KOZLER
BUSINESS SOLUTIONS

SHOP

5 steps to

Take your Business Online

Welcome *to this ebook*

This ebook is for any business owners that are currently running a brick and mortar retail store and are looking to sell all or some of their products online while still being able to sell their products in store. This book will take you through all the steps you need to take your business online. Expanding your potential customer base and giving you even more control over your income and business. I'm not going to lie, depending on how much stock you have and your current systems, this process can SUCK HARD but in the end will be worth it and if we are being honest, will most likely be necessary for the long term survival of your business.

I have done my best to make this as information packed but also short as possible. This is challenging as this subject could fill 10 books but I hope I have given a clear overview of each step.

You will be able to view more in depth content of each topic on our website and social media channels. If you have any questions or want more information please feel free to get in contact with us or see our other content.

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1.

Selecting the best web platform for your *online business*

What is a web platform:
A web platform is essentially a website builder or program that allows you to put together your website without knowing how to use complex code.

The first step is to select what platform you are going to use. Selecting a platform can be a daunting challenge when you're starting out as they all claim to be the best choice for your business.

I remember trying to create my first ecommerce store and making so many mistakes. I thought I was doing the right thing. I hired a web developer and thought, they have done this hundreds of times, who am I to question them on their work.

To be honest, I didn't even know what questions to ask anyway.
But of all the mistakes I made, not learning about all the different web platforms and the difference between them was one of the biggest.

I ended up paying thousands of dollars to build my site, on a platform that was almost impossible to update. Along with a heap of other issues and in the end the platform I used: Adobe Catalyst, was shut down. So all the time, money and effort I put into the site was for nothing.

So what can you do to avoid these issues yourself and what are the right questions to ask when looking for a platform?

how easy is it to customise?

It's important to make sure that the web platform that you choose makes it easy to customise your site the way you want it and to make ongoing changes. You don't want a site where every time you want to make a change it takes hours of work.

how easy is it to use?

Choosing a platform that is easy for you and your staff to use will save you hours in staff training and onboarding. It will also reduce mistakes because the system is too complicated to navigate.

is it mobile friendly?

Having a site that is mobile friendly is critically important. Over 50% of internet traffic comes from people using their phone. Not having a site that looks great and performs well on mobile devices is simply not acceptable in the modern world.

What integrations *does it have?*

When you are looking at platforms, finding one that integrates with your existing systems such as inventory and accounts is beneficial and makes the process a lot easier.

Also, having a platform that has a lot of integrations and a strong app market will give you a lot of flexibility in the future.

A quick note on this: If you are using older or more niche systems you may find it difficult to find anything that integrates with your systems. In this case, you may need to convert over to a different system. This is usually the biggest hurdle to get over especially when you are using older systems in a business that has been operating for many years. I cover this more in step three when we talk about inventory management.

is it SEO friendly?

What is SEO? SEO stands for Search Engine Optimisation. Basically the better your SEO, the higher you rank in search results for terms and keywords related to your business. For example, if you are selling skincare for women and someone types women's skincare products in Google. How high your product ranks in the search will often depend on how well the SEO of your selected platform performs.

Selecting a platform that is SEO friendly is very important but with most reputable platforms this should not be an issue as the highest rated platforms for SEO are constantly changing.

how reliable is the platform and what is the customer support like when there is an issue?

You want to make sure that the site isn't known to crash regularly. This means the time your site is up and working and not down for maintenance, issues or crashes etc. This shouldn't be an issue with most reputable platforms. Whereas, they all differ when it comes to what support you get when there's an issue. Make sure you check if they offer 24/7 support and if that support is by message, email or phone. If you are someone that likes to call a company for support, make sure they offer that service. This is all about making your life easier. Checking recent reviews should give you a good idea of what their support is like.

how scalable is the platform?

Depending on the plans you have for your business, you want to make sure that whatever platform you choose you will be able to grow with your business.

