



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
 - <https://woocommerce.com/product-category/woocommerce-extensions/payment-gateways/>
- 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
 - <https://woocommerce.com/product-category/woocommerce-extensions/shipping-methods/>
- 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
 - <https://woocommerce.com/products/currency-converter-widget/>



Localization

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



Testing

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

Red Flags



Out of Date Plugins & themes

- A few minor versions out of date is fine. I'm talking about plugins that are years out of date.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)

SHOW TICKETS FOR: ✓ Me

██.com

██.me

Need help? Check our [documentation](#) for the answer.

Chances are it's been answered **already!**



OPEN A NEW TICKET



Search query

Ticket status(es)

FILTER

Trying to Get First Class Mail Rates through WooCommerce Services #██████████

Hello! I'm trying to get First Class Mail Rates through WooCommerce Services. 1. The product...

CLOSED

13 days ago

Happy scoping projects!