CLIKFOCUS

THE COMPLETE GUIDE TO:
SCALING YOUR DRUPAL E-COMMERCE STORE

BUILD SMART
BUILD STRONG
BUILD BEAUTIFUL
BUILD EFFICIENT
BUILD FOCUS

CONTENTS

no limits
development

WHO IS THIS CHECKLIST FOR?

This guide is more advanced for someone who already has a store and looking for a more robust, custom system. If you are just starting out, a solution like Shopify or Squarespace is probably more applicable as you won't need that much customization until you scale.

▶ **Customization**

- Drupal's storefront allows you a lot of options to choose from to customize every piece of your e-commerce site. This way, you can design the right user experience and keep conversion rates high.

▶ **Performance**

- Your needs change when you are growing and when you need to think about performance and speed for a variety of user types, Drupal has lots of tools to choose from so you can make the best decision.

▶ **Easy to Use**

- Even after you build and customize, you can also manage it easily. Drupal lets you build a custom dashboard to manage your content, increase prices, and change shipping easily and quickly so you don't need to learn code before you can get to work.
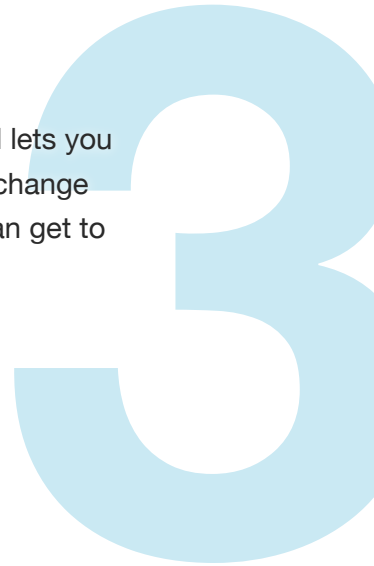
STEP 1: PRODUCTS

As you scale, you might offer more products to users. This means you will have to focus more on making items easy to find and ensure the checkout process is intuitive and fast.

► **Search**

- If you already have search, you will probably want to add some form of filtering. This allows consumers to further narrow their choices and browse easily within a smaller group of items.

► **Personalization**

- This is typically done when users create an account or after their first purchase, but providing product recommendations goes a long way in making their shopping experience quicker and easier. Anticipating their needs takes the pain away from choosing, making the decision process much faster in checkout.

► **Navigation**

- As your store grows, you need to focus on keeping it easy to move around and find items. Working through user personas and outlining your current content strategy for the new site are some basic ways to get started.

These are some of the big items to think about when managing products in a bigger store. Your Drupal development team will walk you through the entire process during the Discovery phase.

STEP 2: INVENTORY

A bigger store will mean that you need to think about getting a robust system to manage your inventory and the various SKUs that you have.

▶ **Are you using a 3rd party system?**

- Check for an integration with Drupal to see if one already exists, if not you might need get a custom integration. The goal of picking a system is something that doesn't require a lot of work on your end.

▶ **Are you going to use Drupal?**

- Drupal has some great tools to help manage inventory and could be a great option depending on where you are in the growth phase.

If you have any questions or need help choosing, your development team probably has experience with several tools and can direct you to the right one.

STEP 3: PAYMENT

Depending on how long it has been since you did a major update of your store, there are some important changes to think about in terms of payment. The upside of Drupal is that you get to choose all of these pieces and get them tailored exactly to your liking.

▶ **Picking the right merchant provider**

- When you have a solution like Drupal, you can examine lots of merchant providers. You can choose to keep the payment process onsite or send the user offsite, depending on the type of user experience you want to provide.

▶ **Thinking about mobile payment**

- For e-commerce, the key to this point is making the payment process easy on a mobile device. This probably requires some change to adjust from desktop to mobile.

▶ **How are you storing payment data?**

- With PCI compliance in mind, storing payment information is difficult. It is usually more cost effective to use a merchant provider for that piece. Third party tools handle the data and compliance so all you have to worry about is customizing the experience.

