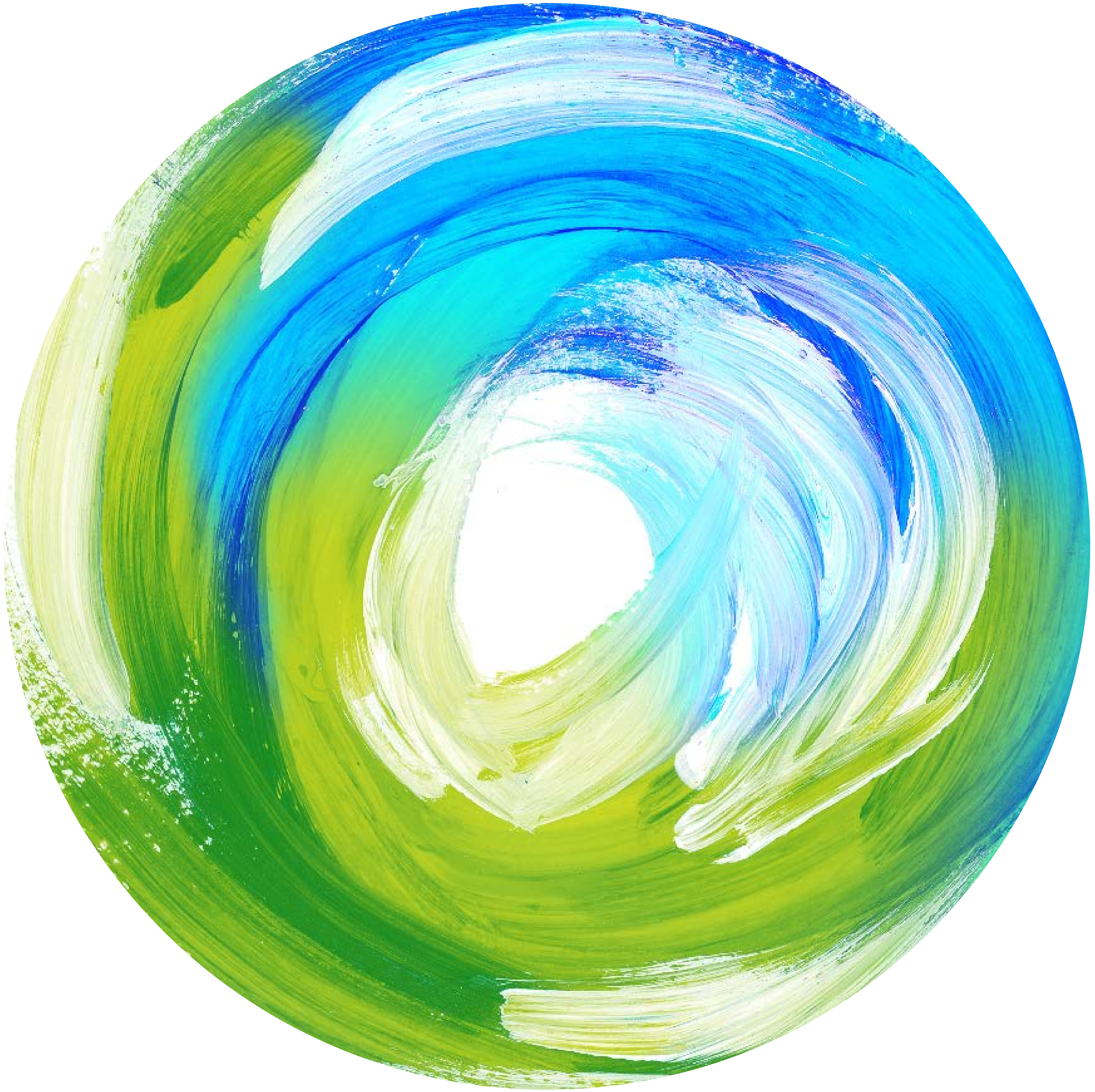
Adobe Commerce Operational Playbook

Created by: Scott Rigby



Playbook Objective

The objective of this playbook is to get your businesses operationally ready to run a successful e-Commerce site. This will help you and your organisation as Commerce users derive maximum value from your technology investments. Although we have seen many websites succeed, others have faltered due to a lack of internal investment in the businesses to ensure they are operationally ready to run an e-Commerce site successfully.

This playbook is created for all industries and customers (B2C and B2B) to use as part of their day to day commerce operations and the successful management of their commerce platform.

This playbook will help to avoid some of the common areas we have identified as missing in less successful website management and delivery teams. The recommendations and best practices in this playbook are ideally intended to be applied any industry and business in parallel to your technology solution, to ensure your business is best positioned to realise value from your investment and utilise the platform end to end.

The playbooks in this series use a common digital governance structure focusing on the key areas of leadership, strategy, people, solution, product and process to deliver a robust approach to readying your business whether you are deploying one new feature on your platform or planning a robust Commerce road map on Magento Commerce.

Day to day commerce operations and the successful management of their commerce platform

This playbook should be read by:

- Chief Marketing Officer
- Head of Digital, Head of Strategy, Head of Marketing
- Head of Content, Head of UX, Content Production Lead, Content Strategist, Content Producers, UX Designer
- Solution Architect, Head of Implementation, Lead Developer
- Program Manager, Project Manager
- E-Commerce Manager, Business Analyst

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01.

Introduction

Within this section:

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About this playbook

This document follows a structure that will help you understand the key focus areas to drive maximum value from your investment in Magento Commerce. This structure is based on the Deloitte and Adobe Commerce Governance Framework, which creates the appropriate business environment for digital operations and transformations to succeed. It includes:

Leadership

Executive buy-in and support for the successful management of a Commerce platform.

Strategy

Clarity and alignment around key business goals for evaluating digital performance and Commerce operations.

Solution

Hosting and infrastructure evaluation for varying business and Commerce requirements.

People

Resources, expertise, and the appropriate team structure to run Commerce Operations effectively.

Process

Procedures, project management, and workflows for managing a Commerce site effectively.

Product

General Commerce solutions, common integrations, and automations.

The playbook is industry agnostic and created for all customers (B2C and B2B) to use as part of their day to day commerce operations.

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Magento Commerce

Magento is the leading platform for open commerce innovation. Every year, Magento handles over $100 billion in gross merchandise volume. Magento Commerce gives customers the power to create unique and engaging shopping experiences, out-of-the-box features, and the unlimited ability to customise, a flexible headless architecture, and seamless third-party integrations.

There are two versions of the Magento platform:

Magento Open Source is the free version of Magento, previously called Magento Community. You can download, customize, and run the platform on your own server or Magento host of choice.

The majority of merchants use Magento Open Source because of the low cost and open nature. For developers, it doesn't really matter if he develops on Open Source or Commerce. But Commerce has more built-in features that can be used out of the box.

Magento Commerce: Magento Commerce is the paid version of Magento, previously known as Magento Enterprise. Being the premium version, there are a lot of additional features from Magento Commerce.

Magento Commerce can be hosted on-premise. So you host and develop locally on your own server, or have the choice of your own Magento host. Alternatively, there is Magento Commerce Cloud, the cloud-hosted solution from Adobe. In the Solution section, we look deeper into the differences between hosted (SaaS, on premise and Platform as a service hosting solutions.

Magento Commerce is a full-featured e-Commerce platform that comes with additional features:

- B2B functionality, like quoting, custom catalogs, and manage buyer roles and permissions.
- Magento BI dashboards, with Visualisation and custom report builder.
- Magento Chat (powered by dotdigital)
- Advanced marketing tools.
- Sense powered product recommendations.
- WYSIWYG page builder.
- Customer segmentation
- Customer Loyalty Tools, like Easy-to-redeem coupons.
- Content staging and preview for Magento hosting.
- Visual merchandising.

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What is e-commerce

In the overlapping worlds of e-commerce, social selling and digital marketplaces, the customer experience gives consumers a choice to engage in the channel they prefer, so making the right choice on how you engage and sell online has never been more paramount 'E-commerce' and 'online shopping' are often used interchangeably but at its core e-commerce is much broader than this – it embodies a concept for doing business online, incorporating a multitude of different services.

E-commerce is experiencing monumental growth. It went from being a 1.3 trillion-dollar industry in 2014 to a 3.5 trillion-dollar industry in 2019. And experts predict that by 2023, it will reach more than 6.5 trillion, which means there is a tremendous opportunity for e-commerce brands to capitalise on conversion optimisation. The power of e-commerce should not be underestimated as it continues to pervade everyday life and present significant opportunities for small, medium, and large businesses and online investors.

Whether you're just starting your e-commerce business, or you've been in the business for a while, you probably know that it's hard to be successful, which is why we have compiled this guide on how to run a successful e-commerce business.

Here's a quick summary of the types of e-commerce businesses out there according to each different category:

Here are the different e-commerce business models:

- Business-to-Business (B2B)
- Business-to-Consumer (B2C)
- Consumer-to-Consumer (C2C)
- Consumer-to-Business (C2B)

Here are the different e-commerce revenue models:

- Dropshipping
- Subscription
- Private labelling and manufacturing
- White labelling
- Wholesaling
- Rent and loan

Here are the different types of e-commerce website:

- Individual brand website (one seller)
- Online retailers (select number of sellers)
- Marketplaces (multiple sellers)

Advantages and Disadvantages

E-commerce makes it possible for people to open the doors of their very own virtual stores. Selling online makes it easier for small, specialized stores and big brand outlets to reach a wide audience. And, just like traditional businesses, e-commerce has its advantages and disadvantages.

Here are a few advantages and disadvantages of Commerce:

Advantages:

- E-commerce overhead is low in comparison to bricks and mortar
- Online stores are open 24/7
- Purchasing is instant
- Personalisation and customised user experiences
- Global customer reach potential

Disadvantages:

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- Competition online is fierce
- Shipping can be unpredictable

It is clear from the above, that the advantages outweigh the disadvantages, which is why the Commerce market, retailers and merchant revenues are growing expediently.

Customer Challenges

Here are some common e-Commerce challenges organisations encounter:

- You might use an outdated platform that makes visitors leave your site.
- Your site may be not responsive, forcing mobile visitors to head elsewhere.
- Your internal team might lack structure and skills to be able to effectively run a Commerce platform.
- You might question whether your infrastructure is the right fit for your business

Customer expectations are rising and there are always new growth techniques to surge your conversion rate. This playbook will look to outline and explain in more detail how to address some of these customer challenges and successfully run an e-Commerce site to its full potential.

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Commerce Industries

Successful Manufacturer & Distributor Customers

Successful Technology Customers

Successful Retail Customers

Successful Healthcare Customers

Successful Media & Entertainment Customers

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What is B2C and B2C

Simply, “B2B” stands for “business to business,” while “B2C” means “business to consumer. In general, B2B businesses sell products and services directly to other businesses. Or, more specifically, they sell to the decision makers in any business. This can include everything from manufacturing to consumer.

This contrasts with business-to-consumer (B2C) models, which sell products directly to individual customers, which are generally purchased for personal use. This can include travel, clothing, cars and so much more.

B2B businesses need to focus on:

- Purchase Guides
- Product details including images and videos
- Product specific blog posts
- Provide 24/7 customer support
- Provide case studies for reference

B2C businesses need to focus on:

- Provide reviews and ratings
- High-resolution product images and videos
- Featured products

Homepage of B2B should include:

- Product demonstration
- Product carousel
- Content for target audience

Homepage for B2C should include:

- Displaying promotions
- Product carousel
- Simple checkout

Customer Service for B2B:

- 24/7 customer service
- Live chats
- FAQs
- After sales issues
- Reorder

Customer Service for B2C:

- 24/7 customer service
- Post-sale returns
- Post-sale exchange
- Post-sale issues
- Availability

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Here is a summary of the differences between B2B and B2C:

Variable	B2B	B2C
Audience	Businesses	Individual consumers
Stakeholders involved in decision making	Sales representative, managers	Individual end consumer
Purchase Volume	Bulk orders	Small volume
Price	Dynamic price changes as per the client, product quantity and/or payment timelines	Consistent pricing
Customer Service	24/7 support throughout the purchase process	24/7 support before and after purchase. Usually required sometimes
Product Detail	Product images, videos, guide, case studies, demonstration	Product videos, images, features, promotions
CTA	Business oriented	User oriented

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Commerce Operations

Commerce Operations is about centralising the back-end operations so that it works smarter, faster, and more efficient for an e-Commerce business to have a successful operational strategy, it requires a strong IT infrastructure that is capable to support the end-to-end e-Commerce operations from displaying products to inventory to checkout and shipping. e-Commerce operations are built on several things such as a user-friendly storefront, variety of products, proper management of inventory, promotions, easy checkout and convenient payment and shipping methods.

Why is e-commerce operation strategy important?

e-Commerce is based on direct-to-consumer strategy; hence it is essential that customers receive the best customer experience for them to keep coming back. To do so:

- The owner would need to start with understanding the products they are hosting on the site and target audience they would be catering to which would lead to a higher conversion rate.
- The owner needs to find the right platform which is not only secure but also scalable, has different features and functionality that are not over complicated for the team to manage.
- There needs to be the right set of people with the required skill set to achieve the end vision
- There needs to be set Project Plan which covers team required, timelines, deliverables etc
- There needs to be clear Project Scope which mentions the singed off/agreed in-scope and out of scope items to avoid scope creep and delay on the project deliverables
- The pricing modal of the project keeping in mind with any internal and external costs that would be incurred during the project

The importance of laying out an e-Commerce operations strategy is to provide the best e-Commerce experience to the customer by keeping all the internal plan, scope and team aligned. Better the commerce operations, better the focus and speed on selling products online to bring more revenue.

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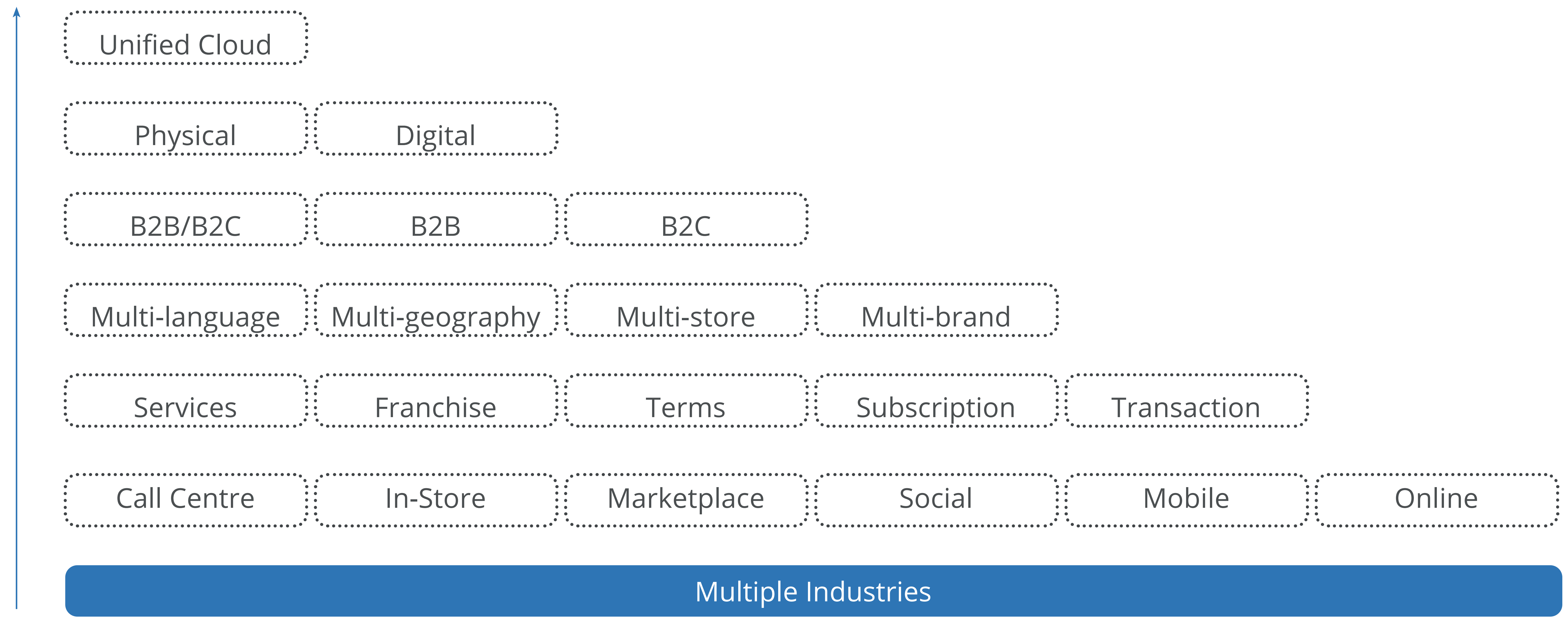
Commerce Features

Delivering the world's best commerce experiences requires supporting every touch point, business model, and deployment scenario

An open platform to support your evolution



02.

Leadership

Within this section:

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Leadership Overview

Sponsorship

Having an effective executive sponsor will help the project achieve maximum success. To be truly effective, this internal executive sponsor should have enough seniority and influence within the business to have buy-in from other stakeholders across the organisation. Having a high level of self-interest in the online store's success and a passion for digital transformation and Commerce — and truly believing in how Adobe Magento is going to transform the business — are also critical.

An effective executive sponsor should guarantee the management, roadmap and continual growth of the Commerce platform stays in line with the corporate strategy, protecting it from conflicting initiatives or internal politics and helping address any limiting factors, such as resource, skill shortage or budget constraints.

Buy-In

Achieving management buy-in across your leadership team is also key. Having multiple change agents to drive growth will help you drive growth easier and faster. The responsibility for the successful management of Adobe Magento needs to be shared by the entire leadership team. It is then the executive sponsor's responsibility to win over the executive team by sharing examples that prove the value of Adobe Magento and Commerce overall. Typically, this focuses on delivering a better customer experience and subsequent benefits to the business.

When managing e-Commerce sites or implementing digital projects such as Adobe Magento, leaders will be responsible for monitoring different departments and teams owning different parts of the e-Commerce initiatives. It is critical then to make sure that all groups share a common strategy to achieve common goals. Having an internal roadshow to win support from executives will help raise awareness towards aligning all teams and obtaining the necessary resources for an optimal implementation.

Accountability

Project leadership is most simply, the act of leading a team towards the successful completion of a target goal. It can often be one of the most critical areas to get right in order to successfully deliver an e-commerce project. Successful project leadership requires skills in both management and leadership in order to secure buy-in from the right people, whilst leading the team in the right direction.

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C Level

C level executives play a strategic role within an organisation. They hold senior positions and impact company-wide decisions. C stands for “Chief”, so a C-level executive is often in charge of an entire department or business unit, such as Finance, IT or Sales. As these individuals are significant stakeholders within the organisation, it is important to ensure that they are aware of the benefits the e-commerce project will bring to the organisation. More specifically, it can be helpful to identify the specific benefits the project will bring to their department, as this can be an important motivating factor. Tying tangible metrics to the successful delivery of the project can motivate and transform your C level stakeholders to become active supporters of the digital transformation project.

At smaller organisations, C level executives tend to be heavily involved, or at least very close to the transformation project. As we start looking at larger merchants however, it’s natural that executive involvement decreases as the company size increases. As such, it’s critical to keep these stakeholders involved and informed throughout the project to ensure buy-in and support remain intact.

Stakeholders

Stakeholders are those with an interest in your project’s outcome. They are typically members of your project team, project managers, executives, project sponsors and finally, your end users. It’s important to secure buy-in from all relevant stakeholders to ensure effective change. If you fail to get support from key stakeholders who contribute to the final decision, often a project may fail.

As well as this, it’s important to ensure that you have an effective process in place to train and upskill users on the new systems or platforms. People can often be a strong barrier to change, especially when they are unfamiliar with a new system and the impact that this may have on the processes and workflows within their environment. Having effective change management and training processes may help mitigate this. In addition, upskilling users will ensure you get the most out of the system. Teams that are well-versed in the platform will be able to optimise the platform for effectiveness, ensuring you get the most bang for your buck.

Steering Committee

Steering committees are advisory bodies that are made up of senior stakeholders or expects, that provide guidance on a range of factors which may affect a project. The aim of the steering committee is to ensure successful delivery of the project, including the maximisation of benefits from the project and ensuring that proper project management processes and controls are followed.

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Common Roles and Responsibilities Within a Steering Committee

The following high-level roles and responsibilities are based on industry-standard practices for Steering Committees.

Role Responsibility Business or Technology Sponsor - Ultimately accountable for the outcome of the project and responsible for securing spending authority and resources for the project.

- Vocal and visible champion
- Legitimises and lends credibility to the strategic goals and objectives
- Is the escalation point for changes and issues outside the agreed tolerances
- Assists with stakeholder engagement where required

Business Executives - Ensuring that the project is focused on achieving its objectives and ensuring a cost-conscious approach, delivering a product that will achieve the forecast benefits, give value for money and balance the demands of the business.

- Designs and appoints the project management teams
- Oversees the development of the business case, ensuring corporate strategic alignment
- Monitors and controls the progress at a strategic level, in particular reviewing the business case regularly
- Escalates issues and risks. Is the escalation point for issues and risks, and ensures that any risks associated with the business case are identified, assessed and controlled?
- Makes decisions on escalated issues, with particular focus on continued business justification
- Ensures overall business assurance of the project and ensures that it remains on target to deliver products that will achieve the expected business benefits

Business Owner

Represents the interests of all those who will use the product (including operations and maintenance), those for whom the product will achieve an objective or those who will use the product to deliver the benefits and value drivers.

- Provides the quality expectations and defines acceptance criteria
- Ensures that the desired outcome is specified
- Ensures that products will deliver the desired outcomes and meet user requirements
- Ensures that the expected benefits are realised
- Provides a statement of actual versus forecast benefits at the benefits reviews
- Resolves user requirements and conflicts

Technical Owner or Chief Technical Officer

Represents the interests of those designing, developing, facilitating, procuring and implementing the product. This role is accountable for the quality of product(s) delivered by suppliers and is responsible for the technical integrity of the project.

- Assesses and confirms the viability of the approach
- Ensures that proposals for designing and developing the product are realistic
- Advises on the selection of design, development and acceptance methods
- Ensures quality procedures are used correctly, so that products adhere to requirements

Head of Digital

Covers the primary stakeholder interests of the business, technical, end users and suppliers.

- Ensures that the right people are involved in quality inspection at the correct points in the product’s development

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- Ensures that staff are properly trained in quality methods
- Verifies that the quality methods are being correctly followed
- Ensures that quality control follow-up actions are dealt with correctly
- Reviews regularly to ensure that an acceptable solution is being developed
- Makes sure that the scope of the project is not changing unnoticed
- Verifies that internal and external communications are working
- Ensures that applicable standards are being used
- Makes sure that the needs of specialist interests (for example, security) are being observed Business assurance responsibilities
- Assists to develop the business case and benefits review plan
- Reviews the business case for compliance with corporate standards
- Verifies the business case against external events
- Checks that the business case is being adhered to throughout the project
- Checks that the project remains aligned to the corporate strategy and continues to provide value for money User assurance responsibilities
- Ensures that the specification of users' needs is accurate, complete and unambiguous
- Assesses whether the solution will meet users' needs and is progressing towards that target
- Advises on the impact of potential changes from users' point of view
- Ensures that quality activities relating to products at all stages has appropriate user representation
- Ensures that quality control procedures are used correctly to ensure that products meet user requirements Supplier assurance responsibilities
- Reviews the product descriptions (features and capabilities) and aligns to delivery
- Advises on the selection of the development strategy, design and methods
- Ensures that any supplier and operating standards defined for the project are met and used to good effect
- Advises on potential changes and their impact on the correctness, completeness and integrity of products against their product description from a supplier perspective
- Assesses whether quality control procedures are used correctly, so that products adhere to requirements.

E-Commerce Manager

Has the authority to run the day-to-day operations with the prime responsibility of ensuring that the result produces the required products within the specified tolerances of time, cost, quality, scope, risk and benefits.

Effective management of a Commerce site requires that the project management team possesses and applies the knowledge in several areas:

- Project management itself
- Business and industry domain knowledge specific to the product and platform
- Technology knowledge required by the product
- Interpersonal and communication skills
- The Project Management Framework consists of five key activity groups: Initiation, Planning, Execution, Monitoring and Control, and Closing.
- These are the processes or activities for managing the tasks and they are different from the Project Life Cycle.

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- The Project Life Cycle activities are generally sequential, while project management activities are performed concurrently, because project management activities may overlap and repeat along the timeline depending on risks (for example, the controlling activities may lead back to planning to revise the goals or plan as a result of changes)

Communication

To get the organisation on board, it is always a good idea to share the vision and repeatedly reinforce the reason why your company is investing in Adobe Magento technology by articulating both the customer benefits and business benefits. Sharing documentation such as success case studies of digital implementations will help you validate why and how this investment will take the organisation to a new level. If you want the organisation to embrace digital transformation, it's important to let employees know it is a priority

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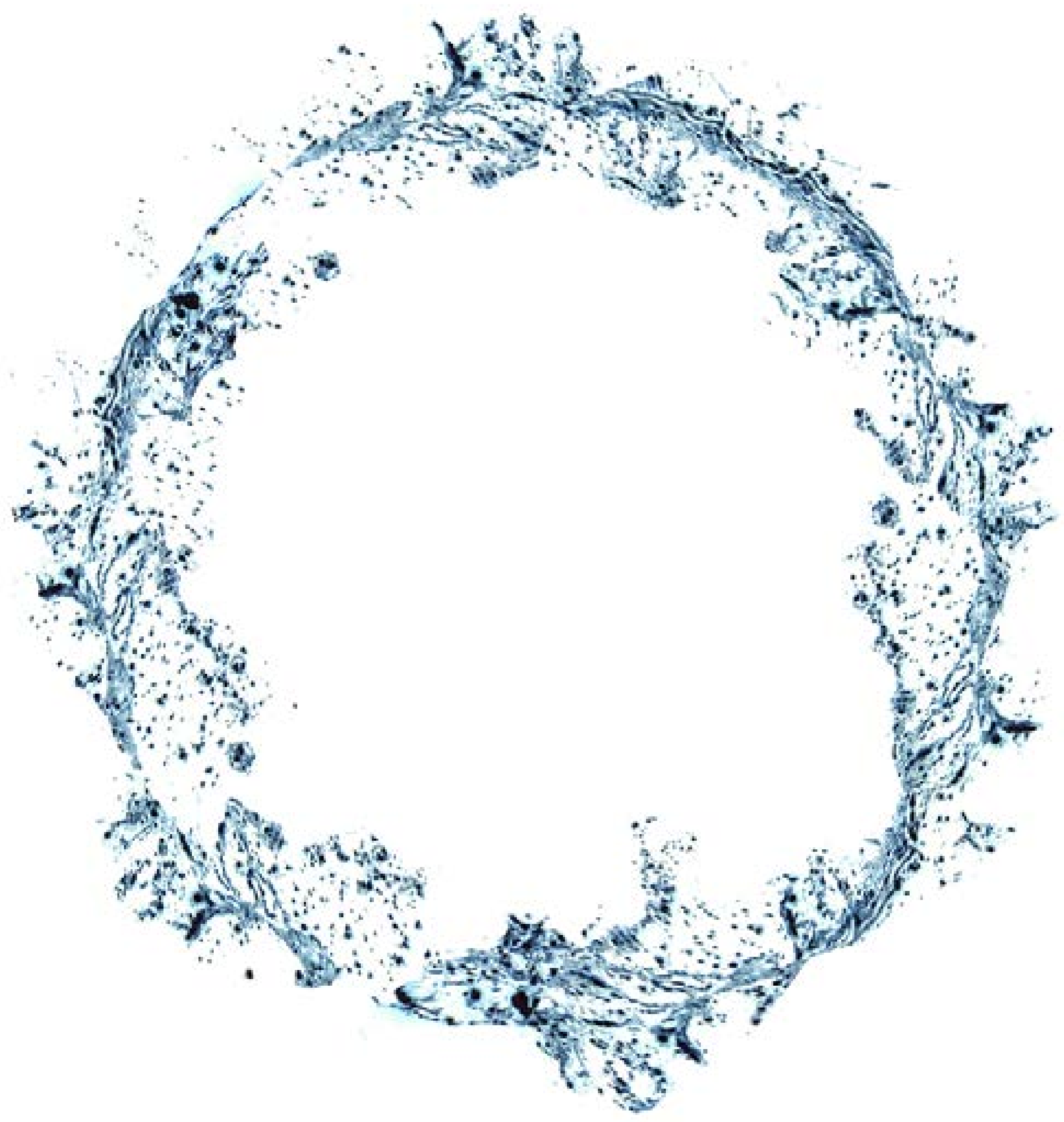
Goals



Organisational goals are strategically set objectives which outline expected results and guide the efforts of employees to share objectives. Goals are critical to organisational effectiveness, as they serve as an objective for people to work towards. It’s important to establish short-term as well as long-term goals for your business, in order to provide realistic steppingstones towards achieving long-term objectives.

Long term goals

Long-term goals are commonly defined as goals which will take a minimum of five to ten years to achieve. Long-term goals are inherently strategic and are used to shape the overall direction of an organisation. These goals form the broad strategy which maps out the long-term direction for the organisation. Long-term goals should have periodic milestones or benchmarks for the organisation to use in evaluating their progress.

Short term goals

Short-term goals are often defined as having a time-frame of under five years, and more commonly, within one to three years. These goals have an operational component to them, with action plans for the immediate future. They also roll up to form the action plan for achieving long-term goals

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Vision

An organisations vision is the desired state, or ultimate condition that the organisation is working to achieve. It is typically expressed in a vision statement, which is a clear and brief summary of what the organisation is trying to achieve.
An organisational vision provides focus and serves as a source of inspiration for employees. It articulates the goals for the organisation, and it is important for all employees to understand and work towards the same vision across the organisation.

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Planning

Organisational planning is the process of defining a company's purpose, setting goals to realise an organisations full potential and finally, creating increasingly discrete tasks to reach those goals. Organisational planning helps a company uncover approaches to enhance performance. In addition to this, organisational planning can:

- Increase the efficiency of an organisation
- Identify genuine customer needs
- Optimise resource allocation
- Enhance decision making

In Commerce, planning with the leadership team, c-level executives, stakeholders, marketing and IT teams are paramount activities to the success of any Commerce platform and transformation.

03.

Solution

Within this section:

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SAAS

More businesses are turning to Software-as-a-Service (SaaS) apps and systems to optimise and forge business functions whilst better managing their e-Commerce operations.

Using a SaaS e-Commerce platform instead of open source or on-premise software can seem overwhelming for any size organisation. It feels like an even more daunting decision if you're planning on switching platforms.

SaaS e-Commerce platforms operate in a software licensing and cloud-based delivery model, which users access via a web browser. One of the benefits of SaaS platforms is that the software isn't installed on-premise or maintained by the user themselves. Instead, your e-Commerce system runs on the SaaS provider's hosted servers. The third-party provider is responsible for the security, performance, and maintenance of the application on their servers. Normally, SaaS licensing models operate on a subscription basis, where users pay a monthly fee based on level of service and number of users. This kind of operating model is usually a cost-effective way for merchants to have real-time access to their e-Commerce platform.

Some other advantages of SasS solutions include:

- Leveraging out of the box solutions
- Maintenance
- Security and PCI Compliance
- Scalability
- Easy Integration

SaaS e-Commerce platforms are out-of-the-box solutions, where users leverage intuitive, user-friendly interfaces. In general, SaaS projects can be up and running within a short amount of time, which allows merchants to operate the e-Commerce platform using the prebuilt themes, features and functionality rapidly. One of the core advantages of a SaaS e-Commerce platform is the maintenance. The provider is responsible for hosting and maintaining the software, uptime, performance, updates and bug fixes to the software. In turn, the e-Commerce or IT teams can focus on developing the code base of the online store, whilst the SaaS provider (aka Magento Cloud) can improve the infrastructure.

Part of selling goods or services online is ensuring the store is meeting PCI compliance standards, so customer data such as payment information is safeguarded. In a SaaS e-Commerce model, this responsibility sits with the SaaS provider, as its their responsibility to stay up to date with any patches or bug fixes which may impact the security of the store.

As thriving retailers need e-Commerce platforms to scale, take on more customers, process more orders, and add more complex functionality when needed. SaaS e-Commerce platforms tend to be more robust and agile, when trying to accommodate these growth spurts. Businesses can easily increase their bandwidth on servers to deal with increased load and traffic, this is especially important during peak periods, sales, campaigns and new product drops.

Even though e-Commerce platforms sit at the core of most businesses, it's not always the only system organisations use to run all operations. In most cases, SasS e-Commerce platforms will be required to integrate with an ERP, POS, 3PL, or any other financial software. Most SaaS platforms have powerful APIs that make integrations easier because there isn't as much customisation required. It is recommended that retailers should use best of breed systems meaning that they use the best system for each part of their business. Most of the time, choosing one platform to perform all aspects and functions of your business falls short of your expectations.

Instead, businesses should be able to use any number of best systems for their ERP, POS, 3PL and e-Commerce systems. Then, integrate those systems so you can sync inventory, orders, customers, items, and shipping/tracking data, thus automating your business processes. Cloud-based, SaaS platforms often allow for this business requirements to happen with flexibility and ease.

P 3.2

PaaS

PaaS is a type of cloud computing which offers service to deliver a platform to clients allowing them to develop, run and manage the business without the requirement to build an infrastructure to manage the services. PaaS is provided as a service which is hosted on the providers' infrastructure and can be accessed using the Internet on the browser. Most of the e-commerce platforms function as a PaaS which means the site does not need to build from scratch.

PaaS works on all types of cloud private, public, and hybrid:

- PaaS with Private cloud: PaaS is delivered within the client's firewall for security, where the data is stored on-premise.
- PaaS with Public cloud: The client is in control of the deployments and the provider is responsible for all the other components such as network, operating system etc.
- PaaS with Hybrid cloud: Hybrid mixes the functions of both private and public so that the client can have flexibility

Advantages of PaaS:

- Allows to build and deploy without the requirement to spend money and time on building infrastructure such as servers
- Allows faster deployments and delivery
- Gives a competitive advantage
- Allows the user of new languages, technology, systems etc.
- More flexible
- Access to the code of the website
- Allows to integrate with external 3rd party systems or software
- Self-hosted
- Accessibility
- Cost-effective
- Time-effective

Disadvantages of PaaS:

- Could lead to a security threat as everything is stored on the cloud
- Dependant on the service provider
- If the provider experiences a down-time it would be an issue for the client
- Allows easy and quick updates

When the client uses PaaS in e-commerce, they do no need to manage the system and operating software. The client is provided with a platform to set up their e-commerce site where they build and configure content, code data, products etc. which is separate from the administration side of things related to PaaS. Due to its flexibility, it is easier to implement changes on the website without requiring updating the entire system. PaaS allows clients to build and test in development or staging sandbox before going live so that there is no issue or downtime on the production site.

