

Post-Purchase Buyer's Guide Checklist



This checklist is intended to help you make an informed, intelligent decision when it comes to investing in a post-purchase solution.

The following will help you understand what questions you should ask, what you should look for in a solution (based on your business' needs), and what differentiates one platform from another.

Calculate your score at the end of this checklist and use it as a benchmark when looking at post-purchase solutions so you can partner with the platform that's best suited for your brand.

—Your Friends at Narvar

**Part 1 —
Need analysis**

**Part 2 —
Operational analysis**

**Part 3 —
Functionality analysis**

**Calculate your
total score...**

Part 1 — Need analysis

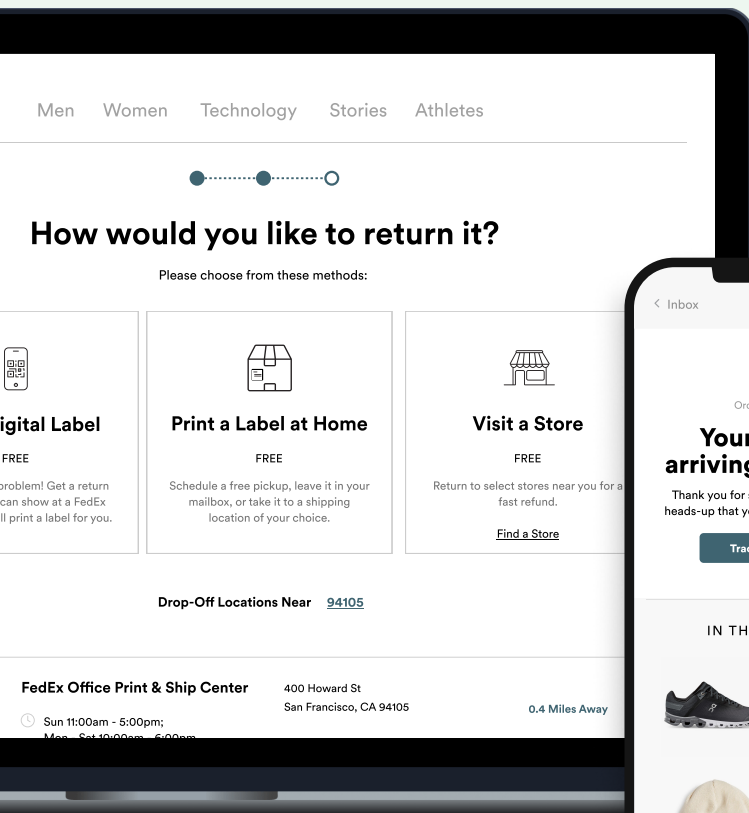
Part 1: General post-purchase

	Yes	No
Do you use any post-purchase tools at this time?	<input type="checkbox"/>	<input type="checkbox"/>
Do you process more than 80,000 orders per year?	<input type="checkbox"/>	<input type="checkbox"/>
Do you ship your products to more than one country?	<input type="checkbox"/>	<input type="checkbox"/>
Do your customers return or exchange more than 4,000 items per year?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like to reduce the number of “Where is my order?” or “Where is my refund?” calls you receive?	<input type="checkbox"/>	<input type="checkbox"/>

Instructions for scoring

Record 1 point for every “Yes” and 0 points for every “No.”

Part 1 Score: _____



WHAT YOUR SCORE MEANS...

A total score **below 3** indicates you do not need a post-purchase solution at this time—please do not proceed with this checklist.

If you scored **3 or higher**, please move on to Part 2.

Part 2 — Operational analysis

Part 2a:

Technical support

	Yes	No
Do you have an IT agency that you partner with regularly?	<input type="checkbox"/>	<input type="checkbox"/>
Will you need help developing and executing an activation plan that outlines go-live activities?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want access to implementation specialists who can guide you through the initial configuration, setup, and rollout of a post-purchase solution?	<input type="checkbox"/>	<input type="checkbox"/>

Instructions for scoring

Record 1 point for every “Yes” and 0 points for every “No.”

