

eCommerce Checklist 2018

*Below you'll find an overview of the **common eCommerce issues** you might need to consider to ensure that your conversion rate is solid and the checkout smooth.*

Product Detail Page

- ☐ **Are you designing for considered or non-considered purchases?**

Considered purchases take time. They are often multi-channel experiences, with customers browsing and reading a lot, focusing on *product reviews* and pictures. There, customers shop by quality and service. Non-considered purchases are mono-channel and fast-paced, often with a high mobile traffic. Customers read *vendor reviews*, and shop by price and shipping speed.

- ☐ **Avoid hidden costs.**

Display full or estimated price early on, e.g. in the cart — way before entering card data. Show full cost granularity and cost descriptions, including a detailed shipping breakdown. Users cannot make an informed decision if either speed or cost is missing from the shipping options. Also, always display “Stock Availability” alongside shipping methods to reinforce user’s decision.

- ☐ **Show price in shopper’s local currency.**

Helps avoid confusion and simplifies comparing; value user’s account settings over IP detection. Allow users to select a country before they land in the checkout to display final price right away.

- ☐ **Consider using unit pricing.**

Similar products are often sold in different quantities. Provide total price and price per unit. Additionally, consider adding a “Lowest Price Per Unit” sorting option for price transparency.

- ☐ **“Catch” doubts and concerns before they happen.**

Display a price match tool tip when users start highlighting an appliance model to copy/paste.

- ☐ **Don’t mix plain and context thumbnails.**

Depending on the more common type, users tend ignore the other one when browsing. Show one thumbnail type by default and the other type on mouse hover (consistently).

☐ **Suggest alternative, supplementary and “recently viewed” items.**

Make it easy for the user to find substitutes, add-ons, accessories, and complementary products. Refinding a previously visited product before making a decision is often needlessly complex. The list should be available on all pages throughout the site — e.g. in the footer or in the sidebar. Especially for considered purchases.

☐ **Prefer “Load more”+ Infinite Scrolling pattern.**

“Traditional” pagination is perceived as slow; yet endless scrolling is often a usability nightmare. Display 15–30 products on initial page load, use endless scrolling to load next 15–30 products. When reaching 30–60 products, switch to the “Load more” pattern to actively prompt user to act.

☐ **Consider having a drop-down cart.**

Users who want to confirm compatibility need a quick way to look up its model name and specs. A quick preview reassures the users and helps them make a decision, without hassling back and forth.

☐ **Prefer honest, lower average rankings.**

People tend to trust authentic, imperfect products that have negative feedback and negative reviews. Users don’t trust averages based on < 5 ratings; they prioritize *more* ratings *despite* lower average. To provide “better” results, seek appropriate rating patterns, prioritize them, encourage more ratings. E.g. introduce an FAQ question connecting past and new customers.

☐ **Display delivery options, shipping time, costs, taxes, fees and availability.**

On the product page, eliminate all uncertainties to clear the path for a quick and “mindless” checkout. Make sure to clearly communicate shipping options incl. *both* the estimated shipping time *and* extra costs involved. Include currency selector, shipping country selector.

☐ **Prioritize what matters.**

To make a purchasing decision, the customer needs to know that they are buying a *very good product* for a *very good price* that will be *delivered in very good time* and that *fits their needs very well*. Without any risk, hassle, hidden fees or unexpected problems. Your task is to frame exactly this message as an attractive story, *clearly*. Prioritize: availability, price, photos, free shipping, testimonials, reviews, “best price” guarantee, simple returns.

☐ **Consider helpful features.**

Stock availability note. Email notification box (if the item is out of stock). Sizing guide. Texture/color variant watcher. Zooming in/out. Complementary products. Alternative products. Saving to wishlist. Keep “add to cart” always visible. Shopping cart overlay. “Save for

later”. “Save for comparison”. Testimonials. Ratings. Carousel. FAQ (as accordion/tabs). Technical Details. Quick access tiles: “Add to cart”, “Quick checkout”, “Save for later” etc.

Checkout

- ❑ **Short number of steps ≠ good checkout.**

It doesn't matter if you're using a single page checkout or a multi-page-checkout. Always display at most 5–6 input fields at a time, and display all the other items progressively. Short number of input fields always leads to good checkout.