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On-premise

Cloud based solutions are extremely popular, and it certainly serves an important role in many organisations, however on-premise infrastructure is still a suitable option for some organisations and merchants.

Several factors come into play including significant sunk costs, a readily available pool of competent / cost effective IT expertise, and the fact that on-premises applications can often be more readily tailored and adapted to an organisation’s needs. When compliance regulations (i.e, when data must reside locally), on-premise hosting solutions are more advisable. Many organisations are more likely to stick with on-premise when they are still depreciating their hardware and software costs along with no compelling technical or economic reason to change. Keep in mind to effectively leverage all the cloud has to offer, traditional applications need to be rewritten and built upon micro services. In most instances a “lift and shift” to the cloud doesn’t result in tremendous savings.

P 3.4

Cloud vs On-premise

By analysing and then determining the type of technical and economic resources an organisation is willing devote to each of the areas below, allows merchants to make tactful decision about which hosting solution is the best fit for their business.

Below is a table outlining the advantages and disadvantages of cloud vs on-premise solutions:

Factors	On- Premises		Cloud	
	Advantage	Disadvantage	Advantage	Disadvantage
Cost	Possibly more cost effective in the long term	Considerable upfront hardware and software costs (cap-ex). Any mistakes during development can be very expensive for the business.	Predictable subscription pricing. Costs can be budgeted to op-ex and no upfront hardware/ software investment required.	Long term cost projection is required. Licensing costs can mitigate hardware savings
Security	The organisation can control all the data locally. No third-party access to the data.	Internal resources require specific skills and knowledge of the infrastructure. If organisations lack the applicable skills and expertise, it risks significant exposure.	Advanced data security is available and easily manageable for organisations.	Aggressively targeted by hackers Data could be accessed by 3rd party.

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Factors	On- Premises		Cloud	
	Advantage	**Disadvantage**	**Advantage**	**Disadvantage**
Scalability	Physical control over the hardware means upgrades can be tightly controlled	Need to plan well in advance to changes in demand because of the time necessary to research, justify, order, and deploy hardware. Could be stuck with excess IT infrastructure which may or may not be able to be re-purposed	Cloud resources can be rapidly adjusted to accommodate specific demand	Costs escalate when the cloud infrastructure is improperly managed and not properly tracked
Upgrades	The organisation can control when the upgrade takes place and what features are included/ excluded as part of the output	Time consuming exercise which can impact other work pipelines Costly exercise if not managed appropriately	Fast and cost effective exercise with low impact to other work streams	SaaS provider manages the upgrade, and the organisation is not always aware of the final output and impact on the site

P 3.4

Factors	On- Premises		Cloud	
	Advantage	Disadvantage	Advantage	Disadvantage
Platform Customisation	Readily able to customise the platform to meet unique requirements	Customisations can lead to reliability and software support issues	SaaS platforms are quite stable. Updates are iterative and easy to manage	SaaS minimises the ability to modify the platform
Deployments	Technology can be deployed based on unique IT infrastructure and application requirements	Complexity can mean lengthy and difficult deployments	SaaS is reliable and easy to execute deployments	Normally, SaaS is implemented to a lowest common denominator, which can sometimes cause limiting functionality
IT Support	Infrastructure and application expertise are readily available	Dedicated IT team is necessary, especially when applications are tailored to meet an organisation's unique requirements.	The caution of scale inherent to cloud deployments mean that IT support can manage more with less time and effort.	The learning curve for cloud is significant and adequately trained personnel are expensive

P 3.5

Integrating with Third-Party Services

As most business understand, when developing an online store, many unique strategies and processes need to be considered as part of the overall digital roadmap. Sometimes, the platform alone does not provide all the features and functionality needed to operate a storefront at the optimal level. Which is why merchants turn to third party providers to fill the gaps and move the Commerce operations forward. Most operational needs can be fulfilled using different software platforms including ERP, marketplace, business intelligence tools, accounting software, reporting suites, and many more. The additional software is selected to reduce time and effort for the organisation, whilst optimising the customer experience and business operations.

When selecting a third-party provider, businesses should use a simple and effective approach of third-party integration as per the customer's needs. After understanding the need of the customer, decide on a detailed plan with the help of the stakeholder. After deciding the plan, set up a specification document that defines how the system communicates and what kind of data will be required and passed onto the third party. Most integrations are available via an API, which allows systems to communicate with each other. But the problem is that all platforms are not supported via an API, so understanding what is possible from a technical perspective is paramount.

Here are some points to consider when integrating and selecting a third-party platform:

- Integration preference - API etc
- Any technical limitations of the plugin
- Cost vs return of the investment
- Scalability of the service
- Upgrades and maintenance required
- Help Desk reliability

Below is a list of common Third-Party Integrations which most e-Commerce sites will need to consider as part of their digital roadmap:

- Accounting software
- ERP system
- Product Information Management (PIM)
- Finance
- Payment Gateways
- Marketplaces
- Email Marketing
- Social
- Google Shopping, Tag manager and other API feeds

P 3.6

Upgrades, Backups and Maintenace Services

Maintaining the strong code base, features, functionality and keeping a high-security level are crucial to having a competitive e-commerce store.

There are multiple ways to efficiently upgrade the e-Commerce site depending on the infrastructure available, this process will vary from business to business. Depending on the technical maturity, this can be a very challenging and costly exercise for business to undergo. In the above table, the advantages and disadvantages of managing upgrades on a Cloud vs on-premise were detailed.

Firstly, always important to back up files before running an upgrade.

Why upgrading makes sense?

Since change and adaptation to new customer behaviors is the norm, being on an older platform makes accommodating or imitating new technology and behaviors more expensive and time-consuming, or may simply not be possible. Additionally, as more and more developers move their focus on new technology, the scheduling and cost of retrofit projects may be prohibitive.

By upgrading, you're future-proofing your business and giving yourself the ability to better service changing customer needs

Planning your upgrade.

Planning Questions:

Here's a quick list of questions you should ask as you plan your upgrade:

Site Cleanup

What can I keep and what can change? What new things do I want to implement? (e.g. what changes do I want to make to taxonomy and product structure, or changes to content)

Analytics Check

What are my current KPIs? What does my data tell me about how my site could be improved? Are there new KPIs that I want implemented for my new site?

Extensions

Do I still need them? Which third parrty extensions cover my needs?

Integrations

What third-party systems (e.g. ERP, accounting), do I integrate with? Do they have specific connectors or are custom integrations needed?

Training

Does the upgrade team have the right knowledge and training? What's my plan to train end users on how to use the new admin before it goes live?

Upgrade Team — Who will be dedicated to the upgrade project, both in-house and external experts? Do they have the necessary support from leadership and other internal teams?

P 3.6

Common Upgrade Questions

How long does a typical upgrade take?

A. It depends on the platform and architecture. There are a lot of variables, and if you're also doing a redesign, it will take longer. After the discovery process is complete, your implementation team will be able to give you a more accurate timeframe for your project.

How much does it cost to upgrade?

A. Again, it depends on your current situation and your requirements for your new site. The good news is that generally as partners and developers have become more familiar and adept with your Commerce platform, upgrade costs and projects lengths have come down. We recommend consulting with your Solution Partner for an estimate.

Are Magento Commerce 2 versions of my Magento Commerce 1 extensions available?

A. Virtually all business-critical needs are covered. From content and customizations and shipping and fulfillment to site optimization, we've seen a dramatic increase in the number, and diversity, of extensions in Marketplace as merchant adoption of, and partner familiarity with, Magento Commerce 2 has grown. Examples of leading global technology companies who have created extensions include: • PayPal • dotmailer • TaxJar • Nosto • Adobe • Fastly • Vertex • Amasty • Celebros • Logicbroker Also, quality assurance checks implemented for all Magento 2 extensions ensure consistently high product quality, so there is a very high probability that your extension or a high-quality alternative to your extension is already in Marketplace. Many merchants have found that the native capabilities in Magento Commerce 2 have reduced their need and reliance on extensions, simplifying development and maintenance operations and improving overall performance. If you haven't already, engage in thorough upgrade planning to uncover these types of opportunities.

What if my extensions and integrations are not compatible with the platform?

A. Depending on the platform flexibility and hosting solution different customisation options maybe an option for most software and systems. These customisations would be developed during the upgrade process.

How will my SEO be impacted?

A. With proper planning, your SEO should be improved. Our partner Corra recommends:

- Creating a succinct 301 redirect plan
- Building a strategy around URL taxonomy
- Doing an XML sitemap check
- Working with tag management (e.g. Google)
- Discussing in detail with your implementation team

04.

Strategy

Within this section:

P 4.1

Commerce Strategy

Digital Commerce is a rapidly moving force, that evolves expeditiously each year. While this can be exciting for individuals, it also comes with many challenges for organisations trying to navigate the lay of the land that is Commerce.

As Commerce continues to evolve in both B2B and B2C, businesses are seeing drastic changes in customer behaviours and expectations, from the way they research a product/service, consider and complete a purchase, or show loyalty to a brand, to the way they communicate all of this to their peers. Customer behaviours and expectations can shift instantly, and businesses can struggle to adapt to new market trends and creating a digital strategy that is both realistic and achievable. Therefore, the execution and planning of any digital strategy is key to any successful e-Commerce business.

The overall Commerce strategy of every business will be unique in nature, depending on maturity, team size and resources. Here is a strategy for unlocking your core commerce capabilities:

Unlock Core Commerce Capabilities

Awareness

Product catalog management

Product Comparison

Product Search and navigation

Product information

Personalized Experience

Product bundle management

Promotions

Consideration

Product selection support and recommendations

Customer specific pricing

Product availability and inventory

Price identification and price list management

Self Service Quote request/ RFQ

Configure, Price, Quote

Dynamic Pricing

Purchase

Order Creation

Shopping cart & checkout

Marketplace

Quote to Order conversion

Subscription services

Online PO transaction and pay invoice online

NextGen B2B Integrated ordering (e.g. Punchout)

Procurement workflow and integration

Support

Order management status & tracking

Shipping and delivery status

Retrieve invoices (order history)

One-click reorder

Returns Management

View accounts statements invoices & credits

Automated renewals and replenishment

Product registration / activation

Support

Order management status & tracking

Shipping and delivery status

Retrieve invoices (order history)

One-click reorder

Returns Management

View accounts statements invoices & credits

Automated renewals and replenishment

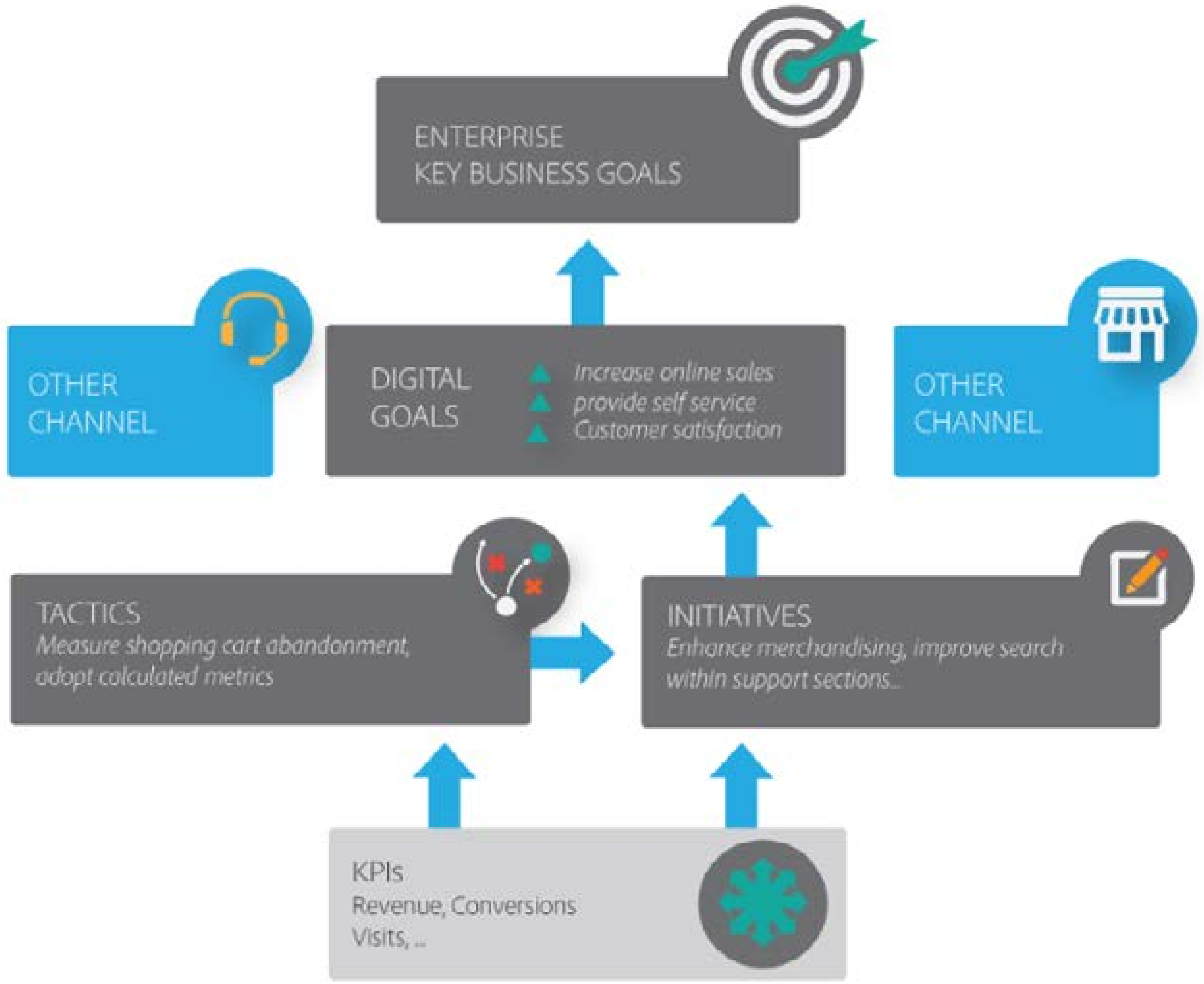
Product registration / activation

P 4.1

Key objectives to consider when planning the digital strategy of your business:

- Consistency is important
- Regularly review customer analytics
- Improve personalisation online
- Interactive Product Visualisation
- Leverage new technology where applicable
- Artificial intelligence (AI)
- More delivery options
- Appropriately plan for upgrades and site maintenance

A suggested Commerce Strategy Framework



P 4.2

Focus

General Commerce Metrics

The most successful Commerce teams follow and embrace metrics to make informed decisions about back-end operations, user experience and most importantly customer behaviour.

Below are the most important e-Commerce metrics all businesses should be tracking for B2C:

- Sales conversion rate
- Website Traffic
- Customer lifetime value
- Email opt-in rate
- Average order value
- Customer acquisition cost
- Shopping Cart Abandonment rate

Below are the most important e-Commerce metrics all businesses should be tracking for B2B:

- Customer Acquisition Cost (CAC)
- Conversions
- Customer retention rate
- Traffic funnels
- Returning customers
- Pages viewed
- Customer actions
- Peak periods

KPI

As businesses go through the mapping of their digital strategy a common marker of success is meeting set KPI's, when measuring the effectiveness of the team's effort.

- It is most constructive to have multiple KPIs that tell you something about the visitors and their behaviour
- Spend time with your team defining meaningful KPI's that are not centred purely around conversation rates
- Measure content effectiveness, not just page views
- Set a small number of achievable KPI's that will inspire the team
- Short term and long term KPI's are more achievable

Obviously, conversion is an important KPI in any digital commerce environment. But variables like time spent on the site, number of visits before conversion and even the type of content visitors are consuming can also provide valuable insights in the overall journey and the visitor's willingness to convert.

Example KPI

Customers viewing at the cancellation page of a mobile phone provider might be existing customers looking to cancel their subscription. However, by looking at the overall customer journey and behaviour you could potentially identify if they looked at the store pages as well. It could be that visitors are concerned about their ability to cancel easily but are still willing to sign up and buy.

P 4.3

Content Strategy

Successful Commerce content marketing plans do not come from brainstorming sessions, hunches, or inherited habits. Businesses must gather quantitative and qualitative data, some from sources they already own and some created or purchased, to plan for content that customers will find and value. With AEM, you can leverage content managed in the AEM authoring environment to build highly engaging campaigns. Marketing assets designed, managed, and validated in Adobe Experience Manager can be easily published across different channels.

Framework for content strategy

Pre-Production	Production	Post-Production
Reseach/Insight	Delivery&Distribution	Content Review& Optimisation
Content Management & Resourcing	Content production	
Content Planning/ Objective Setting		

Pre-Production

This stage involves starting with your user, understanding their needs, the development of personas, as well as a review and inventorying of existing assets and position. Content management, resourcing and planning is designed to establish and maintain appropriate structures, organisation and resourcing.

Production and Execution

This stage involves the creation and production of content. This includes content creation, authoring, editing, asset production, and content optimisation — accessibility. SEO, tagging and classifying, insourcing/ outsourcing in production, role of third-party tools and technology and content re-use.

Post-Production

This stage involves the review and evaluation of content, adaptation and optimisation. This includes analytics evaluation, optimisation, test, learn and user experience.

Finally, the test, targeting and personalisation strategy will give you the opportunity to identify the right content to be delivered to a specific segments of visitors with different preferences or needs and then create targeted experiences for each of them.

P 4.3

Adobe Experience Manager

Whether you're managing basic web content or content to be released into social networks, Adobe Experience Manager helps deliver creative assets and other content across all channels where a customer might engage. With AEM, you can leverage content managed in the AEM authoring environment to build highly engaging campaigns. Marketing assets designed, managed, and validated in Adobe Experience Manager can be easily published across different channels and platforms.

Adobe Experience Manager combines a number of infrastructure-level and application-level functions into a single integrated package. The offering addresses:

- **Sites** - Quickly create and deliver relevant websites and mobile apps, and update the content anytime, all without burdening your IT department.
- **Assets** - Easily manage images, videos, and other assets across every digital channel to deliver personalised customer experiences.
- **Communities** - Build thriving communities and engaging conversations across all your social properties, so you can inspire new levels of learning and customer loyalty.
- **Forms** - Integrate enterprise-level forms into your websites and mobile experiences and simplify the creation of forms and the completion of transactions.
- **Apps** - Create and deliver mobile apps with a solution that bridges the gap between marketers and IT, so marketers can easily update content, even after launch.

Framework for content strategy

Sites	Assets	Communities	Forms	Apps
Web Content Management • Go Live 25% faster • Valuable content insights • Touch UI • Commerce integrations	**Digital Assets Management** • Advanced video support • Streamlined photo-shoot to delivery • Responsible viewers	**Social Communities** • Global with machine translation • Unified moderation with Adobe Social	**Forms & Documents** • Adaptive accessible forms for mobile • Increase conversion rates with user insights	• Customer-facing mobile apps authoring and management for marketers & Developers

P 4.4

Maturity

A maturity model is a formula for businesses to use to determine what stage they're at with any given functional area or strategy. A useful and accurate maturity model will help businesses understand how to advance from one stage to another through their Commerce roadmap.

Think of a maturity model as a robust chart/ report with all the information needed to know how to improve an area of the platform, which acts as a road map for progress.

Below is a summary of the different levels of maturity:

Different Needs Across Maturity Levels

	Expansion	Technology	Customization	Data	Selling	Content
Cutting Edge	Global, multi-site, multi brand Unique and custom business models. Fully Custom business processes	Advanced IT Environment – Systems of Record approach, many custom processes, service-oriented approach (microservices) and homegrown systems	Best in class Fully customized Storefront Experience optimized for channels (BFF/ Headless)	Custom AI driven personalization, optimization, and dynamic merchandising supported by custom models and algorithms	Highly Configurable & Sales Assisted Goods, services, digital goods	AR, VR, 3d, prototype and advanced Product support
Advanced	Global, Multi Language, Multi Store Multiple business models Complex business processes	Advanced IT Environment – Systems of Record approach, many custom processes, mixed build/buy approach	Advanced storefront experience using best of breed tools/approaches	AI driven personalization, optimization, and dynamic merchandising tunable by business and data prof.	Configurable Products across product lines	Advanced rendering, customization and sizing
Emerging	Advanced, may have multi store Multiple business models Advanced business processes	Established IT env. & proficiency. Multiple systems with packaged SW preference	Customized storefront using native tools and extensions	Rules based personalization, Dynamic Merchandising	Customizable Products And Services	Rich product content And dynamic media
Basic	Single Store Single Business Model Simple Processes	Limited IT, cloud-based environments. Prefer pre-integrated	Templated – One size fits all Site	Simple personalization and segmentation	Simple or Basic Merchandise	Simple product images And content

P 4.4

Variable	B2B
Crawl	The entry level for e-commerce maturity consists of the easiest to reach tasks by a single marketer. The business normally progresses through to build upon the basics to further enhance the customer experience.
Walk	At this level, organisations are starting to leverage past customer data coming from multiple sources, needing multi-departmental collaboration. Organisations within this level can use the full potential of campaigns managed by people and have a mature set of best practices, processes and development stream.
Run	The highest level of maturity enables AI-powered campaigns across various channels and uses predictive stock management to prevent churn, product information management tools to enrich products. It is best achieved by organizations with an evolved data culture, development skills and processes in house and offshore.

P 4.4

Following on, here are some areas of an e-Commerce Maturity Model, that businesses would consider as part of their overall strategy.

Action

Types of marketing activities that are in place:

- First session web layer
- Personalised recommendations on website
- Abandoned cart email

Data

Data collection and management:

What data is available and how interconnected they are. What interactions and attributes are tracked? How is the data enriched from external sources?

- Data optimisation and enrichment
- Page view tracking
- Complete cart interactions
- Updated product returns
- Advanced session and customer behaviour tracking

Insights

Analyses, trends and data triggered alerts:

- Campaign evaluation based on product profit
- Recency, frequency, monetary
- AI-driven lead scoring
- Advanced reporting and dashboards

Methodology

Processes the business follows:

Are you just trying out your luck with ad-hoc campaigns or are they based on customer behaviour, historical purchases and predictions?

- Trigger based campaigns
- Campaigns based on predictions, i.e. potential churn
- Campaigns based on past behaviour of customers
- Product information management

Governance

Resources, team size and processes:

Have you established continuous support of optimisation and knowledge sharing?

- Marketing team takes care of campaigns with support from e-Commerce team
- Common use cases are documented
- Company-wide programs for idea generation

Privacy

Security and privacy management:

Are you adding value to your customer's experience in exchange for the personal data they are providing you? Are you just aiming for the basics or do you compete in privacy and security?

- Privacy policy documents online
- Data flow processes mapped
- Customers can edit and extend their tracked data
- Hosting optimisations

P 4.4

Crawl

This is the initial phase for any business, the starting point. In this phase, businesses need to focus on delivering a presentable, easy to navigate, user-friendly and simple checkout style of e-commerce platform which is equipped with the basic features required in an e-commerce site. Businesses need to check if they already have a pricing system in place or would they require a pricing system.

If they require a pricing system, they will need to understand the payment gateway providers out in the market and which suits best to their needs, who are experienced, fits the budget and provides the service and security required. Payment gateways will process the transaction payments independently from the website which would allow the team to focus more on the site and the payment information will not get stored on the website.

Once the business decides the payment gateway provider, they would need to analyse the required payment methods, the ones that are popular among the customers. Being new to the e-commerce platform, some businesses choose to offer limited payment method options as each option has a setup and on-going costs which could be a heavy upfront investment. As a basic, businesses in the crawl phase do offer credit and debit card and then branch out to payment methods like PayPal and Afterpay. once they see there is traffic on the site and the traffic is leading to increased conversion rate.

Overall, businesses in the crawl phase should develop a well-integrated e-commerce system to get it started and off the ground before they expand to add-on more features.

Walk

Businesses in the walk phase begin to develop the site based on the customers they have, insights and the experience they have had with their existing e-commerce site. In this phase, businesses can start implementing more complex features to provide new offerings to their customers to increase customer experience and customer loyalty.

Business in the walk phase have features like blogs, videos, feature sections, product variations and purchase of the product is easily accessible on the web pages. In the walk phase, businesses already understand the purchase trend of their customers through the data and the feedback which allows them to improve their process including their pricing. Businesses in the walk phase are in a place where they can implement multiple payment methods such as credit/debit, more than one option for electronic wallet and/or gift cards. Providing multiple payment options gives the customers the liberty to choose the one they are comfortable with. They also have the option to opt for a larger payment gateway provider who can manage more than one payment method.

Overall, businesses in the walk phase have the advantage to improve their site and payment methods based on customer data.

Run

In the run phase, businesses have a complete understanding of their customers and their purchase behaviour which helps them to set a goal where they can expand their business outward.
In the run phase, businesses can set a goal to achieve complex requirements, marketing, multiple global payment methods or global shipping.

Having an in-depth understanding of the customers, market, internal and external team, the website can allow businesses in the run phase to implement custom features that are unique to the site like recommending the payment methods most used by the customer, provide services like subscriptions for the registered user where they can get free shipping discounts or offers on their transactions and more.

Implementing more complex features be it in shipping, product or payment can be easily done by the businesses in the run phase as they have already achieved the market share and are confident that investing in these will help them improve their customer service and make their customers keep coming back.

05.

Process

Within this section:

P 5.1

Order Management Process

For brand new businesses the order levels are low, and it is easier to complete the orders at a low cost but when the demand rises, the orders increase, and it becomes difficult to handle the orders with a small team or by yourself at a lower cost. You might need a bigger place like a warehouse or more than one warehouse depending on the nature of the business which can be costly and would require more manpower. This is where Order Management comes to play.

Order management helps to meet the changing requirements and the changing operational needs to be able to manage the demand, inventory, packaging and shipping. Integrating an Order Management System to the Platform can help businesses meet their changing requirements, drive customer satisfaction, customer retention, higher conversion rate and brand loyalty. All these factors will directly or indirectly impact the performance of the business and the growth in the revenue.

An Order Management system will help centralize all the crucial data in one centralised system which gives a single view of all the streams such as orders, products, customers, inventory, packing, returns, payment etc. so that you are easily meet customer expectations.

Order management is essential in any e-Commerce business as it forms a chain and binds all the factors together so that the business can:

- Keep inventory in check be it in multiple warehouses
- Maintain the product stock level sow they are prepared for any promotions or sale period
- Provide multiple payment methods to the customer to enhance customer experience
- Provide order tracking making it convenient for the customer to check the order status and for their in-house customer service team to speed through any inquiries
- Provide support to all the departments in the business so that no one is misaligned
- Keep shipping in check to know if there is a requirement of more staff or shipping methods to speed up the order shipping
- Monitor return to understand why the returns re being made by the customers so that they can work on that and improve
- Helps to understand the overall experience of the customer if they were satisfied with their purchase or not and how can the business improve to better serve the customers

The correct Order Management system and the right use of it can do wonders for the organisation in terms of revenue as it helps to save money and time. Also provides an overview of the different departments of the business who are working together, helps the business to forecast the demand and overall work on improving customer experience to increase conversion rates

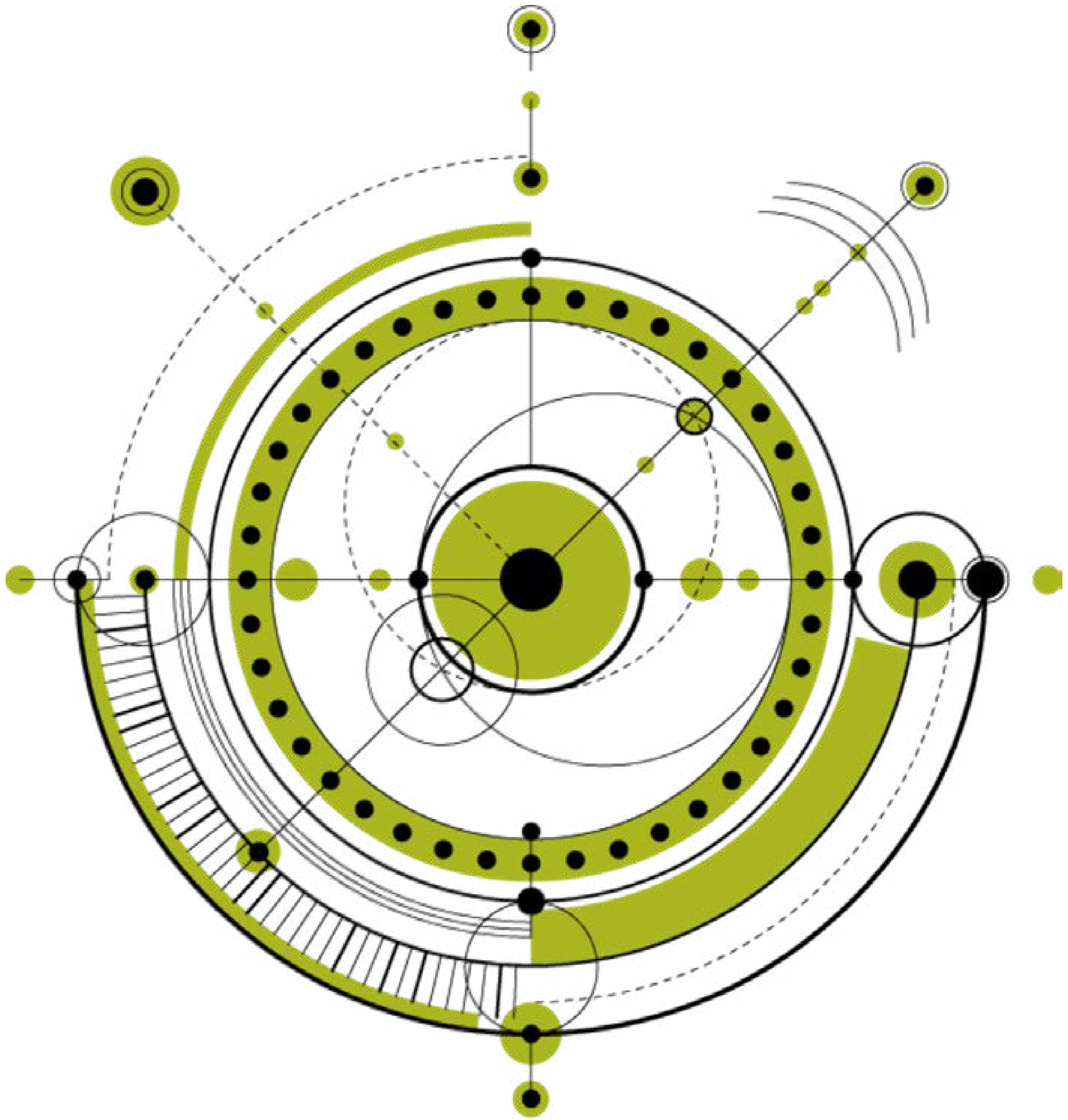
P 5.2

Project Plan

For a project to be successful, it is not only required to have a well-detailed project plan but as a prerequisite, it is important that the organisation has done their business plan are well versed with their products, services, pricing modal, market, customers and their Geo-location Without this drafting a project plan would be difficult. The project plan should contain all of the information relating to the project from monitoring, executing and managing the project. This is the initial document which is signed off by both the project team, product owner or any stakeholder who is involved in the project. The project plan should have details relating to:

- Project Vision
- Objectives
- Requirements
- Timelines
- KPIs
- Team
- Milestone
- Budget
- Risks
- Scope

A well laid out project plan acts as a roadmap that everyone needs to follow to achieve the required result.



P 5.3

Project Scope

Project Scope is an integral part of a Project Plan which outlines the goals, deliverables, costs, tasks, deadlines etc. Project scope defines the project limits, each team members responsibilities and sets the procedure of how the project needs to be done. In-scope and out of scope items are defined in the project scope which helps to track what requirement was signed off and what is a scope creep. Following the in-scope items helps the project to stay on track and hand over the deliverables on time by staying within the budget. The project scope also helps to take decisions on changes that occur during the project. Changes are bound to happen when the project is ongoing and if the project is well scoped in the beginning it will be easier to manage any changes that crop up.

Projects will never be as planed out there will be scope creep that would occur, a situation when there is additional work requested which takes more time and this could happen due to change in requirement or miscommunication. To avoid such situations or manage scope creep, a well-written project scope acts as a guide to understand what in-scope is and what is a scope creep.

There are some benefits of having a well-written project scope:

- Outlines what the project consists of
- Acts a road map that can be used by the project team and/or any stakeholder involved in the project
- Define the project objectives the team is working towards
- Prevents and helps manage scope creep
- Defines the scope of work that the team needs to work towards

Overall Project Scope provides a strong foundation for carrying out the project

P 5.4

Project Management

Project management can be defined as the application of knowledge, skills, tools and techniques to project activities in order to achieve goals and meet project requirements successfully. There are five phases of project management, and the project management life cycle provides an overview of this process.

The project management life cycle provides timely and controlled process to project delivery which benefits a project's stakeholders. The first step to a successful e-commerce project delivery is project management. A right approach and methodology are required to enable the team to deliver the project effectively and efficiently.

Scrum methodology is applied within the project management for some e-commerce projects. Scrum features mentioned below help to facilitate and manage the project:

- Periodization of tasks
- Periodization of backlog tasks before and during the sprint
- Daily team stand-ups
- Planning session for each sprint
- Sprint retrospectives

P 5.4

Scrum helps to overall manage changes during the project, allows team to give quick results, is flexible and increases collaboration.

A basic e-commerce project management plan would include:

Analysis

In the initial stage of a project the business would need to conduct analysis which includes market, competitor and business analysis to understand the organisations strengths and weaknesses.

Requirements

Lay out detailed requirements of what the organisation wants in the end of the project in terms of enhancing existing skills and/or implementing new features and/or integrations

3rd party providers

In this stage map out the integrations which would be required by a 3rd party for example payment, shipping, ratings, reviews and so on

Design

Plan of using existing templates, company's brand book etc. To brainstorm the requirements which are design specific

Migration

Plan out the steps that would be taken when migrating content, data etc.

E-commerce platform

Analyse and finalise the platform required for the business to meet the requirements

Some best practises that businesses can refer to for project management:

- Set clear, precise and trackable goals
- Monitor the time spent on tasks and/or resources to avoid wastage
- Select the correct e-commerce tools required by the team such as the e-commerce platform, communication tools etc.
- Constant testing and iteration should be conducted
- Track budget
- Scope creep to be kept in check

Developing an e-commerce site involves many different aspects that need to be considered which would need tracking to make sure the project goals, timelines, deliverables, team etc are aligned and this is where project management plays an important part.

P 5.5

DACI model

The DACI model is a project management framework used to clearly define the roles and responsibilities of various stakeholders on a project, leading to effective and efficient group decisions. The DACI stands for Driver, Approver, Contributor and Informed. These roles make it clear who has authority in certain areas and situations, allowing a project to progress smoothly.

