

# Retail Business Online – Self Assessment

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## Website Development & Solutions

Your website is the face of your retail business which you present to the world, available twenty-four hours a day, seven days a week. Your website will ultimately become your most important and effective advertisement created. If your website is not visually appealing and captivating, user-friendly and informative, unique and interactive... you will lose business to your competition.

<b><u>Research &amp; Strategy</u></b>	Yes	No	N/A	Comments
Why do you want to have a new website, or have your current website redesigned?				
What will happen if you don't have a new website, or have your current site redesigned?				
What are the top 3 things you want to achieve over the next 6 months on the internet (new or redesigned site)?				
Looking past the initial 6 months what would your overall business and/or internet priorities be?				
Do you require external or 3rd party expertise to achieve your goals?				
What would be your expectations from your internet supplier?				
Trust				
Experience				
Team and support				
Technology				
Marketing experience				
Industry experience				
Have you researched your online competition?				
How are they currently positioned on the web?				
What are their strengths?				
What are their weaknesses?				
Have you researched other websites?				
Can you list at least 5?				
Why are they attractive to you?				
Do you have ideas of what you do and don't want on your site?				
What don't you want on your site in terms of text, content?				
What is your budget for this project?				
Who are the decision makers?				
What is the decision making process?				
What is the turnaround time for making a decision?				
What team members will be involved?				
What are their roles?				
Will there be a webmaster assigned?				
What is the deadline for completing all site work?				
How much time will be available to manage / respond to online inquiries?				
Are you planning to do online sales?				
What products?				
How many items?				
Inventory investment?				
Pick and pack ability?				
<b><u>Design</u></b>	Yes	No	N/A	Comments
<b><u>Audience</u></b>				
What types of visitors do you want to attract?				
How do you categorize your customers or target market?				
Can you describe your potential customers in terms of income, age, gender, interests?				

Have you determined customer key focus areas - products, services, maintenance, purchases?				
Are you looking for new areas of business?				
What are your goals for each type of visitor?				
What are the different sales funnels of each product, services or sign up?				
Can you define your current sales process for each customer type?				
What is the first impression or message you want each customer to feel for each visitor type?				
Can you think of the related keywords they would use to search for you?				
Can you describe your organization in a few sentences?				
Can you deliver your company's elevator speech in 30 seconds?				
What is your unique selling proposition?				
Why would a prospective customer want to do business with you rather than a competitor?				
What is there about you or your company background that sets you apart?				
What is special about you or your employee's work experience?				
How do you establish trust with your current customers?				
What information should be made easily available for current or prospective customers?				
Customer Services				
Products and Services				
News and Announcements				
Contact Information or Location				
Other				
What are the 3 biggest problems your customers face?				
What problems does your product or service solve?				
<b><u>Setting the Tone</u></b>				
What tone do you want to set?				
Serious or fun				
Happy or sad				
Informal or formal				
Visionary or down to earth				
Other				
What message is important to send to your customers?				
Professional				
Customer service focused				
Quality products				
Different than everyone else				
Size of company				
Years of experience				
Other				
Do you know the best colours for your industry?				
Primary				
Secondary				
Colour meanings and associations				
What are your favourite colours?				
What are your least favourite colours?				

<b><u>Images and Shapes</u></b>				
What images are typically found in advertisements or marketing in your industry?				
Products				
People – actually using products				
People - emotional feelings of using products or services				
What is the emotional outcome of your complete product or services?				
Job well done				
End of frustration				
Comfort or physical feeling				
Pain				
Clean				
Other				
What are shapes or symbols in your industry?				
What do they represent?				
Can you describe the perfect picture of your customer?				
Age				
Sex				
Socio economic status				
Hobbies				
Interests				
Do you have a company logo or want an updated logo?				
<b><u>Navigation and Page Structure</u></b>				
Define the pages and sub-pages in your website?				
Where is the content coming from?				
Who is responsible for the content?				
Who will keep the content current and fresh?				
Is the content effective for web copy and ready?				
Web scannable for reading?				
Appropriate keyword usage and density?				
Do you want your navigation / menu system horizontal or vertical?				
<b><u>Functional Requirements</u></b>				
Do you want to manage content or changes yourself?				
Do you want a live feed showing real time interaction on your site?				
Do you want an integrated customer relationship management system?				
Do you want the ability to email market to your customers?				
Does your site require forms?				
Do you want forms submissions to populate your customer database?				
<b><u>Search Engine Optimization</u></b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Comments</b>
If you were using a search engine, what words or phrases would you use to find your site?				
Which words or phrases are most important?				
Second?				
Third?				
Other than SEO, what methods will you use to drive traffic to your site or help you be found?				
Pay-Per-Click advertising				
Email marketing				