The main thing to look at is the site's bandwidth
What is bandwidth? It is the amount of data your website can transfer to your users in a given amount of time. Simply, if you get too many people going to your site at once and you don't have enough bandwidth, your site might crash. For example, like that time when HBO released a new season of Games of Thrones and their website crashed.

A quick note on scale: If you plan on creating a multi million dollar ecommerce website. You can always start with a really good web platform then once your business is at a certain point, move to a completely custom site. Now this can directly affect your SEO ranking but it might be something to think about, to save you some up front costs.

how expensive is the platform, monthly costs and fees on sales?

When comparing platform prices make sure you don't just look at the monthly costs of the platform. You need to take into account any fees that the site might charge per sale when using their payment system, as these fees can really add up.

For example Shopify has its own payment system called Shopify Payments. At Shopify's first tier they charge 2.9% + 30c on all credit card orders, then it goes down to 2.6% + 30c on the second tier and 2.4% + 30c on the third Tier. So when comparing platform prices just make sure that you look at these additional prices.

Something to take into account is that if a platform doesn't have a payment system, you will still be paying normal credit card transactions fees. If you plan on selling millions of dollars of product on your site, making sure those fees are as low as possible is very important.

A guide for selecting a plan

Credit Card Rate (with Shopify Payments)	2.9% + 30¢*	2.6% + 30¢*	2.4% + 30¢*
Additional Transaction Fee for all online transactions (only charged if Shopify Payments is not activated)	External gateway 2%	External gateway 1%	External gateway 0.5%
Pricing	$29 / month	$79 / month	$299 / month

2.

Sorting your *inventory*

The next step is getting your inventory ready to integrate with your web platform. Making sure your inventory is set up correctly will save you so much time and effort in the future. In fact, having the right inventory management system is probably just as important as selecting the right web platform.

Now before I go into what to look for when selecting or deciding if you need to change inventory systems, let me tell you this.

I have spent a very, very long time looking into inventory management

systems for my businesses and to be honest, trying to find a good one is incredibly difficult. So my advice while looking for a system is to have this in the back of your mind.

Ask yourself: if I had to move to another system what does that process look like? Can you Import your current inventory in the new system? If you already have an inventory management system make sure you keep it active at least while testing a new system.

does it reliably integrate with all your accounting systems & sales channels?

Now like I said before, your inventory management system is probably just as important as your web platform. So if you find an inventory management system that works perfectly with your business then that should have a large impact on selecting the web platform you choose to build your site on.

Now, it's not just about making sure that your inventory management system, point of sales systems and your website integrate. It needs to be a reliable integration. There's nothing more painful than trying to sell an item in store when it's already been sold online. Making sure your systems integrate will help to avoid this mistake.

Does the system meet your basic stock requirements?

When searching for the right inventory system for your business, there are a number of features to think about. Consider the following:

01

Barcodes & scanning

Having barcodes on all your products will not only make stock control and sales easier but will also allow you to add your products to Google shopping without having to add them manually. As they require your products to have a barcode before they can be added.

02

Product variants

Having product variants is critical for almost every ecommerce store. Variants allow your customers to easily navigate to a product then select the size or colour they want.

03

Product tags

Product tags are the best way for you to categorise your product, on a deeper level than types. This allows you to run deeper reports and categorise your product more effectively, making it easier for customers to find the product they are looking for. For example if you are selling a blue women's long sleeve shirt, you could have women's, long sleeve and blue as tags then if you wanted to run a report or put all your women's long sleeve shirts into a collection you can easily do this.

04
Product brands & suppliers

This allows customers to search a product by the brand or supplier. Making it easier for them to shop for their favourite brands. It also helps you when ordering stock..

05
Product types

Products types are your overarching product categories. For example, if you were selling clothing, some product types you might have would be: shirts, boots, jeans, etc.

06
Product descriptions

Having clear and detailed descriptions can make it easier for customers to decide which products are for them.

