

Ecommerce Platform Best Practices

1. **Know your requirements, validate their importance.** The single most important step in selecting an ecommerce platform is to define all your detailed business and technical requirements. Having the best new widget is great, but if it is very expensive and only leads to a small improvement in sales, it may not be worth it.
2. **Understand your customers, what makes them buy.** Knowing your customers and keeping their needs in mind will help you understand what features will improve their shopping experience and increase loyalty. Your customers' need and desire change quickly, understand the cadence of change in your industry to ensure your ecommerce platform can adapt, grow and leverage opportunities for change.
3. **Platform due diligence is key. Review several options before making a decision.** There are many ecommerce systems out there. So many platforms have bells and whistles which look great, but once you compare them to your requirements, to each other's cost, and talk to their customers, there will always be a top group that should be reviewed further. Eliminate the rest. Set your sights high, enlist experts, and dive into the details.
4. **Understand that your ecommerce platform is a "store" seen by millions of customers.** The features and design will be representative of your brand. Make sure your store conveys professionalism and the right message. Cookie-cutter design, subpar features, and poor customer support would never make it in a brick and mortar store, thus there is no room for them online.
5. **Integration is no longer an option; it is a necessity.** Make sure your ecommerce platform can integrate with all your business functions and third-party tools. Your systems must be integrated and able to accept orders, confirm them, process payments, decrement inventory, print shipping labels, create a pick order, generate reports and update your financials without manual intervention. Even if long-term, you should always be working toward this goal.
6. **Choose or add a solution that helps customers find what they want.** As the number of products you sell increases, so do the merchandising and search challenges. Make sure the ecommerce platform can effectively merchandise and search for the products you have now and in the future, should your merchandise mix change. If not, consider a personalization or search add-on. Personalization and sophisticated search functionality is considered table stakes for most industries.
7. **Give your customers as much product information as possible, and the right information.** Platforms that either provide or have standard integrations to show comprehensive product data, comparisons, reviews, and rich media techniques such as image zoom, alternate images, color swatches, etc. will improve the customer experience, help customers be confident in their purchase, and lead to increased conversions.
8. **Keep your site as easy to use as possible.** Best ecommerce design practices include simple navigation, clear messaging (inventory, pricing, shipping, tax), simple checkout, alternative payment methods, anonymous shopping, multiple ship-to's, wish lists, merchandising of cross-sells and up-sells. Make sure your platform has best-of-breed practices or can be customized to meet these changing needs.
9. **Understand each platform's support commitment.** How does the provider support them? With internal IT, you have some control over fixing issues. With an outsourced platform, this is not as easy. Make sure the platform you choose has defined service standards tied to financial implications.
10. **Think about the cost or savings of using one platform over another.** Depending upon the platform and the tools that it includes, your internal processes, headcount support needs and cost will be different. Think about these when selecting. Certain platforms will help you reduce hosting, support and IT labor costs. There are other efficiency gains from having a more automated ecommerce channel. While cost may not be the deciding factor, you should clearly understand the numbers.
11. **Assess your platform's PCI compliance.** Your customers' credit information is sacred. Make sure your platform is PCI compliant to the level you require (based on number of transactions). Be wary of platforms that are only self-assessed; most levels also need quarterly PCI scans to be fully compliant.

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eCommerce Diligence™ Checklist

Ecommerce Platform Key Questions to Ask Providers

Company

1. How long have you been in this business? How many clients? How many have you lost?
2. What clients fall into your “sweet spot”?
3. Is your solution geared more toward enterprise, mid-market or the SMB space?
4. What peripheral or support services do you offer (e.g., design, email marketing, product feeds, SEO/SEM, customization, gateways)?

Products/Services

1. Is your solution offered as perpetual licensed software or on-demand multi-tenant solution?
If perpetual license:
 - a. What are the hosting requirements?
 - b. What should I expect regarding upgrades (both timing and pain)? Cost? Timing?
 - c. Do you provide customization & implementation services? Can outside third parties be used?**If SAAS/ASP:**
 - a. Do all tiers include maintenance and support?
 - b. How often are new features introduced?
 - c. What can I do if I need a feature you don't have or plan to have soon?
2. What is your solution built on (which OS, code base and database)?
3. Please describe your architecture.
4. How long to launch a basic site? A complex site?
5. Can third-party products be used within your platform in place of the capabilities your product offers?
6. What skills does my organization (or hired third party) need to implement this platform?
7. What is your SLA for support issues?
8. What technical support services are available? Are there different tiers of service?
9. What is the post-launch support process?
- d. Define your redundancy / disaster recovery.

Features

1. What key features are included in your solution? (Please indicate if they are B2B, B2C based or both).
 - a. Is there a key feature that only you have?
 - b. What features are currently missing that many of your competitors have?
2. What is your product's competitive advantage over other packages? Why?
 - a. Price? Dashboard? Ease of use? Flexibility? Don't say "all of the above".
3. Is your platform geared strictly to B2B sales or is there special B2B functionality available as well?
 - a. Describe your B2B features.
4. What features are included in your platform to support multiple channels (Social, Mobile, B&M, B2B, etc.)?
5. How can you integrate data (product, order, customer, etc.)?
 - a. Is real-time integration possible? How?
 - b. How effective are your import tools at uploading hundreds (or thousands) of products/images at a time?
6. How easy is it to create microsites or to build overseas sites in other currencies / languages?
7. Do you have a staging or test environment and a data/content migration tool to push data and content to live?
8. What about your platform makes it search-engine friendly?
 - a. How can we use your platform to improve our search rankings?
9. How does your platform integrate with other systems (fulfillment, CMS, analytics, social, back-office systems, etc.)?
10. What third party tools do your customers normally add on? Why?
11. Do you have a management console?
 - a. What can I manage with it? Is it web-based, application-based, other?
12. Please describe your reporting capabilities, ad hoc reports, etc.
 - a. Please provide a list of standard reports.
13. Does your platform come pre-configured for shipping, tax and payment processing integration? If I don't want to use the providers you selected, what are my options?
14. What integrations exist to other systems?
15. What reporting and analytics tools does your platform include? Does it provide the ability to analyze cart abandonment, quantify browser searches, tie product purchases to search terms, etc.?
16. Is it PCI compliant and certified?

Pricing

1. What are the typical implementation cost ranges for your platform? What is the minimum cost to get onto the solution?
2. What is the license fee (if perpetual license)?
3. What are the pricing schedules and what features do they include? On what are they based? Provide an annual estimate of cost, based on some performance metrics.
4. How do you charge for annual support? What about maintenance?
5. Are there any additional fees (e.g., implementation, transaction costs, revenue sharing)?

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