Social Media				
Mobile Marketing				
<b><u>Expectations</u></b>				
Once your website is launched, how long do you think it will take to bring in significantly more business?				
<b>Website Targeted Traffic</b>				
<p>Most retail businesses find it extremely frustrating, having launched a website with high performance expectations, only to sit waiting for traffic that never comes. The mentality of "If you build it, they will come" does not apply to the online world. Failure to correctly market your website will result in little to no visitors coming to your site. A website with no traffic is like a radio ad without airtime...Useless! There are several tactics for consideration when developing a strategy to drive traffic to your website.</p>				
<b><u>Search Engine Marketing (SEM)</u></b>				
	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Comments</b>
Have you covered off a strategy for the 2 primary areas?				
Paid Search Advertising?				
Organic Search Optimization?				
Do you know what information prospective clients are searching for?				
<b><u>Search Engine Optimization (SEO)</u></b>				
	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Comments</b>
Do you know what site optimization means?				
Do you know if any SEO has been done on your website?				
Do you know what search robots or spiders are?				
Do you know what website indexing by search engines means?				
How long does SEO take to work?				
How many keywords or keyword phrases has your site been optimized for?				
How is each keyword ranking in specific search engines?				
How are your keywords ranking vs. your competitors?				
What kind of keyword research was done to determine which ones are the best?				
How many times are your keywords being searched?				
How competitive are your keywords in your market?				
How many pages on your site have been optimized?				
Do you know what a perfectly optimized page looks like?				
How many keywords have been optimized by page?				
Have you analyzed your competitor's sites to determine their keyword strategy?				
When was the last time you did an optimization study on your own site?				
What is working?				
What are areas that need improving?				

<b><u>On Page Optimization</u></b>				
Have you strategically placed keywords phrases appropriately?				
Title Tag				
Description Tag				
Keywords Tag				
H1 Tag				
Alt Tag				
Body				
Page Names				
Internal Links				
Incoming Links				
Have you created keyword rich content on every web page?				
Do you have appropriate keyword density by page?				
Have you created an XML sitemap to help search engines find all your pages?				
Has your Blog been optimized for relevant keywords?				
Have you created RSS feeds for articles and blog posts?				
Have you submitted your products to Google Base?				
Is your business listed on Google Maps?				
Local listings in Google?				
Have you made a submission to Google Webmaster Tools?				
Have you submitted your site to online Social Bookmarking communities?				
Have you optimized and syndicated your videos to video sharing sites including YouTube?				
<b><u>Off Page Optimization</u></b>				
Are you submitting your articles to various article directories?				
Have you submitted your site to free and key directories?				
Have you submitted your site to trade organizations sites and specialized directories?				
Have you submitted PDF documents or eBooks in online directories?				
Have you submitted your products in product directory sites and shopping comparisons SE?				
Are you submitting your blog post in blog directories?				
Are you submitting your press releases to print and web periodicals?				
<b><u>Paid Search Marketing (PPC)</u></b>				
Yes	No	N/A	Comments	
Have you conducted market research?				
Have you conducted keyword research and created a list of keywords to be used?				
Have you grouped your keywords by theme?				
Do you have a Google Adwords account or account with other search engines?				
Have you determined your target customers by language?				
Have you created your campaign hierarchy?				

