## Scoping Projects: Questions to Ask Your Clients

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USS Freedom - Littoral Combat Ship https://www.revealnews.org/episodes/deadly-waters/

## **ECommerce Questions**

### Products

- What types of products are they selling?
  - Physical
  - Digital
  - Recurring
- Do they have all of the information?
  - Title
  - Price
  - Short description
  - Long description
  - Tags
  - Categories
  - Dimensions
  - Weight

#### How Many Products?

- 1 Product
  - Absorb this into your costs
- 100+ Products
  - You need a CSV file
- 1 < x< 100 Products
  - Your choice

#### Payment

- Hundreds of options
  - <u>https://woocommerce.com/product-</u> <u>category/woocommerce-extensions/</u> <u>payment-gateways/</u>
- Testing is important
  - If the client values testing get a gateway that makes it easy
    - Stripe = easy to test
    - Paypal = hard to test
- Familiarize yourself with a gateway then use that for every project

## Shipping

- Tons of options
  - <u>https://woocommerce.com/product-</u> <u>category/woocommerce-extensions/</u> <u>shipping-methods/</u>
- Understand how real time shipping estimates work
  - Does your client? Do they know
    \*they\* have to ship the packages?
  - Be prepared to recommend a carrier
    - I usually recommend USPS
- Can be very complex
  - Start simply then add complexity
- Box sizes

# Taxes

- Don't give tax advice unless that's your focus
- Configuring tax settings is your job
  - Knowing *what* to configure is not
- Puts something like this in your proposals:
  - "Client is responsible for providing tax rates. Service provider will enter rates as provided by client"

#### Currencies

- Multi-currency is incredible complex
- You could display multiple currencies
  - This is much easier
  - <u>https://woocommerce.com/products</u>
    <u>/currency-converter-widget/</u>

#### Localization

- Multiple languages is also complex
- I've had countless issues with translation plugins
- Consider multiple stores
  - Invest in an inventory syncing system
  - <u>https://woocommerce.com/product-</u> <u>category/woocommerce-extensions/</u> <u>shipping-methods/inventory-fulfillme</u> <u>nt/</u>

## Testing

- Every website needs testing
  - ECommerce is even more important
  - Plan for testing time
    - Checkout
    - Product page
    - Shop page
- Or setup automated tests
  - <u>https://robotninja.com/</u>



#### Out of Date Plugins & themes

- A few minor versions out of date is fine. I'm talking about plugins that are years out of date.
- Akin to a plumber working on a house built in the early 1900s.

#### Low Quality Hosts

- Each host you work with adds complexity
- If you're unfamiliar with a host don't say your estimate covers everything

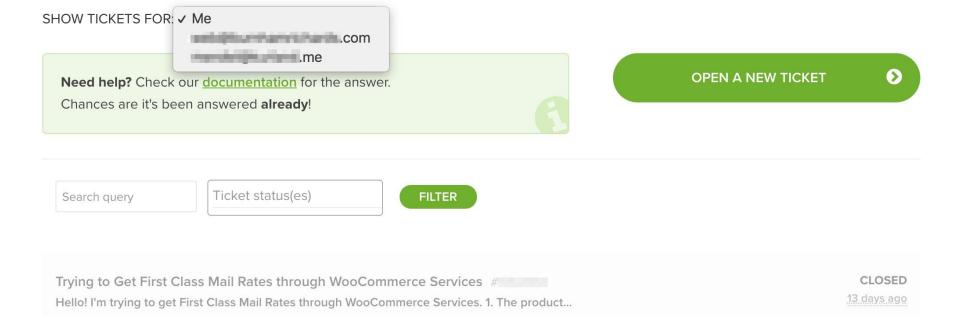
#### **Certain Themes**

- Some theme companies make themes that are *way* to complex
- Avoid themes with custom functionality
  - Testimonials
  - Affiliate systems
  - Integrations
- I'm a huge fan of Storefront

## **Access & Assets**

# Access

- If the client has a deadline get their assets ASAP
- Assets
  - Domain registrar
  - Hosting account
  - FTP access
  - Admin access
  - Google Analytics
  - Vendor logins (for plugins & themes)



## Happy scoping projects!