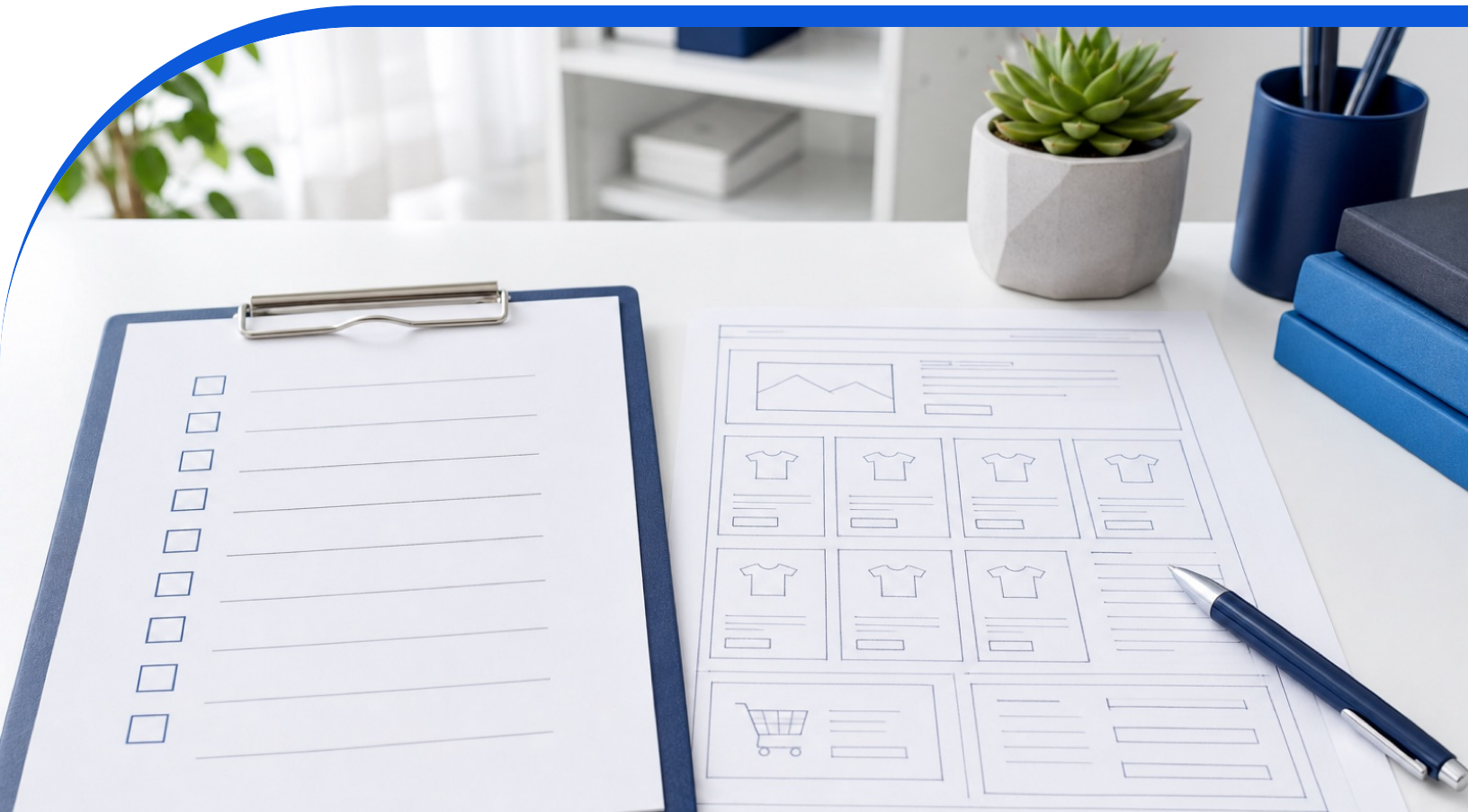


CHOOSING AN E-COMMERCE APPROACH: AN HONEST CHECKLIST



Choosing an E-Commerce Approach: An Honest Checklist

The biggest e-commerce decision isn't which platform to buy — it's whether to buy a platform at all, or build a store you own. Get that call right and everything downstream is easier: the design, the checkout, the integrations, the bill. Get it wrong and you spend years paying for workarounds, or you build custom software you never needed.

This checklist walks you through the questions that decide it. Answer them honestly before you talk to any vendor — ours included — and you'll know whether an off-the-shelf platform like Shopify or BigCommerce is the smart buy, or whether a custom build earns its cost. There are no prices in here on purpose: the approach comes first, and cost follows the approach.

1. Start With How You Sell, Not the Platform

Platforms are built for a common way of selling: a catalog of products, one price each, a standard checkout. If that's you, an off-the-shelf platform is hard to beat. The further you sit from it, the more a template costs you in workarounds.

Answer First:

- Do you sell one price per product, or different prices to different customers?
- Is your checkout standard, or is the buying experience itself your edge?
- Do you sell to consumers, to businesses, or to both at once?
- Is anything about how you sell genuinely different from your competitors?

