WooCommerce Planning Questionnaire

Overall Site Considerations:

Remember: Base WooCommerce is free but it takes time to set it up and configure it.

Plugins have a cost – Even if the plugin is "free" it costs to set it up and configure that plugin.

Keep a list of the plugins you are going to use per project and the cost of the plugin.

Check if the Plugins are Responsive.

Remember plugins do not always play "nice" with each other. If you are using a plugin make sure to read the comments of people that have used it. It will give you a heads up if there are any issues.

If a plugin is purchased there may be **annual costs to renew that plugin**. Make sure the client is on board for that cost per year. Put the costs in your proposal. You may wish to renew the plugins so that you can install and check out the configuration. Also make sure the client knows that the cost for the plugins may fluctuate year to year. Some plugins are not renewed annually. Check renewal timeframe.

Your costs in the **ESTIMATE** should be made up of:

- Planning Time – the time it takes to put together the plan of all of the plugins and getting the answers from the client
- Website Design/Implementation time
- Any external costs like of theme, plugin, etc. Keep track if cost is: free, 1 time, annual, lifetime
- Time to set up and configure each any plugins that need to be added to the site including non-WooCommerce plugins, WooCommerce plugins, WooCommerce itself, and the theme.
- Time to make the pages SEO friendly
- Testing – desktop, mobile as well as processing payments, etc.
- Time to make site Secure
- Project Management

Make sure the THEME you choose can handle WooCommerce.

- Do you have to modify the theme to put Add to Cart in header.
- Do you have to modify the standard product detail page layout that comes with the WooCommerce
- Do you have to modify the standard category page layout that comes with WooCommerce
- Careful of using themes like from Themeforest theme with a number of add-ons. Many times when WooCommerce updates you will get a message that your WooCommerce theme files are out of date. FYI: I have used them but I make sure the client is on a maintenenace plan to ensure this doesn't happen.

INTERNET + MARKETING

Store Considerations:

Number of products for the estimate?

- How will those products be provided to developer – XLS, Word document, pull from another website? Manually entered vs imported via a plugin?? May need an Importer into WooCommerce. Images may still need to be added manually even if imported.
- How many product categories for estimate? How many levels of categories?
- Cost to add more products while in development? (I add a line in my estimate for this just in case)

Product Features

- Do products have variations? (ie: color, size) Do any products have more than 1 variation?
- How does pricing vary per variation?
- Any products bundled?
- Single image / gallery of images / video on product details?
- Need minimum / maximum quantities for any products? ie: must purchase minimum of 2 of a product
- Need wholesale pricing?
- Need inventory management at a product level? At a variation level?
- Do they wish to allow for Comments on a product level?
- Do they need additional Tabs on the product detail level?

Overall Features of the Store

- Which merchant account using? Paypal / Stripe / Authorize, etc. Is that setup already? Does the one the client wants to use integrate with WooCommerce??
- Do they want one page checkout?
- Sales Tax
- Shipping – what type – walk them through examples
- Coupons – ask for examples of what types of coupons they would use
- What search options for store? Look ahead, filters, etc
- Add on fields at checkout? For example: How did you hear about us?
- Need SSL??
- Need currency converter?
- Need to have customer pick Date of Delivery?
- Do they need the customer to be able to ship to multiple locations?
- Where do email confirmations go? Any special emails need to be sent?

Additional

- Search – do they wish a Predictive Search???
- Integration with Accounting software – QuickBooks,etc
- Integration with Amazon?
- Need any special reporting? Like Abandoned Cart Report?
- Do they need to be able to have a printable Invoice from the WP-ADMIN area to go with packaging?
- Training to use WooCommerce