Online Store Discovery Checklist

Use this document to gather helpful information from your customer
& explore which online store option is the best fit for their needs.

Background

What is the customer's industry?

_____

What is the use case/program for this online store?

- ☐ Company Swag
- ☐ Corporate Gifts
- ☐ Employee Recognition & Incentives
- ☐ Employee Uniforms & Supplies
- ☐ Fundraiser
- ☐ Holiday/Event
- ☐ Retail
- ☐ Spirit Wear
- ☐ Team Uniforms & Equipment
- ☐ Other _____

Who will be shopping on the online store?

- ☐ Club & organization members
- ☐ Company employees
- ☐ Company customers & prospects
- ☐ Event attendees
- ☐ General public
- ☐ School students & staff
- ☐ Sports fans & parents
- ☐ Sports players & coaches
- ☐ Other _____

What is the goal of this online store?
For example: Improve employee engagement, increase brand awareness, order team uniforms.

_____
_____
_____

How long will the online store be open?

- ☐ <1 Month
- ☐ 1-3 Months
- ☐ 3-6 Months
- ☐ 6-12 Months
- ☐ 12+ Months

Branding

What are your branding and store design expectations for the storefront?

- ☐ Basic branding (logos, colors, banners, custom domains, etc.)
- ☐ Advanced Branding (fully customizable, HTML & CSS access, etc.)
- ☐ Other _____

Do you have brand guidelines and a logo you can provide?

- ☐ Yes
- ☐ No

Consumer Experience

Does access to the online store need to be restricted or password-protected, so only certain consumers/groups can access it?

- ☐ Yes _____
- ☐ No

Consumer Experience (cont.)

Does access to specific elements on the store need to be limited, so only certain consumers/groups can access them? Select all that apply.

- ☐ Categories / Products
- ☐ Logos
- ☐ Payment Methods
- ☐ Addresses
- ☐ Shipping Methods
- ☐ Coupons
- ☐ Custom Data Collection
- ☐ Budgets
- ☐ Other _____

Do consumers need to have their own accounts to keep track of orders, load account balances, create wishlists, or save addresses?

- ☐ Yes
- ☐ No

Does anyone need to assign budgets or approve orders to control spending on the store?

- ☐ Yes _____
- ☐ No

Products

How many products do you want to offer on the store?

- ☐ 1-5
- ☐ 5-10
- ☐ 10-20
- ☐ 20+

What type of products do you want to offer on the store?

- ☐ High-end, premium
- ☐ Economical, lower price
- ☐ Eco friendly, sustainable
- ☐ Other _____

Are there specific product details & options you want to offer?

- ☐ Categories & subcategories
  _____
  _____

- ☐ Preferred suppliers
  _____
  _____

- ☐ Sizes & colors
  _____
  _____

- ☐ Logos, artwork, & personalization details
  _____
  _____

- ☐ Product Bundles
  _____
  _____

Will products be pre-purchased, warehoused, and shipped as orders are placed on the store (e.g. inventory program)?

- ☐ Yes _____
- ☐ No

Do you need to track inventory?
For example: Display inventory counts on the storefront, track how many products have been ordered against your inventory, etc.

- ☐ Yes _____
- ☐ No

Who will be paying for the orders?

- ☐ Our organization
- ☐ Consumers
- ☐ Other _____

If orders will be paid by your organization, what is your all-in budget per order including the price of the product and shipping?

_____

Payments, Taxes, & Shipping

What payment method(s) need to be available at checkout? Check all that apply.

- ☐ Account Balances
- ☐ Coupons
- ☐ Credit Cards
- ☐ Gift Cards
- ☐ Points
- ☐ ACH
- ☐ Redemption Codes
- ☐ Other _____

Does sales tax need to be calculated for each order?

- ☐ Yes _____
- ☐ No

Does shipping need to be charged on the storefront for all or some orders? If yes, do you have a preference?

- ☐ UPS
- ☐ USPS
- ☐ FedEx
- ☐ Flat Rate Shipping
- ☐ Other _____

Distribution

As orders are placed, where will they be shipped?

- ☐ A single location, like an office or event venue
- ☐ Multiple addresses
- ☐ Other _____

Will orders be fulfilled on-demand or all at once?

- ☐ On-demand as orders are placed
- ☐ Weekly
- ☐ Bi-weekly
- ☐ In batch once all orders have been placed
- ☐ Other _____

Notes