- ❑ **Privacy issues have significant impact on conversion.**

Whenever asking for birthday, gender and phone number, always make clear why you need this data. For birthday, consider asking *only* for the day and month or *only* for the year instead of the full birthday. For gender, provide the option “I'd rather not say”. For phone number, provide a hint to why exactly you require this information.

- ❑ **Inline validation matters.**

Positive inline validation increases confidence. Always display a green box with a green checkmark *after* the user has left an input element. Validate email and data on spot and provide non-generic error messages (might be difficult, but definitely worth investing into).

- ❑ **Make sure there is an active coupon code.**

Some users feel they're overpaying when they see a coupon field but don't have a coupon themselves. Set up a standalone page that contains all active coupon codes, or make sure it's always findable on Google. Alternatively, hide your coupon code option behind a link/button that reveals the form fields when clicked.

- ❑ **Forced account creation is damaging.**

Most hostile step in the checkout process. Many people leave due to forced account creation alone. Provide a guest checkout by default. If a user has an account already, allow them to go through the checkout and add the purchase to the dashboard. If it's not possible, make account registration optional.

- ❑ **Shipping address should be billing address by default.**

Most users order products to the same address; hide the billing address fields entirely. Don't display billing address fields by default. Instead, provide a checkbox (activated by default) to let the users choose if the billing address should be different. If unchecked, display the billing address input fields.

☐ **Reconsider email verification.**

Many users consistently copy/paste their email when asked to verify it in the checkout.

Remove the email verification field altogether; instead, provide an option to adjust email in the “final review” page and *after* the purchase has been made. Instead of prompting the user to check their email, suggest going directly into their inbox.

☐ **Relax password requirements.**

Most users tend to use the same passwords over and over again. Strict password requirements force users to come up with a new password on spot — that password will be forgotten the moment the user finishes checkout, which will eventually lead to password recovery later. Many account users abandon the shopping cart because they can't remember the password. Suggest to create strong passwords, but don't impose minimum requirements beyond “6 letters”. Considering suggesting “pass phrases” instead.

☐ **Password recovery via link sign-in.**

Let the user focus on the task, not technical issues. Don't force the user to retype password — just sign in automatically.

☐ **Prompt to set up a password after the checkout.**

Ask users to set up a password after the checkout is done, with an incentive to get extra discounts.

☐ **Reinforce clarity of credit card fields.**

If you can map the credit card's front and back side in your interface, display the fields exactly where they are placed on the card. Use credit card icons and inline validation to increase confidence. Security seals might or might not work: don't just add them blindly.

☐ **Make it clear when the transaction takes place.**

Eliminate uncertainty by explaining when the customer is just about to make the transaction. (“Confirm order” vs. “Order confirmation”)

☐ **Disable critical actions upon clicking.**

The change of state serves as a visual indicator/feedback for user's actions. Informs customers that their request was registered, and helps prevent double-submits.

☐ **Never lose customer's data.**

When the user hits “Refresh” or accidentally closes browser, make sure that their data (except sensitive credit card data) remains populated in the fields (localStorage, Gmail-like experience). Also, make sure that the shopping cart is persistent (“wishlist”-behavior).

☐ **Disable autocorrect and use appropriate keyboards.**

Pay attention to autofill and autocorrect and disable unnecessary automated corrections. E.g. disable auto-correct on email and addresses, disable auto-capitalization on email, and use proper keyboard layouts, e.g. tel keyboard for phone number. HTML5 pattern attribute might be a good option for quick front-end validation.

☐ **Provide alternative payment methods.**

Suggest the user try out a completely new payment processor, e.g. 3rd-party checkout via PayPal. Eliminates a single point of failure in your checkout. Other solution: “fallback” merchant.

Navigation

- ☐ Faceted search
- ☐ Autocomplete & Autosuggest
- ☐ Forgiving input
- ☐ Breadcrumbs
- ☐ Progress indicator
- ☐ Badges and tags
- ☐ Filters
- ☐ Tabbed navigation
- ☐ Sorting by lowest price per unit
- ☐ Sorting by product features
- ☐ Sorting by review keywords

Pricing Plans Design Checklist

- ☐ Highlight a recommended option.
- ☐ Allow users to switch currency (€/\$/£)
- ☐ Allow users to switch pricing monthly/yearly
- ☐ Keep the entire pricing plan area clickable
- ☐ Use slider to calculate how much a user would save
- ☐ Provide free first month for good engagement
- ☐ Prominently highlight testimonials prominently
- ☐ Repeating call to action on top and bottom
- ☐ Sell benefits instead of features
- ☐ Indicate that users can cancel any time
- ☐ Indicate what group each pricing plan is for (e.g. freelancers).
- ☐ Avoid mentioning “account” anywhere.

