**How to Use This Template**

Thanks for downloading HubSpot’s Ecommerce Plan Template!

This tool was built for you to outline your company’s ecommerce plan for a specific product, line of products, or all of your products. Included are sections common in most ecommerce plans, as well as prompts for you to fill out your company’s tactics and information. Simply erase the gray instructions under each header and replace them with what makes sense for your business.

Once complete, this plan can be shared with internal stakeholders, company leadership, the sales, product, and/or marketing teams, or whomever you see fit.

Keep in mind, this template is designed to be completely customized by your company. If you feel there are sections included that you would rather omit, or if you think a section is missing, you are encouraged to make those changes as you see for your business.

## [Click here to learn more about HubSpot for your ecommerce business.](https://hubs.ly/H0kbmhN0)

*[Company Logo]*

*[Company Name]*

*Ecommerce Plan for [Name of Product, Product Line, or Company]*

*Written by: [Your Name]*

*[Your Email]*

*Last Updated: [Date of Most Recent Update]*

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**The Product(s)**

*In this section, you’ll provide an overview of the product or products in question. Again, this can be for a specific product or your entire product database – just remember to know your audience and the purpose of this plan to keep things clear and consistent.*

**Product Description**

*[Enter a brief description of the product(s), the purpose of the product(s), and why it was developed.]*

**Price Point**

*[How much will the product cost buyers? Why was this price point decided on? Will any discounts be provided to certain audiences or in certain time frames?]*

**Product Costs**

*[Explain how much the product costs to produce. If needed, provide a more in-dept cost analysis to include R&D, overhead costs, etc.]*

**Channels and Vendors**

*Where will you be selling your product online? Go site-by-site and explain what the vendor is, why you chose that vendor, what conflicts or omissions need to be mentioned about that channel, and what costs you can expect to pay for utilizing that vendor (credit card processing fees, ordering fees, markup percentages, etc.).*

**Company Site**

*[Typically, no explanation is needed here, but consider explaining what product category this will live under or any other information you want to share].*

**Channel #1**

*[Explain why you chose this channel, list any concerns or priorities, and list any associated costs].*

**Channel #2**

*[Explain why you chose this channel, list any concerns or priorities, and list any associated costs].*

**Channel #3**

*[Explain why you chose this channel, list any concerns or priorities, and list any associated costs].*

**Technology and Software**

*Aside from your website, which technology of software will you be using to sell your product online? Will you use* [*Google Analytics*](https://analytics.google.com/analytics/web/) *to track pixels for different channels and social media pages? Will you be using* [*Shopify*](https://www.hubspot.com/integrations/shopify) *to run your online store? Will you be* [*linking Shopify to your CRM*](https://hubs.ly/H0kbmV70)*? Will you be using* [*Salsify*](https://www.salsify.com/) *to manage and track your vendors? Outline all of the important software to know in the section below.*

**Technology/Software #1**

*[Explain what the software is and how you’ll use it in your ecommerce planning and management.]*

**Technology/Software #2**

*[Explain what the software is and how you’ll use it in your ecommerce planning and management.]*

**Technology/Software #3**

*[Explain what the software is and how you’ll use it in your ecommerce planning and management.]*

**Technology/Software #4**

*[Explain what the software is and how you’ll use it in your ecommerce planning and management.]*

**Target Market**

*Use this section to outline the intended buyer for the product(s) and why they would benefit from what you’re selling online.*

**Buyer Persona**

*[Enter the buyer persona this product is intended for. If you need to build a buyer persona,* [*click here to access HubSpot’s free Make My Persona tool*](https://hubs.ly/H0kbmTY0)*.]*

**Market Size**

*[Explain the size of your market and estimated market penetration based on calculations and research.]*

**Customer Retention Strategy**

*[If your product is popular for recurring orders or reorders, explain how you’ll retain customers to ensure they repurchase from you.]*

**Market Research**

*Explain the research your team has don’t to position your product(s) online. If you’re just getting started with market research,* [*click here to download HubSpot’s Market Research Starter Pack*](https://hubs.ly/H0kbmSs0)*.*

**Market Size**

*[Explain the size of your market and estimated market penetration based on calculations and research.]*

**SWOT Analysis**

*[Flesh out your strengths, weaknesses, opportunities, and threats with a* [*SWOT analysis*](https://blog.hubspot.com/marketing/swot-analysis)*.]*

|  |  |
| --- | --- |
| Strengths: | Weaknesses: |
| Opportunities: | Threats: |

**Competitive Analysis and Advantages**

*[List out your top competitors, what your competitive advantages over each of them are, and what your overarching competitive advantages are.]*

**Marketing Strategy**

*Outline the marketing initiatives you’ll take to send people to your product page(s). There’s a good chance that you won’t be using all of these marketing channels, or that you’ll be utilizing platforms we didn’t outline here. Feel free to add or remove platforms as you see fit!*

*If applicable, each marketing initiative should include its budget, timeline, and point of contact. If you need help building this out, download our free* [*Advertising Plan Kit*](https://hubs.ly/H0kbnkx0)*.*

**Paid Search Ads**

*[Explain how you’ll advertise on Google, Amazon, Google Display Network, Bing, or other search engines, and where these advertisements will point to.]*

**Social Media Marketing**

*[Explain how you’ll leverage social media – from both a paid an organic stand point – in your marketing efforts.]*

**Retargeting**

*[Will you be using retargeting to reach out to website visitors who did not check out? If so, explain your strategy for that here.]*

**Email Marketing**

*[Explain how you’ll be leveraging your list of existing contacts in your* [*CRM*](https://hubs.ly/H0kbnhH0) *with email marketing.]*

**Content Marketing**

*[How will blogs, ebooks, and your content marketing initiatives support your ecommerce sales?]*

**Keyword Research and SEO**

*[Explain the efforts you took to make your product pages rank on search engines.]*

**Financial Goals**

*Lay out the financial goals you have for this product for a set time period, broken down by vendors and units sold. You can also track these numbers in the spreadsheet included in your downloaded.*

*[Date Range]*

|  |  |  |  |
| --- | --- | --- | --- |
| *Vendor* | *Projected Units Sold* | *Projected Revenue* | *Projected Profit* |
| *Company Site* | *# of units* | *$ Revenue* | *$ Profit* |
| *Vendor #1* | *# of units* | *$ Revenue* | *$ Profit* |
| *Vendor #2* | *# of units* | *$ Revenue* | *$ Profit* |
| *Vendor #3* | *# of units* | *$ Revenue* | *$ Profit* |
| *Vendor #4* | *# of units* | *$ Revenue* | *$ Profit* |
| *Vendor #5* | *# of units* | *$ Revenue* | *$ Profit* |
| ***Total*** | *Total # of units* | *Total $ Revenue* | *Total $ Profit* |

**Did We Miss Something?**

*Add another section here if you need it.*

[****](https://hubs.ly/H0kbmhN0)

**Need help putting your ecommerce plan into action?**

HubSpot’s lets you connect your online store to your CRM.

Learn more about the solutions and strategies HubSpot provides to grow your online store through inbound. Now live in HubSpot is a new, HubSpot built, integration with your online store.

## [Click here to learn more about](https://hubs.ly/H0kbmhN0) HubSpot for ecommerce.

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