Process Solutions Tom Bellinson

Process Automation: Life On theWeb-WordPress

Here at the process automation desk of BPTrends (okay, not really), I oftentimes find myself thinking more about automation and less about process. If you are an information technology professional such as I, you may also think about the processes surrounding your activities. It is only natural that someone who subscribes to BPTrends would have some interest in process management.

Sadly, too many people involved in developing process solutions focus more on features and less on process. If there is any good news here, it is that if a product ultimately develops enough features and configurability, it can support a wide array of process variations. Such is the case with WordPress, my preferred web based content management system (CMS).

WordPress has evolved to become a full-blown ecosystem. It transcends its original intended function to become a highly configurable system that can evolve with your processes. By way of example, I would like to take you on a WordPress-eye-view of a journey undertaken during the startup phase of a new venture being undertaken by me and my two partners.

We decided to launch our company as a 100% web-based enterprise. We all have experience marketing on the web, but none of us have tried to live exclusively there until now. I began setting up the domain with my hosting service and doing a baseline installation of the WordPress system -- easy peasy!

Look and Feel

The next step is to select a theme. WordPress has thousands of themes. It is not clear exactly how many as the number is changing almost daily. Some themes are designed for specific usages such as blog sites, ecommerce or even specialties like real estate. Some themes are highly configurable without any knowledge of the WordPress technological framework. Others have hooks to make it easy for technical folks to enhance them.

The major challenge with WordPress themes is too much choice. I spent hours "trying on different themes. One of the really nice features of WordPress themes is you can literally change them faster than trying on a new pair of pants. If you use the WordPress.org site, you will usually see some screen shots along with a list of features for each theme. Unfortunately, content set up in one theme will not always get picked up by the next theme, so some rework is required to change themes after you've configured one. For this reason, any content that was put into a theme's custom configuration interface should be pulled into an offline document for reloading after the theme change.

Most themes have a "pro edition" for which you must pay. Pro editions generally cost between $20 and $100. They add features such as better control of site colors and some have more types of content that can be configured. All of them that I have encountered also include support and updates for a year with the pro edition, so if you're building a business site it is well worth it. We liked our selected theme so much that we are still using the free version for now. We will probably switch to pro later to show our appreciation for such a great product.

Analytics

If you are serious about doing business on the web, you need to have actionable feedback about the traffic coming to your site. In this regard, Google has a distinct advantage. Google Analytics offers the most comprehensive tracking of traffic sources and site level activity of any solution we found. However, with this decision made, there was still plenty more choices to investigate.

A quick search shows that there are 100's of options for Google Analytics plugins to WordPress. We selected Alin Marcu's Google Analytics Dashboard for WP. We especially liked the panel that is provided on the WordPress administrative dashboard (pictured right). The two dropdown lists at the top of the panel can be altered to provide a wide variety of analytical data.
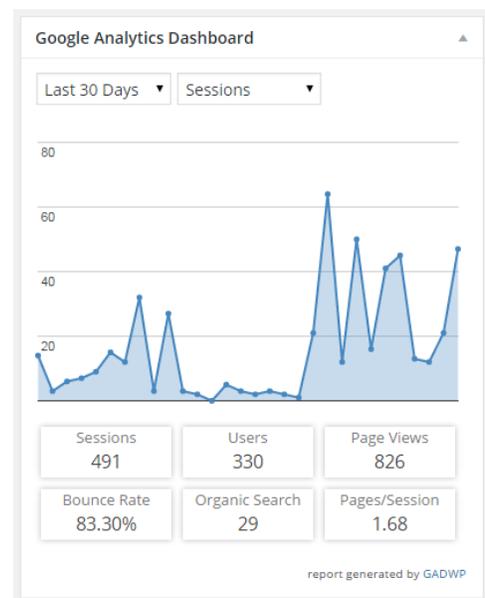

Ecommerce

The basic site won't help you sell any product, so you're going to need a plug-in for your web storefront. There are a few major players out there in the WordPress plugin space, but none can match Woocommerce. If you're going to use this plugin, make sure beforehand that your theme supports it. If it doesn't, you will need to switch themes. One of the great things about Woocommerce is that it is an ecosystem in its

own right. There are many plugins for it that extend its capabilities. We ended up using more of these than WordPress plugins.

