes allocating additional memory on a server can make a significant difference on customer's searches and the checkout process.

**Secure Certificate** – I assume a SSL these days and try to pick hosting at a company that offers Let's Encrypt which is a free SSL.



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**Products and Product Categories** – It is absolutely essential that you accurately define the specifications with regards to the Product Catalog.

- How many products and how many Categories?
- Does the client use SKU's are you adding a separate Product for each SKU or is each SKU a variation of a Product?
- Is the client going to supply Products in an XLS spreadsheet or Word document?
- Are there so many you need to import those? Some import Plugins cost a few dollars but may be well worth it
- Images – What size(s) are needed? Who is going to provide them?
- Do they need Min/Max Quantities purchased?
- Do they require Inventory Management?
- Do they need Wholesale vs Retail purchase capabilities?
- Additional tabs on the product detail page?

**Shipping** – What type and get examples from client? Causes the most headaches with eCommerce

**Sales Tax** – do they need to configure and if so maybe SalesJar (a company that handles the sales tax for you) is a good option. You still need to configure it.



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**Merchant Account** – Paypal/Authorize/Stripe are common options. Paypal is included with WooCommerce, but others may require a paid Plugin.

**Additional Considerations.** Don't start writing your proposal yet. There are a few more questions to ask.

- Currency Converter?
- Do they need the customer to pick a Date of Delivery?
- Break an order and ship to multiple locations?
- Coupons – WooCommerce has basic coupon configuration but they may need more
- Additional Checkout Fields – like “how did you hear about us”
- Integration with QuickBooks
- Any special Reporting?
- Do they need printable Invoices?
- Are there other eCommerce sites that you like? Why?

Perhaps you now see how important it is to take the time to ask as many questions as you can think of.

Ask the client if they have any questions. Are there any processes that they use to manually process orders? What is their workflow?



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## THE JOURNEY

After reviewing our detailed proposal, the client is so impressed that we treated them with such professionalism that they have selected us as their eCommerce vendor. YEA! Let's get Started.

**Timeline** – Schedule a meeting and go over the plan and timeline with the customer. Everyone must be accountable. Establish your weekly meeting/call date and time.

**Source Files** – Sent the client a list of the source files and/or data you need from them. Product information, product categories, merchant account information, etc.

**Data Exchange** – Invite them to a shared folder like Dropbox or Google Drive so that we can share source files.

**Development Site** – We setup a DEV environment, install the Plugins and share the DEV URL when it is presentable. A builder allows the home buyer to view the house under construction. It can look a bit rough during the early stages, but any changes in design or scope are best addressed as early as possible. Any changes should go through a formal change request with additional costs is applicable.



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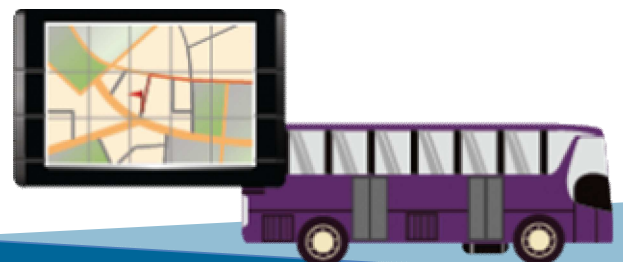
## ROADBLOCKS / DELAYS / REROUTE

**Scope Change** – Understand you WILL have roadblocks. The biggest Roadblocks ones are either change in scope due to the number of products or design changes. Evaluate each situation and determine if the cost will be the same or different. The client may choose a different shipping method and if we haven't purchased one yet, it may cost the same.

**Time Challenges** – Sometimes, unforeseen circumstances can affect the launch date. It could be a personnel issue, a conflicting business issue or others. Make it clear to the client that these roadblocks may likely change the “go live” date.

**Communication** – Another big roadblock is the client not getting back to you on time for what you need. This is where Project Management time becomes critical as you call and email.

**Software Conflicts** – There may also be Plugin conflicts. You need to allow for this. I have seen projects come to a halt because the developer does not know how to debug code and therefore doesn't know what to do when an error occurs. If you are one of these developers, have a person you can go to that can dig into code to assist. Remember you will have to pay them to fix the issue!



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## ARRIVAL

You're not there yet, but in the neighborhood. Let's make sure that everything is in order. Test multiple scenarios. In order to launch make sure you test every condition.

**Test All Pages** – There are a number of Plugins and processes to ensure that moving from a DEV environment to a production environment is error free. However, sometimes these processes are not without errors to Permalinks or other references to the old DEV site. Double check.

**Shipping conditions** – Test by carrier, by weight, and rush orders

**Sales Tax conditions** – Test in state vs out of state sales tax.

**Product Variations** – Test normal scenarios, but don't forget to test unlikely scenarios, like 10 accessories to a product when a normal order would only choose 1 accessory. Unusual scenarios may cause the site or path to purchase to break. You think – “Why would anyone do that”? People are strange and sometimes do strange things to a website.

**Payment** – Test multiple payment methods. The entire process needs to evoke trust. People need to be assured that their money is being allocated properly and safely.



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**You Have Arrived – It's not time to put your feet up just yet.**

**Security** – Make sure the SSL is enabled and visible on all pages

**Merchant Account** – Make sure it is set for the production domain. Any errors here means no money being transferred to the right account.

**Google Analytics and Search Console** – Add the Google Analytics code to the production site. Go to the Google Search Console account and run the tests that they provide for link checking, crawling and performance.

**Performance** – Run performance checks from Google Pagespeed Insights, GT Metrix, and YSlow to check for Page Load, etc



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## POST TRIP

Now you can celebrate and put your feet up, but don't get too comfortable. There are always on-going updates and changes that make up a successful eCommerce project. Which of the following were included in the proposal?

**Training** – Client needs to know how to check for orders and process requests.

**Monthly Security and Performance Plan**– We strongly recommend all of our clients to be on our Monthly Security & Performance Plan. We utilize a combination of Wordfence premium for real time protection and ManageWP for software monitoring, updates and backups.

**Content Management** – It is essential that regular content updates are published and distributed to the client's target audience. Most of our clients don't have the time or ability to produce regular and relevant content as necessary. This content includes Blog posts, Video updates, Social Media engagement, SEO and local marketing. Updates to the Product Catalog may also be included here.

**Support** – What type of support will you provide? Will it simply be technical in nature, or will your client want you to handle some level of customer support? Will you be available 24/7 in case there is an issue?

**Status Meetings** – Check in every month at a minimum to review Key Performance Indicators like number of orders, monthly revenue, returns, abandoned shopping carts and more.

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This roadmap is a great guide to help you estimate, plan and manage a successful eCommerce project.

If you have any questions on this process or have additional insight into additional questions, please [feel free to reach out](#).

Our goal is to help you avoid some of the common mistakes we see when implementing an online store.

## Looking For An eCommerce Partner?

We would welcome the opportunity.  
Let's setup a couple of minutes to talk  
and answer any questions.

No obligations!

Contact us today.

### Contact Us

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