D

Driver

Who is setting the pace and pushing this forward?

A

Approver

Who decides the output is acceptable?

C

Contributor

Who is contributing to the process or output?

I

Informed

Who need awareness of activity & outcome

P 5.6

Agile Scrum Methodology

Agile is a time-boxed, iterative approach to project management and software delivery which focuses on delivering incremental value to customers faster and continuously, compared to a traditional, waterfall approach. Scrum is an example of a framework based on agile and is often used in many Commerce delivery units. In recent times, there has been a shift away from traditional or waterfall styles of project delivery towards agile or scrum-based delivery. This is due to the increased transparency, collaboration and faster time-to-market that these frameworks provide.

Scrum encourages self-organised, cross-functional teams to solve problems together in a time-boxed period called a ‘sprint’. The scrum team is self-organising in that there is no leader, and the team is cross-functional so that everyone is needed to take a feature from idea to implementation.

In Scrum methodology, there are several meetings which are used to drive transparency and progress on a Commerce project:

- Sprint planning: a planning meeting where team members come together to decide how much work can be completed in a ‘sprint’
- Daily scum: a 15-minute meeting used to share updates of what each team member is working on
- Sprint review: A meeting used to demonstrate progress from the sprint
- Sprint retrospective: a meeting used to reflect on the previous sprint and to identify opportunities for improvement

At the end of each sprint, an increment of value, new features, bug fixes, upgrades or general code updates should be delivered and releasable to customers.

P 5.7

Common Commerce Workshops

Project kick off

Kicking off a new project is exciting and at the same time can be a horror. The only thing that can save it from becoming a horror if proper kick-off planning and presentation. Project kick-off is the initial step and needs to be properly planned, laid out and executed. Some companies do not require this as they feel its standard but this phase no matter how standard it needs to be carried out effectively. This forms the foundation of the project.

There are a few phases of project kick-off:

Preparation

In this step, the project manager and sometimes few team members get in touch with the client to understand when the kick-off will take place, where the kick-off will take place and who all will be attending. Usually, the project kick-off takes places at the client site to make the client feel comfortable as they are in their zone.

In this step it is essential to add-on a presentation deck, proposed agenda, deliverable, team and timelines to avoid any surprises. If face to face meeting is no possible with the client, the project kick-off can also be executed online. Make sure you are prepared for either of the scenarios.

Attendance

It is essential to outline the attendees for the project kick-off. Having a big team which includes all the developers, users etc will only complicate the kick-off. It is important to call key stakeholders from the client site such as the project sponsors, C level, and project leader from the client-side. From the project team side, it should be Project manager, Functional Architect, Technical Architect and the Engagement lead.

Topics to cover

Topics that need to cover in the project kick-off depends on project size, requirement, technology etc. Some of the common things that need to cover are:

- Budge to the project
- Team introduction
- Timelines
- Deliverables
- Milestones
- Proposed Dates
- Communication mode
- Training
- Testing
- Change Request

Next steps

Next steps for an e-commerce project refer to outlining the requirements such as the build solution, design Nd project planning. Be it a remotely managed project or same location project, the next steps need to be detailed so that the team is aligned.

P 5.7

Discovery

A discovery phase in e-Commerce is conducted with the leads of the client such as the product owner, project team lead, digital lead and sometimes even the C level do get involved. From the team side the project manager, functional and technical leads attend the discovery workshop. This phase is to go through all the requirement of the client in greater detail to understand their business needs and expectations of customers.

Design

Design and requirements go hand in hand. When an e-commerce system is being built one of the first key workshops is the design workshop. The design of the site matter when it comes to attracting customers and increasing traffic on-site In this workshop people involved from the client is usually the digital provider, product owner, creative lead and C level. from the team side project manager, functional lead and designers get involved.

In this workshop here is brainstorming done by the client site to understand what look are there after for their storefront. To create an effective workshop:

- Start with an overview
- Set a goal
- Brainstorm the needs
- Define the outcomes
- Sketch Sketch Sketch!
- Make teams within the client side to get feedback on each other work
- Note down the likes and dislikes
- Track time

Technical

A technical workshop is used to define the details of the technical aspect of building a site. During this workshop the client and project team side will go through various technical accepts relating to:

- Team skills in-house
- Integration
- Coding language
- OMS
- ERP
- Current or New platform

QA

Testing in e-Commerce is important. One cannot go live with bugs on the site or a broken page, or poor checkout. Setting up an e-commerce site is complex and requires to be tested inside out covering all the aspects from:

- Browser Compatibility
- Page display
- Usability
- Content
- Availability
- Products
- Page Load
- Backup
- Transactions
- Processing
- Integration
- Login
- Security
- Performance

All of these must be tested thoroughly as any issue in the site can negatively impact customer experience

P 5.8

Testing

A/B testing

A/B testing is the process of comparing two different versions of the website to see the difference in performance.

Once the website is created, running A/b testing helps to test which words, phrases, images, content etc. are working best towards increasing in conversion rate. E.g. A/B testing a green CTA button and red CTA button to understand which colour button is preferred by the customers.

As a rule. it is recommended that A/B testing is conducted twice a year on major release, features and front-end optimisations.

Deployment testing

The objective of deployment testing to check that all the build, changes, design, load etc. Works are per the requirement on the production site. This is testing is important as this is the final check before the site goes live, and customers would get to view the site and the functionality.

Deployment testing should be done on staging before the release and bug fixing executed accordingly to avoid any live issues and impacting customers from checking out. As well, testing should be done after every release on the live environment to ensure ease of adding to cart and transacting. w

06.

People

Within this section:

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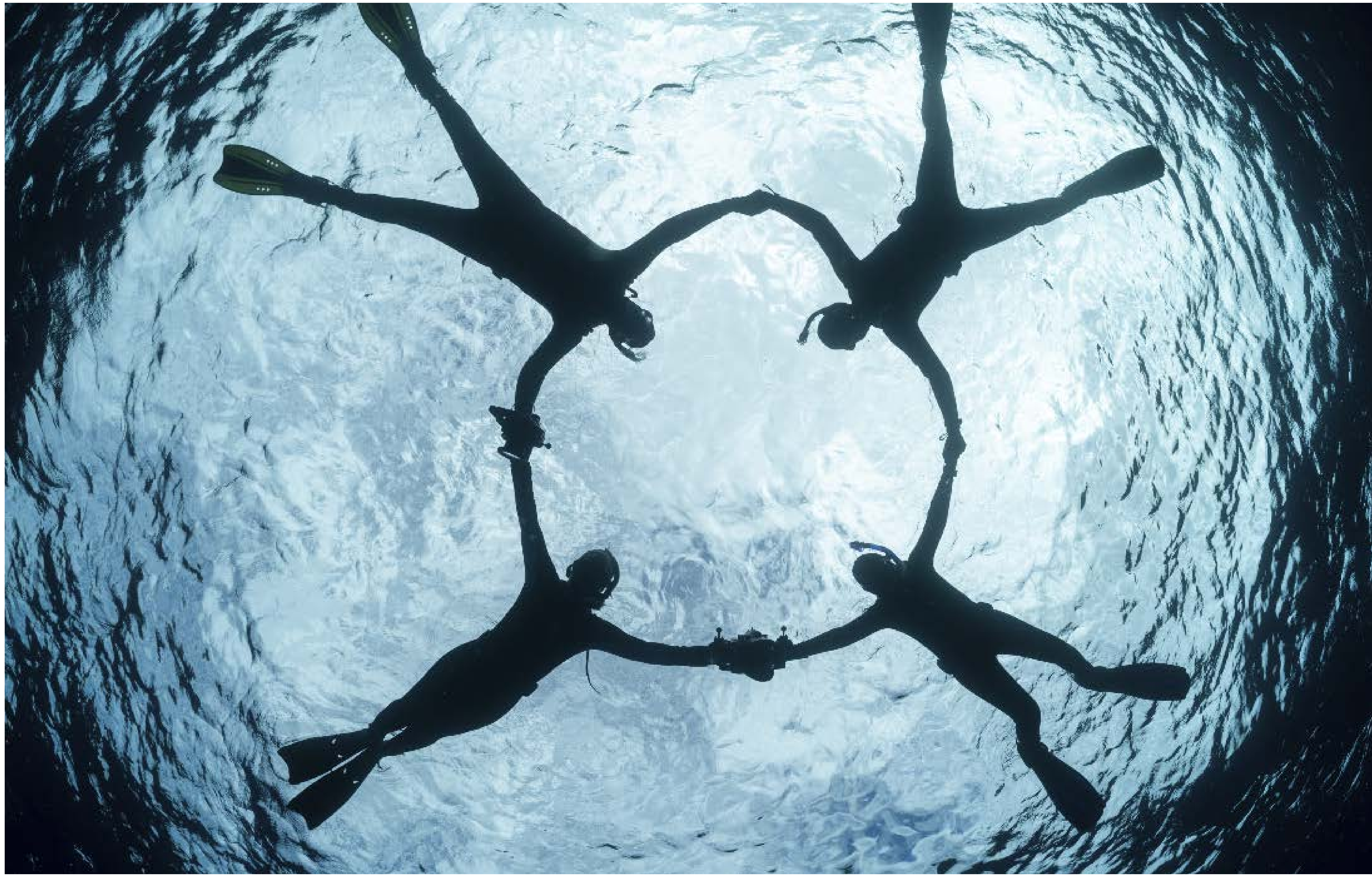
People



E-Commerce is one of the fastest-growing segments in the market where brands are rushing to get online. For every e-Commerce project to be successful, it is necessary to have the right team balance. Managing an e-Commerce business needs a team with experience, strategy and cross-functional skills. Along with the right e-Commerce team, it is also essential to have other teams within the organisation to be equally involved in the entire project process and even after go-live. It needs to be a collaborative effort if the business wants to achieve the envisioned goal and to do so the business needs to ensure the departments aren’t working in isolation,

Along with setting up teams, onboarding team members should not be overlooked. On-boarding a member on the team needs to be done in an effective manner as it can define the success of the overall team. The team can be structured in a mixed format such as the team can be co-located, working remotely, and 3rd party service providers. A successful team can be in-house, co-locates, remote or 3rd party service but needs to be clearly defined yet needs to be flexible so that the business to minimize cost and maximise efficiency and productivity.

P 6.1

People

Marketing team

There are tons of tips and tricks out there that can be used for marketing your brand online, some might be great, but some might not work for you. It is not only posting content on social media or sending out emails to customers. It's the people who create all of this for the business, it's the marketing team that helps bring traffic on the site, helps drive the ROI, produces campaigns and promotions, manages influences, builds online marketing strategies and so on and so forth. The marketing team is an integral part of e-Commerce just like the other teams. They keep the SEO, SEM, loyalty programs, rewards and other related tasks running. Coordination with the marketing team helps drive conversion rate on the site.

If there is no communication or collaboration, there could be issues that crop up. For example, if the inventory level for a certain item is low in the warehouse and the marketing team sends out a promotional email regarding that product, the business could face some angry customers and that would in turn negatively affect the brand name and customer loyalty. There is one shot when it comes to e-Commerce, and that needs to be perfect.

IT team

Some businesses take the IT team (technical team) involving the developers - both back end and front end and testers as part of the e-commerce team, whereas some businesses keep them separate. Some businesses prefer to have the entire IT team inhouse, this could be due to security concern, cost, culture, environment or product management.

Alternatively, some businesses prefer to outsource the IT (development) team to consultancy type firms who have more expertise in that area and can help enable the in-house team more effectively. Also, some businesses prefer to have a mix of both.

Ideally, the development and Commerce teams would remain separate, but work together in unity when it comes to setting goals, planning sprints and deploying new features.

Customer Service

Customer Service is usually one of the most overlooked and undervalued teams in an organisation. But in the e-Commerce industry, everything is based online, and the customer service team is the only team who have direct day to day contact with the customers. They can provide the marketing, product, and e-commerce employees with important information which can be used to improve and understand what is working and what changes need to be accounted for in the next sprint cycle.

For example, an organisation had the customer service team in the same room as the e-Commerce team for the first time. The e-Commerce and Marketing team were able to firsthand hear and understand what the customers had to say which was invaluable.

It is important to ensure that the customer service team is involved and consistently providing feedback to the Commerce team, because the information provided is firsthand knowledge of the customer. Any feedback that might be impacting transactions or add to cart behaviour can be quickly addressed and accounted for as part of the roadmap.

It is important to ensure that the customer service team is involved and consistently providing feedback to the Commerce team, because the information provided is firsthand knowledge of the customer. Any feedback that might be impacting transactions or add to cart behaviour can be quickly addressed and accounted for as part of the roadmap.

E-Commerce team

Ideally, most organisations have a dedicated e-Commerce team that manages the day-to-day e-Commerce related operations, decisions, strategy, goal, maintenance, and everything related to the success of the online platform. A typical overview of the team members involved in an e-Commerce team are:

- E-Commerce Manager
- Platform SME
- Product Specialist
- Business Analyst

P 6.1

- SEO/SEM Specialist
- Content Manager
- Inventory

In some businesses, these roles overlap with the other team roles or they sit within the e-Commerce team, depending on size, revenue and growth targets.

Warehouse

When a business plans to release an e-Commerce site, it is imperative to consider the working of the warehouse because even though e-Commerce shopping experience takes place online, packaging and shipping products take place in the physical world. When businesses only focus on the working of the site, they can miss out on the intricate parts of the end-to-end e-Commerce experience.

For example, an organisation builds the website, did all the testing and in the end, they found out that their warehouse printer could not print the orders fast enough because of which the warehouse team had to wait to pack the orders which in turn reduced the number of products they were able to package and send out. This not only wasted time but also the orders were being delayed which increased the number of phone calls made by customers to the customer service team which damaged their customer experience and customer loyalty.

C level

C level executives always want their organisation to perform at the optimum level and increase the conversion rate to gain returns on investments. For this to happen it is not only important for the different teams in the organisation to be involved and work together but it is also crucial for C level and other top-level executives to be more involved and understand the process of how the goal set is going to be achieved.
Having C level and other top-level executives buy-in to a major e-Commerce project is critical to the success of the project overall. Direct engagement is required from the C level as well as proper communication is needed with all the teams involved.

Though at times it does depend whether the project was initiated at the C level or below. Often the project starts with the technology rather than starting with the business. It is usually rare to find a project being initiated at the C level. Due to this very reason, it is necessary to get the C level involved as soon as possible and keep them involved till the very end to bring it all together and to set expectations across the board so that as you move along the project everyone knows what you are doing, why and how the project is being carried out.

When you start the project, the C level and business in mind, they would first look at the KPIs and the ROI but bringing them onto the journey from the very beginning will them understand why this is being done, what the organisation will gain from this and what benefits will all the stakeholders derive from this. For the success of any e-Commerce project, it is downright essential from everyone from top-down to be on the equally involved and on the same page.

Others

There are various other teams that are either part of an existing time or are a stand-alone such as:

- Content team - they need to be aligned with all the teams to know that the content being put out there is being well received or not. Content on the site would be required to be updated with time to keep the customers up to date. The content team are responsible for setting up content on the product page, category pages, blog, footer etc. that attracts traffic onto the site to increase conversion rate.

- Data team - on an e-commerce site there is a lot of data that can be gathered and analysed. Data such as customer information, spending habits, popular products, time the site has the most footfall etc. all this information is processed by the data team to provide great insight on how the site is functioning and where the site needs more improvement Data can recommend what trends are upcoming and where the business needs to focus on.

- Finance and Accounting team - some businesses have a small finance and accounting team which can in-house or outsourced who focus on budgeting, speculating and managing the finance aspect of setting up and running an e-commerce site

P 6.2

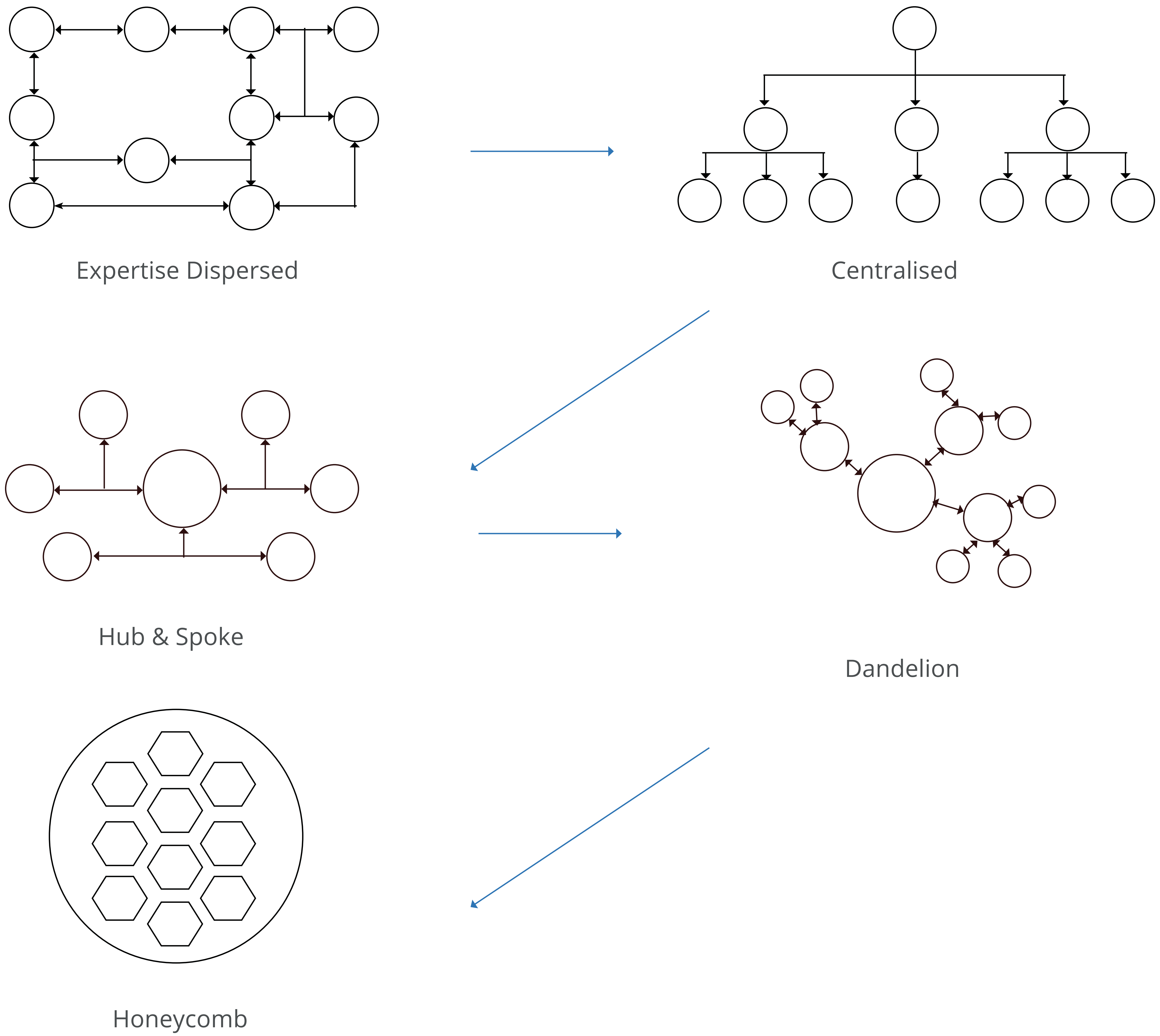
Team Structure

Team structure refers to a combination of either an individual team or a multi-team structure. Team structures are an elemental part for any team process. A correct enabled team allows effective collaboration, communication, support, leadership, problem-solving and decision-making. Team Structure allows the individuals to work together towards a common goal which working on their business as usual. There are different types of team structures ranging from being hierarchical to being flexible which work differently for different industries.

In the below diagram, a summary of the different team structures found within organisations:

1. Expertise Dispersed
2. Centralised
3. Hub and Spoke
4. Dandelion
5. Honeycomb

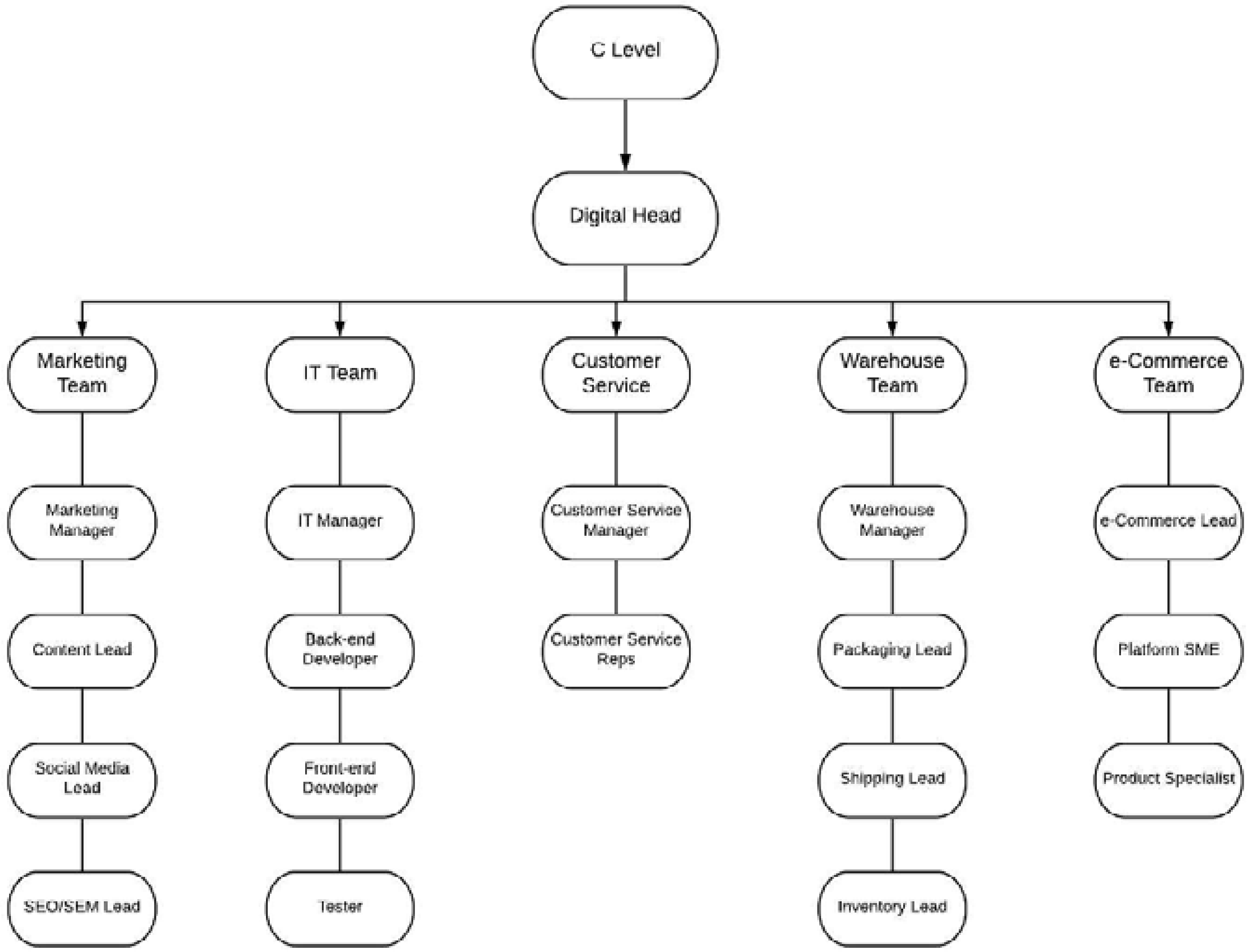
As part of a typical Commerce flow, a centralised team is the most common of the 5 types displayed below, with the honeycomb structure being the closest to Agile alignments.



P 6.3

Organisational Structure

For digital implementation projects, there is usually a centralised team structure which is implemented. There are individual teams which have a team lead which then reports to the head of digital, e-commerce lead or the product owner. Example of how the organisational structure would look:



The benefits of this form of centralised modal in a digital implementation project are:

- Promotes control and consistency
- Unifies budget and strategy
- Helps scalability
- Supporting wider business

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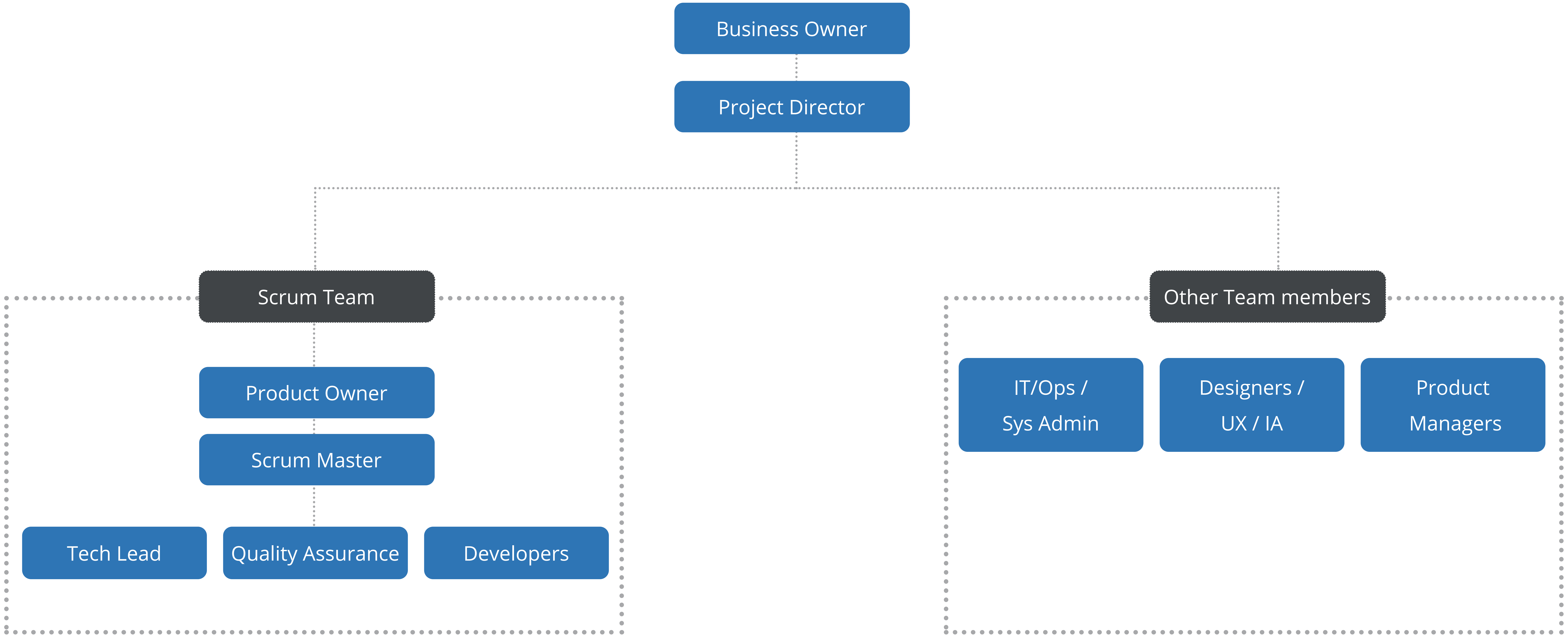
Project-Based Recommended Organisational Structure



P 6.5

Culture

When working with internal and external customers on a project, it can pay dividends to pay close attention to the corporate culture at hand. Commerce culture refers to the shared beliefs, attitudes and values that an organisation's members share and are consistent with. Culture helps an organisation reach strategic goals by encouraging desired behaviours, attitudes and ways of working.

Understanding the organisational culture at hand is critical for project success. On any given project, despite the many benefits a new project is projected to deliver for an organisation, this will effectively be reduced to 0 if the changes are not adopted successfully. If the pre-determined culture at play within the organisation is resistant to change, the employees of the organisation may not be receptive to the changes the project is introducing. This can manifest itself in employees failing to adopt the new system, failing to understand the benefits the new system will introduce or worse yet, blaming the system for failing to deliver a full ROI.

P 6.6

Communication Processes

Creating a strong communication process within any Commerce team is about managing all assets and processes as efficiently as possible and investing in the people that matter. Part of the strategy that businesses need to adopt is about delegating tasks to the right people, or software, in their teams. In general, every e-Commerce business needs to tackle three main groups: product, customer acquisition, and customer retention. Many roles will fall under these three umbrellas.

Listed below are some of the process's e-Commerce businesses should adopt in order to operationally tackle, manage and improve those three groups effectively.

- Create workflow and task management solutions that your team can easily access and understand
- Design an efficient onboarding process
- Create a workflow that employees can use across product management, Commerce operations, order fulfillment and distribution

P 6.7

Communication Tools

It is common knowledge that poor communication within any working relationship is detrimental to any organisation and team. Studies have shown that financial losses per year are in the millions due to inadequate communication between employees. It’s likely that staff take on varied roles and responsibilities, which leads to them being pulled in many directions. Fortunately, there is an array of technology available to help people stay open and connection through clear lines of communication.

We will explore some of these tools, which have been found to be very impactful within large and small organisations.

P 6.7

JIRA

Application tools for project management and issue tracking have been around for quite some time now. Such tools simplify the communication process among employees and ensure the scalability of the project or platform. JIRA has been known to tick all the boxes when it comes to the exchange of information and fundamental project management. The application allows teams to share more knowledge and information, which lead to a better understanding of business objectives, goals and tasks within any team and thus if used well can improve the collaboration and efficiency within organisations.

Below is a list of ways JIRA can be used within any organisation:

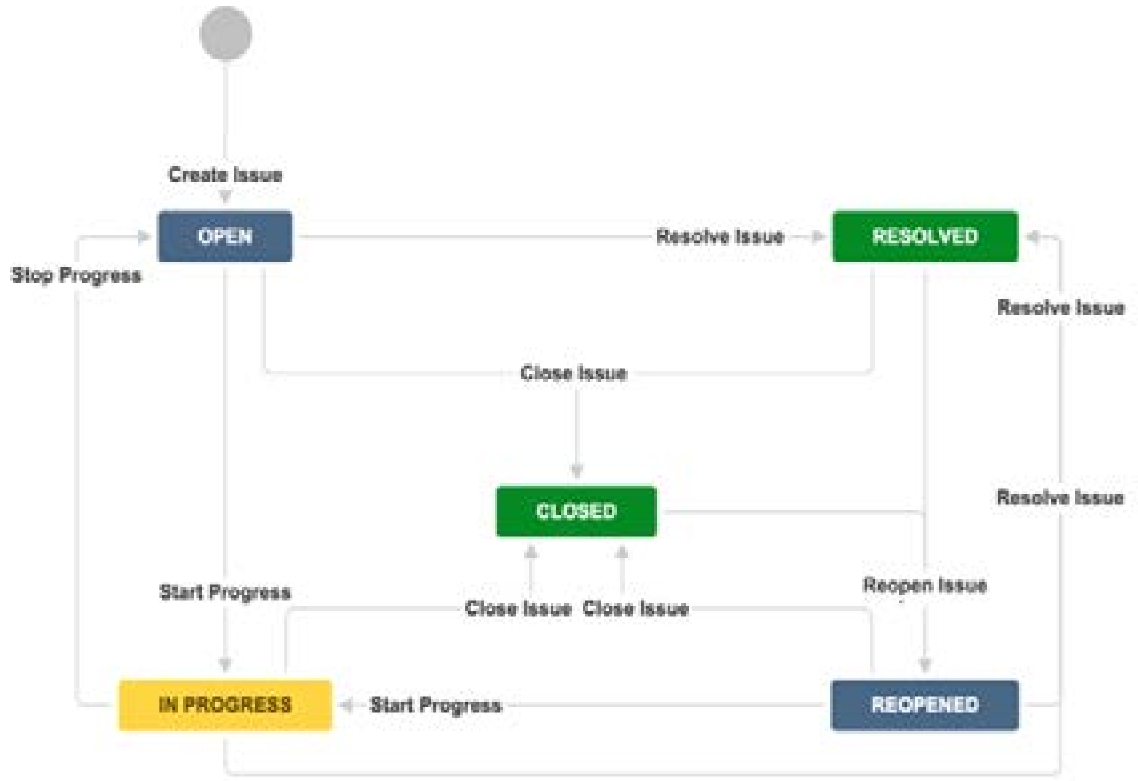
- Manageable agile workflows
- Unlimited custom fields and swim lanes
- Bugs and test management
- Seamless source and issue integration
- Search and filtering
- User mentions and multiple assignees
- Project planning
- Task management
- Resource management
- Resource planning
- Advanced reporting
- Customizable JIRA boards
- Out of the box Kanban and Scrum boards
- Advanced security and administration
- Integration with flexible REST APIs
- JIRA hosting
- Effectively import data from other systems

Here's an example of a default workflow:

JIRA allows teams to create and write detailed tasks, generate reports customise workflows and assign jobs across individuals relatively fast. Commerce Managers, Marketing and Development teams, even C stakeholders can track the daily, weekly, month and yearly progress of any given JIR A task or project. The Atlassian project management tool comes in three versions including JIRA Align, JIRA Core and JIRA Software.

The benefits of using JIRA within any e-Commerce business is the ability for multiple teams to collaborate using one platform. Many times, companies witness the marketing, development, creative and Commerce teams all working in their silos. Having a project management tool like JIRA, enables each team to represent all kinds of priorities including documents, tasks or people. Issues can represent anything teams want to track and are all contained within different projects that are made up of recurring tasks teams need to complete. Each issue goes through a process called a workflow.

The right workflow can make or break communication lines. Teams can create their own workflows to define the steps an issue follows toward completion. Jira allows for business to customise workflows to suit their business requirements and obligations while easily matching how teams work most efficiently. As issues are tracked throughout a workflow, all members of the team, department, or even business gain visibility into their status. A workflow also ensures that an issue passes all the steps before it's complete – that's how teams never forget any of these priorities.



P 6.7

Confluence

Creating a rich knowledge and information bank can be tedious. It takes a willing team to come together and give attention to creating processes around how documentation is managed. When done correctly, however, creating a proactive knowledge base can dramatically shave the number of issues in your support queue and save your team hours of work.

Whether you are launching or maintaining a website, documenting the fundamental Commerce processes, Confluence is an interactive space where individuals from across the business can come and create, plan and give feedback on all types of documentation.

Commerce teams can create standardised templates and checklists for deployment preparations, product launches, how-to-articles, test scripts and troubleshooting to name a few. In addition, the Confluence application, owned by Atlassian is a nice extension to JIRA, where the two applications can work hand in hand harmoniously. The content created is easily accessible to teams that sit across the organisation and allows everyone to collaborate on topics in one space.

Stand-ups

In the world of start-ups, stand-ups were born. And it is now more than ever; we are seeing businesses review their process around meetings. Research has found that in general employees prefer fewer meetings, but to have a clear line of communication and openness, getting people together occasionally is important for the success of any business and more specifically e-Commerce operations.