The Rule:

If how you sell looks like everyone else, buy a platform. Custom earns its cost only where your sales model, catalog, or checkout is the thing that sets you apart.

2. Map Your Catalog and SKU Complexity

Catalog complexity is where template stores quietly hit a wall. A few dozen simple products fit any platform; thousands of variants, kits, and configurable items do not.

Describe Your Catalog:

- How many products, and how many variants of each?
- Do you sell bundles, kits, or configurable, made-to-order items?
- Does inventory live in another system that must stay in sync?
- Do prices or availability change by customer, region, or channel?
- How often does the catalog change, and who maintains it?

Why It Matters:

A platform that fits a simple catalog can buckle under a complex one. Size the catalog honestly before you assume a template will hold it.

3. Decide Whether You Need B2B and Wholesale

B2B is the single most common reason businesses outgrow off-the-shelf stores. Platforms model one price for one product; wholesale rarely works that way.

Check Your B2B Needs:

- Do different customers or tiers see different prices?
- Do buyers need accounts, roles, and approval before they can order?
- Do you quote, negotiate, or sell on purchase orders and net terms?
- Do you run wholesale and retail from the same store?
- Do large buyers reorder, and do they need reorder or standing-order tools?

The Rule:

If you answered yes to two or more, you're in custom or heavily-extended territory. Wholesale bolted onto a retail template is where the workarounds pile up.

4. Define What Your Checkout Must Do

Checkout is where sales are won or lost, and it's the part platforms guard most tightly. Decide how much control you actually need before you accept a fixed one.

Answer First:

- Does your checkout need steps, fields, or logic a template doesn't offer?
- Do you need to capture custom information, approvals, or terms at purchase?
- Which payment methods must you support, and in which markets?
- Do subscriptions, deposits, or split payments come into it?
- Does anything about tax, shipping, or compliance make checkout non-standard?

Why It Matters:

Every payment stack carries processor fees — those exist no matter how you build. What a custom checkout removes is the platform's limits on **how** checkout works, so the flow is built for your conversion, not the template's.

5. List Every System the Store Must Talk To

A store rarely lives alone. Integrations — not the storefront — are usually the hardest, riskiest part of the build, so surface them first.

Inventory Your Integrations:

- What systems hold data the store needs — ERP, accounting, CRM, inventory?
- Does data flow one way, or in both directions?
- How fresh must it be — real-time, hourly, nightly?
- Does each system have an API, or will data move by export and import?
- Who owns the credentials, and what are the limits on each connection?

The Rule:

Deep, business-wide integration is a reason to build. Where a platform's app store already covers your connections, that's a reason not to.

6. Plan the Migration Risk If You're Replatforming

Moving an existing store is its own project, and the risk that hurts most is invisible: lost search rankings. Plan the migration before you pick the destination.

Protect What You Have:

- How many existing URLs need to map to new addresses?
- Who owns the redirect plan, and when is it tested?
- What product, order, and customer data has to move intact?
- How much organic search traffic is at stake if rankings slip?
- How will you verify redirects and indexing after launch?

Why It Matters:

Most migration damage comes from broken URLs and missing redirects. A URL map made before launch, and verified after, is the difference between a smooth move and a traffic cliff.

7. Settle Ownership Before You Commit

Ownership is an approach question, not a legal afterthought. It's the clearest line between renting a storefront and owning one, and it changes everything about your leverage later.

Get These In Writing:

- Who owns the storefront source code and intellectual property?
- Can you export your product, order, and customer data in a usable form?
- Can you change developers or hosts without rebuilding from scratch?
- Are there platform fees or lock-in that make leaving expensive?
- Who controls the roadmap — you, or the platform's release schedule?

The Bottom Line:

A rented storefront is a store you can be evicted from. If ownership and portability matter to you, insist on them — in the contract, before work starts.

8. Understand What Really Drives Cost

Cost follows the approach, so compare the whole picture, not the sticker. A platform's low entry price and a custom build's larger up-front investment aren't the same shape of cost over time.

Compare the Full Picture:

- Platform approach: subscription and app fees that recur, and grow with sales.
- Custom approach: a larger build investment, then hosting and maintenance you control.
- Both approaches: payment processor fees on every transaction — unavoidable either way.
- Workarounds: paid apps and manual steps that a poor fit forces on you.
- Switching: what it costs to leave if the approach stops fitting.

Why It Matters:

The honest comparison is total cost over the years you'll run the store, fit included — not month one. Sometimes that favors a platform; sometimes ownership wins. The answer depends on the boxes you checked above.

The Final Word

There is no universally right answer, and any shop that gives you one without asking these questions is selling, not scoping. For a standard store, an off-the-shelf platform is usually the smart buy. Custom e-commerce earns its cost when your sales model, catalog, checkout, or integrations are the thing that makes you money — and when owning the store outright is worth more to you than launching next week.

Next Step:

Work through sections 1, 3, and 7 first — how you sell, whether you need B2B, and who owns the result. Those three decide most of the call. When you're ready to turn the checklist into a plan, QOS Software will scope it with you honestly, and tell you plainly when a platform like Shopify would serve you better. Call **877.800.7672** or visit **qossoftware.com**.