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Ecommerce Excellence Checklist 2023

Evaluate last year's performance and optimize for the year ahead.

2022 calculations report that U.S. ecommerce sales totaled $35.3 billion from Thanksgiving Day through Cyber Monday[1] — this is a 4.0% increase from $33.9 billion in 2021. U.S. consumers spent $11.3 billion online on Cyber Monday this year alone.[2]

To meet demands and customer expectations, retail and ecommerce companies need systems that quickly process and fulfill a high volume of orders during these substantial sales spikes.

Your system checklist

As you set priorities for this year, use this checklist to help you evaluate how your ecommerce process and systems performed last year and how you can optimize for the year ahead.

Order **Inventory** **Product** **Communication**

Order-to-Fulfillment

Were your customers satisfied with how quickly their online orders were fulfilled?

Yes	No	Checklist
☐	☐	Were orders available in real-time within your ERP, 3PL, warehouse management, and/or other fulfillment systems?
☐	☐	As sales volume increased during the peak selling season, did your processes push orders into your fulfillment systems quickly and accurately?
☐	☐	Were orders normally processed without requiring manual intervention by your customer service reps or other staff?
☐	☐	Was accurate order and fulfillment data available in the right systems, at the right time, without the need for manual data entry?
☐	☐	If you used an integration technology, did it scale during the peak selling seasons to handle increased data load and automate processes end-to-end?
	←	**Enter the total number of boxes checked "Yes"**

Problem

Slow, error-prone fulfillment leads to poor customer experience and lost sales — and inefficient use of talent and resources on low-value, manual activities.

Solution

As soon as an order is placed, it should be immediately available in your fulfillment systems. Load test your current system to see if orders can be fulfilled as expected.

Inventory Levels

Is product availability accurately reflected across all your sales channels, all of the time?

Yes	No	Checklist
☐	☐	Was inventory correctly reflected across all your sales channels, including webstores, marketplaces, and brick-and-mortar stores?
☐	☐	As orders increased during peak selling seasons, did your sales channels accurately reflect products that were available or out of stock?
☐	☐	If orders were fulfilled from multiple locations, was product availability accurately reflected across all sales channels?
☐	☐	Were accurate inventory levels reflected in the right systems, at the right time, without the need for manual data entry?
☐	☐	If you used an integration technology, did it scale during peak selling seasons to handle increased data load and automate processes end-to-end?
	←	Enter the total number of boxes checked "Yes"

Problem

Inaccurate product availability can result in lost or canceled sales orders, tarnished business reputation, and lost customers.

Solution

Automate inventory tracking across all channels. As an order is fulfilled, storefronts and marketplaces should be automatically updated with accurate quantities.

Product Catalog

Were shoppers viewing up-to-date product information across all channels?

Yes	No	Checklist
☐	☐	Were customers finding consistent information for products that are sold across multiple channels?
☐	☐	As orders increased during peak selling seasons, did your process maintain accurate and up-to-date product information across all your sites?
☐	☐	Were updates to product information such as sizes, prices, images (and other details) automatically available across all your webstores and marketplaces?
☐	☐	Were product details updated across all your sales channels without the need for manual data entry?
☐	☐	If you used an integration technology, did it scale during peak selling seasons to handle increased data load and automate processes end-to-end?
	← Enter the total number of boxes checked "Yes"	

Problem

87% of shoppers begin their product searches online.[3] Without accurate product descriptions, shoppers will go elsewhere.

Solution

Automatically push changes and updates made to product catalogs within your ERP or PIM system across all your sales channels — including webstores and marketplaces.

Customer Communications

Were customers happy with status notifications and insights on their orders or returns?

Yes	No	Checklist
☐	☐	Were customers receiving the real-time status of orders, including shipping confirmation and tracking information as soon as the information is available?
☐	☐	Did customers receive real-time status of canceled orders, returned items, and/or refunds?
☐	☐	Was the average talk time for customer service calls on order or return status less than other types of calls?
☐	☐	Were order status, shipping information, and refund status reflected in the right systems, at the right time, without the need for manual data entry?
☐	☐	If you used an integration technology, did it scale during peak selling seasons to handle increased data load and automate processes end-to-end?
	←	Enter the total number of boxes checked "Yes"

Problem

Without regular communications, customers can become anxious about their orders — leading to increased customer calls and canceled orders.

Solution

Integrate your fulfillment systems and ecommerce systems for automated, real-time notifications of order, delivery, and refund statuses to be easily communicated to customers.

How did you score?

Talley up your count to understand how mature your ecommerce operations are.

If you answered "**Yes**" to...

Between 0–5 questions

You are at the very beginning of your automation journey.

Automation is likely an afterthought for your organization or is done in decentralized silos. You have a distribution of SaaS applications and some integrations. However, you still need to set a plan for company-wide automation.

Between 6-10 questions

You are integrating some applications, but you are not taking advantage of all the efficiencies that process-centric automation offers.

While you may integrate specific applications to remedy acute pain points, your current strategy is reactive. While you have started to think about automation at a department level, a company-wide automation-first mindset has yet to be established.

Between 11-15 questions

You are beginning to centralize your automations and examine the complex integrations needed to resolve departmental issues.

Your company could attain organization-wide automation, but the responsibility falls on your IT teams. To progress, an automation-first mindset is required to broaden the automation scope.

Over 15 questions

You are on your way to a successful process-centric automation roadmap.

You put automation at the center of your planning. You are using IT and business resources to automate business processes and have calculated how to create reusable automation assets. Drive your automation journey beyond operational and financial ecommerce processes. Data warehousing, marketing, human resource processes (and more) can all be optimized through process-centric automation.

Optimize your business processes this year!

Create efficiencies within every department in your organization and experience more value from your applications.

Speak with an automation roadmap expert →

Sources:

[1] Kaplan, Marcia. "Sales Report 2022: Thanksgiving, Black Friday, Cyber Monday." Practical Ecommerce. Web. 12/01/2022

[2] Davis, Don. "Deep discounts drive Cyber Monday web sales to a record $11.3 billion." Digital Commerce 360. Web. 11/29/2022

[3] Alaimo, Dan. "87% of Shoppers Now Begin Product Searches Online." Retail Dive. Web. 08/15/2018