07
Product pricing options

Pricing options allow you to have prices other than just your retail price, for example if you have a membership or wholesale site you can have different prices for your members or if you are running a sale being able to have the original prices crossed out with the discount prices next to it can help increase the effectiveness of your sales.

08

Bulk product editing

The ability to bulk edit products inside your system without having to export them to a spreadsheet for editing then having to import back again can save a lot of time and errors.

09

Product images

Make sure you compress the images to reduce loading times for your site before adding an image to your inventory management system or website. It's important, DO NOT MISS THIS STEP. A great free tool for this is https://tinypng.com/. Also make sure that when you upload your images to your site that you also add alt text to your images. This will increase your search ranking and will allow your product and picture to show in search results.

10

Reporting options

A system that offers deep reporting options will allow you to make effective decisions and manage your business on a deeper level.

11

Unlimited product quantity

It is critical that you make sure that whatever inventory system you choose, it will be able to handle not only your current inventory but every product that you may add in the future. Some inventory systems have a low level of inventory allowance especially on their lower subscription tiers.

how easy is the system to use?

You want to make sure that the inventory system that you choose is easy to use. The 3 biggest things to look out for are:

1

Ordering & receiving stock

Having a simple and straightforward process when ordering and receiving stock will save you a lot of time and will reduce mistakes.

2

Conducting stocktakes

Make sure you find out how stocktakes are done. Something to look out for with this is many of them force you to conduct stock takes on your entire inventory instead of being able to do it in a single section at a time. This can be incredibly inefficient and frustrating.

3

Adding and updating products

This is probably self explanatory but making sure this process is as efficient as possible can save countless hours of work every week.
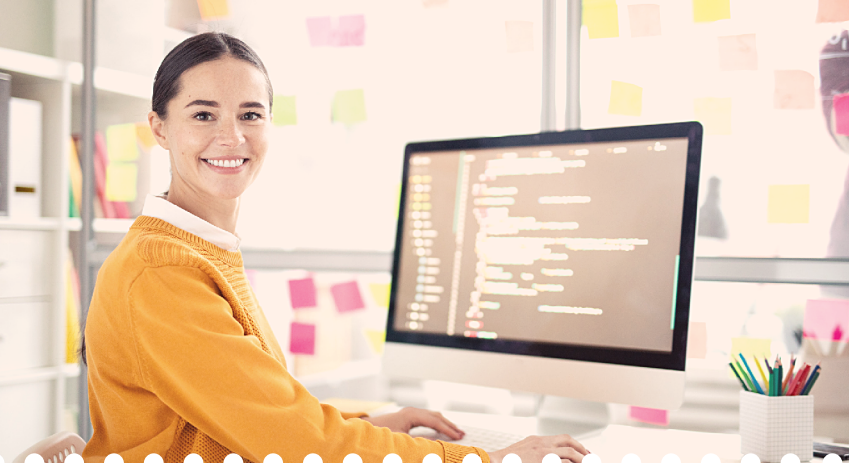
3.

Start creating your *website*

At this stage you should have chosen the platform to build your site on, the inventory system you are going to use and how it is all going to integrate with each other and your accounting systems.

Now it's time for the fun bit. Setting up and creating your site. This step can be overwhelming for many people as creating a site that not only looks outstanding, connects with your potential clients and is functional on all devices can be massively time consuming and difficult.

If possible, you should seriously consider hiring an expert to help in this area.

If you think you have the technical, design and marketing skills to do it, following these steps should make the process a lot easier and help you avoid many mistakes.

A quick note: It's not just simply writing a few paragraphs about what you do and expecting that people will line up for your service. That's just not how it works, attracting customers through your website is a carefully curated balance between writing that evokes emotions and a tried and tested design.