Therefore, as a more casual alternative to long and rigid meetings, companies of all sizes have moved to a more relaxed stand-up style of meeting. The culture of stand-ups within any Commerce team allows for short and quick discussions, where all members are given the chance to talk, goals are set, and strong team bonds maintained.

The use of stand-ups within any Commerce team are particularly useful when planning for deployments, managing deliverables and debugging issues.

P 6.8

Team Communication

Team communication skills are taught in many different settings, but company culture sets the tone of any

Here are some tips for how to improve communication:

- Keep your messages clear, use simple language, and stay away from jargon. Although your teams may be expected to know Commerce terminology, jargon can still impede understanding.
- Meet your team where they feel comfortable, whether that is through traditional written or video messages sent via email.
- Use JIRA and Confluence for project management, planning and documentation of Commerce processes
- Manage stand-ups to be short and impactful for the whole team

P 6.9

Roles and Responsibilities

Head of Digital

Responsible for managing the e-Commerce operations and overlooking at each team to ensure everyone is performing up to mark and towards the envisioned goal. Some of the tasks which the head of digital need to carry out consists of managing contracts, partnerships, defining strategy, budgeting, overseeing products and purchase. In some organisations, the digital head would also have to oversee the marketing tasks. The digital head would be the key point of contact for all the internal and external stakeholders. They require to have e-Commerce knowledge to carry out the implementation of technology be it B2B, B2C of D2C.

e-Commerce SME

An e-Commerce subject matter expert would take the lead of the project in terms of what can be implemented and how it needs to work. They guide both the functional and technical side of the teams. Projects can have more than one SME where one is more functionally focused whereas the other is more technically focused. An e-Commerce SME needs to ensure that the details of the requirements are correct and aligned with the required deliverables to meet the need of the policies, best practises and standards. The e-Commerce SME sometimes do have to play a double role of being the project manager as well where they take care of the project management tasks such as reporting, presentations, and managing the stakeholders.

Marketing Team

The goal of a marketing manager is to attract traffic onto the site, building marketing strategies, being up to date with the current trends, focusing on conversion rate, abandoned cart and promotions to increase the ROI of the organisation. e-Commerce businesses require marketing in different forms such as email, print, web, social media, influencers and so on. It's the responsibility of the marketing manager to use these ways effectively to gain the most of it. The marketing manager of a digital implementation project also needs to focus on the SEO and SEM tasks which can be either carried out in-house or a 3rd party. A marketing manager should constantly communicate with the digital head, the e-Commerce manager, customer service team and warehouse team to align their campaigns and promotions. If a marketing manager plans and sends out a promotion for a product which has low inventory then there would a lot of upset customers which would increase the workload of the customer service team to manage, hence it is essential all the teams are aligned. The marketing manager also needs to cater to different customer service methods such as loyalty, reward points, gift vouchers etc. to improve customer experience and customer loyalty.

P 6.9

e-Commerce Business Analyst

An e-Commerce Business Analyst helps the business to run the project smoothly by being the key point of contact between the business and the e-Commerce team including the IT team. They need to able to multi-task, keep up with the requirements, timelines, allocation of tasks, follow-ups etc. Most of the businesses also require the e-Commerce business analyst to have in-depth knowledge about the platform on which the site is being hosted so that they can build the site using the configuration method where possible. Also, the knowledge would also help them answer questions of the client, making the workload less on the developers.

IT Team

The developers usually sit under the e-Commerce team but sometimes they are under a separate IT team. There can be different types of developers such as full-stack developers, back-end developers and front-end developers. The developers should be able to create and customise the site as per the requirement of both functionally and customer-facing storefront. In the current times, mobile-first sites have been in demand, ensure that the developers are able to carry out mobile integration. The e-Commerce site is the soul of the business which makes it important that the site is user-friendly and easy to use for both the customers and the back-end users to both increase conversion rate and increase efficiency. The team needs to get the foundation of the site right in terms of the payment gateway integration, social media, filters, sorting rules. customer interaction with the site, content, category, pricing, inventory etc. the whole lot.

The team also consists of the testers. The main role of the testers is to test every scenario possible that could break what has been built so that the site when it goes live does not have inconsistencies, bugs or performance issues which could hamper the customer experience. In e-Commerce, you get one chance with the customer and it needs to be right.

Warehouse Team

Though the entire experience takes place online, there is still a physical world which consists of managing inventory, packaging the order and shipping it off to the customers.

The logistics manager needs to ensure that the orders coming in are being packaged correctly and is transported safely to the customer. The logistics manager would also need to manage the team and the fleet whether its in-house or 3rd party. The very core responsibility of the logistics manager is to ensure that the product is shipped in the right manner, to the right address, and at the right time to the customer.

The inventory manager needs to oversee the inventory in one or more warehouses to ensure what product is being ordered, is the product being shipped. They are responsible to oversee that the packing of the products is done in the correct manner. No business would want to their customer to revive the product in an unlikely manner, presentation is key.

P 6.9

Customer Service Team

Usually, one of the most underrated teams in the business. But when it comes to an e-Commerce business this is the only team who have direct daily contact with the customers making the transaction on the site. Customer service teams use different tools to communicate with the customers ranging from live chats, answering calls, and managing chatbots. The customer service team are also responsible to answer any questions or concerns from the customers, processing returns, coordinate the inventory relating to returns, checking order status with warehouse, check promotions with marketing and anything related functionally with the e-Commerce team.

The customer service team can provide detailed insight to other team members based on customer feedback, questions and concerns which the business can use to improve and enhance their customer experience.

Content Team

The content team can either sit within the marketing team, the e-Commerce team or independently. Only having traffic on the website is not enough, you require the customers to purchase your products to make ROI. Content on the entire website is important but the most crucial content is on the category and product pages, this is the content that helps businesses make money. The content team is responsible for:

- Organise the content: Elements, URLs, navigation and page structure need to be straightforward and user-friendly. If the site is too complicated, then customers can be lost

- Broken Content: Broken image, pages, missing pages, broken checkout flow, error messages etc. will make the customer leave your site and will leave a negative impression

- Old Content: Content on the website needs to be up to date. If the site consists of outdated content, it will hamper customer experience and would in turn increase workload for the customer service team where they would need to answer customers questions which should have been early mentioned on the website

- Confusing Content: The content team needs to create a simple and straight forward content. Simple language works best when interacting with customers

The content team creates, tests, manages and optimizes all the content on the website which bring in the ROI.

P 6.10

Resources

Digital implementation requires resources which can either be internal (in-house) or external (3rd parties) or a mix of both. A business would need to analyse their in-house team and their capabilities when deciding if they want to execute the entire project in-house or they would need support for an external 3rd party. In most cases, businesses with less digital implementation experience would opt for outsourcing to an external 3rd party. If the business wants to utilise their in-house team, they will need to access team capability and they can also opt for hiring new employees while retaining their digital talent.

Internal

Some businesses try to develop and recruit people with the required skills to create an in-house team thinking that an e-Commerce site is a continuous development process which can be expensive if the project development is done with an external (3rd party) entity. To develop an in-house team, businesses need to focus on having the right people in the team with the required skills and capabilities. Benefits of an in-house team are:

- Effective and easier communication
- More increased legal protection
- More product ownership from the business and team
- Easier collaboration
- Same culture
- When do businesses decide on having an internal team:
- When the business has a highly secured business environment where all the information is sensitive and confidential which cannot be shared with a 3rd party
- Technology the business is working on is patented and could create legal issues when working with a 3rd party
- Budgeting issues where the business is only able to afford an internal team
- Products being sold are highly innovative such as devices, software etc. which cannot be shared with an external team

There are few cons of operating with an internal team like there is no guarantee on if the team members understand the importance of the project, efficiency, self-motivation, understanding of the product or productivity. But overall internal teams do have several benefits. Thus, the business needs to ensure that they have the right people working in the team who are self-motivated, skilled and have the required capabilities.

External

When businesses don't have the required internal team in terms of resources and/or capabilities, then businesses resort to hiring external teams also known as 3rd parties. 3rd party resources are hired for a limited time frame where the 3rd party team consists of the required experience, knowledge, subject matter expert and implementation skills. While developing the project, 3rd party team also helps to enable the internal team so that they can handle the platform once the 3rd party roles off. 3rd party resources can be in terms of consultancy, payment gateways, SEO/SEM related activities, marketing etc. Businesses need to analyse and figure out where their internal team lacks so they can hire the required 3rd party. Like any other resources, 3rd parties also have pros and cons.

Pros of an external team/3rd party:

- A specialised organisation has more experience in delivering

P 6.10

similar e-Commerce projects compared to the internal team which produces economies of scale

- The team members of the 3rd party team are more experienced. Like an SME of a platform would know the inside out features of the platform and can suggest best practises that the business can use to maximise the use of the platform
- Consultancy companies are always pushing their resources to be up to date in terms of technology and trend. Consultants have a flexible working style and bring a lot with them not only in terms of knowledge and experience but also culture
- 3rd party can provide people to work on the project in terms of need. Thus, it allows team scalability
- Working with 3rd party resources requires the business to be more disciplined in terms of communication, planning and executing the project
- Quality of the deliverable from a 3rd party is always better than the internal team as they are experienced and have the knowledge to apply and build the requirements of the business
- Payment gateways are managed and are more secure as the 3rd party is responsible for providing the support and security
- Cons of an external team/3rd party:
- Can be quite expensive in the long run
- The project timeline could fall back, or it could not meet the required expectation
- There is always a risk of sharing confidential data and security
- Contracts with 3rd parties can be rigid which can cause issues during the project
- There could be friction between what the business expects and what the team can provide within the guidelines of the contact

Overall, based on the pros and cons the business needs to identify their need and what suits them best. Businesses who have little or no experience, opt for external 3rd party resources who can implement the e-Commerce site and train their employees to handle after go-live.

Hybrid

When a business looks at carrying out a digital implementation, they need to consider a lot of factors from resources, budget, skills, capabilities etc. Some organisations tend to choose a hybrid modal. A hybrid modal consists of both internal and external 3rdparty teams to work together. In a hybrid modal the external 3rd party team would usually carry out the complex bit of the project with the support of the internal team, where the internal team would be responsible to provide all the content, information, integrations etc. to the external team to successfully implement the system. During the project, the 3rd party resources train the internal team so once the project is delivered the internal team can manage. In a hybrid modal, the 3rd party team becomes an extension of the in-house/internal team which allows better collaboration and communication.

P 6.11

Project Teams

Every brick-and-mortar store needs a team and it's the same for an online e-Commerce store thus is very important to have people in your team who fit best to the role with the required skillset. Be in a B2B or B2C e-commerce, it is essential for each department in the organisation to be involved in the e-Commerce project. There are direct and indirect dependencies between departments which help to achieve the set goal for the project team. It is key that each individual understands what the team is working towards, what is the end goal and how we have to reach there together. Getting someone on board in the internal e-Commerce team who does not know the platform well or who is not aligned, will only tend to slow things down and increase pressure on the other team members.

There is a dependency on the size of the team based on the complexity of the project.

There are certain key roles within the project team such as:

- Project Manager
- Technical Architect
- Functional Lead
- Business Analyst
- Back end Developers
- Front end Developers
- Designer
- Content Manager
- Tester

Each of the individuals mentioned above is responsible for planning and executing the e-commerce project. But at times it is not only these individuals who are responsible

Organisations tend to overlook the external dependencies who could directly or indirectly play an important part in the success of the project, such as the:

- Warehousing team: for example, if the website is all up and running but the staff in the warehouse is limited, that would mean there could be a delay in packing and sending the products out or if there was a system issue in the warehouse which could not keep up with the number of orders being placed that would again delay package.
- Customer service team: they are the only ones who are in direct contact with the customer, they are aware of the pain points and the linking's of the customers, yet they are usually the most underrated team in an organisation. For example, if there is a new promotion being set out on the website and the team is not aware it could be possible, they might not be able to provide the correct information which would affect customer experience or if there is a promotion out and the team size is small then they would not be able to keep up with the number of calls which again would affect customer experience.
- Marketing team: marketing team would handle sales, offers etc. and if they were to send out emails regarding a product and they were not aware that the stock is limited then it could create a bad impression on the customers which would lower the conversion rate.

When setting up the project team it is not only essential to have the correct people with the required skill set in the team but also to ensure the external teams are in sync with the project and the workings to be aligned to achieve a successful result.

07.

Product

Within this section:

1. Order Management Systems
2. Shipping and Fulfilment
3. Payment Gateways
4. Pricing
5. Product Images
6. Checkout flows and process
7. Dynamic Pricing Management
8. Promotions
9. Campaign Management
10. Lead Generation
11. Reporting and Dashboards
12. Online Customer Service
13. SEO
14. Email Marketing
15. Personalisation
16. Click and Collect
17. PWA

P 7.1

Order Management Systems

Online shopping is increasing as a rapid rate and companies are competing to provide the best service to attract customers to their site. To have competitive advantage retailers need to grow their digital footprint this includes selling online, other marketplaces, and even partnerships.

e-commerce order management system is the back-end process of managing and meeting orders placed online. This involves things like packaging, shipping, returns and subscriptions. An order management system in today's time need to allow the retailers to be one step ahead of their competitors, to be more scalable, flexible and adaptable. The OMS should allow the business to meet the customer demands and easily change with the market.

Order management systems allow integration and automation through the customer order journey in the back end, this allows retailers to provide enhanced customer experience. OMS help retailers to process orders coming in from multiple channels and facilitating the packing and shipping to different locations while proving update to the customer via different mediums in real-time.

Order Management System is important for an e-commerce site as it helps brands to grow and since customers have a high expectation in terms of maximising customer experience which leaves no room for error. Some of the reasons why an OMS system is essential:

- **Provides faster delivery:** In an age of next day or 2-day shipping, businesses need to look out for ways to push their orders out fast as the windows of completing orders are becoming narrower. An OMS gets immediately notified when an order is placed, and the OMS can choose the nearest warehouse to the order destination to help fast track the delivery. OMS send automated order information for the warehouse team to prepare and pack the order to ship is using a cost-effective shipping method
- **Limited errors**: OMS help to cut down on human errors. These errors can be time-consuming and expensive at times. OMS help to notify the team when the inventory levels are low, or when a product is not selling or what product has the highest return rate. This helps the business to rectify the errors, analyse the reason for returns, shipping errors etc. to improve customer experience
- **Increase in scalability**: OMS system scales according to the need of the business, unlike the old manual systems. OMS software gives the business the option to scale with the market to not fall back
- **More multi-channel possibilities:** In the era of multi-channel sales across websites, marketplaces or partnerships like Facebook, Instagram. Tracking orders can be complex as they are being shipped to several locations, through one or more shipping methods, OMS help to bring it together and increase customer experience

Key features of an OMS:

- Integrates with the company system or systems
- The manual process is eliminated
- Can provide service internationally
- Helps to generate reports to forecast and understand order data

Businesses/retailers would need to select the appropriate OMS system that best suits their business needs to utilise the OMS system, efficiently. Businesses should start with:

P 7.1

- Understanding their customer orders, products, inventory, shipping and packing
- They need to decide how and when will the OMS system communicate with the company system during the order process
- What should the OMS system do when the order has been placed, should it communicate with the company systems, if so then which systems? and once they communicate what should be the next step
- Based on the order the OMS will send the information to the warehouse. Businesses need to decide which tasks in the warehouse would be automated such as calculating shipping costs, allocating the shipping method, packing slips, and/or updating inventory
- If a product is out of stock should the OMS system communicate it to the vendors, production team, suppliers etc to restock the product
- For shipping should the OMS system notify the customer about the progress of their order and notify the team.
- If a product is returned what should the process be for the OMS like automate the refund, update inventory, send the information to the customer and team
- Cost of the OMS - if the business can afford a full-fledged OMS system or parts of it
- Implementing the OMS system - this would be a project to implement the OMS system and train the team to best utilise it

Businesses need to go through different aspects to better understand the OMS whether the organisation has an existing OMS or are looking to set one up. But in the long run, an OMS system can help control costs, increase ROI, speed up the process and improve not only the customer but team experience. To summarise:

Order Management in B2B is intricate compared to B2C. B2B usually has a higher cost when it comes to retaining customers as they have a different purchase cycle compared to B2C. B2B purchase cycle takes longer as it involves RFP's, Purchase Order etc. B2B orders tend to be reorders several times where as B2C tends to have orders that are high in volume and smaller in size.

P 7.1

Order Management Process for B2B typically looks like:

- The sales representative enters the customer's order details into the OMS or the customer can also place an order online which will send the order details to the OMS
- The customer receives the order confirmation
- Products are allocated to the order
- The order details are sent to the warehouse where the products are packed
- The inventory is updated
- Order status is sent to the customer
- Order is shipped to the customer

Order management can be effective for B2B and B2C businesses where the OMS system:

- Allows omnichannel or multichannel adoption which helps order management
- OMS is usually cloud-based which allows organisations to go paperless which helps to improve overall efficiency
- Helps to centralise information from multiple channels
- Reduces complexity once it has been implemented
- Helps to track orders
- Improved customer experience
- Helps speed up the delivery process

When implementing an OMS system B2B business needs to understand that they will not be able to serve customers such as B2C businesses. OMS need to be implemented differently for both B2B and B2C depending on their requirement.

P 7.2

Shipping and Fulfilment

A lot of effort goes into providing customers with the best online experience from content to products to blog to check out and so on. But on the physical side of things, retailers should not overlook the importance of shipping. Shipping cannot just be handed over to any 3rd party, there needs to be research, planning, and analysing involved. This is the final point in the customer experience journey, this is the reason why shipping and fulfilment should be mapped out in the right manner.

Shipping and fulfilment have some basic factors that act as the foundation such as:

- Shipping methods and cost: Businesses need to analyse and divide whether the entire cost of shipping will be passed onto the customer or onto the business or will it be split? How will the business provide free shipping or shipping offers? How will the products be shipped? Will there be more than one shipping method and shipping costs?
- Product: Each product would be different from each other in terms of the number of items, weight, destination, durability etc. Businesses need to analyse such details to understand the total cost of shipping as different products have different shipping costs
- Packaging: Packaging also plays an important role in understanding the shipping method and cost. For example, is the product fragile, or is it packed as a gift?
- Season: What changes should be brought in during peak seasons like click frenzy, festivals, etc.
- Carriers: Which 3rd party shipping company would best suit the business? What are the services provided by the shipping companies? What is the cost?

Before a business ships their product, the company would need to decide the shipping methods and costs. There are various options for shipping methods such as:

- **Free shipping:** Providing free shipping to customers might be the best customer experience but might not suit the business as in the end someone has to pay so if not the customer then the cost would be on the business/retailer
- **Real-time rates:** Collaborating with 3rd party shipping providers would allow retailers to post

P 7.2

the shipping method and cost as per the shipping company currently. This allows customers to choose their preferred shipping method

- **Flat Rate:** One of the most popular shipping options. But the trick here is to ensure that retailers do not overcharge or undercharge the customers. This also works if the retailers have a standard product but can get complicated if the retailers have a variety of products.

- **Free shipping over an amount:** Retailers can provide free shipping when the customer purchases above a certain amount. Retailers would need to calculate that amount to provide this service

Shipping and fulfilment require team coordination both internally and externally. Shipping and fulfilment strategy should be shared with the entire organisation so that they are aligned. For example, if the marketing team wants to send out a promotion where free shipping is applied, they would need to align it with the shipping and fulfilment strategy and team to eliminate any negative customer experience.

There are some e-Commerce best practises that be leveraged by retailers when deciding the shipping and fulfilment strategy such as:

- The right team with the right people who have the skills required
- Setting goals for the teams to follow
- Selecting the correct shipping strategy which best suits the business
- Reviewing the strategy and reiterating as and when required

The difference between B2B and B2C shipping and fulfilment:

B2B	B2C
Fulfillment and Shipping takes longer to complete due to the costs involved and the quantity	Can be same day shipping and/or free shipping
Requires one on one connection between the business and the client	Usually, shot term relationships
Usually, long term relationships	Business provides loyalty cards to retain customers
Process can be long and complex	Promotions and campaigns offer provides to customers
Strong rules need to be applied	Basic rules can be applied
Returns can take time	Returns can be quick

P 7.3

Payment Gateways

There was a time when cash was the main source of transaction, but the online world has taken over, where online payment methods are replacing the old payment methods. Everything is now online which makes things easier and more accessible, from credit cards to e-wallet to bank transfer and so on.

A payment gateway is a form of a service that connects and processes payments for e-commerce websites. Hence, it plays a vital role in the customer buying experience and conversion rates. A complete and complicated payment system has seen to have a negative impact where customers have abandoned the cart. It's important to provide them with easy, user-friendly payment system where even if one payment method fails, they have an alternative method to motivate them to complete the purchase.

Retailers need to select the best payment gateway that meets their requirements. There are many payment gateways in the market like Braintree, Stripe etc. But before the business can decide the payment gateway there are certain questions to be answered such as:

- What is my business requirement?
- Is it within the budget?
- How strong is the security on the payment gateway?
- Will there be any impact on my storefront UX/UI?
- How well does the payment gateway perform?
- How is the support service of the payment gateway once purchased?
- Which payment gateway provider would suit me best?
- Payment gateways assisting other functions such as calculating tax, using geolocations, calculating service fee etc.?

There are some limitations of payment gateways that the retailers need to be aware of such as:

- Not all types of cards are accepted by payment gateways
- Some payment options might not be available for international shoppers
- ecurity loopholes in the payment gateway. Customers do tend to hesitate to place online orders due to security reasons

When the business decides to integrate the payment gateway with the platform it is always better to see how it would appear on the storefront, what kind of experience will the customers get, and is it user-friendly. Also, check the security of the payment cannot be compromised. A good, secure working payment gateway will boost customer experience.

P 7.3

B2B and B2C have a similar kind of payment system but are more steps involved in a B2B payment as B2B payments have more rules, regulations and processes. B2B businesses tend to deal in larger volumes compared to B2C.

In B2C customers purchase products or services for individual use where customers usually pay the same price as other customers, there is no bargaining involved. Whereas in B2B various stakeholders are involved which makes it more complex and expensive when it comes to approval.

In B2B customers have different orders and requirements which need to be processed and approved by the sales representative or there needs to a sales representative involvement when the customer purchases online using RFP or Purchase Order.

In B2C payments can be one-time and are of smaller value which is displayed on the storefront, the consumer adds the product to cart and checkout using secure payment where the customer can pay from their choice of payments such as credit card, e-wallet etc.

In B2B due to the high volume the payment for B2B there are different payment options besides the standard such as checks, bank transfer, purchase orders etc.

Implementing the right payment options is based on the type of business and business requirements.

P 7.4

Pricing

The importance of e-commerce is growing rapidly. Consumers prefer to purchase products online as it can be accessed anywhere at any given point in time. For an e-commerce site to grow it is essential to have a good pricing system in place. When a customer tries to pay online and the transaction fails, most often the customers choose a different payment method whereas, some customers abandon the cart. Those customers who abandon the cart have a negative impact on their e-commerce experience as they find the payment method complicated and confusing. If a business chooses to have only one type of payment method, it will most likely not provide the expected level of customer service. Providing various payment methods will allow potential shoppers to select the payment method which best suits their need which would in turn boost ROI.

There are many 3rd party payment gateways such as Braintree, Stripe, Square etc. who manage the online transaction processing for the business. Typically gift cards are not handled by payment gateway 3rd party.

Businesses can collaborate with the payment gateway teams to manage their transactions.

Also. there are various payment methods out there in the market such as:

- Credit and Debit Cards like Mastercard, Visa, American Express
- Electronic Wallets like Apple Pay, Google Pay, PayPal, Afterpay
- Interbank Transfers
- Mobile Payments
- Gift Cards
- Subscriptions
- There are many benefits of online payments such as:
- Easy shopping experience for customers
- •Swift and hassle-free payment
- Less effort required by the customer
- Multiple payment options increase customer experience
- Secure gateway - security is a vital point in payments because customers will only proceed to complete their transaction if they feel safe to do so.

Given all this, businesses still need to select the payment methods and the payment gateway by analysing aspects like the preference of the customer, setup costs, ongoing costs, security and business requirement. Not one business is the same, each business has a different requirement and is in a different phase - crawl, walk and run. The business requirement and the phase play a major role in the pricing strategy

P 7.5

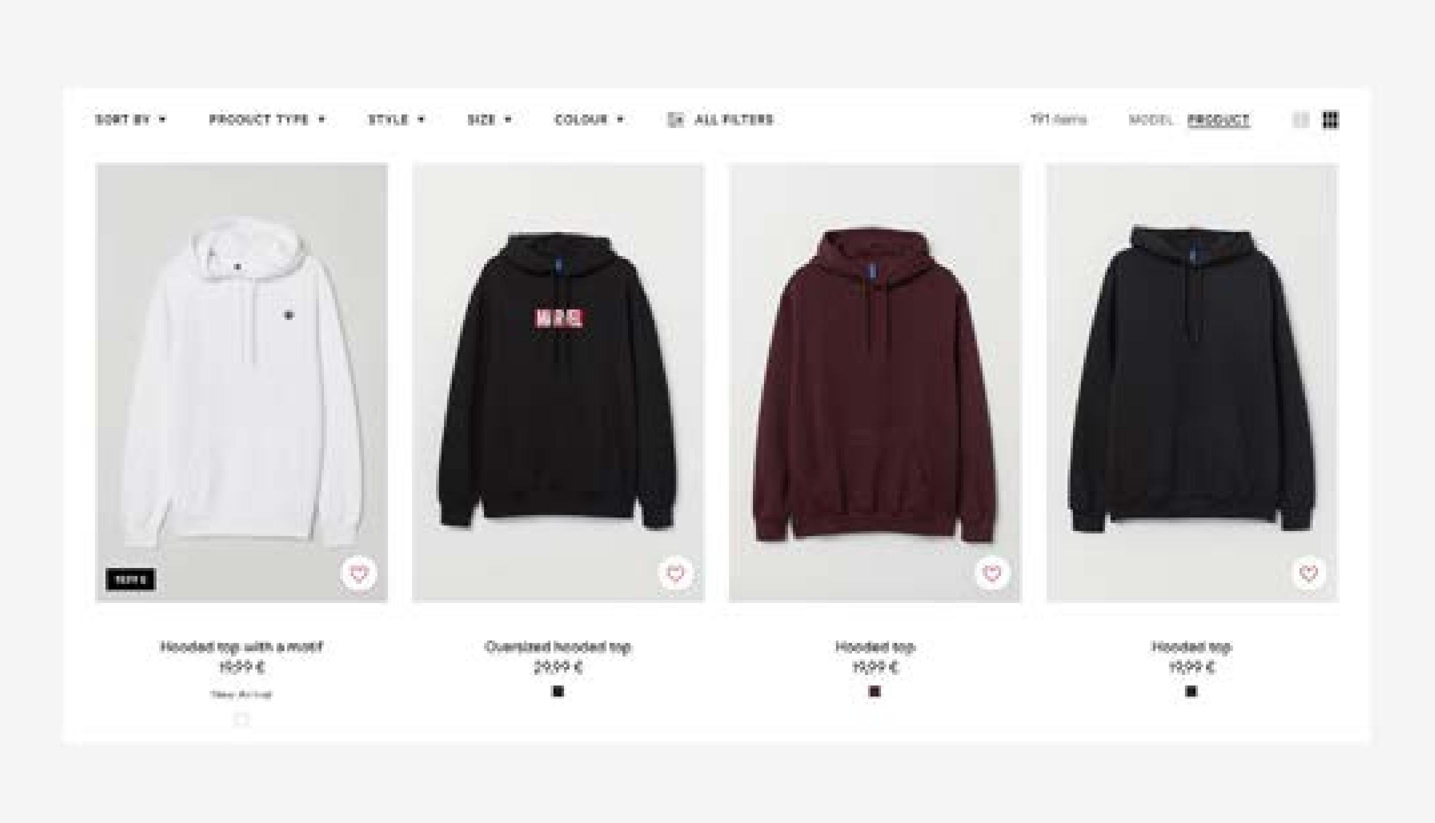
Product Images

e-Commerce is entirely based on the online experience. Customers visiting the website should be intrigued to purchase the products available which will increase the conversation rate. Many factors play a role in increasing ROI, once such a factor is the product image. Product images play a major role in attracting and convincing the customer as to why they should purchase the product. Products images can be used in an identical way for both B2B and B2C.

In real life, customers can feel and try the product but when purchasing online they do not have an option to do so, thus it is necessary to provide detailed information about the product. Along with details, it is essential to have high-quality visuals of the product like images and videos, this will help the customer understand the product before they decide to purchase. Product images are the first thing that the customer sees on the website, even before the product description, name or price.

Different types of images can be used as per the requirement of the business such as:

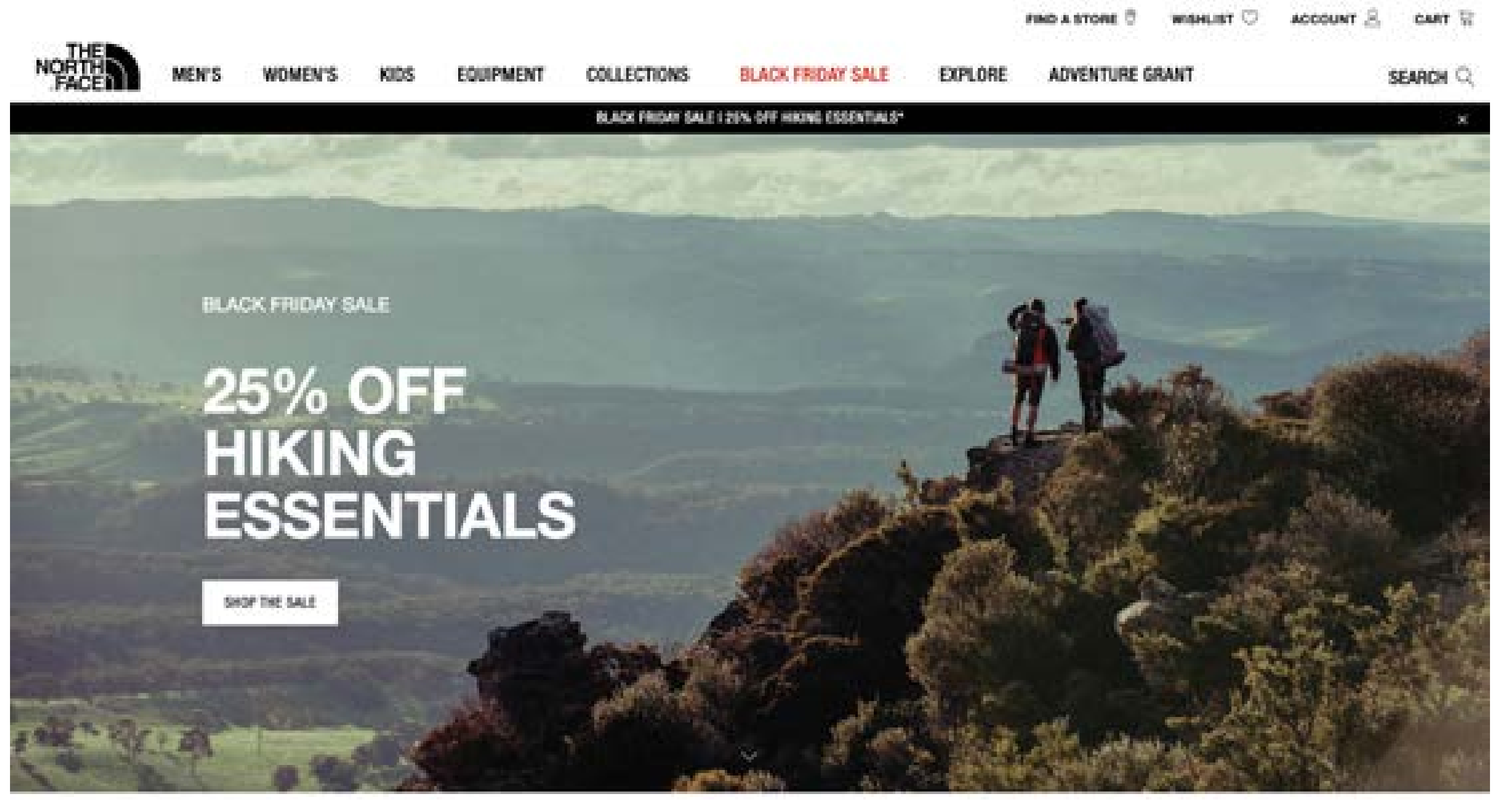
Product images on a flat surface



Product images with the product on a model

P 7.5

Featured images



Lifestyle type of images

User images - images being uploaded by users

P 7.5

Product packaging images

Unboxed images

Product Video

Some best practices that can be followed by retailers are:

- Demo the product - of the product have a defined purpose then demo the product to show the function and features of the product
- Promote user-generated images - users uploading their images with the product as a review which will motivate other shoppers to purchase the product
- 360-degree view of the product - uploading a 360-degree video or GIF of the product can provide a detailed view to the customer which pursue the customer to purchase the product
- Naming convention - make it a rule in the team to follow a naming convention for the product image which will help to minimize the error of uploading an incorrect image for a product and helps the team to easily manage the images
- Page load - do not upload images which will hamper the page load time. If the customer must wait for the image to be displayed, they might leave the site and move onto another
- Simple content - do not over complicate the content. Try to keep the content simple and attractive where the focus is the product e.g., one best practice is to have the product image o a white background which enhances the product image.
- Real product image - when a customer purchases a product online, they expect to see the product as on the website so try and avoid applying any filter on the product or enhancing the image which alters the way the image looks. It is important to be transparent with the customer otherwise there could be a high rate of returns is placed

Retailers need to remember that the goal of product images is to show the customer what product it is, how it looks and motivate them to buy it.

P 7.6

Checkout flows and process

Checkout is a critical part of online shopping. This is where the real money is made. Retailers tend to focus more on the look and feel of the website and overlook the checkout flow, but both parts are equally important.

Checkout flow is like the finish line, where shoppers turn in customers making transactions. But even a small hitch in the checkout can have a huge negative impact on the conversion rate and ROI, thus, improving the conversion rate even slightly can help the increase ROI massively. Improving checkout flows and processes starts even before the checkout page.

P 7.6

There are various ways to improve checkout flows and processes such as:

Product pages:

- Try to keep all the information before the page fold such as product details, pricing, product images, reviews, ratings etc. all the factors that are needed for the customer to make the decision to purchase the product
- Add sections such as 'You might like' which displays products that are related to the current product being looked at by the customer. This is a strategy used to make the customer purchase more.