Part 2a Score: _____

Part 2b:

Project management

	Yes	No
Would you like access to an online support portal that’s available 24-7-365?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want a dedicated project manager coordinating day-to-day needs for your implementation?	<input type="checkbox"/>	<input type="checkbox"/>
Following implementation, would you like a dedicated customer success manager (i.e., account manager)?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like Quarterly Business Reviews (QBRs) to examine performance, identify opportunities for optimization, and learn about best practices followed by comparable retailers?	<input type="checkbox"/>	<input type="checkbox"/>

Instructions for scoring

Record 1 point for every “Yes” and 0 points for every “No.”

Part 2b Score: _____

Part 2 Score (2a + 2b): _____

Part 3 — Functionality analysis

Part 3a: Order tracking

	Yes	No
Do you use a chat bot you'd like to include order tracking in?	<input type="checkbox"/>	<input type="checkbox"/>
Are you currently providing a branded domain for your tracking URL?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like your customers to be able to leave delivery instructions for carriers?	<input type="checkbox"/>	<input type="checkbox"/>
Is it important that a post-purchase solution allows you to tap new revenue streams?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want a customizable order tracking solution (e.g., branded order tracking pages)?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like to offer package routing and rerouting for the convenience of your customers?	<input type="checkbox"/>	<input type="checkbox"/>

Instructions for scoring

Record 1 point for every "Yes" and 0 points for every "No."

Part 3a Score: _____

Part 3b: Return and exchange

	Yes	No
Do your customers want boxless and printerless return options?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like to allow your customers to initiate their returns online?	<input type="checkbox"/>	<input type="checkbox"/>
Can you proactively notify customers about their return or refund status at this time?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like to offer easy exchanges or issue refunds as store credit (or a gift card)?	<input type="checkbox"/>	<input type="checkbox"/>
Do you need to route returns to different locations depending upon your business' return rules?	<input type="checkbox"/>	<input type="checkbox"/>
Would it be helpful to know what products are being returned and what customer return reasons are the moment a return is initiated?	<input type="checkbox"/>	<input type="checkbox"/>

Instructions for scoring

Record 1 point for every "Yes" and 0 points for every "No."