Have you written ads within the rules and regulations of Adwords?				
Have you determined broad, phrase and exact match keywords?				
Have you determined the appropriate ad budget for your campaign?				
Have you set up split testing of your ads?				
Have you inserted conversion tracking?				
Are you considering dynamic insertion?				
Have you considered or studied PPC tips and tricks related to Google Adwords?				
<b><u>Email Marketing</u></b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Comments</b>
Do you have clearly stated goals and objectives you want to accomplish from the email?				
Do your emails messages and campaigns cover at least one of the objectives below?				
Providing Information				
Requesting Information				
Call to Action				
Is your content relevant and high quality?				
Are your emails personalized?				
Are your subject lines relevant to the body of the message?				
Are your subject lines going to immediately capture the interest of the receiver?				
Do you state the purpose of the email at the very beginning of the message?				
Are your messages brief and concise?				
Do you always provide contact details?				
<b><u>Spam</u></b>				
Do you get spammed for false or misleading information?				
Can recipients opt out if they don't want to receive future emails?				
Do you try to harvest addresses from the Internet or generate them randomly?				
Have you attached files to your emails?				
<b><u>Building Email Lists</u></b>				
Do you include forward to a friend in all outbound emails?				
Is your newsletter sign up form on a prominent area of your website?				
Do you drive potential customers to your website from all advertising?				
Is your website on all company documents, stationary, business cards, note pads?				
Do you have a formal strategy to collect emails?				
<b><u>Tips on Closing</u></b>				
Are your emails personalized?				
Do emails get in front of your customers enough to create top of mind awareness for your brand?				
Too often and customers get annoyed and opt out?				
Do emails provide a compelling reason to be actioned?				
Are you measuring results of conversion testing and making improvements?				

<b><u>Social Media Marketing</u></b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Comments</b>
What is it that makes social media such a "buzz" in the online marketing world?				
Why has Social Media spread like wildfire?				
Can Social Media attract and hold the attention of a vast demographic?				
Why does your company need a social presence?				
Does the consumer expect your business to participate in Social Media?				
Have you embraced the concept of Social Media marketing in your business?				
Do you believe there is any peril if you don't participate in the Social arena?				
Are your customers already talking about you online?				
Who rules the Social arena?				
Why?				
Why has Social Media turned traditional mainstream media upside down?				
What type of benefits will you experience by utilizing Social Media?				
Affordable Marketing				
Viral or Online Word of Mouth				
Brand Enhancement				
Credibility Building				
Increase in Traffic				
Customer Engagement				
What is it that prevents you from establishing a sound Social Media strategy?				
Fear of the unknown				
Resources				
Don't know where to begin				
What do all social portals have in common when relating to your business?				
Are there any Search Engine Optimization benefits?				
Does Social Media help you be found?				
Does Social Media drive traffic to your website?				
<b><u>Brand Management</u></b>				
Has Social Media given the means for customers to openly share their experiences?				
Do you put ample stock in your brand perception and reputation?				
Have you considered your company's reputation positioning online?				
Do you still consider the web more for competitive intelligence?				
How much faith do you think social media users put in their networks?				
Are you listening to the social chatter?				
Do you have the megaphone blasting messages to your customers?				
Have you turned the megaphone around and are listening to customers?				
Is it savvy to openly communicate with your customers?				
Can it deepen existing customer relationships?				
Have you considered turning critical feedback into opportunities to improve?				

Have you implemented processes to take customer attitude checks?				
Are you aware of online tools for monitoring your brand?				
Have you brought your company around to the reality that consumers have unprecedented voice and visibility today?				
Do you have a strategy to join the conversations?				

## Website Conversion

Once you're online and getting visitor traffic the real work begins: turning those visitors into buyers. Conversion Architecture involves understanding your prospective customers and their needs and desires. When you can determine exactly what those needs and desires are, you will find yourself in the unique position of being able to create highly focused marketing campaigns that cater to each individual prospect. Carefully planning the Conversion Architecture of your website will help maximize your conversion rates and increase your ROI.

<b><u>Testing</u></b>	Yes	No	N/A	Comments
Is testing of online communication part of your conversion strategy?				
Does your website have analytics in place to measure online actions?				
What areas of your website have you determined to test?				
Home Page				
Landing Pages				
Pay Per Click Ads				
Emails				
Social Media				
Which tests provide the biggest potential for return on investment?				
How do you structure tests for consistency and accuracy?				
How do you improve tests results and duplicate success?				
Does better online conversion reduce your overall cost per lead?				
Have you incorporated the appropriate focus areas to increase online conversion?				
Ask the right questions?				
Measure the right items?				
Perform the right tests?				
Analyze and make adjustments based on results?				
Does your testing give you a better understanding of your customer profiles?				
Customer online behaviour?				
What drives them to take action?				
<b><u>Benchmarking</u></b>	Yes	No	N/A	Comments
Have you applied the concept of benchmarking to your testing process?				
Does your benchmarking work as a testing process that is useful?				
Practical?				
Delivers consistent results to carry forward?				
Do you start your benchmarking by asking the right question(s)?				