Streamline checkout process:

Try to have limited steps and fewer clicks on the checkout page to fast track the process. For example, the checkout needs to consist of:

- Shipping
- Billing
- Payment

Implementing an easy and convenient checkout eliminates the risk of cart abandonment

Visual checkout flow

Display a visual checkout flow where the shoppers can see the preview of the number of steps involved to complete the purchase

Remove extras

- Remove extra information such as the minibag, search, and/or navigation bar. This helps the customer to focus on the checkout process rather can navigating to another page
- Have clean and bold CTA buttons with a simple page design

Trust

Customers shopping online are always concerned about security. To provide assurance to customers display site with:

- Credibility accreditations such as Norton secured, MacAfee secure, Google Trusted Store etc.
- SSL certificates
- Payment method logos
- Rating and Reviews
- Policies
- Terms and Conditions

Checkout options

Provide different checkout options like:

- Guest User
- Registered user
- Create an account

Do not enforce one type of option on the user

Shipping options

- Retailers should provide different shipping methods to meet the needs of different customers
- Besides payment options, retailers can also provide options like Click and Collect

Payment details

- Should be placed at the very end right before confirming place order
- Provide easy mode of entering payment details like the name on the card, card number etc.
- Provide an option for the user to save their credit details for the next purchase

P 7.6

Order summary

Provide detailed order summary before the user confirms the purchase

Order confirmation

- Display a Thank you message with the order confirmation details to provide the customer with the confidence that the order has been successfully placed.
- Some retailers also provide promotion messages if the user has checked out as a guest to promote signing up to be a registered user

Emails

Always follow up the order confirmation with an order confirmation email which outlines all the order details and tracking facility

Checkout is a driving factor to increase the conversion rate to in turn increase ROI. It is necessary to streamline the checkout process to provide a user-friendly, quick and convenient checkout experience. It is not one size fits all when it comes to the checkout flow and process, hence, it is essential for retailers to research, analyse and test the best-suited option.

P 7.6

There is a difference between B2B and B2C checkout flows and processes.

B2C checkout flow and process (see Figure 7 below):

- Able to change quantity
- Able to delete product from cart
- Simple checkout
- Different payment options such as credit card, e-wallet etc.
- Able to add coupon code to checkout

B2C Checkout Flow and Processes - Figure 7

B2B checkout flow and process:

- Able to change quantity
- Able to delete product from cart
- Simple checkout
- Different payment options such as purchase order, bank transfer, check etc.
- Simple process to reorder

Checkout is a driving factor to increase the conversion rate to in turn increase ROI. It is necessary to streamline the checkout process to provide a user-friendly, quick and convenient checkout experience. It is not one size fits all when it comes to the checkout flow and process, hence, it is essential for retailers to research, analyse and test the best-suited option.

B2B Checkout Flow and Processes - Figure 8

P 7.7

Dynamic Pricing Management

Dynamic pricing is a responsive pricing strategy where the price changes based on the demand, supply, trend and competition in real-time. It is not a new concept; it has been around for a while now but is surely taking over e-commerce. Dynamic pricing gives retailers the leverage to change prices to have a competitive advantage. Like retailers can decrease the price of a product that does not sell to well to increase the sales.

Overall, it can be said there are 3 factors that drive dynamic pricing:

- Industry - Retailers need to check what is the most basic price of a product among other brands
- Market - What is the demand and supply currently, what is the predicted demand and supply?
- Customers - What is the customer purchasing behaviour? What is the price the customer would be willing to spend on the product?

Retailers would need to look at every aspect when working on a dynamic pricing strategy.

Like any other strategy, dynamic pricing also has benefits and pitfalls. Some of the benefits of applying a dynamic pricing strategy are:

- Allows retailers to gain insights on customer purchasing behaviour and market trends
- Retailers can set different product prices based on the most basic price set for the product by other brands
- Allows retailers to analyse what price would be most acceptable for the customer to spend
- Helps to maximise ROI
- Provides retailers with a competitive advantage

Some of the pitfalls of dynamic pricing are:

- Not regularly updating the price. Even though the software would be managing, it is essential that human interaction is available constantly
- Fluctuating prices to often will confuse the customers, some customers might wait for the prices to change again or some customers might lose trust
- Competition with other brands might increase initially when the strategy is applied

P 7.7

Some best practices that can be applied when implementing dynamic pricing strategy:

- Set a good pricing strategy which is more initial pricing based. Initial pricing is straightforward, and it helps retailers understand the market and the market pricing
- Introducing a loyalty program can help to introduce different dynamic pricing level for different types of customers
- Analyse real-time demand for products when setting prices
- Apply a holistic approach when implementing dynamic pricing because a product can be of different prices in different stores. E.g., a Hot Dog in IKEA costs cheaper than buying a pack of buns at the supermarket

The most effective way to gain benefit from implementing dynamic pricing is continuously learning about the customers, competitors, and market

Dynamic pricing differs from B2B and B2C

B2B should:

- Provide customised pricing for customers
- Automatic change in price based on the quantity

B2C should:

- Maintain consistency
- Maintain price
- Display promotions and discounts
- Terms and Conditions to be displayed

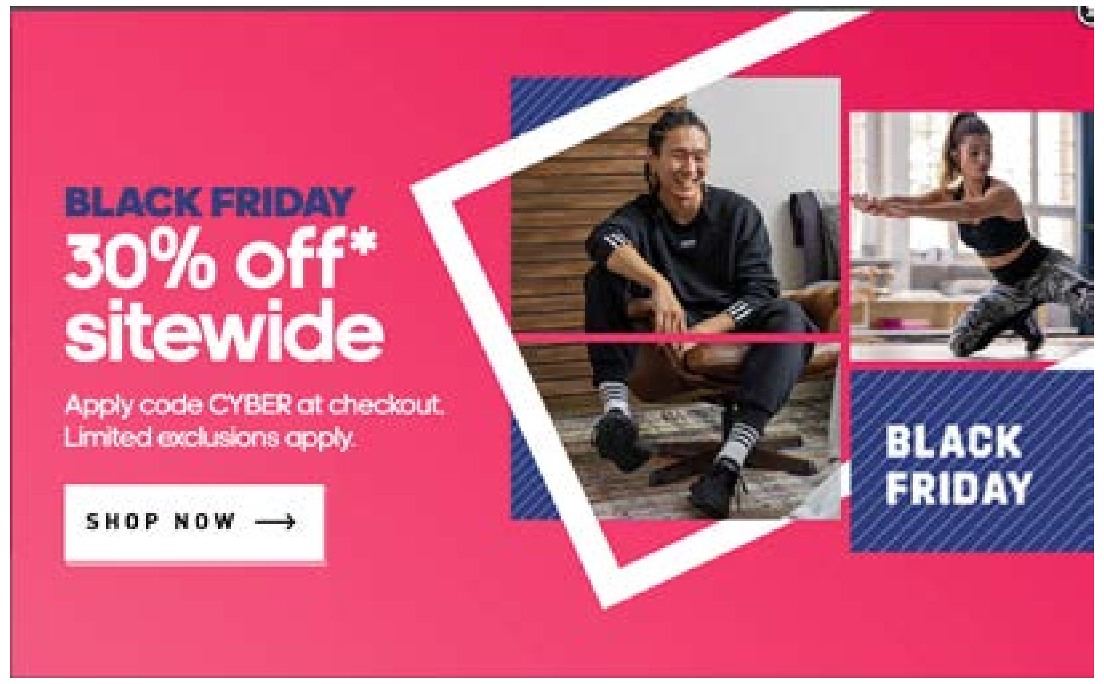
P 7.8

Promotions

DWith most of the population moving to shop online, retailers need to be one step ahead in providing the best to their customers, retailers need to think what would be the best way to get their products out there in the market? This is where marketing strategy comes into play. In a general aspect, marketing strategy consists of 6 P's:

- Product
- Price
- Promotion
- Place
- People
- Processes

Each of the 6 P's is equally important but to market the products, retailers need to use promotion as a tactic to increase traffic on-site to lead to higher conversion rates. Promotion helps to market the products and services being offered by the brands. There are various promotional levels such as shipping, product and order.



Each of these promotion levels has different types of promotions such as:

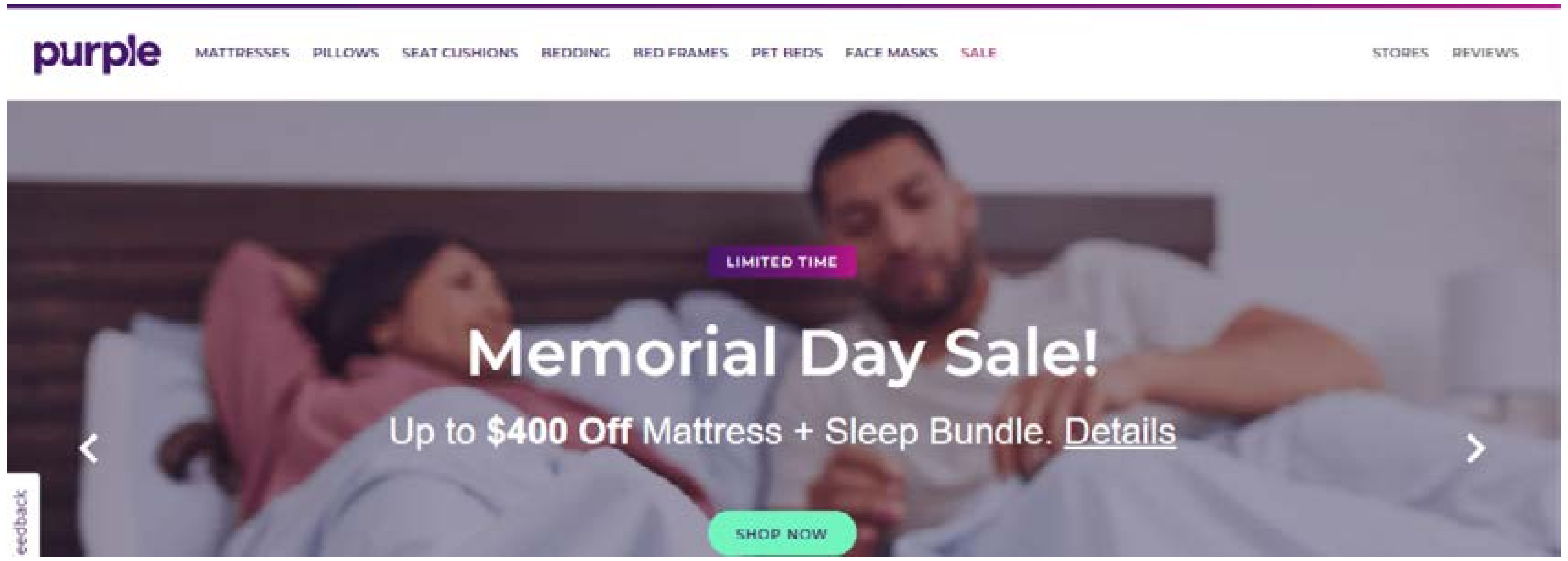
- Giveaways
- Flash Sales
- Free Samples
- Buy X for Total
- Buy 1 get 1 Free
- Bonus Products
- Multi-purchase
- Cross-selling
- Bundles
- Product Sets
- Coupons
- Promotional Emails
- Free Shipping
- Discount on shipping

Retailers face intense competition and to have a competitive advantage, retailers need to apply marketing strategies like promotions. Each retailer will need to analyse which promotion would best benefit them.

P 7.9

Campaign Management

In e-Commerce, campaigns define a series of actions or tasks that are linked to each other which contributes to benefiting the business vision and goal. These actions or tasks can be set-up in a way in which they are able to function individually, sequentially, simultaneously or in any combination. Campaigns play a major role in the business strategy.



There are various types of campaigns which are structured in a way that best suits to meet business requirements. Some of the campaigns are:

- Marketing
- Sales
- Public Relations
- Internal

Campaigns need to be effective, to make a lasting impact on the customers. Retailers need to make their presence felt in the market as quickly as possible. To create an effective campaign there are certain points that retailers should refer to

- The entire modal of e-commerce is set on the website which means the storefront needs to be presentable, user-friendly, quick, secure and easy to use.

Differences between B2B and B2C campaign management:

- Develop relationship: B2B uses campaign management to build long term relationships whereas, B2C user campaign management to build short term relationships
- Branding: B2B campaign management focuses more on generating leads whereas B2C focuses on brand value
- Decision Making: B2B make logical decisions when creating campaigns whereas B2C are emotional decision makers
- Audience: B2B consists of multiple stakeholders when creating a campaign management whereas B2C create campaigns targeting to individual end user

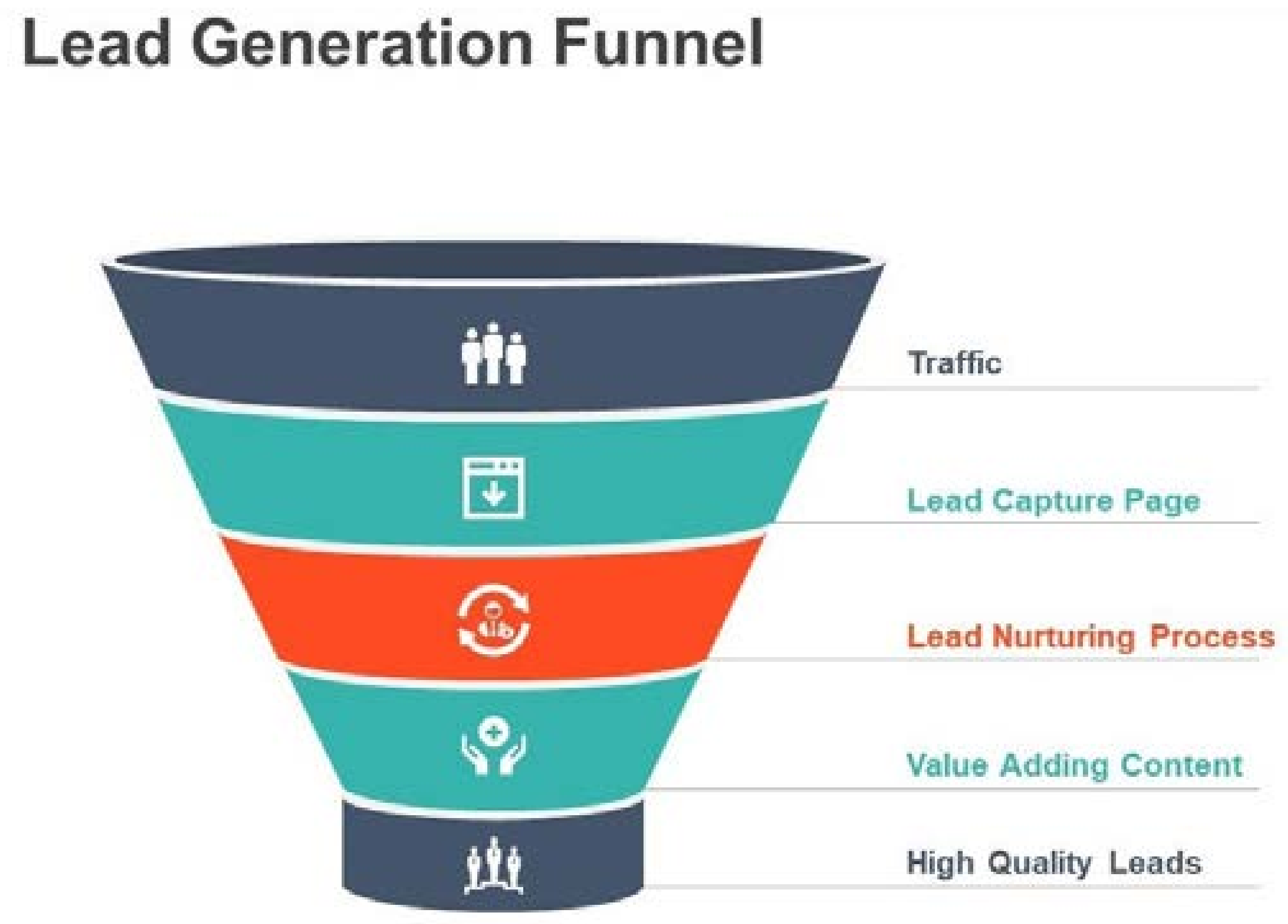
Detailed, streamlined, smart and unique campaigns which help e-commerce retailers to improve customer digital experience.

P 7.10

Lead Generation

In the e-Commerce industry, lead is anyone who shows interest in the brand and its products. Be it clicking on the website, checking out an advertisement on social media, or exploring products. Generating a lead in the e-commerce industry is a cortical part of the business because a lead today can be a customer tomorrow. Lead generation can is a long process and can take time and requires patience.

There is a simple workflow can that be followed by retailers for lead generation:



There are some best practises when it comes to generating leads such as:

Unique Content - Retailers need to do their research and find out what customers like, are interested in and want to purchase. Content needs to be such that it grabs customer attention, intrigues them, and creates a bond with them. Content is not only limited to videos and images there is must to that such as using social media

- Online Communities - Retailers can have online communication such as an Instagram page or Facebook community where people can post reviews, questions or concerns. The customer service team can actively be involved in on social media
- Influencers - Influencers can be looped in to promote the brand. Influencers have a fan base, a group of followers who listen to them, which can be beneficial for the brands. Retailers can either collaborate officially or send free products for the influencers to promote.
- Social Media - The world today is attracted to the online world and having a social media presence is important for brands nowadays. Brands need to ensure they make their presence felt but posting regularly, posting content to target different customers, making sure the content is correct and always reposting to the comments on the posts
- SEO - Retailers need to have a good SEO in place as good SEO ranking will improve the traffic on the site and the brands will have a higher chance of displaying their content
- Paid Campaigns - Brands can focus on posting paid campaigns which will bring focus on the site
- Unhappy Customers - Customers who are not satisfied, brands should try to reach out o them

Though lead generation might not be easy nevertheless, it is required if the brands want to sustain in the market and to have a competitive advantage.

P 7.10

Lead generation is different between B2B and B2C:

- Sales Cycle: Lead generation for B2B are much larger compared to B2C as the contracts made in B2B are for a long term compared to B2C. The price, time and resource allocated in B2B is more whereas B2C sales cycle is much shorted and there is less time, money and resource involved.

- Content: B2B consumers usually have more knowledge about products as they research about the product, they require whereas B2C customers typically purchase based on market trend content.

- Audience: B2C reaches out to a wide range of audience whereas B2B have specific audience

- Goal: B2C tends to attract customers from a market that is highly saturated whereas B2B builds relationships with clients on trust. End of it both have the same end goal which is to increase ROI

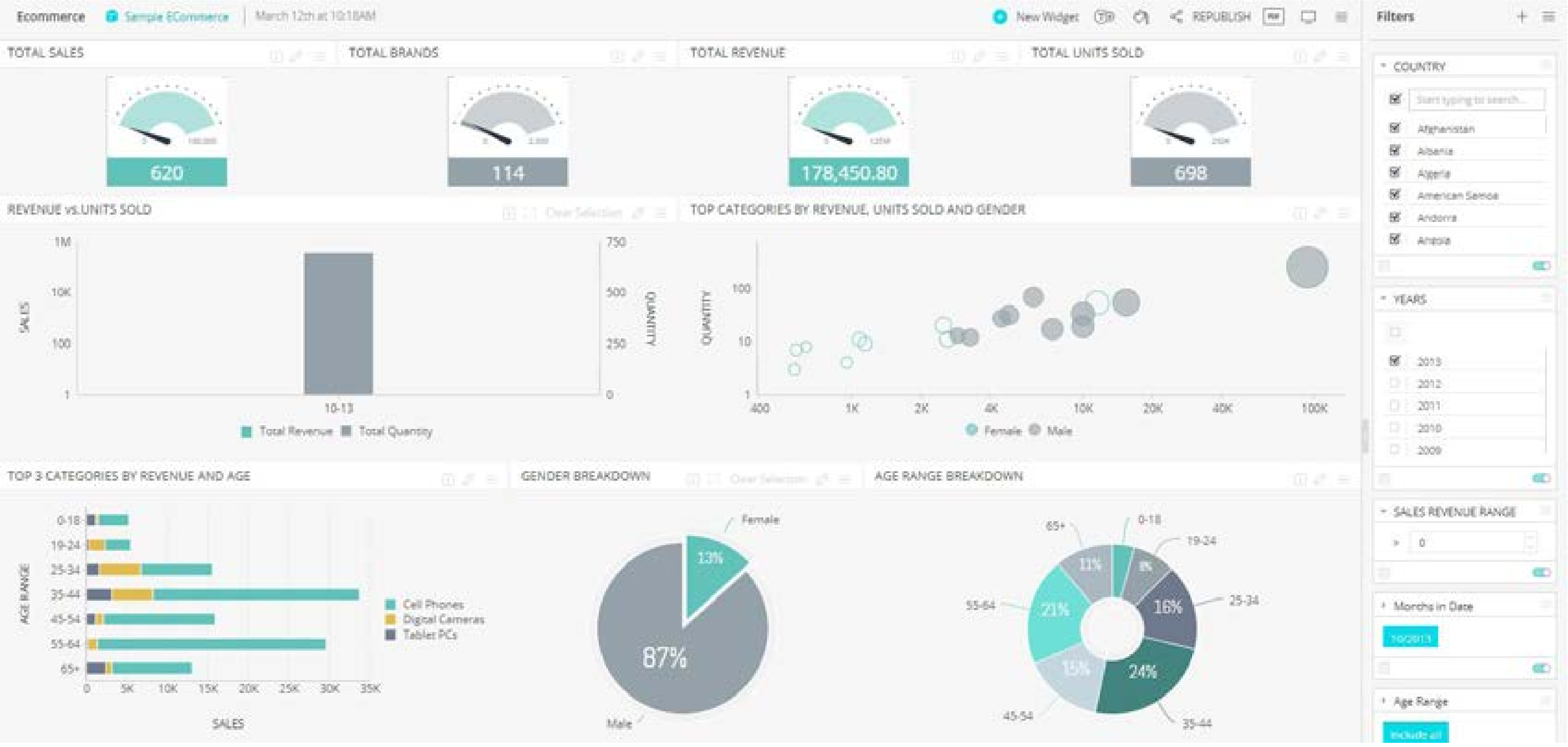
- Interaction: In B2C customers make purchase decisions individually whereas there are multiple stakeholders who are involved in decision making for B2B

There is no set method of generating leads but it is possible to increase lead generation by analysing the methods that best suit the needs of the business and help to shape the organisation are required whether is B2B or B2C.

P 7.11

Reporting and Dashboards

Ie-Commerce fits well as a use case when it comes to reporting and dashboard. In e-Commerce, everything is online which lets the retailers leverage the power of different tools to gather data and analyse it to improve their business process, teams, offering and more.



Every business has a different requirement and dashboards can be meet those requirements. For example, if the brand wants to track a specific promotion, they can create a specific dashboard to see the progress of the promotion such as how many people used the promotions, which products sold the best, etc. They can also use the dashboard to track daily activities on the site, traffic, conversion rate, bestselling product, worst-selling product, returns etc.

Some other features of reports and dashboards

- Tracks ROI which helps retailers to make decisions and monitor their progress
- Track Sales to understand what on their site is generating the most sales
- Traffic on the site can be tracked in real-time to visualise the information
- Able to measure the success of the features on the site and to improve them to enhance customer service
- Monitoring KPIs of each team

There is so much going on in an e-commerce business, it can get difficult for the retailers to keep track and that's where reports and dashboard come to play. They consolidate all the data in one place to give an overview of the business to everyone. Helps retailers to set new targets, identify new opportunities and get a competitive advantage.

P 7.11

Top 4 reports and dashboards that can be used by B2B companies are:

- 1Company Profile: B2B businesses need to track the company profiles of their clients to understand their purchase history like what products they purchased, the payment details, which channel they used to purchase and so on. This dashboard can help to identify any potential risks or issues.
- Catalogue: A catalogue report and dashboard can help a B2B business to view the performance of each product in the catalogue, promotions, inventory levels etc which can help them identify what kind of promotion best worked and which product is in demand. This will help them be one step ahead in terms of stocking up the inventory and give them a competitive advantage
- Quotes: B2B model works on quotes and pricing where the B2B business needs to go through a process where they analyse the quote sent by the client with the pricing so that they can either approve or negotiate. A quote report and dashboard will help them improve their quote conversion rate by tracking the success rate, competition rates, performance and overall customer retention
- Sales: Even though B2B business can work online but there is still a need for a sale representative to get things moving along in terms of identifying quotes that need negotiation, track quotes which are getting expired, contracts which are up for renewal, track team performance and help to streamline their day-to-day business activities.

	Magento Business Intelligence (MBI)	Adobe Analytics Foundation
Why	Seeking detailed **transactional data:** customers, orders & products to gain a holistic understanding of how commerce operations are performing on a regular basis.	Seeking insights with rich behavioral data across multiple channels, online and offline, to gain a detailed view of commerce customer and real time actionability
Core Uders	• **Centralizing** vital commerce data • Calculating business KPIs • Automating & sharing commerce reporting	• Behavioral insights across web and apps • Multi channel customer intelligence • Advanced & unlimited segmentation • AI & ML driven insights for predictive insights
Differentiating Technology	• Complete data replication from any source • Hosed cloud-based data warehouse • Full SQL query capabilities • Magento integration, auto dashboards	• Tag management for data collection • Deep data drill down capabilities • Adobe Sensei • Integration into Adobe Experience Cloud

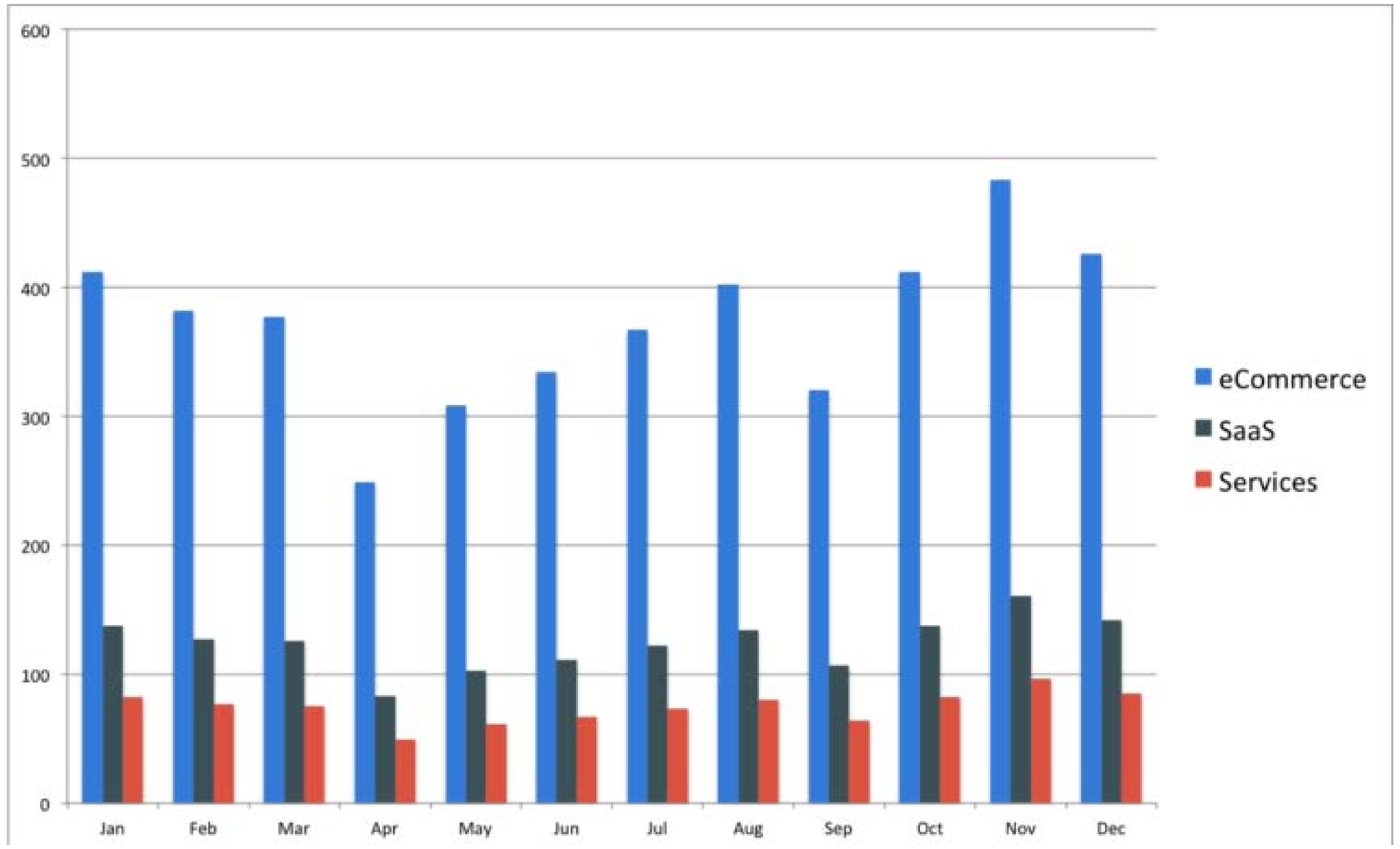
Better together

If a merchant is using MBI and Adobe Analytics and is looking for a way to correlate behavioral data to transactional commerce data so they can gain a more accurate understanding of how marketing activities impact core commerce metrics.

P 7.12

Customer Service

e-Commerce is digitally based and the only team who interacts with the real customer behind the transaction is the customer service team. Customers expect high-quality customer experience and if they do not get that retailers could lose their customers. The highest number of calls, messages and/or emails received by the customer service is in the e-commerce industry compared to others.



Retailers need to be pro-active in terms of customer service as not only the brand name is at stake but most importantly, its the customer's loyalty. For retailers to be successful in providing the best customer experience, there are some best practises can they can follow:

- **Multi support channel** - Providing service just visa email or phone is not enough in today's era. Customer service needs to be provided on various channels such as live chats, emails, phone calls, social media and or text messages. Each of these has their own pros and cons which retailers would need to analyse and select which one or which combination would suit them the best

- **Personalised service** - All of the activity done by the customer is done online which the retailers can track to understand the customer behaviour. For example, when a customer reaches out to the customer service team, the team will have their information beforehand such as their name, email, order history, returns etc. this helps not only the customer service to provide quick and accurate service but also the customer gets a personalised service

- **Self-service** - Customers can also be provided with self-service such as providing FAQ's, privacy policy, terms and conditions, forums etc.

Retailers should put themselves in the customer's shoes to understand their problem which will help them provide the best customer experience. Customer experience keeps the customer loyal and promotes the brand.

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Customer service is important for both B2B and B2C businesses, but concept of customer service is difference between the two such as:

- B2B tend to have involves a lot of stakeholder's and more complex issues which would take more time and effort to resolve whereas B2C usually consist of regular issues
- B2B businesses have fewer customers but it is essential to provide the best customer service to retain those customers. Also, B2B products can tend to be more complex and larger so there is significant impact on the ROI
- In B2C the customer service team talks to one person who made the transaction whereas B2B there are multiple stakeholders, so if there is any issue then the customer service team might receive calls from different stakeholders from the client side
- B2B customer service team is required to make a bond with the clients to have a deeper understanding of the client's requirement whereas B2C businesses rarely have a relationship with the clients

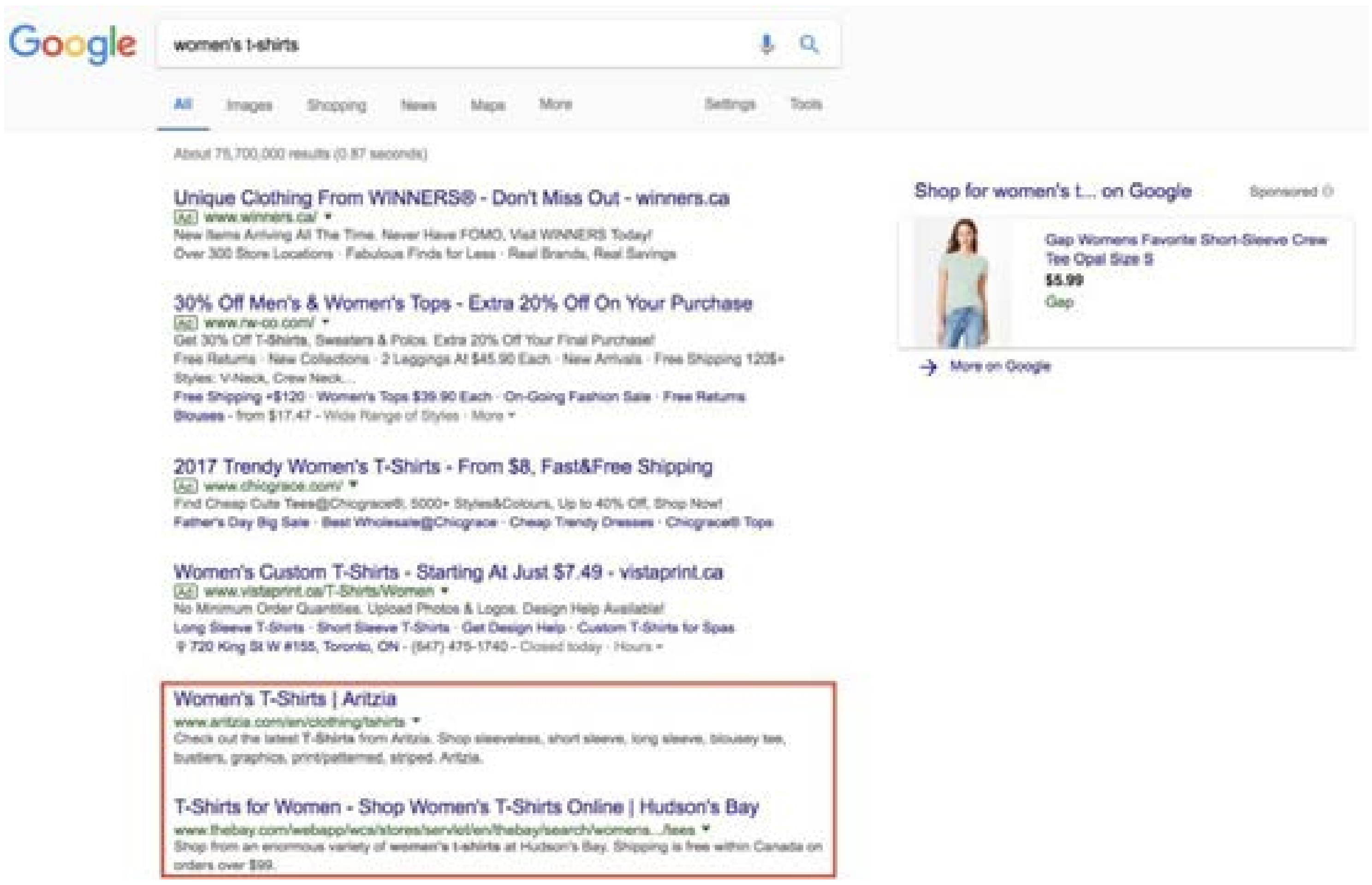
Retailers should put themselves in the customer's shoes to understand their problem which will help them provide the best customer experience. Customer experience keeps the customer loyal and promotes the brand.