Part 3b Score: _____

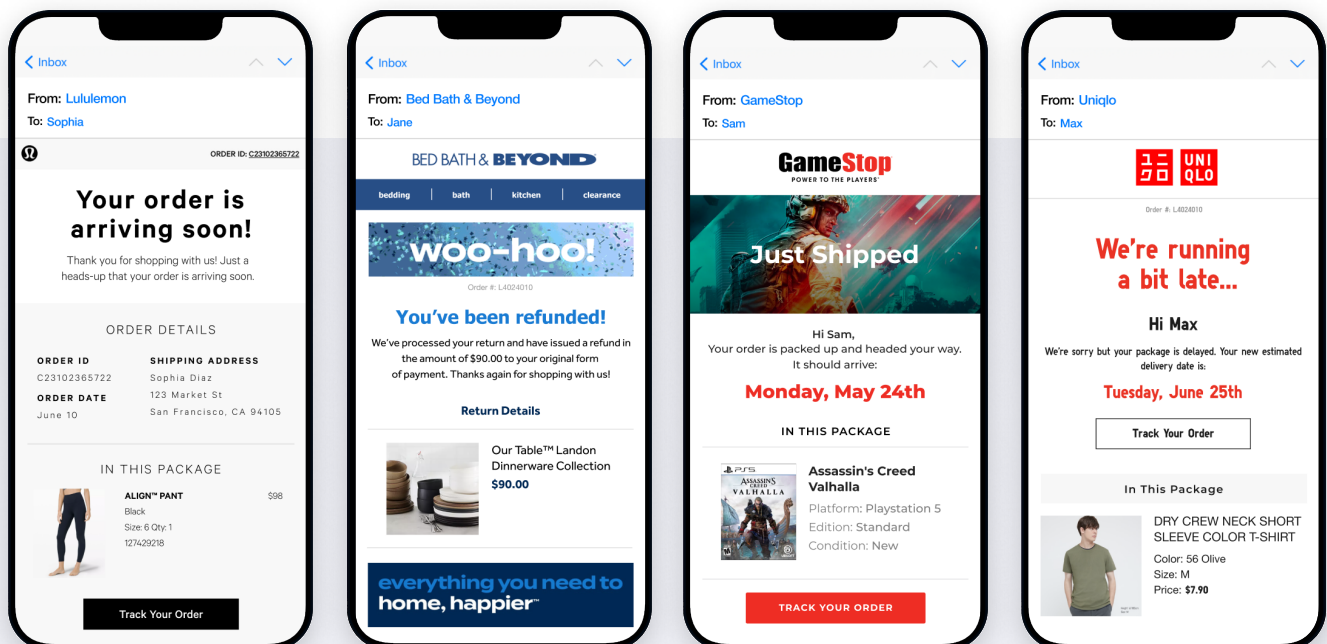
Part 3c: Messaging and notification

	Yes	No
Do you segment your customers (VIP, first time buyer, product type)?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like to have specific email messaging for each customer segment?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to update customers about their order status by way of email and SMS?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to collect feedback from shoppers on their delivery or return experience?	<input type="checkbox"/>	<input type="checkbox"/>
When order issues arise, do stay ahead of problems by using email automation to alert the appropriate teams?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like to offer your customers pre-ship emails (e.g., pre-ship emails when purchases are made for items on backorder, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>
Are you hoping to use predictive shipping analytics to anticipate delivery issues before they happen so you can notify consumers proactively?	<input type="checkbox"/>	<input type="checkbox"/>
To fuel additional sales, do you want the ability to embed special offers, product recommendations, and other assets into your post-purchase notifications?	<input type="checkbox"/>	<input type="checkbox"/>

Instructions for scoring

Record 1 point for every “Yes” and 0 points for every “No.”

Part 3c Score: _____



Part 3d: Pre-purchase

	Yes	No
Is cart abandonment a problem for you?	<input type="checkbox"/>	<input type="checkbox"/>
Are predictive shipping analytics something that interests you?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to show the estimated delivery date on Product Detail and Checkout pages?	<input type="checkbox"/>	<input type="checkbox"/>
Does the prospect of showing delivery windows by carrier, origin zip codes, and destination zip codes interest you?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like to offer adjustable estimated delivery dates depending on product category (e.g., monogrammed, rush delivery, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>

Instructions for scoring

Record 1 point for every “Yes” and 0 points for every “No.”

Part 3d Score: _____

Part 3e: Data and analytics

	Yes	No
Could you benefit from real-time visibility into your logistics network?	<input type="checkbox"/>	<input type="checkbox"/>
Are bespoke dashboards and analytics related to your shipments of interest to you?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to be able to evaluate carrier performance by analyzing historical trends and data?	<input type="checkbox"/>	<input type="checkbox"/>
Is predictive delay intelligence to improve fulfillment performance something you’re interested in?	<input type="checkbox"/>	<input type="checkbox"/>
Do you need reporting capabilities related to initiated returns, in-transit returns, and completed returns?	<input type="checkbox"/>	<input type="checkbox"/>

Instructions for scoring

Record 1 point for every “Yes” and 0 points for every “No.”

Part 3e Score: _____

Part 3 Score (3a + 3b + 3c + 3d + 3e): _____

**Calculate
your total
score...**

Add each score from Part 1 through 3 and write it below.

Part 1 Score:

Part 2 Score:



Part 3 Score:

Total Score:



WHAT YOUR SCORE MEANS...

A total score **below 14** indicates you do not need a post-purchase solution at this time.

A total score **between 14 and 24** indicates that you need one or more point solutions (e.g., order tracking), but not necessarily an end-to-end post-purchase platform.

A total score of **25 or above** indicates that you should invest in an end-to-end post-purchase platform—something that offers everything from order tracking, to analytics, to returns and exchanges, to messaging and more.