Of course, ecommerce is not a process -- it is a set of processes (as suggested in the flowchart below). After we installed Woocommerce, we quickly realized that you cannot buy something if you can't pay for it. Here again there are many choices. Merchant services abound, but not all of them work with Woocommerce. We decided to play it safe and go with the most popular choices. We used Mastercard's Simply Commerce plugin, which has competitive rates, and despite being Mastercard branded, accepts all major credit cards.
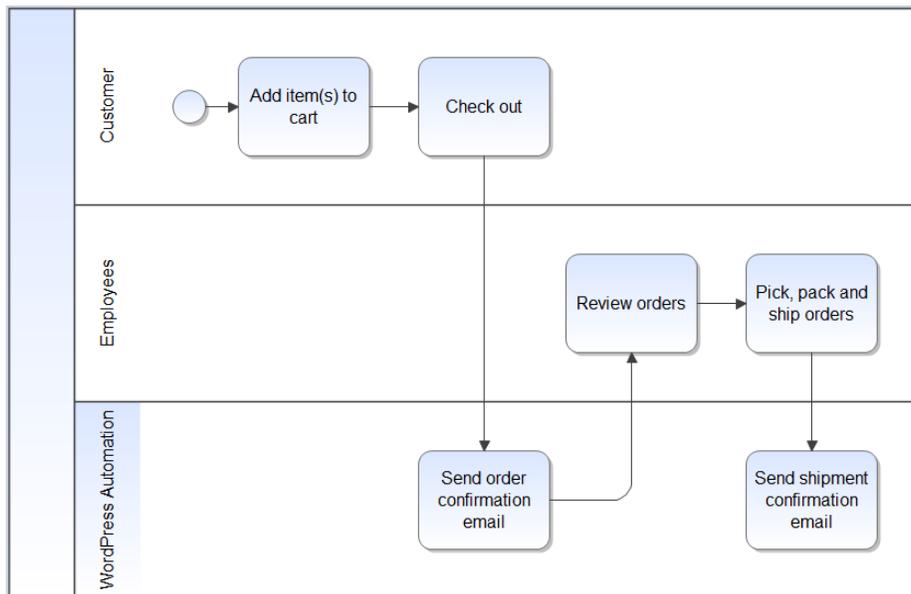
If you've purchased anything on the web lately, you know that PayPal and Amazon checkouts are very popular. To install these not only required two extra plugins, but we also needed to establish merchant accounts with both providers. All three are linked directly to our bank account.

Having dealt with the process of collecting payment, we moved on to the next process in the value-chain: getting the product to the customer. If your product is a digital download, this is easy and part of Woocommerce. If your product fits in a standard business envelope, you are also in luck because this is easy to manage. However, if you're like us, you generally sell multiple items and they must go in a box. Things just got more complicated.

We decided to start with two standard box sizes : 6x6x6 and 12x6x6. If the order doesn't fit in either of those two boxes, we either fake it or ship in multiple boxes. This reduces some complexity, but we still need to pick a way to manage shipments that works seamlessly with Woocommerce. As with all the other plugins, there are many options. Some plugins have an upfront fee and you use them to manage the

workflow and documents (e.g. packing list). Others are fully integrated with carriers and allow you to purchase and print shipping labels.

We chose the latter, selecting a cloud-based product that integrates with multiple carriers, so that we can do freight rating as we grow. It integrates with WooCommerce to fetch orders, but has its own shipping dashboard for handling the picking, packing and shipping processes. When orders have been shipped, it automatically updates the status of the order in WooCommerce. The system also manages returns, including issuing return merchandise authorizations (RMA's).