Building your site

buy your domain

The first thing you need to do is select and purchase your domain.
To do this go to your domain registrar of choice. There are lots of amazing options out there and doing a quick google search will allow you to find many to compare. Do some research, look at reviews, and pick the one that you find the easiest to understand, and has the most competitive prices.

set up your site

Depending on the platform that you have chosen this process will be a little different but your chosen platform should have in-depth guides on how to do this. A few things to make sure that you do on every platform are:

1. Set up your payment gateways.

2. Make sure your shipping fees have been set up correctly for not only domestic orders but also for international orders.

3. Select the correct tax codes for your area.

4. Add your ABN to the site.

5. Make sure your standards and formats are correct. Unit system, weight, timezone and currency.

6. Legal documents such as: refund/returns policy, privacy policy, T's & C's and shipping policy.

7. Set up conversions for overseas currencies.

8. Set up your shipping notifications such as: order confirmation, cancellation, refund, email cart from POS and abandoned checkout. Gift card exchange, payment error, shipping confirmation and updates.

Selecting your *theme*

Once you have set up your site the next thing you need to do is select your site's theme. This process will be different and have different effects on each platform. On some sites the theme will only affect the look of the site such as colours, fonts and basic layout. However on other sites it will affect other things like the entire page setup and layout, apps and other important functions.

It will be important to understand how your site works before you begin. Tutorials and Youtube walkthroughs can be invaluable in helping you before you start. It is important to think about how you want your site to work before selecting your theme. Try to select a theme based on function over form. You should think about what functions you will need on your site before you consider what it looks like.

6 things to consider when selecting a theme:
1. Functionality
2. Design
3. Support
4. How customisable is the theme?
5. Is the theme responsive? Does it work correctly on all devices?
6. Loading times for the theme

Add your *inventory*

Now that you have selected your theme you may want to jump straight into customising your site. However, we recommend that you first add your inventory. The reason for this is that you will be designing your pages around real products rather than place holder images. This allows you to see exactly how your site will look when it goes live.

So how do you add inventory to your site? This will be different depending on the platform you have selected and the inventory management system you have chosen. Even though the way you complete the steps may be different, the steps themselves are pretty much the same no matter what platform or system you have chosen.

Step 1 - Link your inventory system to your web platform and import your products.

We recommend following a detailed guide specific to your web platform and inventory system, as small mistakes during this step can cause annoying problems that can be time consuming to correct.

Step 2 - Test and check that your inventory has successfully been imported and that the integration is working correctly

Go into your product details and make sure that all details have been correctly imported. Once you have done this try adjusting the inventory in your inventory system and make sure that the inventory changes on your website. This may take a few minutes.

Step 3 - Set up your collections

Now you need to create the collections you are going to use for your site. This is the way you are going to seperate your inventory into categories to help your customer find the products they are looking for.

For example: if you are a clothing store, you might have a collection for all your women's T-shirts. This way you can set up your menu so customers that are just looking for women's T-shirts can go directly to where they need to go. Don't neglect your descriptions, SEO and images for your collections.

HOME   ≡ WOMEN'S COLLECTIONS ⌄   ≡ MEN'S COLLECTIONS ⌄   ≡ KID'S COLLECTIONS ⌄

≡ MISCELLANEOUS ⌄   ≡ LOCAL AUSSIE SUPPLIERS (LAS) ⌄   ≡ DKC MERCHANDISE   ⋮ SALE – LAST CHANCE

19.

Designing your *website*

Ok, you have set up your site, selected your theme and added your inventory. Now it's time to start designing your site. It's important to make sure when designing your site that it not only looks amazing but that it is functional and fits your brand. It's fine to have an artistic masterpiece but if people find it a nightmare to navigate and can't find what they are looking for you won't be making many sales. Now, what should you think about when designing your site?

Menus

Make sure your menu is easy to navigate. There are three types of menus. Header: which goes on the top of your page, footer lives at the bottom and the main menu where you put your product categories.

Consistency

Try and keep a consistent look throughout your site that is in line with your brand colours and character.

