

5 steps to set up an e-commerce site

Use this worksheet to guide you through the process of setting up your site. The goal is a website that accurately reflects the spirit of your business and can help your company grow.

1 ASSESS WHERE YOU ARE

There are different ways to sell online, and you don't have to hire a professional developer to do it. The two most common ways for businesses to sell online are:

1. Third-party websites, like Etsy for retail
2. Website development tools

To choose between the two, consider if you want to:

Test the waters
(Consider a third-party website.)

Control the user experience
(Build your own website.)

If you decide to build your own site, you'll need to think about what website building tool or software to use.

Start by looking at what others in your industry use.

List some ideas:

For example, physical therapists might want a site designed to comply with HIPAA, whereas a retailer might look for software designed to handle high transaction volume.

2 PICK A DEVELOPMENT TOOL

Now that you have an idea of website development tools and software options, narrow down your list by considering your specific needs. Do you want:

	<i>Is this feature needed?</i>		<i>Does the platform offer this feature?</i>	
	Yes	No	Yes	No
Inventory management				
To control branding and design				
To control the user experience				
Blog integration				
Email marketing				
Integrations with other apps				
To identify as a minority-owned business				
Resources and/or coaching for minority-owned businesses				

3 THINK ABOUT LOGISTICS

A successful online business integrates well with in-person operations.

If you sell products, consider:

<i>Inventory:</i>	<i>Shipping:</i>
<ul style="list-style-type: none">• How many units do you want to keep in stock?	<ul style="list-style-type: none">• How quickly will you ship a package after the order is placed?
<ul style="list-style-type: none">• How long does it take to replenish your inventory?	<ul style="list-style-type: none">• Who will manage packing and shipping orders?
<ul style="list-style-type: none">• How often will you count your inventory? (Daily, weekly, monthly?)	<ul style="list-style-type: none">• Which postal carrier will you use? (FedEx, USPS, UPS, etc.)
<ul style="list-style-type: none">• Do you want actual inventory numbers to be reflected on your site?	<ul style="list-style-type: none">• How much will you charge for shipping?

If you offer a service, consider:

<i>Appointments:</i>	<i>Logistics and billing:</i>
<ul style="list-style-type: none">• How will you handle bookings?	<ul style="list-style-type: none">• Do you have the proper paperwork in place (including release forms)?
<ul style="list-style-type: none">• How will you coordinate scheduling with clients, as well as any landlords, tenants, or employees?	<ul style="list-style-type: none">• How will you handle sales (billing, pay in advance, pay at time of service)?
<ul style="list-style-type: none">• Do you have a system to integrate online and in-person bookings?	<ul style="list-style-type: none">• Do you have the tools in place to process those sales via your site?

4 MARKET YOURSELF

A [website can only help your business](#) if people can find it. Think about which of these marketing ideas might make sense for you, either now or in the future.

Blog

Now Later Not Interested

Social media

Now Later Not Interested

Video or podcast

Now Later Not Interested

Paid advertising

Now Later Not Interested

Influencer marketing

Now Later Not Interested

Email marketing

Now Later Not Interested

Affiliate or referral program

Now Later Not Interested

Resources to help minority business owners

Now Later Not Interested

5 NAIL DOWN YOUR CUSTOMER SERVICE

You want your customer service standards to be reflected online. These questions can help you plan ahead.

How will customers contact you?

- Via a business email address
- With an online contact form
- Built-in messaging (*if you're on a third-party platform*)
- Special software (*like a chatbot*)

How will you ensure all customer requests are answered?

- I will answer them personally
- I will designate an employee to respond
- Hire a third-party (*service or software*)

What is your return or cancellation policy?

And what is your plan for disclosing and enforcing it?

For more actionable tips and advice to help you manage your money, build your network, and run your business, visit our [small business resources page](#).

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