P 7.13

SEO

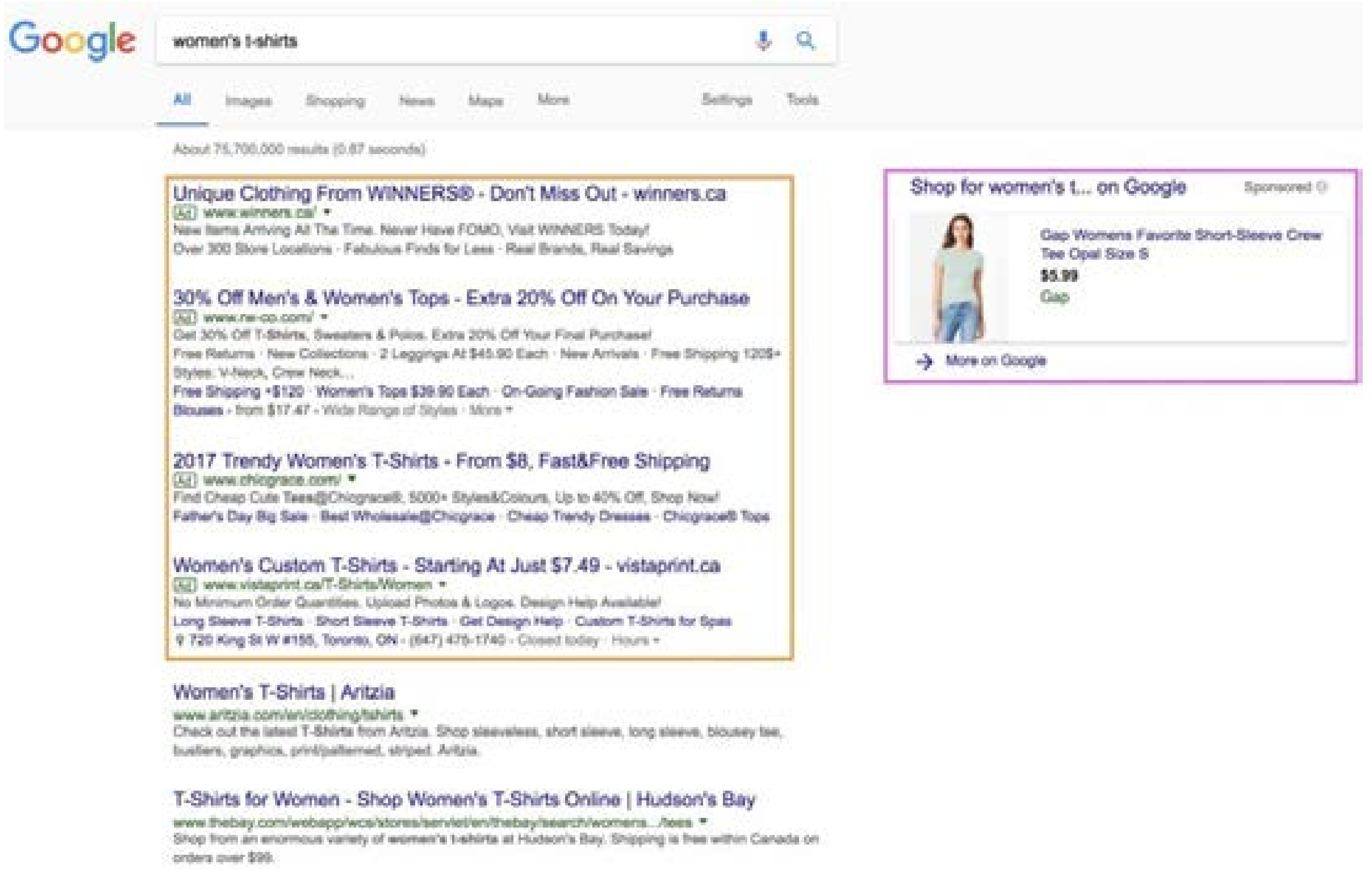
Search Engine Optimization (SEO) is a tool which helps to optimise the website based on specific keywords so that the site ranks higher in Google search results. Google ranks the websites based on whether the brand has answered all the search questions asked by customers. When customers search something on google they will find different types of results:

Unpaid (marked in red below)



Paid (marked in orange below)

Google shopping (marketed in purple below)



SEO strategy includes:

- Keyword search - keywords used by customers to search
- Site architecture - research is done on the keywords
- SEO - Technical - ensuring SEO crawls the site
- SEO on-page - Meta-tags and content is set Marketing content - content used to attract customers
- Analytics - tools such as google analytics is used to message SEO

B2B SEO campaigns are aimed to increase brand awareness and lead generation which will lead to an increase in conversion rate whereas B2C SEO aims to attract visitors to make immediate purchase. SEO has different use and impact in B2B vs B2C. SEO can help to increase traffic on the site which will in turn increase sales and ROI. Set a simple SEO strategy to gain competitive advantage.

P 7.14

Email Marketing

Email marketing in simple terms is sending marketing messages to leads and current customers through emails in order to promote, attract, and sell products to customers. e-Commerce being a digital, email marketing team has full control of retrieving customer information to send controlled and personalised content via email. Email acts as a tool which helps to build a relationship between the customer and the brand.

Why should email marketing be considered:

- Let's you build a relationship with current and further customers
- Helps in driving sales and increasing conversion rate
- Helps to multiply business growth
- Does not need a 3rd party such as Instagram or Facebook

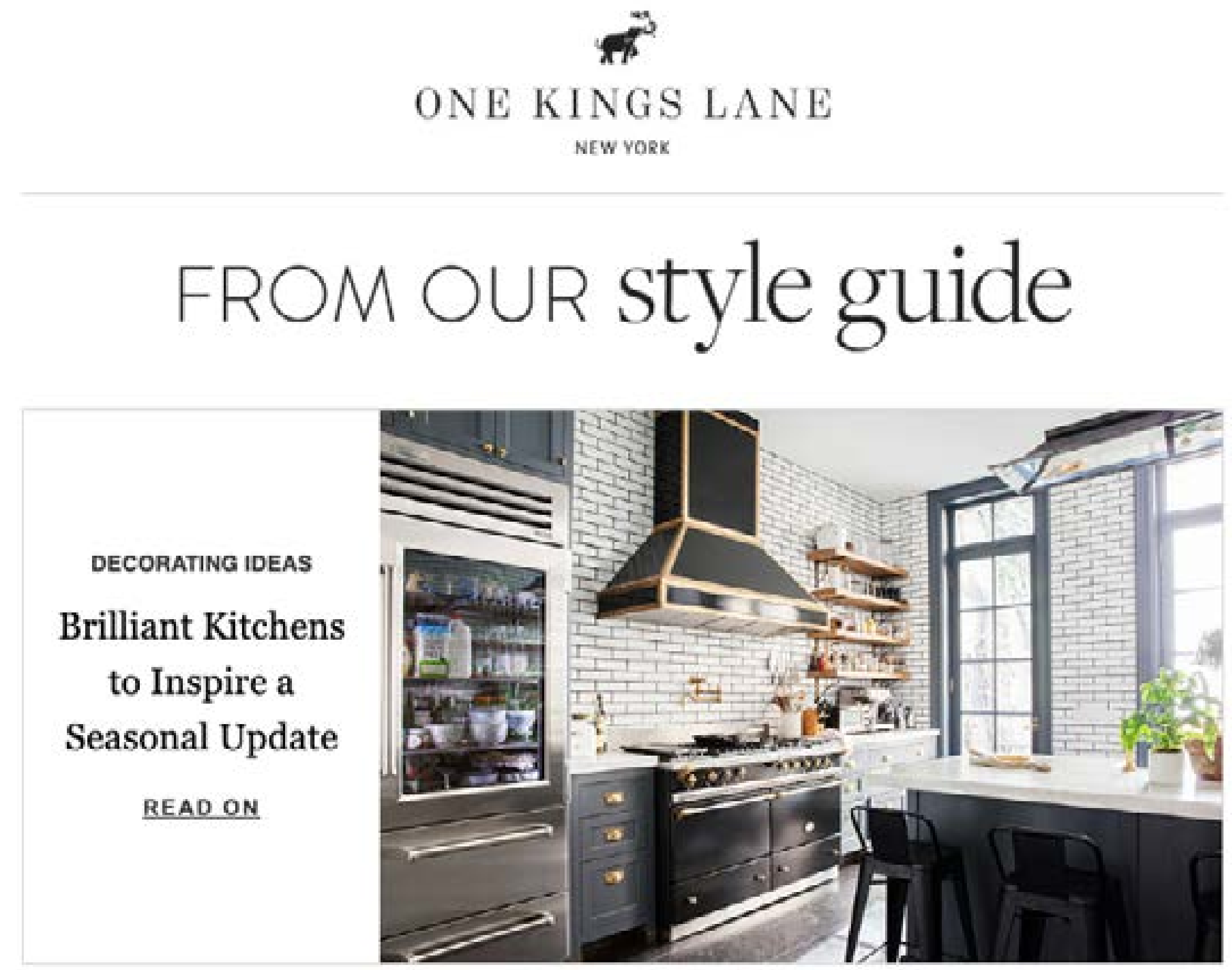
Some examples of email marketing:

Welcome Email

making the first impression last is essential in an e-commerce business If the first email sent to leads or new customers are effective it will last in the memory of the customer. Try to keep the design simple and original. For example, some brands provide discounts in the email when the customer signs up

Curated Email

One of the best forms of email sent to customers as it allows the subscribers to learn more about the product and you can also send curated emails based on customer segmentation



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Engagement Email

emails can easily be overlooked by customers but if the emails are set as engagement emails, the possibility of the email to be looked at without deleting is higher. Engagement emails can be in a form of campaign where the users are being provided with a promotion such as free shipping.

Referral Email

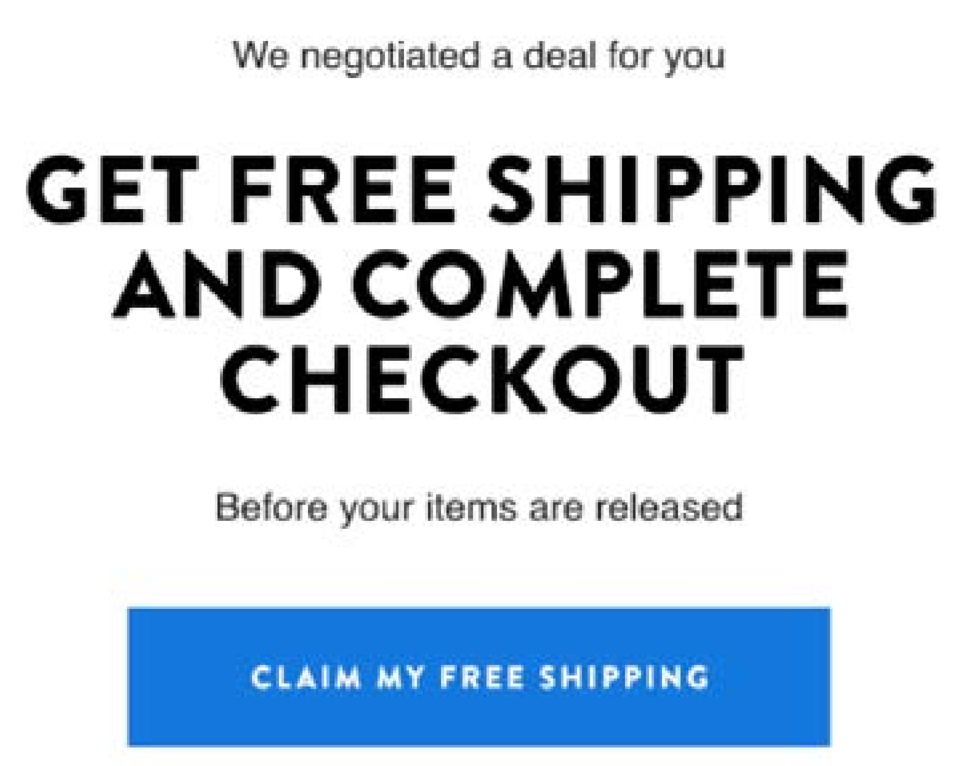
Word of mouth is one of the best marketing strategies. For example, sending an email to an existing customer such as 'Refer a Friend and Receive $10!!'. This will motivate the customer to spread the word around which would help the retailers gain more users

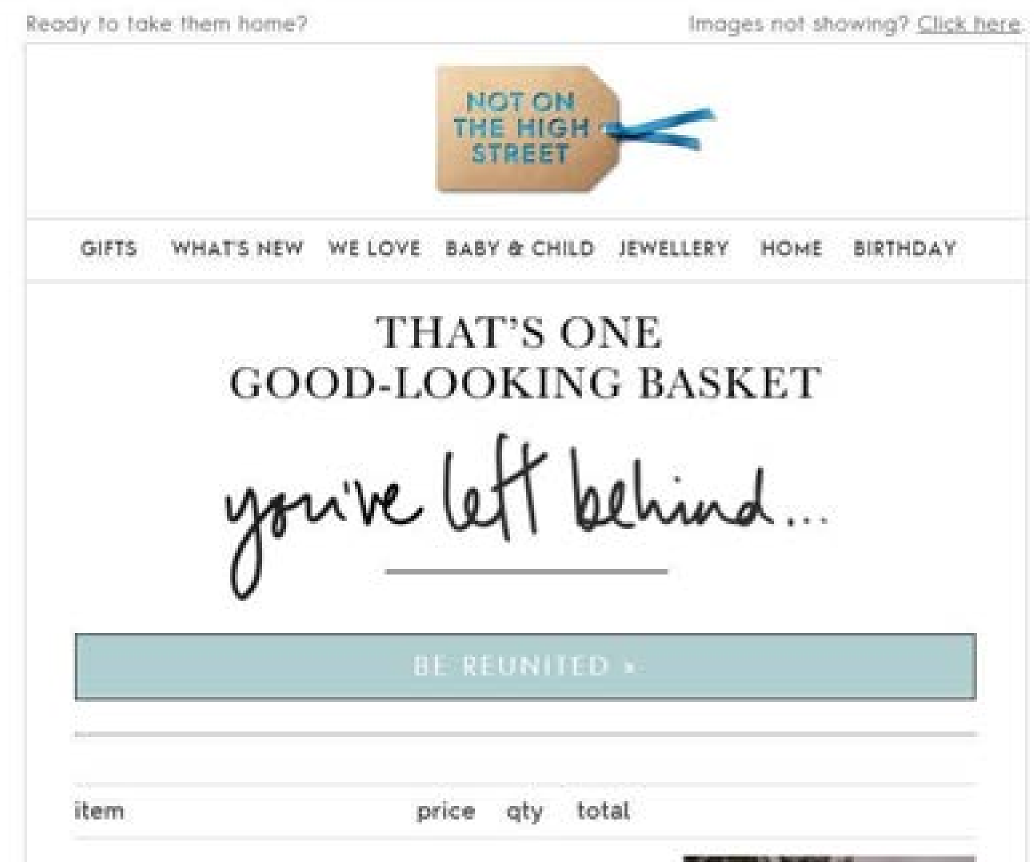
Discount Email

Offering discount via emails is an effective form of marketing strategy. Brands should offer the discounts to subscribers as it will help to retain their loyalty

Abandonment Email

There are times when customer abandoned their cart due to various reasons such as high shipping cots, return policy etc. But retailers can try to convert those customers to successful shoppers. Retailers can send the user a reminder email about the product they left in the cart by providing them with offers such as free shipping, discount or voucher for next purchase. this will help increase the conversion rate





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Order Confirmation Email

Order confirmation email not only helps to boost sales but also gives the customer the confidence that their order has been placed which increases customer experience and loyalty.

Survey Email

After the customer receives their order, retailers should send a follow-up survey email to understand how the experience was for the customer and areas of improvement. Some retailers also provide a gift voucher if the customer completes the survey as most of the time surveys are not completed since there is no motivation for the customer to do so.

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Personalisation

The baseline of e-Commerce business growth is customer loyalty. Keeping the customers happy is a combination of a lot of factors from products, content, checkout, customer and service experience. Personalisation depends on AI which tracks customer information in real-time and delivers a personalised unique experience. Personalisation might not work for all types of business but it's an additional feature which helped to drive traffic on the site.

Personalisation should:

- Meet customer needs
- Provide customers with appropriate product recommendation based on their history
- Segment their customers and products
- There are several personalisation examples such as:
- Customer Interest - Changing homepage and navigation based on customer profile, for example, if the user has visited the site previously and explored the women's section then next time when they enter the URL, they would be navigated to the women's homepage
- Recommended Products - Recommend products based on the customers browsing behaviour
- Search - Display personalised search results based on customers previous search behaviour
- Email - Send personalised emails about products if the customer has left the item in the cart or the product was out of order to send a notification it is back in stock etc.
- Geo-location - Displaying multiple geo-location of the site, for example, a customer visits the AU site, but the US site option is also displayed to give the customer a choice
- Discount Code - Display specific category discount codes to promote products of a particular category
- Complementary Products - Display complementary products when the customer visits a product e.g., customer visits a dress, and they can view complimentary products like shoes, bags and accessories that would go with the dress
- Personalised Homepage - Display a personalised homepage for the registered user to make them feel special

These are just some examples of personalisation. There are countless more features and capabilities that can be explored as per the requirement of the business. Keeping up with the constantly changing market trends can be difficult but does help to improve overall customer experience.

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Click and Collect

Click and Collect has become an integral part of omni-channel strategy of any company as it promotes increase in footfall, customer experience and ROI. Click and Collect is no longer just for big supermarkets, it is in-fact become a part of both B2B and B2C type of organisations.

10 tips that businesses should follow to deliver a good click and collect service:

1. Deliver

When deciding to implement click and collect, businesses need to consider how they will be delivering click and collect to customers such as:

Services types:

- Online payment and collect in-store: The user pays for the product online and once the payment is confirmed the store notifies the customer when the product is ready to be collected based on the customers store selection. Collecting payment first helps to reserve the product.
- Reserve product online, payment and collection in store: In this service type the customer does not require to pay online when booking the product. In this type of service, the customer can change their mind and might not purchase the product.
- Integration: Once the delivery type is decided, businesses need to decide on integration structure. Where will the orders be sent to, where the orders will be fulfilled. Stock can be fulfilled from either a central warehouse or directly from individual stores
- Returns: Returns can be complex hence it is required that businesses need to have a clear strategy to manage returns be it products delivered, or products ordered via click and collect. Businesses need to allow customers to return the products they have orders via click and collect to provide end to end customer service

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2. Promotion:

It is necessary that businesses market their click and collect service. If no one is aware of the service, then it will be so no use and will not generate the required return on investment. Even though click and collect services are usually the same it is still essential to explain to the customer the steps of click and collect.

3. Stock Availability:

Businesses need to display real time stock level to customers when they select click and collect while checking out a product. This will display the stock level to customers in their preferred store. For this to function to work as per requirement it is necessary that the warehouse and the e-commerce platform are integrated to keep the inventory levels in check to avoid customer complaints

4. Store Locator:

Businesses need to ensure they display all the store information from where the customers can collect their order through click and collect. The store should provide information such as store address, store timing – including public holidays and contact number.

5. Mobile Friendly:

With the growth of mobile user, businesses should take into consideration by designing the e-commerce website to be more responsive. Businesses should provide the same experience to customers on all devices

6. Store Options:

Some stores of the businesses might not in easily assessable to customers hence it is a good option to provide other locations for click and collect such as the post office, convenience store etc.)

7. Fulfilment Options:

If all the products being sold on the website aren't available for click and collect, then it is required that businesses display the shipping method provided for the product. This could be a bit inconvenient for customers hence it is a better option to provide maximum products for click and collect

8. Order Status:

Communication is key for customer service even when it comes to click and collect. Communicating the order status after purchase such as where and when they should collect their order and whether they require to bring any personal identification when coming to collect the order etc. The status should not only be communicated via SMS or email but also on the site under tracking order.

9. Additional Cost:

Some brands charge additional service cost if the order is less than a value for click and collect but research has shown that providing free click and collect increases footfall on the website and increases conversion rate which in turn increases ROI

10. Collection In-store:

No matter if the business is B2B or B2C, they all need to provide the best customer service. It is essential to provide in-store information to customers such as where in the shop is the collection point. Designate a well layed out section in the store for click and collect. Ensure customers do not have to wait long to collect their order. Also, some brands also provide click and collect parking, where the user enters the details for click and collect parking and the order is bough out to them by the store employees

These are just some examples of personalisation. There are countless more features and capabilities that can be explored as per the requirement of the business. Keeping up with the constantly changing market trends can be difficult but does help to improve overall customer experience.

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PWA

The future of shopping experiences, Progressive Web Application (PWA) is a next-generation web technology standard which delivers app-like shopping experiences via mobile and desktop devices. Using PWA, merchants can build their own high performance PWAs on top of their Commerce platform, which is proven to increase user engagement, boost conversion rates, and diversify revenue streams.

PWAs run in a browser but give users the experience of a native app through key features like:

- Access to the app through the mobile home screen
- Offline app access
- Push notifications

PWAs have been used by large enterprises to increase conversion rates and grow revenues, but also small and medium businesses can take advantage of the same technologies to create an app-like experience for their customers and expand their audience.

Why are PWAs so important to e-Commerce platforms?

- Reach a wider audience
- Reduce development costs and time
- Speed and accessibility
- Better conversion

08.

Checklist

Within this section:

1. Maturity Checklist
1. Go live Checklist
3. SEO Checklist
4. Deployment Checklist

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Maturity Checklist

The following lists highlight some specific high-level points; they are not meant to be exhaustive but aim to give some pointers and provide a basis for your own checklists. You and your Adobe Customer Success Manager can use the first checklist to qualify which of our recommendations from this document have been put in place.

On a scale of 0-5 please score your maturity based on the below topics addressed in this playbook:

- **Leadership** Executive buy-in and support for the successful management of a Commerce platform.
- **Strategy** Clarity and alignment around key business goals for evaluating digital performance and Commerce operations.
- **Solution** Hosting and infrastructure evaluation for varying business and Commerce requirements.
- **People** Resources, expertise, and the appropriate team structure to run Commerce Operations effectively.
- **Process** Procedures, project management, and workflows for managing a Commerce site effectively.
- **Product** General Commerce solutions, common integrations, and automations.

Item	Client Rating	Adobe	Comments
Leadership			
Strategy			
Solution			
People			
Process			
Product			

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Go live Checklist

Name	Recommendation/Setting	Status	Due Date	Assignmnet	Note
Application Best Practices					
Full page cache	enabled				
Full page cache auto generation	enabled				
JS merging	enabled				
CSS merging	enabled				
Magento log cleaning	enabled to clean logs > 30 days				
Flat tables	enabled				
ETags	commented out in htaccess to prevent FPC issue				
Session Validation Settings	lifetime: 2592000, cookie path: / , cookie domain: .domainname. com , Use HTTP only: Yes, Cookie Restriction Mode: No				

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Name	Recommendation/Setting	Status	Due Date	Assignmnet	Note
Application Best Practices					
Parralel Connections	utilize different domains for media, skin, and JS loadingenabled				
Correct Magento permissions	find . -type f -exec chmod 644 {} ; find . -type d -exec chmod 755 {} ;				
Correct Magento ownership	Webserver user should own the files				
Magento cron setup	Webserver user should have cron setup. Example: sudo crontab -u www-data -e				
htaccess	[devops to complete				
SSH user group	[devops to complete]				
rsync (for load balanced environment)	[devops to complete]				

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Name	Recommendation/Setting	Status	Due Date	Assignmnet	Note
Application Patches Installed					
Magento	for known issue of sessions messages not appearing on product pages				
Magento multi-store patch	for known issue of products disappearing on sites with > 1 store				
Magento admin product save SQL error					
BA cache clear module	required for cache clearing to work from admin in load balanced environments				
General Performance Settings					
Gzip compression	Enabled for text/plain application/xml text/css text/js text/xml application/x-javascript text/javascript application/json application/xml+rss				
Expires headers	Setting an Expires header on assets will prevent the browser from having to revalidate on every request				

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Name	Recommendation/Setting	Status	Due Date	Assignmnet	Note
General Performance Settings					
Minimize scaling image use	Confirm not utilizing HTML or CSS to scale down images on the page				
Compress media directory	Media and other images should be properly compressed for the web pre launch				
CSS sprites	Sprites should be utilized in order to minimize the number of HTTP requests when displaying images across the site				
Stylesheet placement	Stylesheets should be loaded in the HEAD tag or near the top of the page so that they are loaded quickly				
3rd party script placement	Scripts should be loaded near the end of a page as they can often block the rest of the page from loading				
Minify JS and CSS	Minifying JS and CSS will reduce the total file size of the served files				

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Name	Recommendation/Setting	Status	Due Date	Assignmnet	Note
General Performance Settings					
Redis/Memcache	redis or memcache needs to be utilized to store sessions, cache, and full page cache				
Utilize redis tag cleanup script	[devops complete]				
logrotate	enabled for load balanced environments				
Database cleaning	report_event and quote_tables should be configured where entries > 30 days old are removed				
Software Settings					
MySQL/Percona					
Version	Percona 5.5				
Check that all tables are of type INNODB	INNODB				
innodb_buffer_pool_size	41% Shared, 83% Dedicated				

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Name	Recommendation/Setting	Status	Due Date	Assignmnet	Note
Software Settings					
MySQL/Percona					
innodb_thread_concurrency	2 * [Number of CPUs] + 2				
thread_cache_size	8-16				
thread_concurrency	16-32				
table_cache / table_open_cache	1024				
query_cache_size	64M				
query_cache_limit	2M				
join_buffer_size	8M				
sort_buffer_size	8M				
MySQL Logging	Disabled				

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Name	Recommendation/Setting	Status	Due Date	Assignmnet	Note
PHP					
version	5.3+				
maxvar	[need devops]				
memory_limit	256M				
max_execution_time	1800				
realpath_cache_size	256K				
realpath_cache_ttl	86400				
Extensions needed	SOAP, PDO_MySQL, simplexml, mcrypt, hash,GD,DOM,iconv2 [need devops consult]				
Apache					

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Name	Recommendation/Setting	Status	Due Date	Assignmnet	Note
Redis					
Version	[need devops]				
daemonize	yes				
timeout	0				
loglevel	notice				
rdbcompression	no				
maxmemory	8000000000 (8GB)				
maxmemory-policy	volatile-lru				
auto-aof-rewrite-percentage	100				
auto-aof-rewrite-min-size	64mb				
slowlog-log-slower-than	10000				
slowlog-max-len	1024				
list-max-ziplist-entries	512				

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Name	Recommendation/Setting	Status	Due Date	Assignmnet	Note
Redis					
zset-max-ziplist-entries	128				
zset-max-ziplist-value	64				
activerehashing	yes				
web nodes can communicate to each other and DB					
port open for redis					

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Performance Checklist

Front-End Performance Checklist 20191

Below you'll find an overview of the front-end performance issues you might need to consider to ensure that your response times are fast and smooth.

Get Ready: Planning and Metrics

Establish a performance culture.

As long as there is no business buy-in, performance isn't going to sustain long-term. Study common complaints coming into customer service and see how improving performance can help relieve some of these problems. Build up a company-tailored case study with real data and business metrics. Plan out a loading sequence and trade-offs during the design process.

Be 20% faster than your fastest competitor.

Gather data on a device representative of your audience. Prefer real devices to simulations. Choose a Moto G4, a mid-range Samsung device, a good middle-of-the-road device like a Nexus 5X and a slow device like Alcatel 1X or Nexus 2. Alternatively, emulate mobile experience on desktop by testing on a throttled network (e.g. 150ms RTT, 1.5 Mbps down, 0.7

Mbps up) with a throttled CPU (5× slowdown). Then switch over to regular 3G, 4G and Wi-Fi.

Collect data, set up a spreadsheet, shave off 20%, and set up your goals (performance budgets).

Choose the right metrics.

Not every metric is equally important. Study what metrics matter most: usually it will be related to how fast you can start render most important pixels and how quickly you can provide input responsiveness. Prioritize page loading as perceived by your customers. Time to Interactive, First Input Delay, Hero Rendering Times, First Meaningful Paint, Speed Index usually matter.

Set up "clean" and "customer" profiles for testing.

Turn off anti-virus and background CPU tasks, remove background bandwidth transfers and test with a clean user profile without browser extensions to avoid skewed results. Study which extensions your customers use, and test with a dedicated "customer" profile as well.

Curated by Vitaly Friedman. Permanent URL: www.smashed.by/perf-checklist. January 7, 2019.

Share the checklist with your colleagues.

Make sure that the checklist is familiar to every member of your team. Every decision has performance implications, and your project would hugely benefit from front-end developers being actively involved. Map design decisions against the performance budget.

Setting Realistic Goals

100-millisecond response time, 60 frames per second.

Each frame of animation should complete in less than 16 milliseconds — ideally 10 milliseconds, thereby achieving 60 frames per second (1 second ÷ 60 = 16.6 milliseconds). Be optimistic and use the idle time wisely. For high pressure points like animation, it's best to do nothing else where you can and the absolute minimum where you can't. Estimated Input Latency should be below 50ms. Use idle time wisely, with the Idle Until Urgent approach.

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SpeedIndex < 1250, Time-To-Interactive < 5s on 3G.

The goal is a First Meaningful Paint under 1 sec (on a fast connection) and a SpeedIndex value of under 1250 ms. Considering the baseline being a $200 Android phone on a slow 3G, emulated at 400ms RTT and 400kbps transfer speed, aim for Time to Interactive < 5s, and for repeat visits, under 2–3s. Put your effort into getting these values as low as possible.

Critical payload chunk = 14KB, critical file size budget < 170KB

The first 14KB of the HTML is the most critical payload chunk — and the only part of the budget that can be delivered in the first roundtrip. To achieve goals stated above, operate within a critical file size budget of max. 170KB gzipped (0.7-0.8MB decompressed) which already would take up to 1s to parse and compile at 400ms RTT on an average phone.

Make sure your budgets change based on network conditions and hardware limitations.

Defining the Environment

Choose and set up your build tools.

Don't pay much attention to what's supposedly cool. As long as you are getting results fast and you have no issues maintaining your build process, you're doing just fine. The only exception might be Webpack which provides many useful optimization techniques such as code- splitting. If it's not in use yet, make sure to look in detail into code-splitting and tree-shaking.

Use progressive enhancement as a default.

Design and build the core experience first, and then enhance the experience with advanced features for capable browsers, creating resilient experiences. If your website runs fast on a

slow machine with a poor screen in a poor browser on a suboptimal network, then it will only run faster on a fast machine with a good browser on a decent network.

Choose a strong performance baseline.

JavaScript has the heaviest cost of the experience. With a 170KB budget that already contains the critical-path HTML/CSS/JavaScript, router, state management, utilities, framework and the app logic, thoroughly examine network transfer cost, the parse/compile time and the runtime cost of the framework of our choice.

Evaluate each framework and each dependency.

Not every project needs a framework, not every page of a SPA needs to load the framework. Be deliberate in your choices. Evaluate 3rd-party JS by exploring features, accessibility, stability, performance, package ecosystem, community, learning curve, documentation, tooling, track record, team, compatibility and security. Gatsby.js (React), Preact CLI, and PWA Starter

Kit provide reasonable defaults for fast loading out of the box on average mobile hardware.

Pick your battles wisely: React, Vue, Angular, Ember and Co.

Favor a framework that enables server-side rendering. Be sure to measure boot times in server- and client-rendered modes on mobile devices before settling on a framework.

Understand the nuts and bolts of the framework you'll be relying on. Look into the PRPL pattern and application shell architecture.

Optimize the performance of your APIs.

If many resources require data from an API, the API might become a performance bottleneck. Consider using GraphQL, a query language and a server-side runtime for executing queries by using a type system you define for your data. Unlike REST, GraphQL can retrieve all data in a single request, without over or

P 8.3

under-fetching data as it typically happens with REST.

Will you be using AMP or Instant Articles?

You can achieve good performance without them, but AMP might provide a solid performance framework, with a free CDN, while Instant Articles will boost your visibility and performance on Facebook. You could build progressive web AMPs, too.

Choose your CDN wisely.

Depending on how much dynamic data you have, you might be able to “outsource” some part of the content to a static site generator, push it to a CDN and serve a static version from it, thus avoiding database requests (JAMStack). Double-check that your CDN performs content compression and conversion, (e.g. image optimization in terms of formats, compression and resizing at the edge), support for servers workers and edge-side includes for you.

Build Optimizations

Set your priorities right.

Run an inventory on all of your assets (JavaScript, images, fonts, third-party scripts, “expensive” modules on the page), and break them down in groups. Define the basic core experience (fully accessible core content for legacy browsers), the enhanced experience (an enriched, full experience for capable browsers) and the extras (assets that aren’t absolutely required and that can be lazy-loaded).

Revisit the good ol’ “cutting-the-mustard” technique.

Send the core experience to legacy browsers and an enhanced experience to modern browsers. Use ES2015+ <script type=”module”> for loading JavaScript: modern browsers will interpret the script as a JavaScript module and run it as expected, while legacy browsers wouldn’t recognize it and hence ignore it. But: cheap Android phones will cut the mustard despite their limited memory and CPU capabilities, so consider feature detect Device Memory JavaScript API and fall back to “cutting the mustard”.

Parsing JavaScript is expensive, so keep it small.

With SPAs, you might need some time to initialize the app before you can render the page. Look for modules and techniques to speed up the initial rendering time (it can easily be 2–5x times higher on low-end mobile devices).

Use tree-shaking, scope hoisting and code-splitting to reduce payloads.

Tree-shaking is a way to clean up your build process by only including code that is actually used in production. Code-splitting splits your code base into “chunks” that are loaded on demand. Scope hoisting detects where import chaining can be flattened and converted into one inlined function without compromising the code. Make use of them via WebPack. Use an ahead-of-time compiler to offload some of the client-side rendering to the server.

Can you offload JavaScript into a Web Worker or WebAssembly?

As the code base evolves, UI performance bottlenecks will start showing up. It happens because DOM operations are running alongside your JS on the main thread. Consider moving these expensive operations to a background process that’s running on a different thread with web workers. Typical use case: prefetching data and PWAs. Consider compiling into WebAssembly which works best for computationally intensive web apps, such as web games.

Serve legacy code only to legacy browsers (differential serving).

Use babel-preset-env to only transpile ES2015+ features unsupported by the modern browsers you are targeting. Then set up two builds, one in ES6 and one in ES5. Old browsers could load legacy builds with script nomodule. For lodash, use babel-

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plugin-lodash that will load only

modules that you are using in your source. Transform generic lodash requires to cherry- picked ones to avoid code duplication.

Identify and rewrite legacy code with incremental decoupling.

