


# Online Selling Preparation Checklist

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- 01.** Outline the things you need to take into consideration before you start  
.....
  - 02.** Introduce you to the most popular tools available today.  
.....
  - 03.** Provide pathways for all budgets.  
.....
  - 04.** What to watch out for



## Introduction

At Consult we specialise in cloud-based software.

As the world has moved online, we've put our focus on providing setup, training and ongoing support for businesses systems to help you, the end user, use these systems efficiently and effectively.

We don't do annual accounts or bookkeeping, instead we focus on really understanding the software and the way it can best work for you. We do work very closely with accountants and bookkeepers also to ensure we provide the best outcome for our clients.

So, it used to be that if you wanted to sell online the first step would be to get a website and you might do this using a generic website builder or engage someone to custom build you a website.

But now there are so many options out there, omni channel retail is an expectation, you're using various other software for your business and there's such a huge range in price and value that it's important to think this out thoroughly prior to going ahead. So we have prepared some checklists to help you work through the things you want and need.





## Step 1

### Establish your Key Criteria

This is your must have's and nice to have's. Think about things you know you need i.e. E-commerce functionality and also think about existing functionality you have and need to maintain, but also the pain points in the way you are currently operating and what needs improving through to what would be great to have i.e. automated marketing. List everything you can think of, no matter how big or small.

Even if you think it's a given that a system will have this, list it anyway, you might be surprised at somethings that you assume all systems will have, but don't. This is a critical step as when you analyse your options you need to make sure everything is checked off and considered and that you don't end up with something that doesn't meet your needs.

You may not end up with everything perfectly flowing and every desire met but let's at least try to get close. Here are some examples

- |                                     |                      |                    |
|-------------------------------------|----------------------|--------------------|
| • Digital products                  | Multiple currencies  | Loyalty            |
| • Customer portal/membership area   | Reporting            | Omni Channel       |
| • Subscription                      | Promo/discount codes | B2B, B2C or both   |
| • Inventory management/stock levels | Affiliate program    | Drop Shipping      |
| • Easy to update yourself           | Payment methods      | Scheduled Ordering |
| • Facebook integration              | Automation           | Inbuilt SEO        |

## Establish Key Criteria

[illegible]





## Step 2

### What Extensions do you Need?

For example:

- Point of Sale
- Accounting Software – will you use existing software? Does your e-commerce solution need to connect to this?
- Marketing
- CRM
- Inventory management software
- Shipping software


## Establish Extensions

[illegible]



## Step 3

### What is your Budget?



Note that there will normally be three sets of costs, firstly the initial setup/implementation costs, subscription costs and lastly any ongoing support costs.

Most software these days will have an ongoing subscription cost that can be paid either monthly or annually and usually free support via chat/email and sometimes phone will be included. This kind of support can often be handled by numerous different people within a call centre that know nothing about your business (which will be fine for many) but think about whether additional support needs to be allowed for.





## Step 4

### Who will carry out the Implementation?

There are several options. At the lower end of the scale you will probably be doing this yourself or with limited assistance.

Other options are:

- An existing staff member
- A bookkeeper
- The software provider
- An implementation specialist

It's important to understand the level of service/costs of this service advantages/disadvantages of each.

See the following tables to get an idea of setup costs and the people involved.

## Budget Ranges – to get up and running

Business Size/Implementation/Software	Price Range
Small Business/Do it yourself/generic software	Up to \$2000
Small to Medium Business/Assisted or full implementation/generic software	\$2000 to \$10000
Medium Business/Fully implemented/ERP, custom build	\$10000 to \$60000
Medium to Large business	Over \$60000

## People

	Advantages	Disadvantages
An existing staff member	Knows/understands business Could be cost effective	May lack skills. Implementation is quite different to ongoing use and can confuse (if they are learning as they go) Extended timeframe (could cancel out cost effectiveness)
A bookkeeper	Knows business Ongoing support Can sometimes access additional promotional offers Can be cost effective	May lack skills Varying levels of knowledge and experience – make sure you get the right fit
The software provider	Can be cost effective	Normally implementation consists of talking you through what you need to do
An implementation specialist  May be a combination of two i.e. website design alongside POS/accounting specialists	Has the skills to fully implement but can also do partial implementation if required. Should be completed efficiently and within timeframe Can access additional promotional offers	Higher cost as they need to familiarise themselves with business but also due to higher skill level