Customer journey

Think about a customer's journey through your site and design the site around that journey. For example, if your brand has an amazing mission or story you may want to lead people to your about page after they have visited your home page.

Responsive design

Make sure that your site looks and functions amazingly on all devices and aspect ratios. Make sure when you are designing the site you alway check what it looks like on desktop, laptop, widescreen, mobile phone and tablets. This can take a lot of time to format correctly but it needs to be done.

Images

Make sure you add alt text to all images on your site. You should also compress all the images on your site (same as product pictures) with the only exception being images that lose significant clarity when compressed.

Important features for every *ecommerce store*

About page

It's super important to have a fantastic about page on your site. This allows a potential customer to put a face or faces to the business and helps create a deeper connection between the customer and your business. Also consider including your location in your about page as many people like to know where your business is located.

Returns page

Even though your platform might have a generic returns page that you can use, these are usually super hard to read and full of legal jargon. Creating a clear page outlining your business policy will make it easier for your customers to understand. It is important to still have the full version on the page but we generally recommend putting it under the simplified version. For example: https://www.diamondkcountry.com/pages/returns-policy

Sizing charts or measurements

This is incredibly important to help customers make their decisions whether to buy your product or not.

Contact page

This is self explanatory but just make sure you include your postage addresses and the physical location of your store as well as phone number and email. Also, make sure your contact information is in the header and/or footer of your site.

FAQ page (frequently asked questions)

Having a page where you can put answers to all your frequently asked questions will save you and your staff having to continually answer the same questions over and over again.

Apps & 3rd party plugins

This is where you can use apps or plugins to add any functionality you need that your theme couldn't. A huge thing to be aware of before you go and add 100 apps is that you want to be incredibly selective when adding apps to your site. This is for a number of reasons but the two main ones are:

Reason 1 - Adding too many or the wrong apps will slow your site down drastically. Lowering your search ranking and reducing your customers experience when using your site. A general guide is a maximum of 10 apps per site.

Reason 2 - The more apps you have, the higher the chance they will conflict with each other. A number of apps don't play nicely with each other. This causes a lot of issues which can be incredibly frustrating and time consuming to resolve.

Other things to consider when adding apps or 3rd party plugins

1. Always look at the reviews left by others.

2. Does the app work with your theme? Some apps don't work with some themes. This can be hard to know before downloading the app and seeing for yourself.

3. Do they have a high level of customer support if there is an issue.

4. What is the process to remove the app if you need to? Some apps need you to embed code into the site. It's important to make sure that this code is removed when the app is removed. If you need to add, remove or change code it's important to make very detailed notes and even take before and after screenshots of any changes that you have made. This can save a lot of time troubleshooting issues if you know what you changed.

5. Most apps have very clear pricing but others charge on a scaling system. Make sure you understand how the app charges. You don't want to have an app that costs $10 a month but that only goes up to 1000 customers then charges $0.1 per extra customer and when you get to 3000 customers that $10 app is now costing you $210 a month.

6. Do they offer a free trial? Even after you do your research unfortunately the only real way to make sure that the app is going to work is to try it.

SEO & Google

So now you have a kick ass site that not only looks amazing but is functional and easy to navigate. Now it's time to work on your SEO.

This process can be very complicated and is probably best done by an expert as doing proper keyword research can require expensive software and expertise. Every platform should have an in depth guide to walk you through the process if you have the time, technical skills and access to research tools. What should you consider when doing SEO?

Keywords

Keywords are simply the words or phrases that people are searching for when looking for products or services. How do you work out what are the best keywords for your business?

To find the best keywords for your site you need to do research into what terms or words people are searching for when they are looking for your products or services. This is where that super expensive software comes in handy but if you don't have access to that software trying using Google's Keyword Planner https://ads.google.com/aw/keywordplanner

Page titles

A page title is just that, the title of the page. You want this title to be easy to understand and give the customer a reason to click through. It will appear in search results like this example below.

www.dictionary.com › browse › example ▾

Example | Definition of Example at Dictionary.com

Example definition, one of a number of things, or a part of something, taken to show the character of the whole: This painting is an **example** of his early work.