Have you progressed questions from "what" generalities to "which" specific factors to test?				
Have you developed your test control elements and variables to test?				
Have you put in place the right metrics to best answer your primary test question?				
Will your test results be statistically meaningful and valid?				
Do you have sample size sufficiency?				
Once results are valid, do you correctly interpret their meaning?				
Primary conclusions?				
Secondary conclusions?				
When breaking down you campaigns and marketing channels can you determine:				
Who your customers are?				
What their needs and wants are?				
What drives them to take action?				
Do you use the standard conversion funnel for your online marketing programs?				
Audience profiling				
Acquisition channels				
Landing Pages				
Website				
Shopping Cart or customer lead form				
Purchase of lead				
Customer or potential customer				
Do you understand each potential audience?				
Are you communicating the right message at the right time?				
Do you understand how your audience makes their decision?				
<b><u>Test Protocol</u></b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Comments</b>
Have you a sequential testing strategy developed?				
Have you selected the right tools?				
Have you identified and established your control page?				
Have you considered all the right elements to optimize in your test?				
Headline				
Call to Action				
Page Copy				
Graphics				
Colours				
Configuration of Page Elements				
Have you put in place your testing goals and parameters?				
Have you determined a sufficient testing interval?				
Have you created enough difference or radical redesigns in your testing elements?				
Have you set your test for all pages to test against each other?				
At least two pages?				
Based on results, can you determine your true control page?				
New control page?				

<b><u>Conversion Success</u></b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Comments</b>
Is online conversion the same as in-store conversion?				
What makes online conversion different?				
Do you treat online conversion with the same intensity as in your store?				
Are you measuring your online conversion?				
Based on your goals what is your conversion percent?				
Have you correlated your online testing results with those of your store?				
Have you used online testing to determine how to maximize conversion?				
Solve problems?				
Challenge assumptions?				
Increase knowledge of your customer?				
<b><u>Conversion Friendly Design</u></b>				
Is your website user friendly?				
Site load time quick				
Easy to read text				
Custom 404 pages				
Content presented to be easily scanned by users				
Main action items featured (vs. multiple options for the same action)				
Effective use of white space surrounding call to action				
Ads and pop-ups are unobtrusive				
Is your content appropriate?				
Copy flows with design				
Marketing message is consistent and inline with other marketing initiatives				
Major headlines are clear and descriptive				
Text relates to images used				
AIDA principal in effect				
Attention - strong taglines focused on customer needs				
Interest - does the product relate or help customer alleviate customer need				
Desire - showcase benefits over features				
Act - does call to action create urgency to ACT NOW				
Is your layout structure appropriate?				
Most important information above the fold				
1024 x 768 resolution used? (most common)				
Logo prominent				
Main image - setting the stage / emotion				
Banner images				
Content blocks				
Calls to action				
Is imagery and colour effective?				
Does design reinforce the copy?				
Prevents choice paralysis?				
Product is shown with the target demographic in mind?				
Maximum of 4 colours from a palette?				
Text has furthest contrast ration to palette?				
Are conversion testing items in place?				

Google Analytics - goals and custom reporting setup?				
<b><u>Items for Consideration</u></b>				
	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Comments</b>
Do you understand:				
Customer behaviour				
Sales Process				
Calls to Action				
Who the product is targeted at:				
Age Group				
Sex				
Demographic				
Phycographic				
Geography				
Have you identified the websites role in the sales process:				
Just traffic				
Fill out a form				
Call a number				
Download a coupon				
Visit the store				
<b>eCommerce</b>				
<p>For any business looking to grow, eCommerce represents one of today's single greatest opportunities to target new customers and increase sales. Selling your products or services online is like having a shop that's open 24 hours a day, 7 days a week, all year round. And the best part of that always-open shop is that there's no rent or utilities to pay for, no additional fixtures to buy, you don't even need to staff it (unless things get really busy!)</p>				
<b><u>Background and Strategy</u></b>				
	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Comments</b>
Have you previously implemented an eCommerce solution?				
if yes,				
What was the name of the solution?				
Was the solution implemented in house or with a web development company?				
Was the solution maintained (e.g. products uploaded) in house or through a web development company?				
if not,				
What is your level of familiarity with eCommerce?				
Very familiar				
Somewhat familiar				
Not familiar				
Are you replacing an existing eCommerce solution?				
Why?				
What features are not working?				
If not, will your existing non-eCommerce sales and fulfillment cycle be appropriate?				
Will a template design be acceptable?				
Is a custom design what you're looking for?				
How time sensitive is the project?				
What is the target date for completion?				
<b><u>Functionality Requirements</u></b>				
	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Comments</b>
<b><u>Products</u></b>				
How many products do you have?				
Do the products come in various styles? (different colours? different sizes?)				