Getting Social

We quickly learned that if you build it, they won't come. We fired up a Facebook page, a Twitter account, Pintrest, and Instagram. We even ran some online ads. That served to get some people over to our site, but still no sales. After some head-scratching, we came to realize that once you get people to your site, you need ways to encourage them to buy.
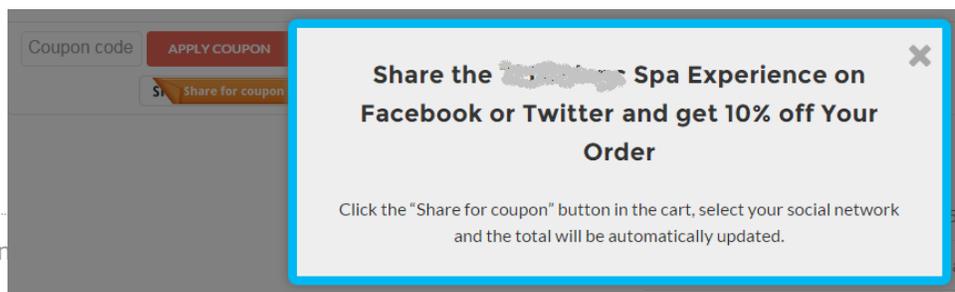
BPTrends is all about process, so I won't bore you with a treatise on the psychology of selling to Millennials, Gen Xers and Baby Boomers. Suffice it to say that we did some studying on this topic. From a process perspective, we had assumed that if we did enough marketing to get people to visit the site and we had a site with some good products and the ability to purchase them -- sales would happen.

What we came to realize is that an ecommerce website is more like a bricks and mortar store than we thought. When you walk into a restaurant at noon and it is empty, what is the first thing to come to mind? For me, the question is: where "ELSE" should we eat today. It turns out that a website can look like nobody is home, too. Like the empty restaurant, nice decorations and new carpeting will not substitute for a lack of guests. This is the plight of every startup.

So, we did what any startup would do. We hung a Grand Opening banner. We had a Grand Opening sale. We went out into the physical world and handed out free product, asking people to go to the site and review that product. Basically, we made it look like our restaurant is not empty.

As with all the other features we've needed, the WordPress community was able to oblige. First, we added a plugin that shows on every page of the site that allows people to click and share our site with their friends/followers from their favorite social media site. Next, we added the ability to log into the site using your favorite social media site (only Facebook and Twitter for now).

When we weren't getting the response we wanted, we added the ability

Coupon code   APPLY COUPON

Share for coupon

Share the ▨▨▨▨ Spa Experience on Facebook or Twitter and get 10% off Your Order

Click the "Share for coupon" button in the cart, select your social network and the total will be automatically updated.

to get an additional discount if you share your purchase on Facebook, Pintrest or Twitter (studies show these are the big three for B2C sales). In the end, we added those annoying popups that you see on almost every commercial site on the Internet these days. Did I want to do this? No, I did not. I was raised by the golden rule and this seems to violate it. Unfortunately, studies show that these things work.

The goal of ecommerce is getting customers to the checkout page. To do that, you need to give them a compelling reason to do so. Great products and services may not be enough. Good content may not even be enough. Sometimes a little coaxing is needed and with all the tools available to enhance your site, it is possible to design a process that takes people from your home or landing page right to checkout. Further, with a little more coaxing, you might even get each customer to provide you with more prospects.

The Journey Continues

We are still learning and evolving our strategy. We have already decided that we would like to add a "bespoke" program that will allow customers to custom design their products. Initial research shows that there are a number of WooCommerce plugins that allow for product configuration. We are also planning a subscription program and that functionality is also readily available.

The reason I wanted to open this series with a piece about WordPress is because so many companies who seek professional guidance in building their web presence get roped into using fully customized or proprietary platforms for their website, and the cost becomes astronomical. Hopefully, what I have been able to demonstrate here is that tools like WordPress and WooCommerce provide a vast amount of flexibility with nary a line of HTML code written by the implementor.

Author

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Mr. Bellinson has been working in information technology positions for 30 years. His diverse background has allowed him to gain intimate working knowledge in technical, marketing, sales and executive roles. Most recently, Mr. Bellinson finds himself serving as President of a BPM related software start-up company called UnaPage that provides solutions based on Microsoft SharePoint. From 2008 to 2011

Bellinson worked with at risk businesses in Michigan through a State funded program which was administered by the University of Michigan. Prior to working for the University of Michigan, Mr. Bellinson served as Vice President of an ERP software company, an independent business and IT consultant, as chief information officer of an automotive engineering services company and as founder and President of a systems integration firm that was a pioneer in Internet services marketplace. Bellinson holds a degree in Communications with a Minor in Management from Oakland University in Rochester, MI and has a variety of technical certifications including APICS CPIM and CSCP.