MetaData/ Page Descriptions

Each platform approaches this a little differently, but this is the description of the page under the page title on searches. This is where you try and put your keywords. Just remember that it still has to read well. It can't just be a list of keywords or it will hurt your click through rate and might even hurt your SEO.
See here in this picture below how "Example" is in bold. This shows the keyword in the page description that was selected to show up because of what was searched.

www.dictionary.com › browse › example ▼
Example | Definition of Example at Dictionary.com
Example definition, one of a number of things, or a part of something, taken to show the character of the whole: This painting is an **example** of his early work.

Adding your business to your Google business *account*

Now you have set up your SEO you need to connect your website to your Google business account. If you don't have a Google business account you will need to set one up at www.google.com/business/. This will allow your business to show up in Google searches and maps etc. Just like the other steps it differs from platform to platform but a quick search and you should find an in depth guide on how to do this. If your platform does not have a way to connect it through the platform follow these steps:

Step 1 - Go to www.google.com/business/ and login to your account.

Step 2 - Once logged in to your Google business account go to the "Info" tab on the left hand side menu.

Step 3 - In the information section all your business details will be listed. Scroll down to the "add website" and click on the pencil icon next to it. While you are there it would be a good idea to double check to make sure all your other information is filled in and up to date. A box will pop up, enter your website and click apply. Your website will now be linked and visible to Google searchers.
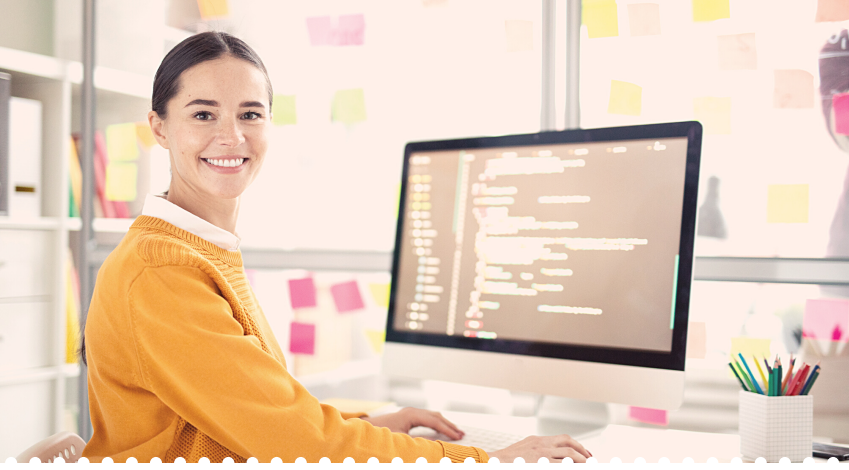
4. Setting up your *internal systems*

Now you have set up your site, you need to set up your internal systems. Doing this will allow you to avoid mistakes and save time.

Selecting a shipping company

When selecting a shipping company you want to look for the one that is going to offer you the most value for the type of products you are selling. Shipping will probably be one of your largest expenses so picking the right shipping company is incredibly important. Some questions you want to ask when looking for a shipping company are:

1. Do you need to ship internationally?

2. Do you need to ship to rural areas regularly? If you are regularly shipping to remote locations even in your country some shipping companies may not deliver to these areas or may have very expensive fees on these orders.

3. What is the cost for shipping? How large and heavy are the products that you will be selling? Some companies are best for smaller parcels and some are better for larger items. If you have products that range in size, you may want to consider having different shipping companies for these items if you can not find one that can does both.

4. Do they offer shipping insurance? This is really important as many shipping companies do not cover items that are lost. Even if you have tracking on the items they may not cover it. Unfortunately, in my experience this happens more often than you would think. If they don't have insurance you can always get insurance from a 3rd party insurer.