▶ **What types of payments do you allow?**

- This only really becomes an issue when you want to do ACH or direct deposit. For most types of payment are easy to accept and online, it's very easy to accept all of them.

These are only a few options to think about. Your development team will walk you through the entire process and help you pick the best choices that match your use case.

STEP 4: PRICING

This section discusses how to handle some special pricing considerations and how they could help your store.

▶ **Tiered Pricing**

- This lets you easily manage your pricing. You can set up a scale system and let Drupal do the rest of the work. This is helpful because it takes a lot of the guesswork out of pricing and can save you lots of time.

▶ **Discounts**

- If you are going to use coupons, there are third party systems that you can integrate with to provide that solution. Drupal can easily integrate with lots of options and likely has many integrations already available. This lets you easily manage social media campaigns to increase signups.

▶ **User Experience**

- Drupal lets you customize how users view the pricing. Depending on your audience and their need for feedback during the shopping process, you can customize the animations and interaction accordingly.

These are a couple of the unique things we always discuss when talking about price. Because you are scaling your store, the goal is to provide options that save you time instead of requiring more of it. Growing a business is hard work and you need to spend your time as efficiently as possible.

STEP 5: SHIPPING AND FULFILLMENT

With Drupal, shipping and fulfillment have been separated out into three separate pieces. This allows you to customize the process according to what your users need.

▶ **Shipping rate calculator**

- This is where you take the order info and decide how you want to calculate shipping, whether you want to use a base flat rate and change from there, or something different. This calculates separately in case you want it to calculate before checkout to increase transparency with consumers so they see totals before buying.

▶ **Delivery**

- Which major shipping supplier are you going to use? The Drupal community actively supports modules for all major shipping companies, but there are always updates and changes as more get added. Once users know the shipping, you can let them choose the supplier so they can pick the best option for them.

STEP 6: COMMUNICATION

How you communicate with your customers is very important and if you are growing your site, you will need to consider how you want to manage and establish that relationship on a bigger scale.

- ► **Order Confirmation**

  - • Sending an order confirmation after purchase is essential to providing feedback, as well as sending notifications when an order ships. These types of updates are useful in building trust that makes them more likely to come back.

- ► **Ongoing relationship**

  - • Most of this involves new product offers but it can also mean handling a poor customer experience. Sending regular updates and asking for feedback helps create a level of honesty that will keep them coming back.

- ► **Easy to reach**

  - • If you choose to automate your system, either through social media or email, you want to make sure that when a customer has a complaint or wants to start a conversation that you are ready. Before and after the sale, the relationship is the most important aspect because it ensures that customers come back and enjoy their experience.

The important goal is to focus on the user and establish a relationship. You want to build your communication channels to tailor to who your customer is. Even as you scale and you have more and more people coming to your store, maintaining that relationship as if they were your only customer builds crucial trust.

STEP 7: REPORTS AND ANALYTICS

To manage your bigger store, you want to get the most relevant and tailored reports to make the right decisions for your business. If you already have a third party tool that helps you with analytics, like Google or another software, then we usually suggest that you stick with that and integrate with Drupal.

With Drupal, the reports have to be built from scratch by developers which can limit your freedom and take time. We often suggest that you find a third party analytics tool that integrates and allows you to do that work on your own.

Here is some stuff you might need to know, but there really is no limit to how much you can get:

- ▶ Cart Abandonment rates
- ▶ Average amount per purchase
- ▶ Payment methods used most often
- ▶ Most popular purchase items
- ▶ Most popular time to purchase

All of these insights give you a better picture of the user so you can make changes over time that improve the overall experience for your user.

IN REVIEW

All of the choices that Drupal gives you are so that you can build the user experience exactly how you want it. If everything is bundled in and you can't pick out the details yourself, it limits what you can offer your users in terms of customization. Drupal separates all the pieces so you can scale and build directly for your user.

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