Revisit your dependencies and assess how much time would be required to refactor or rewrite legacy code that has been causing trouble lately. First, set up metrics that tracks if the ratio of legacy code calls is staying constant or going down, not up. Publicly discourage the team from using the library and make sure that your CI alerts developers if it's used in pull requests.

Identify and remove unused CSS/JavaScript.

CSS and JavaScript code coverage in Chrome allows you to learn which code has been executed/applied and which hasn't. Once you've detected unused code, find those modules and lazy load with import(). Then repeat the coverage profile and validate that it's now shipping less code on initial load. Use Puppeteer to programmatically collect code coverage.

Trim the size of your JavaScript dependencies.

There's a high chance you're shipping full JavaScript libraries when you only need a fraction. To avoid the overhead, consider using webpack-libs-optimizations that removes unused methods and polyfills during the build process. Add bundle auditing into your regular workflow.

Are you using predictive prefetching for JavaScript chunks?

Use heuristics to decide when to preload JavaScript chunks. Guess.js is a set of tools that use Google Analytics data to determine which page a user is mostly likely to visit next. Note: you might be prompting the browser to consume unneeded data and prefetch undesirable pages, so it's a good idea to be quite conservative in the number of prefetched requests.

Consider micro-optimizations and progressive booting.

Use server-side rendering to get a quick first meaningful paint, but also include some minimal JS to keep the time-to-interactive close to the first meaningful paint. Then, either on demand or as time allows, boot non-essential parts of the app. Always break up the execution of functions into separate, asynchronous tasks. Where possible use requestIdleCallback.

Constrain the impact of third-party scripts.

Too often one single third-party script ends up calling a long tail of scripts. Consider using service workers by racing the resource download with a timeout. Establish a Content Security Policy (CSP) to restrict the impact of third-party scripts, e.g. disallowing the download of audio or video. Embed scripts via iframe, so scripts don't have access to the DOM. Sandbox them, too. To stress-test scripts, examine bottom-up summaries in Performance profile page (DevTools).

Set HTTP cache headers properly.

Double-check that expires, cache-control, max-age and other HTTP cache headers are set properly. In general, resources should be cacheable either for a very short time (if they are likely to change) or indefinitely (if they are static). Use cache-control: immutable, designed for fingerprinted static resources, to avoid revalidation. Check that you aren't sending unnecessary headers (such as x-powered-by, pragma, x-ua-compatible, expires).

Assets Optimizations

Use Brotli or Zopfli for plain text compression.

Brotli, a new lossless data format, is now supported in all modern browsers. It's more effective than Gzip and Deflate, compresses very slowly, but decompresses fast. Pre-compress static assets with Brotli+Gzip at the highest level, compress (dynamic) HTML on the fly with Brotli at level 1–4. Check for Brotli support on CDNs, too. Alternatively, you can look into using Zopfli on resources that don't change much — it encodes data to Deflate,

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Gzip and Zlib formats and is designed to be compressed once and downloaded many times.

Use responsive images and WebP.

As far as possible, use responsive images with srcset, sizes and the <picture> element. Make use of the WebP format, by serving WebP images with <picture> and a JPEG fallback or by using content negotiation (using Accept headers). Note: with WebP, you'll reduce the payload, but with JPEG you'll improve perceived performance, so users might see an actual image faster with a good ol' JPEG although WebP images might get faster through the network.

Are images properly optimized?

Use mozJPEG for JPEG compression, SVGO for SVG compression, Pingo for PNGs — or Squoosh for all of them. To check the efficiency of your responsive markup, you can use imaging-heap. For critical images, use progressive JPEGs and blur out unnecessary parts (by applying a Gaussian blur filter) and remove contrast (you can reapply it with CSS filters).

Are videos properly optimized?

Instead of animated GIFs, use either animated WebP (with GIF being a fallback) or looping inlined HTML5 videos. Make sure that your MP4s are processed with a multipass-encoding, blurred with the frei0r iirblur effect (if applicable) and moov atom metadata is moved to the head of the file, while your server accepts byte serving. Be prepared for the AV1 format which has good chances for becoming the ultimate standard for video on the web.

Are web fonts optimized?

Chances are high that the web fonts you are serving include glyphs and extra features that aren't really being used. Subset the fonts. Prefer WOFF2 and use WOFF as fallback. Display content in the fallback fonts right away, load fonts async (e.g. loadCSS), then switch the fonts, in that order. Ultimate solution: two-stage render, with a small supersubset first, and the rest of the family loaded async later. Preload 1–2 fonts of each family. Consider locally installed OS fonts. Don't forget to include font-display: optional and use Font Load Events for group repaints.

Delivery Optimizations

Load JavaScript asynchronously.

As developers, we have to explicitly tell the browser not to wait and to start rendering the page with the defer and async attributes in HTML. If you don't have to worry much about IE 9 and below, then prefer defer to async. With defer, browser doesn't execute scripts until HTML is parsed. So unless you need JS to execute before start render, it's better to use defer.

Lazy load expensive components with IntersectionObserver.

lazy-load all expensive components, such as heavy JavaScript, videos, iframes, widgets, and potentially images. The most performant way to do so is by using the Intersection Observer.

Also, watch out for the lazyload attribute that will allow us to specify which images and iframes should be lazy loaded, natively.

Push critical CSS quickly.

Collect all of the CSS required to start rendering the first visible portion of the page ("critical CSS" or "above-the-fold" CSS), and add it inline in the <head> of the page. Consider the conditional inlining approach. Alternatively, use HTTP/2 server push, but then you might need to create a cache-aware HTTP/2 server-push mechanism.

Experiment with regrouping your CSS rules.

Consider splitting the main CSS file out into its individual media queries. Avoid placing <link rel="stylesheet" /> before async snippets. If scripts don't depend on stylesheets, consider placing blocking scripts above blocking styles. If they do, split that JavaScript in two and load it either side of your CSS. Cache inlined CSS with a service worker and experiment with in-body CSS.

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Stream responses.

Streams provide an interface for reading or writing asynchronous chunks of data, only a subset of which might be available in memory at any given time. Instead of serving an empty UI shell and letting JavaScript populate it, let the service worker construct a stream where the shell comes from a cache, but the body comes from the network. HTML rendered during the initial nav request can then take full advantage of the browser's streaming HTML parser.

Consider making your components connection-/device memory-aware.

The Save-Data client hint request header allows us to customize the application and the payload to cost- and performance-constrained users. E.g, you could rewrite requests for high DPI images to low DPI images, remove web fonts and fancy parallax effects, turn off video autoplay, server pushes or even change how you deliver markup. Use Network InformationAPI to deliver variants of heavy components based on the network type. Dynamically adjustresources based on available device memory, too, with Device Memory API.

Warm up the connection to speed up delivery.

Use resource hints to save time on dns-prefetch (DNS lookup in the background), preconnect (start the connection handshake (DNS, TCP, TLS)), prefetch (request a resource) and preload (prefetch resources without executing them, among other things). When using preload, as must be defined or nothing loads; preloaded fonts without crossorigin attribute will double fetch.

Use service workers for caching and network fallbacks.

If your website is running over HTTPS, cache static assets in a service worker cache and store offline fallbacks (or even offline pages) and retrieve them from the user's machine, rather than going to the network. Store the app shell in the service worker's cache along with a few critical pages, such as offline page or frontpage. But: make sure the proper CORS response header exists for cross-origin resources, don't cache opaque responses and opt-in cross-origin image assets into CORS mode.

Use service workers on the CDN/Edge (e.g. for A/B testing).

With CDNs implementing service workers on the server, considerm them to tweak performance on the edge as well. E.g. in A/B tests, when HTML needs to vary its content for different users, use service workers on the CDNs to handle the logic. Or stream HTML rewriting to speed up sites that use Google Fonts.

Optimize rendering performance.

Isolate expensive components with CSS containment. Make sure that there is no lag when scrolling the page or when an element is animated, and that you're consistently hitting 60 frames per second. If that's not possible, then making the frames per second consistent is at least preferable to a mixed range of 60 to 15. Use CSS will-change to inform the browser about which elements will change.

Have you optimized rendering experience?

Don't underestimate the role of perceived performance. While loading assets, try to always be one step ahead of the customer, so the experience feels swift while there is quite a lothappening in the background. To keep the customer engaged, use skeleton screens instead of loading indicators and add transitions and animations.

HTTP/2

Get ready for HTTP/2.

HTTP/2 is supported very well and offers a performance boost. It isn't going anywhere, and in most cases, you're better off with it. Depending on how large your mobile user base is, you might need to send different builds, which would require you to adapt a different build process. (HTTP/2 is often slower on networks which have a noticeable packet loss rate.)

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Properly deploy HTTP/2.

You need to find a fine balance between packaging modules and loading many small modules in parallel. Break down your entire interface into many small modules; then group, compress and bundle them. Sending around 6–10 packages seems like a decent compromise (and isn't too bad for legacy browsers). Experiment and measure to find the right balance.

Do your servers and CDNs support HTTP/2?

Different servers and CDNs are probably going to support HTTP/2 differently. Use Is TLS Fast Yet? to check your options, or quickly look up which features you can expect to be supported. Enable BBR congestion control, set tcp_notsent_lowat to 16KB for HTTP/2 prioritization.

Is OCSP stapling enabled?

By enabling OCSP stapling on your server, you can speed up TLS handshakes. The OCSP protocol does not require the browser to spend time downloading and then searching a list for certificate information, hence reducing the time required for a handshake.

Have you adopted IPv6 yet?

Studies show that IPv6 makes websites 10 to 15% faster due to neighbor discovery (NDP) and route optimization. Update the DNS for IPv6 to stay bulletproof for the future. Just make sure that dual-stack support is provided across the network — it allows IPv6 and IPv4 to run simultaneously alongside each other. After all, IPv6 is not backwards-compatible.

Is HPACK compression in use?

If you're using HTTP/2, double-check that your servers implement HPACK compression for HTTP response headers to reduce unnecessary overhead. Because HTTP/2 servers are relatively new, they may not fully support the specification, with HPACK being an example. H2spec is a great (if very technically detailed) tool to check that.

Make sure the security on your server is bulletproof.

Double-check that your security headers are set properly, eliminate known vulnerabilities, and check your certificate. Make sure that all external plugins and tracking scripts are loaded via HTTPS, that cross-site scripting isn't possible and that both HTTP Strict Transport Security headers and Content Security Policy headers are properly set.

Testing and Monitoring

Monitor mixed-content warnings.

If you've recently migrated from HTTP to HTTPS, make sure to monitor both active and passive mixed-content warnings with tools such as Report-URI.io. You can also use Mixed Content Scan to scan your HTTPS-enabled website for mixed content.

Have you optimized your auditing and debugging workflow?

Invest time to study debugging and auditing techniques in your debugger, WebPageTest, Lighthouse and supercharge your text editor. E,g, you could drive WebPageTest from a Google Spreadsheet and incorporate accessibility, performance and SEO scores into your Travis setup with Lighthouse CI or straight into Webpack.

Have you tested in proxy browsers and legacy browsers?

Testing in Chrome and Firefox is not enough. Look into how your website works in proxy browsers and legacy browsers (including UC Browser and Opera Mini). Measure average Internet speed among your user base to avoid big surprises. Test with network throttling, and emulate a high-DPI device. BrowserStack is fantastic, but test on real devices, too.

Is continuous monitoring set up?

A good performance metrics is a combination of passive and active monitoring tools. Having a private instance of WebPagetest and using Lighthouse is always beneficial for quick tests, but also set up continuous monitoring with RUM tools such as

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SpeedTracker, Calibre, SpeedCurve and others. Set your own user-timing marks to measure and monitor business-specific metrics.

Quick wins

This list is quite comprehensive, and completing all of the optimizations might take quite a while. So if you had just 1 hour to get significant improvements, what would you do? Let's boil it all down to 12 low-hanging fruits. Obviously, before you start and once you finish, measure results, including start rendering time and SpeedIndex on 3G and cable connections.

- Measure the real world experience and set appropriate goals. A good goal to aim for is First Meaningful Paint < 1 s, a SpeedIndex value < 1250, Time to Interactive < 5s on slow 3G, for repeat visits, TTI < 2s. Optimize for start rendering time and time-to-interactive.
- Prepare critical CSS for your main templates, and include it in the <head> of the (Your budget is 14 KB). For CSS/JS, operate within a critical file size budget of max. 170KB zipped (0.7MB decompressed).
- Trim, optimize, defer and lazy-load as many scripts as possible, check lightweight alternatives and limit the impact of third-party
- Serve legacy code only to legacy browsers with <script type="module">.
- Experiment with regrouping your CSS rules and test in-body
- Add resource hints to speed up delivery with faster dns-lookup, preconnect, prefetch and preload.
- Subset web fonts and load them asynchronously, and utilize font-display in CSS for fast first rendering.
- Optimize images, and consider using WebP for critical pages (such as landing pages).
- Check that HTTP cache headers and security headers are set
- Enable Brotli or Zopfli compression on the server. (If that's not possible, don't forget to enable Gzip)
- If HTTP/2 is available, enable HPACK compression, and start monitoring mixed-content warnings. Enable OCSP
- If possible, cache assets such as fonts, styles, JavaScript and images in a service worker

Commerce Platform Migration Checklist

You are seeking a new e-commerce platform to build your online store. Or maybe, you might be on a mission to upgrade your current shopping cart with the latest technology.

If you run an active online store then even migration of a simple store would require thorough planning, seamless execution and a post-migration checkup to ensure minimum interruption for online shoppers and business overall. This checklist, with it's 95 points, should provide you with all of the necessary steps to do so.

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STEP 1: Platform Selection

Validate the target platform vs. your core business processes:

Step	Y/N
Shopper experience flow	
Content and product maintenance	
Order fulfilment	
Customer service	
Product promotions	
Marketing communication	
Customer services	

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STEP 2: Migration Planning Checklist

General Store Configuration:

Step	Y/N
Contact Phone	
Contact Email	
Supported countries and currencies	
Languages and local settings	
Time zone	
Shipping options and rates	
Tax rules and rates	
Payment gateways and PayPal	
Required custom e-Commerce platform extensions	
Web site domain and your store URLs	
SSL certificate	

Step	Y/N
PCI compliance requirements	
Up-time monitoring and alerts	
Security and malware scanning	
Data and content backup. Disaster recovery processes	

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STEP 3: Migration Planning - Product Catalog

Product Catalog Migration:

Step	Y/N
Map all standards and custom product attributes for the import/ export process	
Map old and new catalogue category structures	
Related Products	
Cross-Sell products	
Ups-sell products	
Price promotion rules	
Per product tax group settings	
Data feeds with POS inventory to other inventory systems	
Data feeds to other market places (eBay, Amazon, etc.)	
RSS Feed if any	

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STEP 4: Migration Planning - Storefront

Storefront style and content:

Step	Y/N
Branding style migration – logo, fonts, colours, images and photos	
The site main and secondary navigation, calls to action menus	
Validate responsive theme design on mobile phones and tablets	
Common page header	
Common page elements including fonts, icons, links, buttons, and content styles	
Home page	
Main category pages	
Subcategory pages	
Product detail pages	

Step	Y/N
Search results page	
Shopping cart page: cross-sell options	
Other non-product content pages	
Digital assets (PDF, images, videos)	
Links to external content (Videos, Blogs, Documents on third party sites) migration	
Sliders and banners	
Generic and custom widgets functionality mapping	
Data feeds inbound and outbound	
Product reviews module	

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STEP 5: Migration Planning - Checkout

Checkout Process:

Step	Y/N
Guest checkout options	
Shipping options	
Payment options	
Free shipping rules	
Order and account related transactional emails	

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STEP 6: Migration Planning - Data

Customs and orders data migration, validation and data QA:

Step	Y/N
Customer account	
Orders	
Credit memos	

STEP 7: Migration Planning - Policy Pages

Informational and Policy pages:

Step	Y/N
Privacy policy	
Terms of service policy	
Return and refund policy	
Customer service links	

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STEP 8: Migration Planning - Integration

Third-party sites and services Integration:

Step	Y/N
Shipping service providers	
E-mail marketing providers (Mailchimp, Constant Contact, Bronto, Listrak, Silverpop, etc.)	
Amazon, Ebay, Rakuten, Play.com or other market places integration	
Google Merchant Center data feeds	
Google Shopping Campaigns with Google Ads	
WordPress or other blog integration	
Permanent URL mapping and 301 redirects	
Search engine crawler settings - Robots.txt file	
Keywords research and optimization	
Google site maps	
Rich snippets	

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STEP 9: Migration Planning - Social Media

Social media content and integration:

Step	Y/N
Facebook	
Twitter	
Pintrest	
Instagram	
LinkedIn	
Google +	
Sales reports	
Customer reports	
Shopping cart reports	
Product Reports	

Step	Y/N
Reviews report	
On-site search terms report	
Web analytics reports	
Campaign reports	
Special reports	

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STEP 10: Migration Planning - Customer Communication

Customer communication and proactive customer care:

Step	Y/N
Email and online communication	
Customer service training	

09.

Templates

Requirements Pre-Workshop Questionnaire

Cover Sheet

Client	Name of Client
Project Title	Project Title
Project Sponsor	Name of Client Project Sponsor
Project Managers	• Name of Magento Project • Manager Name of Client Project Manager
Version	• This is a living document, and it is not formally version controlled. • Accordingly, there is no formal sign-off of the document as a whole. Rather, the information gathered in this document will be used to formulate the Project Charter. • The Project Charter is version controlled, and it will require a formal sign-off.
Overview	• This document describes the high-level requirements for the project. It specifies what the system will do as opposed to how it will do it; i.e., it is not a technical specification. • This document specifies only the changes to the Client's e-commerce platform; it does not specify existing functionality.

Business

Topic	Question	Client Response	Person Interviewed	Date Interviewed	Information Complete
Project Goals	What are the business goals for the new e-commerce platform?				No
	Who are the executive stakeholders (roles... CIO, Ecom Dir., etc.) from within your organization?				No
Project Staffing	How many of your IT Project Managers will be assigned to this project?				No
	How many of your Business Analysts will be assigned to this project?				No
	How many of your Technical Analysts will be assigned to this project?				No
	How many of your HTML Developers will be assigned to this project?				No
	How many of your PHP Developers will be assigned to this project?				No
	How many of your QA Engineers will be assigned to this project?				No
	How many of your System Administrators will be assigned to this project?				No

Topic	Question	Client Response	Person Interviewed	Date Interviewed	Information Complete
Project Staffing	How many of your Database Administrators will be assigned to this project?				No
	Have any members of your team been trained on Magento Enterprise Edition?				No
	How many of your Developers are Magento certified?				No
Documentation	What documentation exists for current business processes?				No
	What documentation exists for current system integrations?				No
	What documentation exists for current process flows?				No
	What documentation exists for current data flows?				No
	What documentation exists for current user stories?				No
	What documentation exists for current use cases?				No
	What documentation exists for “To Be” designs?				No
	What documentation exists for future-state business processes?				

Topic	Question	Client Response	Person Interviewed	Date Interviewed	Information Complete
Documentation	What documentation exists for future-state system integrations?				No
	What documentation exists for future-state process flows?				No
	What documentation exists for future-state data flows?				No
	What documentation exists for future-state user stories?				No
	What documentation exists for future-state use cases?				No
Project Dependencies	Is this project dependent on other system development projects?				No
	Are other projects dependent on this project?				No

Infrastructure

Question	Client Response	Person Interviewed	Date Interviewed	Information Complete
How is the current platform being hosted: Internal, hosting provider, private cloud servers, or hosted cloud servers?				No
Which environments does the current platform have: development, QA, pre-production, production?				No
What was your total annual online revenue over the past 12-month period?				No
What was the average order value of all online transactions over the past 12-month period?				No
Which region does the majority of your website traffic come from?				No
How many unique domains do you expect to have in production? E.g. “magento.com” and “magento.com/fr” are two separate domains				No
How many peak page views per hour do you expect on an average day across all unique domains? Please don’t include holiday and sale event traffic. Our proposal is built around the largest moment of your average day, rather than the biggest moment of your year.				No

Question	Client Response	Person Interviewed	Date Interviewed	Information Complete
How many peak orders per hour do you expect on an average day across all unique domains? Please don’t include holiday and sale event traffic. Our proposal is built around the largest moment of your average day, rather than the biggest moment of your year.				No
Do you expect to cross more than 500 concurrent visitors to your online store on an average day (outside of holiday or other promotional sale events)?				No
If you answered “Yes” to the above question, how many concurrent visitors to your online store do you expect on an average day?				No
How much higher is your web traffic on holiday/promotion days compared to an average day?				No
How many holiday/promotion sales events do you expect to have in a year?				No
How many total simple SKUs do you plan to sell across all your domains?				No
How many total complex SKUs do you plan to sell online?				No
How many total simple SKUs do you plan to sell across all your domains?				No

Question	Client Response	Person Interviewed	Date Interviewed	Information Complete
How many total complex SKUs do you plan to sell online?				No
How many categories/sub-categories of products do you plan to sell online? Please include all levels of sub categories.				No
How much storage are you currently using for your production environment (not including copies of the site, database dumps, backups, etc.)? Enter amounts in GBs				No
What percentage of the storage amount entered above is used for media files (images, pdfs, other assets)?				No
How many concurrent back-office users will log in at peak for an average day?				No
Do you need to use your own SSL? For example, do you need an Extended Validation SSL Certificate?				No

Feature function

Site Users /Customers	Answers
Which languages will be available for users to view in?	
Which currencies be available for users to view prices in?	
Who are the primary Users of the site? How would you break them into segments if you could describe each person?	
Who are the secondary users of the site, if any? Do you market to more then one audience?	
What user data are you currently collecting?	
Are your customer passwords currently encrypted?	
Do you have any customer segmentation or group setups we need to be aware of?	
Are we migrating any customer data beyond name, email, shipping address?	
Are we migration promotions, group discounts? Etc.?	
Is there anything else related to your customer we should know?	

Products	Answers
What type of product configurations does your site need?	
How many product attributes do you typically have per product?	
Will products need to be migrated from another system? Name of system if applicable.	
Will the site need to integrate to other systems? Please list:	
How many products will you launch the site with?	
Do you allow pre or back orders?	
Are you interested in utilizing promotions and marketing solutions in Magento Enterprise?	
Do you have wholesale pricing? Will a B2B site be part of the project?	
Do you have any additional special pricing? Example: tiered pricing	
Do you have any special compliance requirements for online sales?	
Do you have downloadable products?	
Do you have prepacks? Do you allow a customer to combine items to make custom packs?	
Do you do any product customizations? Ex: Embroidery, Logo’s	
Is there anything else related to Products we should know?	

Shipping/Payments/Tax	Answers
What shipping carriers do you foresee using? On the site? Examples: Fexex, UPS, USPS	
Are there any unique shipping requirements related to your products? Example: Dimensions, weight, handling fee's, perishable items, controlled restrictions?	
Do you ship internationally? What are the country/region restrictions? Any additional restrictions for international such as carrier, products, etc?	
Do you have an existing payment gateway? Examples: Authorize.net, PayflowPro, Chase. Will this remain with the new site?	
Do you accept Net 30?	
Do you have any subscriptions or auto fulfilment programs? Please describe:	
Is there anything else about shipping or payments we should know?	
What is your tax strategy?	
Are you in one state and collect tax at the state level? If you collect at the state level is the tax the same statewide or is it determined by the county or city?	
Do you have warehouse locations throughout the US? If so where are your warehouse locations?	
Are all products taxable?	
Do you need VAT set-up?	
Is there anything else related to taxes we should know?	

Integrations	Answers
Will the site need to integrate to other systems? Please list:	
Will we be intergrating with a order management/ ERP? Name and Details of system:	
What do you use for your Digitial Marketing Campaigns (DMP)?	
Do you have a separate shipping system we need to connect with? Name and details of system:	
Do you have a separate shipping system we need to connect with? Name and details of system:	
Do you have physical stores? How many?	
Do you have a Point of Sale System (POS) we need to connect with? Name and details of system:	
Do you leverage 3rd party feeds or compariosn shopping engines such as Google shopping, Bing Shopping, The Find, Shopzilla etc? Please list each feed:	
Do you sell via resellers or affiliates? Examples: Amazon.com, Buy.com, Ebay.com, Sears.com. Please list each one:	
Who is your email service provider?	
What anylitics package(S) do you use?	
Will A/B split testing be a requirement?	
Are you interested in Retargeting?	

Integrations	Answers
Are there any other systems such as a CRM, help desk, of call center you want to intergrate? Please list:	
Are there any customer reviews, videos, or social networking integrations you want to include in your website? Please list:	

Search/UX	Answers
Will the site need to integrate to other systems? Please list:	
Will we be intergrating with a order management/ ERP? Name and Details of system:	
What do you use for your Digitial Marketing Campaigns (DMP)?	
Do you have a separate shipping system we need to connect with? Name and details of system:	
Do you have a separate shipping system we need to connect with? Name and details of system:	
Do you have physical stores? How many?	
Do you have a Point of Sale System (POS) we need to connect with? Name and details of system:	

Search/UX	Answers
Do you leverage 3rd party feeds or compariosn shopping engines such as Google shopping, Bing Shopping, The Find, Shopzilla etc? Please list each feed:	
Do you sell via resellers or affiliates? Examples: Amazon.com, Buy.com, Ebay.com, Sears.com. Please list each one:	
Who is your email service provider?	
What anylitics package(S) do you use?	
Will A/B split testing be a requirement?	
Are you interested in Retargeting?	
Are there any other systems such as a CRM, help desk, of call center you want to intergrate? Please list:	
Are there any customer reviews, videos, or social networking integrations you want to include in your website? Please list:	
What redesign strategy are you interested in?	
Do you have an inhouse graphic designer? Will they be working on the website redesign?	
Do you have a design/marketing firm managing your brand?	
Do you have brand standards./guidelines?	
Do you have product photography? Stock photography?	

Search/UX	Answers
Binary Anvil typically creates designs for the home page, categroy page, product detail page, and a genric content page. Do you anticipate a need for design comps outside of these typical pages and if so which ones? Example: Checkout, cart, blog, forum, etc.	
Do you plan to deploy multiple store fronts using Magento’s Multistore functionality? Please list:	
Is there anything else related to design we should know?	

Additional Functionality	Answers
Store Locator?	
One Page Checkout?	
Product Image Labels?	
Authorize.net CIM Module?	
RMA?	
Rewards/Loyalty Progrmas?	
Abandoned Cart Module?	
Gift Registry?	
Gift Cards/Gift Cerficates?	

Additional Functionality	Answers
360 Degree Product Views?	
Product Video's	
Left in Stock Flag	
Pop-up/Mini Cart?	
Virtual Catalog/Lookbook?	
Affiliate/Ambassador Marketing?	
Stock Notifications (Notify me when it's back in stock)	
Online Exchanges?	
Discounts/Coupons?	
Events?	
Order Cancellation?	
Store Credits?	
Rebates?	
Recommendations?	
Ratings and Reviews?	
Royalties?	

Additional Functionality	Answers
Wishlists?	
Upsell/Cross-sell?	
Private Sales Events by Customer Group?	
Newsletters?	
Gift Wrapping?	
Gift Message?	

Commerce Strategy Document

Document Control

Document Title	Commerce Strategy Document. Document sub-title
Authors	Deepthi Amirthagadeswaran
Document Purpose	

Version Control

Verion Number	Date	Author	Comments
1	7/27/2020	Deepthi	
2			

References / Associated Documentationl

The table of references shown below provides a list of those documents that have been directly used to create this document.

Ref.	Version	Date	Author/Sender	Title/Filename
1	1.0		Adobe_experiece_cloud_ guidelines.pdf	

Executive summary

<Place Executive Summary text here, in the same format. Use 'Paste in Destination Format' or 'Paste as plain text only' option while moving text into this section>

Purpose of the Document

The purpose of this document is to provide a contextual, strategic point of view (POV), expound on features and use cases, and convey additional details and clarification on specific topics for a Commerce Strategy review based upon <CLIENT_NAME> requirements, needs, and aspirations captured during the Discovery sessions conducted during <DATE_RANGE>. During this period, Adobe Commerce Strategy conducted a series of calls with various members of the IT and Management team at <CLIENT_NAME>, which has provided a clear understanding and scope for a Commerce Strategy Review.

These interviews have led to a review of the developments of the company in past years, a view of its vision for the near and longer-term future and for the foundation <CLIENT_NAME> requires in order to anticipate the desired growth and use the current technology set-up to achieve that growth.

This document will offer functional recommendations, best practices, and insights that should be considered for a renewed/revised Commerce Strategy. Specific topics and areas discussed in the document were purposely chosen, for a full list of requirements and customizations and the technical approach, please consult the Feature Matrix and Architectural Vision deliverables.

Definitions

For the purposes of this document, the following definitions and acronyms will represent the following:

- "3P" means Third-Party
- "AOV" means Average Order Value
- "BAU" means Business As Usual
- "BI" means Business Intelligence
- "CDN" means Content Delivery Network
- "CRM" means Customer Relationship Management system
- "CTA" means Call To Action
- "CX" means Customer Experience, which entails all touchpoints with your brand, both online and offline, pre-sale and post-sale, and is inclusive of the User Experience
- "ERP" means Enterprise Resource Planning system
- "ESP" means Email Service Provider
- "GA" means Google Analytics
- "KPI" means Key Performance Indictors
- "MAP" means Minimum Advertised Price or the lowest price a retailer can advertise a product
- "MBI" means Magento Business Intelligence
- "OOTB" means Out of the Box
- "PDP" means Product Detail Page
- "PIM" means Product Information Management system
- "PLA" means Product Listing Ads
- "POV" means Point Of View
- "ROI" means Return on Investment
- "SaaS" means Software as a Service
- "SERP" means Search Engine Results Page
- "SOR" means System of Record
- "SSOT" means Single Source of Truth
- "TCO" means Total Cost of Ownership

- “UI” means User Interface
- “UGC” means User Generated Content
- “UX” means User Experience
- “WYSIWYG” refers to a ‘What You See Is What You Get’ editor

Special Icons

Throughout this document, there are special sections that contain additional information. The corresponding icons below denote the special area purpose:

Commerce Strategy Review

The Commerce Strategy Review, in this case, relates to the process of modifying, updating, and adapting business and organizational technologies due to the everchanging, fluid landscape in order to achieve a competitive advantage and to ensure maximum scalability, sustainability, extensibility, and manageability.

At Magento Commerce Strategy, we concentrate on four, disparate, intersecting areas of a Digital Transformation Venn Diagram when developing Commerce Strategy Reviews & sub-sequent strategies (as observed in Figure 1):

- Systems
- Processes
- Data & Innovation
- Resources

Figure 1 – Digital Transformation

Once companies embrace any kind of digital transformation and review of its current setup and processes, it is not a project with a defined end date. As organizations continue to grow, diversify, and evolve, the resulting commerce strategy approach can continue in perpetuity as new technologies emerge, and eventually adopted.

When viewing the initial <CLIENT_NAME> Commerce Strategy project phase through the lens of the Venn Diagram (Figure 1.), the first component Systems will be one of the primary drivers of the review.

Next, when legacy systems are being replaced or new technology is brought in, this invariably requires Process changes from normal operational BAU.

Also, with any existing or newly implemented platform, which data is integrated and how the data is distributed and utilized becomes a major component of a successful strategy.

Lastly, Resources mostly points to people. There may be a need, for instance, for additional training on the existing systems or additional resources that might be needed to perform revised day-to-day operations or where resources will need to be reassigned or added.

Throughout this document we will concentrate on the areas where Commerce Strategy Review has occurred, denote, where valid, how the four (4) components listed above are affected and offer recommendations, best practices, and future considerations to contemplate. When one of the four (4) components from the Venn Diagram is mentioned within this document, it will be bolded to facilitate reviewing the document.

<CLIENT_NAME> Company History

<Place company history text here, in the same format. Use ‘Paste in Destination Format’ or ‘Paste as plain text only’ option while moving text into this section>

Engagement Overview

Reasons to Act

<Place ‘Reasons to Act now’ text here, in the same format. Use ‘Paste in Destination Format’ or ‘Paste as plain text only’ option while moving text into this section>

<Highlight relevant Magento features/ stats. E.g. ‘Did you know Magento has a robust ecosystem of 315,000 developers and a network of 1,150+ highly-trained technology and solution partners?’>

Challenges & Risks

<Place 'Challenges & Risks' text here, in the same format. Use 'Paste in Destination Format' or 'Paste as plain text only' option while moving text into this section>

Critical Success Factors

<Place 'Critical Success Factors' text here, in the same format.

E.g. Architecture & Technology, Using Metrics to drive actionable insights, Increase conversion & Customer acquisition, Focus.

Use 'Paste in Destination Format' or 'Paste as plain text only' option while moving text into this section>

Products

<Summary of inferences & recommendations. E.g. Recommendations of new systems & benefits of the same>

<Place 'Products overview' text here, in the same format. Use 'Paste in Destination Format' or 'Paste as plain text only' option while moving text into this section>

Sales/ Orders

<Place 'Sales/Orders Overview' text here, in the same format. Use 'Paste in Destination Format' or 'Paste as plain text only' option while moving text into this section>

<Sample chart – categorizing types of orders>

Table 1 – Order Types Chart <SAMPLE ONLY>

Order Type	Origination Type	System of Record
Online	Magento Commerce Platform	Salesforce CRM
Retail	PoS system	Salesforce CRM
Phone	Entered into Salesforce CRM	Salesforce CRM

Returns/ Refunds

<Place text here regarding how refunds & reruns are handled, what are the departments/teams involved, the criteria, mechanism to tie it back to Magento, customer payments execution, followed by recommendations to improve the existing process.

Use 'Paste in Destination Format' or 'Paste as plain text only' option while moving text into this section>

Omni-channel Order Customer Experience

<Place text here, in the same format, corresponding to the list of recommendations. Use 'Paste in Destination Format' or 'Paste as plain text only' option while moving text into this section>

E.g. Recommendations for one-click orders using Magento Commerce platform:

https://docs.magento.com/user-guide/customers/account-dashboard-requisition-lists.html

Marketing

Marketing operations is another area which can help drive significant growth of both revenue and the double-opted-in customer database. As this will be key going forward, we have investigated a number of aspects, which are reviewed in detail below:

Email Marketing

<Place text here, in the same format, corresponding to the list of recommendations for email marketing. Use 'Paste in Destination Format' or 'Paste as plain text only' option while moving text into this section>

Transactional/ Operational Emails

<Place text here, in the same format, corresponding to the list of recommendations for transactiona/operational emails. Use 'Paste in Destination Format' or 'Paste as plain text only' option while moving text into this section>

Personalization

<Place text here, in the same format, corresponding to the list of recommendations for personalization. Use 'Paste in Destination Format' or 'Paste as plain text only' option while moving text into this section>

<BELOW ARE 2 SAMPLE RECOMMENDATIONS ONLY. TO BE REVIEWED BEFORE INCORPORATING IN A CLIENT DELIVERABLE>

Sample recommendations for personalization:

- Listed below are some basic product features in a Personalization platform:

- Product Recommendations
- Search
- Browse
- Merchandising
- Content
- Ability to personalize the User Experience (UX)
- Trigged Messages
- Email or built-in integration to ESP
- Multivariate Testing (MVT)
- Individual Customer Profile
- Chatbots
- AI/PI/machine learning
- Flexibility to use automation or manually setup campaigns

Once a Personalization platform is selected and implemented, it is certainly tempting to deploy as much of a Personalization suite's features immediately. However, we always recommend ramping up slowly and employing a 'crawl, walk, run, fly' approach. Otherwise we've found that retailers quickly become overwhelmed and are unable to properly measure the effectiveness of their Personalization program.