Do you have descriptions, images and pricing available for all of your products?				
if yes, in what format is the information (e.g. hard copy, excel spreadsheet, etc?)				
if no, is this information accessible from a third party?				
Are the product images of high quality?				
Are product options required?				
What is your pricing model?				
Is product discounting required?				
if yes, how? (by customer, by region)				
Will the site use stock items?				
If stock items are used, what will happen at zero stock level?				
Are product meta details available (title, description, keywords)?				
Will the site use featured products?				
Will the site use customer who bought also bought?				
Will the site use most popular products?				
Will the site use new arrivals?				
Will the site use wish list function?				
Will the site use email to a friend function?				
Do products prices displayed include or exclude tax?				
Are downloadable products required?				
<b><u>Product Categories</u></b>				
How many categories of products do you have?				
How many sub-categories are there?				
Can a product belong to more than one category?				
if yes, how many categories can a product belong to?				
Are product categories hierarchical (e.g. Mens > Casual > Pants)?				
<b><u>Product Updates</u></b>				
How often do you update your product information (description, pricing, etc.)?				
How is the new product information compiled?				
Who is responsible for product updates?				
<b><u>Shipping</u></b>				
Do you have a preference for shipping carrier - Fedex, UPS, etc.?				
How do you intend to charge for shipping?				
How will shipping costs be calculated?				
How do you intend to process shipping?				
Do you use a carrier's integrated shipping tool/program?				
How do you plan to pick and pack product?				
Will additional labour costs be budgeted for eCommerce sales (e.g. pick and pack)?				
<b><u>Taxes</u></b>				
Do you have any special tax requirements or calculations?				
<b><u>Online Payment Gateway</u></b>				
Do you have an existing online payment gateway?				
if no, do you have a preference?				
if no, do you receive special discounts from RCC when choosing one?				
Do you want a shopping cart system?				

Do you want to process credit card payments based on order forms being completed?				
<b><u>Languages</u></b>				
Is product being sold in one language only?				
How many countries are you expecting to sell in?				
Will you be providing all content in all necessary languages?				
<b><u>Inventory</u></b>				
Do you have an automated inventory management system?				
Do you intend on integrating the eCommerce solution with your inventory management system?				
Will you require adjusting inventory levels to account for eCommerce sales?				
Will inventory reside in a singular location for eCommerce sales?				
<b><u>Accounting</u></b>				
What type of accounting system do you use?				
Do you intend on integrating the eCommerce solution with your accounting system?				
<b><u>Ordering</u></b>				
Do you require the capability of ordering from the system admin interface?				
<b><u>Order Fulfillment</u></b>				
Do you manage and ship products in-house or through a third party?				
If using a third party, do you require an automated integration with the third party?				
<b><u>Reports</u></b>				
What type of reporting system do you use?				
Do you intend on integrating the eCommerce solution with the reporting system?				
<b><u>Feature Set - eCommerce</u></b>				
Which of these features do you want included?				
Favourite Products				
Related Products				
Featured Products				
New Products				
Wish List				
Gift Certificate				
Gift Wrapping				
Multi-currency				
Customer login/account information/previous orders				
Search				
Auction				
Gift Registry				
Download on Demand				
<b><u>Feature Set - Website</u></b>				
Which of these features do you want included?				
Document management system				
Picture Gallery				
Registration System				
News Area				
Customer Testimonials				
Frequently Asked Questions				
Audio				
Video				
Events listing or online calendar				

Email Marketing capabilities				
<b><u>Marketing</u></b>				
Do you intend on implementing Search Engine Optimization on your site?				
SEO for product being sold?				
Do you intend on using other forms of Internet Marketing such as PPC, eMail Marketing, Banners, Social Media				
Will you integrate and/or leverage your current offline marketing efforts with online marketing?				
<b><u>Budget Considerations</u></b>				
Have you accounted for solution development, implementation and initial setup?				
Internet Marketing and/or Marketing consulting?				
eBusiness Consulting?				
<b><u>Hosting</u></b>				
Do you have any special hosting requirements?				