## Step 5

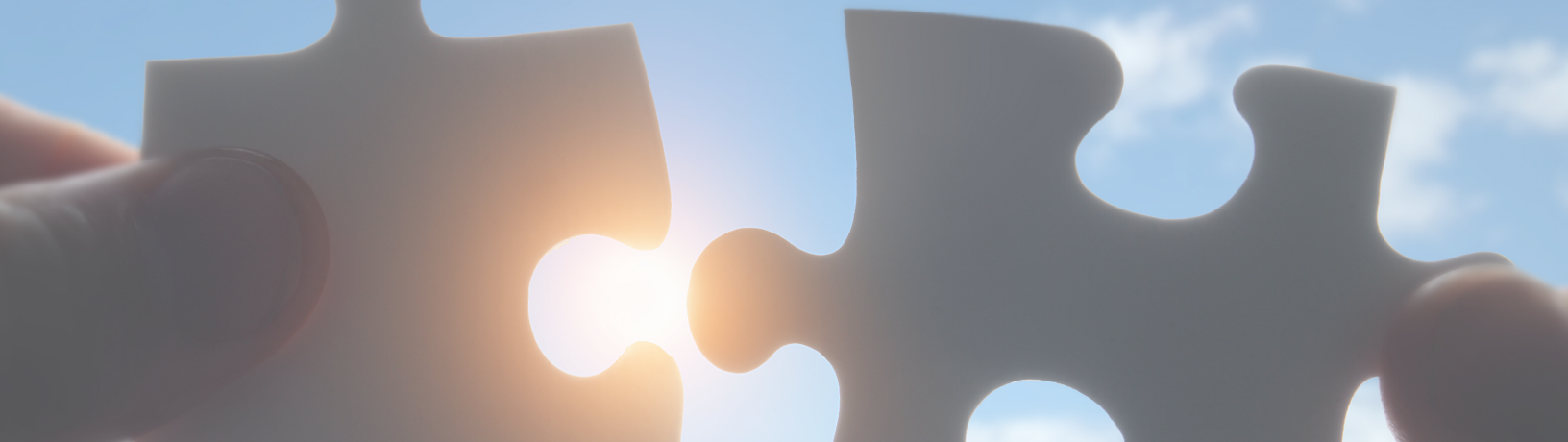
### Research the Tools

The sites below are a starting point, our "go to" sites to start comparing to see if they will cover your requirements

Software Specialisation	Free	Small to Medium	Medium to Large
<b>E-Commerce</b>	Facebook Instagram Swiftly	Etsy TradeMe Weebly Mailchimp Shopify Amazon Big Commerce Woo Commerce Wix Magento Swiftly	Shopify Plus Amazon
<b>Point of Sale</b>		Vend Kounta	Vend
<b>Inventory Management</b>		Unleashed Dear CIN7	CIN7
<b>CRM</b>	Hubspot Mailchimp	Capsule	Salesforce
<b>ERP</b>		CIN7	MYOB Advanced CIN7
<b>Other</b>		A2X	

- Watch out for clashes with integrations – mostly around who is master and product variants
- There will be crossover between tools i.e. CIN7 – Inventory Management, POS, E-Comm





## Step 6

# Bring it All Together

The most important part is bringing it all together.

- Add your identified Criteria, Extensions and software to the following two tables (the first is for “Needs” and the second is for “Nice to Have”).
- Add in the costs at the bottom as these may well be the deciding factor.
- Look out for hidden costs or additional user costs.
- Go through this in detail, contacting software providers or implementation specialists to clarify anything you're unsure of.

As an example, this entire process of going through the checklist from start to finish, if we were doing it for a client, it would take **approx four hours** (and that is with a lot of existing knowledge), so it is crucial to get right to avoid spending a lot of unnecessary time and money in the long run.

It will never be perfect as providers offerings and capabilities are changing all the time as are businesses needs, but this time spent now should make a massive difference in the long run.

If you think it's something you'd prefer to go through with a specialist, look at our website for options – **Consult Limited**

**Once these lists are complete, it's time to take Action!**

## Tool Comparison - Needs

Key Criteria and Extensions	Software 1	Software 2	Software 3	Software 4
Criteria 1				
Criteria 2				
Criteria 3				
Criteria 4				
Criteria 5				
Criteria 6				
Extension 1				
Extension 2				
Extension 3				
Price - Setup				
Price - Subscription				
Price - Support				

## Tool Comparison – Nice to have

Key Criteria and Extensions	Software 1	Software 2	Software 3	Software 4
Criteria 1				
Criteria 2				
Criteria 3				
Criteria 4				
Criteria 5				
Criteria 6				
Extension 1				
Extension 2				
Extension 3				