5. What packages, boxes and bags can be used and where can you get them from?

Setting up your internal fulfilment process

Now we are going to give you an example of what a fulfilment process might look like for fulfilling online orders. This may look different depending on your business or the systems you are using but this should give you an idea of what to include in your own procedures.

1. Print off the invoice.

2. Pick the items for packing.

3. Check the items for damage or issues. It's really important you do this as it's easier to deal with any issues now rather than having to deal with unhappy customers and the return process.

4. Take a photo of all the items and the invoice together.We highly recommend doing this as it helps cover you if a customer claims there was a mistake you can easily refer back to the photo of the order to see if a mistake was made.

5. Pack order in recommended bag, box or packaging.

6. Print off shipping labels and attached to correct order.

7. Drop orders to the post office one hour before post office collection in the afternoon. You want to try and drop your items just before they send orders for the day. If you do the post office drop the next morning or too late in the afternoon, people that order during the day won't get their orders shipped until the next day.

Setting up your internal procedures for customer *communication*

When you start advertising your business online you may find that you will start getting a lot more enquiries and communication with customers online than with your current retail store. This communication can take up a lot of time, dealing with the same issues and enquiries over and over again. A solution to this is to create templated answers for enquiries that come up regularly.

These will be different for every business but here is an example of a templated answer below.

Hi (Customers Name)

I have processed the exchange and have refunded you the difference. This has been refunded through your original payment method. Please allow up to 5 - 10 business days for this process to show in your account. I will have the exchanged item posted out to you today. If you have any questions, please let me know.

(Staff Members Name) form (Business Name)

This can be copied and pasted to use again and again. Creating template scripts like this saves you a lot of time and also can be used for quality control if you have staff. You may even be able to save the responses as a template in your email platform.
I always like to tell my staff that these are simply guides to use and can be customised to the context of the situation. Also the scripts should be continually reviewed and improved upon.

5.

Test your site & *systems*

Ok, so now you have set up and designed your site, you're almost done. All you need to do now is test your systems, menus and integrations. For each of the following steps make sure that you test it on both desktop and phone.

Testing your menus

This step is very simple, literally just click on every menu option you have and make sure that it goes to where it's meant to. If a customer is directed to the wrong part of your website that could end a potential sale very quickly.

Testing your systems

During this step you want to go through your whole customer journey as a new customer visiting your site and as a staff member fulfilling a real customer order. This will help you find any pain points, mistakes or problems with the fulfilment process. These steps are a good guide to follow.

Step 1 - Use incognito mode on Google Chrome or private browsing on Safari. Turning on these modes will remove all cookies and autofill information and make sure that you are looking at your site, just as a new customer would.

Step 2 - Go to your website and navigate through your customer journey.

Step 3 - Purchase a product on your site. You want to look for any mistakes that could come up or places where a new customer might get lost or confused. Pro tip - purchase your product as a gift for someone where you have to send the product through the mail. Just make sure all the details are yours except the name and address. This will allow you to receive the email notifications so you can make sure everything is correct.

Step 4 - Fulfil your order through your web platform and inventory system. Don't cut any corners here. Make sure you pack the order and everything. This is for two reasons. To look for anything you're missing like shipping boxes/bags and also to train your staff. You can even write down each step of the process to create an employee training manual.

Step 5 - Make sure your notifications are set up correctly. As you fulfil your order and send them off you should be sending notifications to your customers. Ensuring they come through correctly is incredibly important.

Conclusion

If you have made it to this step give yourself a massive pat on the back. We hope this book has helped you on your journey to take your business online. You are part of a select group of business owners that are willing to take their businesses success into their own hands.

As a reward for making it to the end of the book we would like to offer you a free one hour consultation to answer any of your questions or help in any other way that we can.

To claim your free consultation please email us at hello@kozler.com.au with 5 step ecom ebook consult in the subject line.