When initially launching a Personalization campaign it is recommended to test all new features and Customer engagement to ensure they are leading to positive impacts and your customers are interacting and adopting, before deploying sitewide.

It would be highly recommended to test the newly added "Adobe Sensei" AI technology that is now part of the Magento Commerce technology. Deploying a personalized product recommendations campaign would not require any immediate UX changes but could prominently serve more relevant products to your customers with additional products and accessories listed to drive margin and sales.

Next, you can easily display different content and banners to customers based upon their personalized results.

Once Product Recommendations are working successfully, you might want to consider using a Personalization engine to merchandise your product listing and search results pages. Using the Personalization platform's algorithm to render product results will eliminate merchandisers having to manually prioritize product and search results listing pages and offer much more topical products based upon the user's preferences, interactions, and browsing and buying behavior.

<Summary of best practices & recommendations along with dependencies to be aware of for personalization. E.g. search and browse should always be inextricably tied together so that behavior on one influences the other. It is never good CX or UX when a customer is browsing for specific products and then performs a search and the results are unrelated to their previous browse behavior>

Client Interaction

<Place text here, in the same format, corresponding to the list of recommendations for client interactions. Use 'Paste in Destination Format' or 'Paste as plain text only' option while moving text into this section>

<BELOW IS A SAMPLE CONTENT – TO BE REVIEWED BEFORE INCORPORATING IN A CLIENT DELIVERABLE>

Part of the challenge of E-commerce is always that the interaction with the customer takes place online as opposed to in "real life". However, there are many ways that this can be addressed:

- Customer reviews
- Customer forum
- Customer service support

E-commerce Operational Readiness

This section offers a high-level review of your organization's operational readiness based upon the conversations and interaction with your resources and operations.

Technology Readiness

<Place text here, in the same format, Use 'Paste in Destination Format' or 'Paste as plain text only' option while moving text into this section>

Infrastructure Readiness

<Place text here, in the same format, Use 'Paste in Destination Format' or 'Paste as plain text only' option while moving text into this section>

Organizational Readiness

<Place text here, in the same format, Use 'Paste in Destination Format' or 'Paste as plain text only' option while moving text into this section>

<SAMPLE CONTENT ONLY - TO BE REVIEWED BEFORE INCORPORATING IN A CLIENT DELIVERABLE>

This can be broadly broken down in terms of three components:

- E-commerce team
- Training
- IT

E-commerce Team

Most of our clients do have a dedicated e-commerce team that oversees the day-to-day operations, innovation, future vision, maintenance, and are involved in decisions around the technology stack. Whilst the roles described below are not vital for every organization and can be fulfilled to a degree by existing staff. What you might typically see in an e-commerce team are the following roles:

- Product specialist
- Data specialist
- Campaign marketeer
- Social Media specialist
- Analyst
- SEO/SEA specialist
- E-commerce Manager

Product Specialist

The product specialist is the person who should be responsible for onboarding and enriching the online product data. It is vital that you do have a person responsible for making sure not only that all data is consistent across your Product Pages, but also that the quality is good enough for delivery online. For instance, the Product Specialist will make sure there are no missing pictures, no missing or inconsistent copy, no varying data formats and so on. It should be the product specialist's role to make sure the data was enriched to the right quality standard to be put on-line.

Data Specialist

The Data Specialist is responsible for building, personalizing and optimizing the experience and going beyond "just product data". They will be defining target audiences, understanding customer journeys, personalizing these journeys, A/B testing – which message really makes sense for your target audience at this time. The Data specialist is responsible for ensuring that not only your e-commerce team but also the wider organization (think Customer Service) has the right data to make the correct decisions.

Campaign Marketeer

The Campaign Marketeer will be handling marketing across all channels (such as via merchandizing, email marketing, paid media, print, promotion handling etc) This role should have the responsibility and budgets to make sure you are expanding your advertising and work on increasing awareness to both your existing customers and the wider market. In addition, the campaign marketeer delivers an analysis daily of money spent on each of your channels vs. money gained through the campaigns that are executed.

Social Media Specialist

Working closely with the Campaign Marketeer (initially this could be a joint role within the team) is the Social Media specialist. This person will monitor and manage all social media channels, determine which channels are the most successful for <CLIENT_NAME> products, determine where and when to place relevant social media Ads and manage influencers. Equally, the Social Media specialist works closely with the Campaign Marketeer to make sure stories are aligned and timing is congruent. Lastly – both Campaign Marketeer and Social Media specialist liaise with the E-commerce IT Team to make sure the latter are aware of expected peaks due to promotions. Ideally the latter communication is on a structured basis, such as a daily or weekly forecast of expected traffic so measures can be taken in advance or at least to create awareness and speedy responses regarding site performance if necessary.

Analyst

A key role is that of an Analyst who captures and tracks core KPIs like Net Promotor Scores, returns, price comparisons with competitors and the likes. He/she will be working closely with all the specialists and brings the data together. The analyst will be able to constantly provide visibility of what is happening in the market and what is happening with <CLIENT_NAME> customers and the growth and use of the (double-opted in) customer database.

Separately – your data analyst should constantly be measuring your key e-Commerce metrics, such as traffic, AOV, time between orders, customer lifetime value, acquisition costs, etc., An example graph has been presented below (Figure 2) to show what type of metrics should be measured from year to year.

Figure 2 – SAMPLE E-commerce Metrics

SEO/SEA Specialist

Most companies will have someone that focuses specifically on SEO/SEA. We have always preferred one team that focuses specifically on this topic as it really supports the funnel of how well your customers know where, when and how to find your online store. SEO is key as it does not necessarily need to cost a big amount of money and will highlight how well your branding strategy works – however, SEA could generate a separate revenue stream bringing substantial revenue. SEA can also play a big role in making sure the brand reaches the right audience. Budgets should be carefully monitored to make sure no funds are spent, and messaging is actually reaching the target audience.

E-commerce Manager

The E-commerce Manager will ensure the E-commerce team has clear goals and clear targets every single day. The E-commerce Manager will make sure the team tests everything before it goes live and that the team clearly understand the goals and objectives of that day, week, month and even year to come.

<CLIENT_SPECIFIC_RECOMMENDATIONS_BASED_ON_ABOVE>

Training

Magento offers both functional business user and technical training through our online Magento U courses. During COVID-19, Adobe has made all on-demand training free of charge to our clients. We would therefore highly recommend that the various departments working with Magento (IT, Creative/Digital Marketing, Customer Service, Product teams) would take the opportunity to really familiarize themselves with the platform.

<Place text here, in the same format, Use ‘Paste in Destination Format’ or ‘Paste as plain text only’ option while moving text into this section>

Reporting

The ability to have better visibility to reports, analytics, KPIs, and metrics is a crucial goal of this Commerce Strategy Review effort.

<Place text here, in the same format, Use ‘Paste in Destination Format’ or ‘Paste as plain text only’ option while moving text into this section>

<Summary of best practices & recommendations along with sample options. E.g. Tools that are compatible with Adobe Commerce Cloud>

E-Commerce Platform Features (this is an example and is dependent on business requirements)

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Portfolio	Shop portfolio should be local on-site/store level (affects P&A + check-out)			
	Search portfolio should be larger than Shop portfolio and it should be common to all sites (global)			
	Local Shop/Search portfolio should include spare parts (AE Service + MHS)			
	Local Shop/Search portfolio should include software products			
Search	Search by product name, part number or material description (short-text)			
	Search by customer material number			
	Search by serial number (Mobile Hydraulics Independent After-market, Eletric Drives and Controls spare parts)			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Search	Search by manufacturer part number (Mobile Hydraulics Independent After-Market materials)			
	Ability to handle indexing from two different data sources (if search by serial number and/ or manufacturer part number required)			
Search - Sort results	Sort by relevance (relevance is set automatically - can be changed by user)			
	Sort by product name and material description			
	Sort by service products (spare part, repair,...)			
	Sort by lead-time			
	Flexibility to optimize on-site search ongoing, based on user feedback/analytics			
Search - Filter results	Filter products included in local Shop portfolio (filter is set automatically - can be removed by the user)			
	Filter by the delivery program (e.g. GoTo)			
	Filter by lead-time			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Filter results	Filter by product group			
	Filter by service products (spare part, repair,...)			
Catalog - Sort results	Sort by relevance (relevance is set automatically - can be changed by user; is differnet then for search)			
	Sort by price (local recommended retail price)			
	Sort by lead-time			
Catalog - Filter results	Filter by product attributes/parameters, e.g. diameter, etc.			
	Flexibility to optimize filter criteria ongoing, based on user feedback/analytics (PIM and front-end)			
Catalog	Automatic catalog management with PIM (store views, languages, product assortment)			
	Seamless updating when products in the PIM change			
	Good performance (fast load times during filtering)			
	State of the art Google indexing			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Catalog	Ability to optimize filtered navigation at every level (category to attribute filtering), e.g. by deleting filters, adding pictures, change order of filters, or create new filter groups.			
	Ability to optimize carousels, for example “recently viewed”, “frequently bought together”, based on product or user			
	Ability to go straight from product filtering results (“List”) to cart, bypassing the PDP page			
	Enable creation of customer specific catalogs			
	Enable possibility to offer information/features based on log-in and or permission rights of user			
Product details	The display product name, part number, material description (short-text) Display customer material number Display serial number (Eletric Drives and Controls spare parts)			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Product details	Display serial number and replacement for manufacturer part number (MH Independent After-market) - hide cross-reference Rexroth part number			
	Display CAD product info			
	Display similar products / spares / accessory			
	Suggest 1:1 alternative or inform regarding planned phase-out			
	Enable material description (short text) of certain spare parts (MH IAM materials) to be displayed partially, according to set rules (before login, after login+rights full display)			
	Hide material description (short text) of certain spare parts (MH IAM materials) in source code			
	Enable use of different templates/layout/ features of PDP, based on product and local requirements			
	PDP displays all information and download options as specified in PIM (e.g.: download CAD or datasheet), incl. what attributes should be shown first			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Product details	Route part number/product not in local Shop portfolio to other DC catalog/tool e.g. GoSelect, configurators, etc.			
	Allow user to give product reviews/ratings			
	Enable relevant PDP to be displayed via QR-code scan			
Product details - additional information	Display lead-time and related assortment data, if relevant (e.g. assortment class or max. quantity)			
	Display in-stock / out-of-stock info for products in local Shop portfolio			
	Display in stock / out of stock info for products in Certified Partner inventory			
	Display recommended list price w/o login			
	Display pre-calculated net price to logged in user with permission rights			
	If product not included in Shop portfolio, show “where to buy” or “call us” or BOTH on Product Detail Page			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Product details - additional information	Display list of Certified Partners to be contacted for order/RfQ			
	Provide the possibility to request a Repair ((MHS + IHS + AE)			
	Display product hierarchy (from ERP masterdata) ---> BE, ES, FR feature			
	Check P&A of products in local Shop portfolio (ERP call & error handling required)			
	Allow stock handling on the platform via SAP or API for in-stock/out-of-stock info and stock sharing with Certified Partners			
	Allow collection of Certifed Partner inventory information (Multi-vendor? Manual? Partner Management?)			
	Allow flexibility in “out of stock” logic based on site/country			
	Vizualization via explosions diagram to support identification of spareparts			
	Enable logic to display lead-time of certain products only to TPC based on product hierarchy (after login)			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Lead-time list **Check lead-time of part numbers in a list (TPC)**	Upload/Download list of Rexroth part numbers as .csv file to check lead-time from ERP table (AMS)			
	Request to be notified in case lead-time of part numbers in list changes			
Add - to - cart	Add-to-cart from store catalog ("list" and PDP)			
	Add-to-cart from Order History			
	Add-to-cart from external applications (e.g. DC configurators)			
	Display mini cart on store pages to summarize products in the cart			
Quick-add part numbers to the cart	Quick-add via Rexroth material number			
	Quick-add via customer material number			
	Quick-add via 'Import list' (.csv/.txt files)			
	Quick-add via 'Import list' (.xml file) ---> not standard			
	Quick-add via Rexroth serial number			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Cart (may affect also Add-to-cart, Quick-add, Check-out)	Enable cart to handle configurable materials incl. Characteristics - transfer configurator result to cart via web service			
	Enable cart to handle MH Independent After-market material - serial number and manufacturer part number can be used as ordering IDs; Rexroth cross-reference part number is hidden - user may be required to add serial number to order item - all relevant IDs are sent to ERP (serial number, Rexroth cross-reference number...)			
	Enable cart to handle relation between main/sub-items (products must be bought together, pricing results from both) - transfer result (relation between main/sub item) to cart via web service			
	Enable cart to handle MTpro kits - transfer configurator result as a list to cart via web service			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Cart (may affect also Add-to-cart, Quick-add, Check-out)	Enable cart to handle Ident numbers ---> DE topic			
	Enable cart to handle EGMS materials ---> DE topic			
	Enable cart to handle orders for parts which are not included in local Shop portfolio (order anyway)			
	Enable cart to handle RfQ process			
	Enable files to be attached to order (e.g. documents, drawings)			
	Enable files to be attached to RfQ (e.g. documents, drawings) - relevant for TPC and NFC			
	Define maximum amount of order items allowed (for performance reasons)			
	Enable download of items from cart incl. data from simulation response (part number, quantity, date, price)			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Availability information (DC) **ATP info**	Enter/select date			
	Display lead-time and related assortment data, if relevant (e.g. assortment class or max. quantity)			
	Display delivery date resulting from ERP order simulation (post goods issue date for CA)			
	Inform the user whether delivery date is shipping date or arrival date (depends on SAP process, may vary per customer)			
	Display DC stock info (how many pieces) to user based on permission rights			
	Display DC location from where product will be delivered (plant, country)			
	Enable on store level for requested delivery date to be restricted to a defined time range			
	Enable on store level for delivery date to be hidden if not reliable - display notification instead (today this is based on product attribute TK2)			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Availability information (DC) **ATP info**	Enable on store level for delivery date to be hidden based on a product attribute (GoTo) - display notification instead ---> NA feature			
	Enable on store level for delivery date to be hidden if outside a defined time range (notification is displayed)			
	Implement error handling based on ERP simulation/store settings and display notifications in cart			
Pricing	Display net price for single items (unit, total) and for complete order			
	Display additional pricing conditions (e.g. discounts, freight, surcharges)			
	Auditable online coupons/discounts? (separate from SAP sales deals)			
	Handle local tax calculations			
	Display additional freight charges for Express delivery			
	Conditions to be displayed are defined on store level (e.g. either net price only or list price/discount/net price)			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Pricing	Conditions are not defined on store level - they vary based on product attributes (division, distribution channel) ---> DE, BE feature			
	Condtions are defined on store level but additional values can be displayed based on customer attribute			
	Hide net price and do not allow order, if only list price is maintained for the product ---> IT feature			
	Do not display values returned from ERP simulation if ≤ 0,00			
	Implement error handling based on ERP simulation/store settings and display notifications in cart			
Price partner (pricing based on end customer of focus customer)	Select end customer in the cart from list of price partner(s) defined in ERP			
	Display prices in the cart based on end-customer pricing (price partner) in ERP			
	Save price partner in ERP sales order			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Replacement product	Automatically replace old part number with the new one and display notification (1:1 replacement)			
	Save both part numbers in ERP sales order (in case of order placement to DC)			
Text fields - comments	Enter a comment on item level and save in configurable text field in ERP			
	Enter a comment for the whole order and save in configurable text field in ERP			
Text fields - PO number	Enter customer PO number in the cart and save in fixed field of sales order			
	Enter end customer PO number in cart - to be saved in the configurable text field of sales order			
Text fields - Software products	Request e-mail address of licence recipient for software products			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Delivery	Display billing address from customer master (bill-to)			
	Display/Select delivery addresses based on customer master (ship-tos)			
	Create a new delivery address - restrict countries and include postal code validation checks			
	Select partial or complete delivery (single deliveries based on availability vs all items in one delivery) - display info text if complete delivery selected			
	Select shipping method, e.g. Express (based on shipping methods enabled on store level) - display info text if freight not calculated automatically			
	Restrict selection of ‘Express’ delivery to spare parts from a certain plant (Service Nurnberg) ---> not an NA feature			
	Select option to buy-online-pick-up-in-store (BOPS), i.e. at Dealer, to reduce shipping costs			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Payment	Do not offer any payment method (pay on account - payment handled via terms/process defined in customer master)			
	Enable payment via credit card on store level, if defined as payment term in customer master (no selection in check-out)			
	Enable selection of payment method on store level, based on store settings (e.g. credit card or Paypal)			
	Enable guest user to pay via credit card or other payment method			
	Integrate multiple payment vendors and gateways			
	Flexibility to handle local requirements, e.g. MX (Wire transfer – Bank info - flexible short term credit limit for trusted direct customers –Manual process (need to verify identity), “buy now, invoice later” - for Non Focus customers exception)			
Order simulation/ placement	Define default sales area data on store level (sales org., division, distribution channel, sales order type)			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Order simulation/ placement	Enable on store level for default sales area data to be overwritten (incl. sales order type) based on customer number/country			
	Enable on store level for sales office and sales group to be defined via mapping (e.g. based on customer and/or division)			
	Enable on store level for cart to be split in multiple orders, based on product attributes (e.g. division and/or distribution channel)			
	Enable on store level for cart to be split in case of complete delivery, if products delivered from different plants ---> DE topic			
	Enable on store level for order type to be defined based on product attribute (GoTo) - could result in multiple orders ---> NA topic			
	Enable on store level for cart to be split in multiple orders based on stock, i.e. one order to DC and one to Certified Partner			
	Implement error handling based on ERP simulation/store settings and display notifications in cart/check-out			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Order placement	Handle acceptance of Terms and Conditions before order placement			
	Display order confirmation page incl. ERP sales order number linked to Order History (UPS could come from Partner)			
	Request order notifications/updates on confirmation page (watch order)			
	Print order as PDF from confirmation page			
	Send order confirmation e-mail to user with order details (header, item data)			
	Include link to Order History in order confirmation e-mail			
	Enable guest user to place order (without permission rights) - affects complete process in cart/check-out			
	Enable guest users to register (for full account with permission rights) from order confirmation page			
	Enable internal notifications to be sent to DC for specific features defined on store level (e.g. in case of comments in sales order)			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Request for Quotation- RFQ	Send RfQ to DC for products which cannot be found on the site			
	Send RfQ to DC for products which are included in the local Shop portfolio (e.g. to request better price)			
Request for Quotation- Routing	Routing from Platform (Non-focus customers)			
Request for Quotation- Process	Route user data of NFC to buyRexroth.com/ marketplace			
	Route user data of NFC to Certified Partner			
	Enable logic to route RfQ to Partner based on the territory			
	Enable logic to route RfQ to DC or Partner, based on stock			
	Route RfQ to buyRexroth.com/marketplace Route RfQ to Certified Partner			
	Enable logic to route RfQ to DC or Partner, based on product			
	Save RfQ in CRM system of DC			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Performance	Define cases when simulation must be repeated despite caching, in order to display correct prices/dates			
	Enable calculation of total order values in the cart (instead of from ERP), if chaching of simulation applies			
Registration	Provide online registration process and internal validation process			
	Automatically create lead/prospect in CRM system of DC			
	Provide “easy” online registration process for features which do not require validation, e.g. download CAD or create wishlist			
User mgt	Define multiple roles and permission rights for internal and external users			
	Enable internal users to act on behalf of other users within the DC Shop (impersonate)			
	Enable external users to act on behalf of other users within the DC Shop (impersonate)			
	Enable TPC to manage accounts of users working for same company			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Wishlist	Add to wishlist from catalog/search results			
	Add to wishlist from cart			
	Add-to-cart from Wishlist			
	Create wishlist linked to user account (“private”) - create, read, update, delete			
	Create wishlist linked to company account - create, read, update, delete			
	Enable possibility to disable ‘Add to wishlist’ based on product type (e.g. serial numbers)			
	Enable possibility for wishlist functions to be offered to users based on log-in and/or permission rights			
Punch-out	Enable OCI connection and transfer cart content to customer ERP			
Promotions and Customer Loyalty features - Performance	Enable parallel simulation in the ERP interface, so that simulation results are displayed in one go			
	Implement caching of simulation results (e.g. prices) to avoid repeating unnecessary simulation			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Local content	Handle multiple languages within one Shop/ store			
	Handle special characters in translations			
Local format	Handle local date and currency settings			
	Handle local address fields (e.g. State or Province in US and CA)			
Site & Content Mgt	Enable easy and efficient update of translations through e.g. use of properties and mass update			
	Display properties/technical labels to internal users on test system to support translation process			
	Enable download of products in Shop portfolio incl. defined product attributes as csv file			
	Provide event logs of each order/RfQ (timestamp, user ID, customer number, products....)			
	Provide error logs for errors displayed to users			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Site & Content Mgt	Enable download of event and error logs as csv files			
	Enable publication of messages to inform about e.g. unavailability of the system due to maintenance			
	Enable content management (incl. Catalog content management)			
	Provide automated testing for standard features			
Analytics	OOTB features and dashboards (if they satisfy requirements - user and customer specific)			
	Possibilty to run reports / analysis (target performance, competitive scoring)			
	Trace RfQ routed to marketplace/Certified Partners and monitor results			
	Integration with CRM and Tealium to track and personalize experiences (e.g. track events such as “CAD downloads”)			
	Automated transfer of analytics data to external system			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Search Engine Optimization -SEO	Automatically generate a Google sitemap			
	Create search engine friendly URLs			
	Take full control of URLs with URL rewrites			
	Enable detailed search results by automatically adding structured data markup to product pages			
Architecture	Accelerate site performance and defend against DDoS attacks with Fastly’s Content Delivery Network (CDN), which includes generous bandwidth allowances			
Cloud	Automatically back up your code and databases for easy restoration in case of any incident			
	Manage performance with unrestricted versions of New Relic APM Pro (performance monitoring) and blackfire.io Enterprise (performance testing) tools			
	Process transactions with confidence with a certified cloud infrastructure			
	Get enterprise grade reliability and availability with 99.99% uptime and a high availability architecture**			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Performance	Store media files on a separate database server or content delivery network (CDN) for faster page load times			
UX & Design	Lean design with selfexplaining elements and clear user guideance			
	Enable use also on other devices (e.g. smartphones)			
	Easy login process and a direct possibility to continue my work			
	Provide performant system with supportive functionality (e.g. search)			
	Easy check out possiblity with all necessary information			
	Representation of assortment (lead-time) information in a trustworthy way			
	Possibility for the user to save current state of the activity (e.g. shopping) in order to continue later			
	Display minimum order surcharge in a transparent way			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
UX & Design	Provide possibility to chat to a Rexroth respresentative directly without calling (addressed as Integration topic)			
	Provide active guidance when the user is new to the eShop on what to do next			
	Enable A/B testing across the platform			
History Appl. General	Replace old OI Application (OT, InvT, OIR, InqT)			
	Utilize the Rexroth Order Information - Data Model to ensure customer-friendly information and an online/offline communication			
	Enable the use of different mobile devices			
	Enable easy and fast configuration of history applications			
	Enable manage of personal settings to control notification (frequency, amount,...)			
	integrate the History Applications into my Rexroth			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Order History	The ability to track the status of an order/ orders placed and completed in the past, to have the possibility to inform myself about the status			
	Display a list of the recent orders when entering Order History			
	Search for his orders by using general Search criteria (customer numbers (int. only)/ purchase order number/ rexroth order number)			
	Search for orders by using extended criteria (time frame creation date/ Material number/ Header status/ delivery status/…))			
	Display general sales order Information in search result (Header + Item; PO number/ Order Number/ Order Date/ Total Net Amount/ Order Status)			
	Display details for a selected order (Header: PO number/ Order Number/ Order Date/ Total Net Amount/ Order Status/ Payment terms/ Contact person; Item: standard item information / confirmation information / delivery information)			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Order History	Mark sales order for push notification, in order to be informed about future changes in the sales document			
	Recieve a mail notification about changes where done in the sales document			
	Enable to print the search result as PDF or Excel			
	Enable to Download linked SAP documents to the sales order (confirmation document pdf, invoice pdf, delivery doc./picking list pdf)			
	Track the deliveries (all relevant data, e.g. tracking information with carrier site integration) within the sales order			
	Reorder whole order or line items from previous placed order			
	Enable possibility to request an interaction on order item (e.g. request to be contacted, cancellation/return/non conformity, expedite when overdue)			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Quote History	The ability to track status of quote / quotes			
	Display a list of the recent quotes when enteringt Quote History			
	Search for his quotes by using general Search criteria (customer numbers (int. only)/ purchase order number/ rexroth quote number)			
	Search for quotes by using extended criteria (time frame creation date/ Material number/ Header status))			
	Display general quote Information in search result (Header + Item; PO number/ Quote Number/ Quote Date/ Total Net Amount/ Quote Status)			
	Display details for a selected quote (Header: PO number/ Quote Number/ Quote Date/ Total Net Amount/ Quote Status/ Payment terms/ Contact person; Item: standard item information / delivery information)			
	Enable to print the search result as PDF or Excel			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Quote History	Enable to Download linked SAP documents to the quote (quote.pdf)			
	Place an order based on the quote.			
Invoice History	The ability to track status of the invoices for previous placed orders, to be informed about all relevant data to have an overview about the payment status			
	Display a list of the recent invoice when entering Invoice History			
	Search for his Invoice by using general Search criteria (customer numbers (int. only)/ purchase order number/ rexroth invoice number)			
	Search for his Invoice by using extended criteria (time frame creation date/ Material number/ Invoice Status)			
	Display general invoice Information in search result (Header + Item; PO number/ Invoice Number/ linked Sales Order Number/ Invoice Date/ Invoice Status)			
	Enable to print the search result as PDF or Excel			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Invoice History	Enable to Download linked SAP documents to the invoice (invoice document pdf)			
Repair History	The ability to track the status of a repair order / orders			
	Display a list of the recent repair orders when enteringt Repair History			
	Search for his repair orders by using general Search criteria (customer numbers (int. only)/ purchase order number/ rexroth repair order number)			
	Search for repair orders by using extended criteria (time frame creation date/ Material number/ Repair status)			
	Display general repair order Information in search result (Header + Item; PO number/ Repair Order Number/ Repair Order Date/ Total Net Amount/ Repair Status)			
	Display details for a selected order (Header: PO number/ Order Number/ Order Date/ Total Net Amount/ Order Status/ Payment terms/ Contact person; Item: standard item information / confirmation information / repair information)			

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Repair History	Mark repair order for push notification, in order to be informed about future changes in the repair document			
	Recieve a mail notification about changes where done in the repair document			
	Enable to print the search result as PDF or Excel			
	Enable to Download linked SAP documents to the sales order (quotation pdf, confirmation document pdf, report of findings pdf, delivery doc./picking list pdf)			
	Track the deliveries (all relevant data, e.g. tracking information with carrier site integration) within his repair order			

Architecture Integration

Integration

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Header / Footer	Website specific / personalized Header Footer Integration (push of navigation structure; consumption of content and function) considere UX and design based on Web UI Toolkit including logged in status			
Website - Cart Icon	Minibasket: Beside the shopping basket icon in the header of the DC websites the number of items in the basket is displayed (only if > 0). It has to be always up to date (refreshed after add/delete).			
Website - Product finder on local homepage	Provide a list of available Productgroups and families from local catalog for local website			
Branding	Branding according to Cooporate Design			
Domain / Channel / Language	www.example.com/<language 2 digit>/ <country 2 digit>			
Content	Content consumption from WCMS (First Spirit)			

Integration

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
CIAM	CIAM (authentication; login with Example ID) / Keykloack Integration (authorization; Open ID Connect) / SSO			
Tealium	Integration of Tealium Tag Management (as base for chat and google analytics integration)			
SAP	SAP connection (order information; Customer master data; ATP; Leadtime; Pricing; Order / Inquiry creation; IAM Business (Serialnumbers; OEM Numbers); Customer material numbers; Stock; Material master			
PIM	PIM Integration			
MAM	MAM integration			
Partner finder	Integration of Partner Data from central global Content locator (as application or snippetsintegration; see website of DC)			
CPQ	Integration of available CPQ systems (goto configurator; add to / update cart; inclulding configuration)			

Integration

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
RFQ Buyrexroth				
Robin	Transfere Inquiries of users from NFC to C4C (including partner indication			
Adyen	Integration of Payment provider Branding according to Cooporate Design www.example.com/<language 2 digit>/ <country 2 digit> Content consumption from WCMS (First Spirit)			

Search

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Search for Material OEM and SN	Transition scenario: utelize GUI from local search function from e-Commerce solution;			
Search for Material OEM and SN	Provide sarch service for e-Commerce content for search by Material number; type code; OEM number; Serialnumber			
	Target scenario: utelize local search function from e-Commerce solution			
provide content	provide “Cataloge” content to global search index (mindbreeze)			

Information Architecture

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
dispatch user	support user in transfere to right channel in case of logged in according to user authorization			
TPC and NFC journey	support TPC and NFC journey in CU Websites (with full e-Commerce solution) and NFC journey for rest of CUs’			
	Shopping list has to be channel independent			
cross channel “cart”	support cross channel cart (list of materials in the cart)			

Authorization

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Authorization concept	Authorization is maintained in Keykloack; It is distinguished between e.g. internal / external; no ordering / ordering; distributor / no distributor; superuser (impersonate)			

System

Topic	Use case / Feature	MVP Relevant (Y/N)	Comments	Evaluation of requirements
Deployment	zero downtime deployment			

Merchant Self-Site Assessment

Customer Experience and Usability

Does your overall customer experience help you sell?

Questions	Y/N
Can customers easily shop on your site on their mobile device?	
Can they view product information without zooming and pinching?	
Can they easily fill out payment forms?	
Is the text large enough for them to read it easily?	
Can they access all website functions without switching to the desktop view?	
Do you have FAQs and Shipping / Returns /Order Status details on your website?	
Is it clearly labelled?	
Is it searchable and easy to navigate?	
Can customers find what they're looking for in two clicks or less?	
Does your website offer live chat?	

Questions	Y/N
Is it easy to start and find during the customer journey?	
Does your website offer personalized product recommendations?	
Do you use machine learning/AI to generate recommendations?	
Do your recommendations perform well with both new and existing customers?	
Can customers easily find products?	
Do you offer an onsite search that has search recommendations?	
Can customers filter within category pages?	
Do your banners have clear Call to Actions such as 'Shop Now' or 'Save 20%'?	
Does your website include social integration?	
Do customers have the ability to share and/or like your business page?	
Can customers register for your site via social login?	
Do you offer shoppable social media?	
Do you have a customer loyalty program?	

Checkout and Payments

Does your checkout and payment experience help you sell?

Questions	Y/N
Does your site offer a guest checkout?	
Does your site allow customers to create an account easily during checkout?	
Does your site offer different payment options?	
Does your site offer Instant Purchase/One-Click Checkout?	
Can customers checkout without completing more than two forms?	

Product Availability and Logistics

Does your product availability and logistics experience help you sell?

Questions	Y/N
Does availability information appear on your product pages?	
For sold-out products, can a customer sign up for product alerts when the product becomes available?	
Do customers on your website have a way to easily check the status of their order or shipping?	
Do customer service representatives have the latest information about orders if a customer	
reaches out via phone and/or live chat?	
Does product shipping and delivery information appear on your product pages?	
Are estimated shipping and delivery costs highlighted?	
Is it obvious whether shipping is free or not?	

Use Case Template - Suggested Format

Use Case ID

Unique, numeric identifier

Use Case Name

Concise, results-oriented name

Use Case Diagram ID

Corresponding Use Case Document ID (Deep-linked if desired)

User Story ID

Corresponding User Story ID (Deep-linked if desired)

User Story

State the User Story

Preconditions

Activities that must take place, or any conditions that must be true, before the use case can be started

A person or other entity external to the software system being specified who interacts with the system and performs use cases to accomplish tasks.

Main Flow

A step-by-step narrative of the user actions and system responses that will take place during the execution of the use case under normal, expected conditions.

This is best done as a numbered list of actions performed by the actor, alternating with responses provided by the system.

Alternative Flow 1

- A concise description of an alternative flow.
- A detailed description of the user actions and system responses that will take place during the execution of the use case when user actions create alternate process flows.

Alternative Flow 2

- A concise description of an alternative flow.
- A detailed description of the user actions and system responses that will take place during the execution of the use case when user actions create alternate process flows.

Post-conditions

Describe the state of the system at the conclusion of the use case execution.

Exception

- A concise description of one or more exceptions.
- Describe any anticipated error conditions that could occur during the execution of the use case, and define how the system is to respond to those conditions

Example

Use Case ID

UC001

Use Case Name

Pick Up in Store or by Mail

Use Case Diagram ID

UCD001

User Story ID

US001

User Story

As a shop manager, I want customers to be able to order online and have a choice to pick up their merchandise in-store or have it delivered to them so they can receive their products by the method that's most convenient for them.

Preconditions

None

Actors

Customer, CSR, Magento, OMS, WMS

Main Flow

- Customer browses catalogue
- Customer clicks product from the catalogue landing page
- Customer clicks "Add to Cart"
- Magento requests stock from OMS
- OMS checks on-hand stock
- Magento adds product(s) to the cart
- Customer checks out
- The customer chooses the delivery method
- Customer receives products

Alternative Flow 1

- The customer chooses to Pick Up in Store delivery method
- OMS sends a list of stores which have stock for the product(s) in the customer's order
- Magento displays store lists to the customer
- The customer chooses store and places order
- Magento saves the order and sends to OMS
- OMS routes order to appropriate store
- The store holds products for pick-up and tells OMS the products should be counted as sold
- Magento changes order status and emails customer
- Customer visits store
- CSR verifies customer
- Customer receives products

Alternative Flow 2

- The customer chooses "Deliver by Mail"
- Customer enters address
- Customer places order
- Magento saves the order and sends to OMS
- OMS routes order to appropriate warehouse
- Warehouse ships merchandise
- Magento creates shipment
- Magento changes order status and emails customer
- Customer receives products

Post-conditions

The customer receives products from the chosen method.

Exception

- Products are out of stock
- No order received by store or shipped by the warehouse

10. Acronyms