- ☐ On mobile, turn pricing plans into accordions (e.g. Slack).
- ☐ Small commitments are better than big ones,
- ☐ Allow users to switch table/slider views,
- ☐ Highlight selected/tapped row/column in a table,
- ☐ On mobile, keep the pricing and figures as a fixed bar,
- ☐ Allow users to select features of interest,
- ☐ Allow users to configure their own pricing plan,
- ☐ Allow users to compare all features in a full screen mode,
- ☐ Potentially use tabs at the top/bottom for comparison,
- ☐ Make sure each section drops a bit of delight,
- ☐ Provide a way out if a user isn't interested ("buy our books instead"),
- ☐ In a form, display at most 5–6 input fields at a time.

☐ **Pick and highlight a recommended option.**

An emphasized product suggestion helps customers make a choice and battles paralysis.

☐ **Sell benefits instead of features.**

People care less about features than benefits. Benefits carry more clearly defined value. People want more: Love, Money, Acceptance, Time. Less: Stress, Conflict, Hassle and Uncertainty.

☐ **Use anchoring to explain the context.**

Our decision making is affected by the first quantities which come to our attention. Start with a larger number and move towards a smaller price; it won't feel as large any longer.

☐ **Make ideas sticky, service easy to grasp.**

Comparisons help ground the price and make it more tangible and less abstract for customers. Framework for sticky ideas: Simple, Unexpected, Concrete, Credible, Emotional, Storytelling.

☐ **Loss aversion instead of emphasizing gains.**

We like to win, but we hate to lose. We're more likely to prefer avoiding losses than acquiring gains. Insurance companies don't sell accident payouts; they sell protection of the things we care about. Apply it to how product offerings are framed and communicated to tell people what they're missing.

☐ **Smaller commitments easier to accept.**

Big commitments scare people off. Foot in the door technique: progress with small commitments. Decrease the barrier of entry by targeting and addressing all concerns the customer might have.

❑ **Use scarcity to drive conversion.**

When there is less of anything, we tend to value it more. Display how many items are left.

❑ **Gradual engagement instead of a hasty sign up.**

Instead of asking visitors to sign up immediately, ask them to first perform a task within your UI. Gradual engagement postpones the sign up process and allows users to test your application first. Curiosity drives engagement and helps establish an emotional connection with the users.

Quick wins

This list is quite comprehensive, and completing all of the optimizations might take quite a while. So if you had just 1 hour to get significant improvements, what would you do? Let's boil it all down to 10 low-hanging fruits. Obviously, before you start and once you finish, measure results, including shopping cart abandonment rate and total revenue.

1. Optimize for considered or non-considered purchases. With considered purchases, focus on product reviews, photos, quality of service. With non-considered purchases, eliminate distractions and focus on vendor reviews, price and delivery.
2. Display full or estimated price early on, including a detailed shipping breakdown. Show price in shopper's local currency. Allow users to select a country before they land in the checkout to display final price right away.
3. Suggest alternative, supplementary and "recently viewed" items.
4. Prefer "Load more"+ Infinite Scrolling pattern when displaying products.
5. Display delivery options, shipping time, costs, taxes, fees and availability.
6. In forms, display 5–6 input fields at a time, and display other fields progressively.
7. Prioritize: availability, price, photos, free shipping, testimonials, reviews, "best price" guarantee, simple returns.
8. Positive inline validation increases purchasing confidence.
9. Set up a page with an active coupon code or make sure an active coupon code is easily findable on Google.
10. Reconsider email verification and password requirements. Repeat customers matter most, so verify email/password outside of the scope of the checkout.

Product Finding and Search

For a desktop view, think about:

- search box
- search query
- search autocomplete
- results list
 - item titles
 - price
 - thumbnail
 - reviews
 - availability
 - compatibility
 - product variations
- number of results
- filters
 - adding more filters
 - removing added filters (clearing the search input)
 - should filters be applied automatically?
- misspellings and synonyms
- sorting options, sort by?..
- displaying many options: infinite scroll, pagination, “load more”?
- specifics of your product that needs highlighting

Product Page

- product name
- price
- product image: close-up, zoom in/out functionality
- product variations
- filters (size/color)
- quantity selector
- calls to action: buy button, “add to basket”, “save for later”
- gifting options
- product headlines
- delivery options
- reviews
- further photos / gallery
- technical specs / details
- warranty details
- related / alternative items
 - “Frequently bought with...”
 - “Customers who bought also bought...”
 - “Your recently viewed items...”
 - cross-sells / up-sells
- accessories
- availability / in stock
- wishlist options
- returns and refunds
- interface copy
 - buttons
 - description
 - sales / marketing blurb
- payment methods/options
- access to the shopping cart

Shopping Cart

- What do you display to the user when an item is added?
 - Drop-down cart (but continue shopping by default)?
 - Cart overlay (the default page is greyed out)?
 - Notification that an item has been added?
 - Skip shopping cart page and move to checkout?
- thumbnail
- product title
- quantity selector
- CTAs: “continue shopping”, “review or edit the cart”, “check out”
- product variations
- shipping options
- gifting options
- reviews
- related / alternative items
 - “Frequently bought with...”
 - “Customers who bought also bought...”
 - “Your recently viewed items...”
 - cross-sells / up-sells
- accessories
- availability / in stock
- wishlist options
- returns and refunds
- interface copy
 - buttons
 - description
 - sales / marketing blurb
- progress indicator
- payment methods/options
- save for later
- coupon code input

Checkout “Account”

- Checkout types
 - Multi-step checkout
 - One-step checkout
 - Accordion checkout
- Account creation
 - Which default option to choose?
 - Guest checkout
 - wording
 - placement
 - Account creation
 - Signing in
 - Login/Pass?
 - Social media account sign-in?
 - Customers who already have an account?
- Layout?
- Navigation?
- Progress indicator

Checkout “Shipping Options”

- Personal Details
 - Gender and title
 - First name
 - Middle name
 - Last name
 - Email
 - Country
 - Address
 - Address Line 2
 - State / County
 - City
 - ZIP code
 - Company/Organization
 - Birthday
 - Phone number
- Billing address
- Opt-ins (newsletter etc.)
- Coupon code input field
- Order of the input fields
- Length and min/max character count for input fields
- Input options
 - Input field
 - Radio button
 - Checkbox
 - Drop-down
 - Slider
 - Expander (Mini-accordion)
- Optional and required fields
- Order summary
- Error messages
- Progress indicator
- Gifting options
- Shipping options
 - Standard shipping

- Airmail shipping
- Overnight shipping
- Store pick-up
- Autofill / IP detection?
- Progress indicator

Checkout “Payment Details”

- Payment options
 - Credit/debit card
 - Name on Card
 - Credit card number
 - Expiry date
 - Security code (CVV/CVV2, CVC, CID, “Security Code”)
 - Credit card logo/visual
 - PayPal
 - Apple Pay
 - Google Wallet
 - Visa Checkout
 - MasterPass
 - Amazon Payments
 - Alipay
 - Cash on delivery (Eastern Europe)
 - 1-Click-Checkout
 - Local payment methods (iDeal)
 - SEPA / invoice payment / Sofortüberweisung
- Placement of options
- Credit card icons? Where to put them?
- Payment fees?
- Input formatting and typing
- Gift / coupon codes
- Loyalty points
- Visual security indicators
 - SSL Seals (Norton, Thawte, Trustwave, Geotrust, Comodo)

- Trust Seals (Google Trusted Store, BBB Accredited, TRUSTe)
- Home-made icons (padlock icons, “secure checkout” badges)
- Reassuring microcopy
- Different background / shading
- HTTPS indicator
- Error messages
- CAPTCHA
- Calls to action
 - “Final payment button” or “Review your order”?
- Progress indicator

Checkout “Review” page

- Summarizing personal details
- Summarizing shipping details
- Summarizing billing details
- Summarizing payment details
 - Credit card input
 - Vouchers/Gift codes/Coupons
- “Edit” buttons to adjust the order
- Quantity selector
- “Place order” button
- Progress indicator

Checkout “Success” page

- Email confirmation
- Order details
- Order number
- Cross-sells/upsells and “next” actions
- Setting up an account / password
- Error recovery