



## **the insider's guide to successful site launches and redesigns**

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## table of contents

- i. introduction
- ii. six secrets to success
  - a. start with strategic business thinking
  - b. develop a well designed project plan
  - c. structure a winning organization
  - d. partner smart
  - e. perfect project management
  - f. demand adequate testing
- iii. the e-tailing group checklist to successfully replatform and redesign
- iv. about the companies

## i. introduction

Our own 2010 e-tailing group research indicates that 49% of merchants will look to replatform their sites over the next three years while countless others will alter their site designs in a myriad of ways. Whether you handle these changes in-house, outsource them or pursue a joint scenario **aligning your strategic objectives, your team, and your vision are all prerequisites for success.**

Unfortunately we have all been part of experiences that have started out smoothly yet turned into a nightmare, going over budget, over deadline or both. This is particularly near and dear to my heart as we continually work with retailers who find themselves in the re-platforming or redesign cycle plus we recently redesigned our own site. Knowing that these transition periods can be daunting and even damaging to one's business, Lyons Consulting, an ecommerce design and development firm, wisely takes an interest in mitigating any challenges merchants will likely face. They seek smooth and successful transitions for their clients and have asked the e-tailing group to expound on this topic that eventually impacts all retailers selling online as it is an ongoing part of their ecommerce existence.

In order to understand the winning ways, best advice, and insights surrounding both positive and painful experiences, I reached out to the merchant community to hear their stories first-hand. Shared insights and advice inspired me to summarize a series of topline recommendations with relevant supporting experiences providing texture and context. Their pearls of wisdom will most likely resonate and enable you to replatform smarter and redesign more effectively. Each section can stand on its own and should be a takeaway that supports your successful initiatives.

My hope is that all future redesign and re-platforming efforts in which you engage start with **strategic business thinking** supported by a **well conceived project plan** that incorporates both front-end and back-end requirements to be shared internally as well as with external partners. **Organization structures with diversified team members** should be readied and the **right partners** picked who fit your unique business needs. **Diligent project management** can ease the stress that comes with replatforming, elevating your chance of bringing an exceptional new site to your customers. Lastly **proper testing** will ensure that consumers understand your execution where tweaking will seal the sale and drive long-term profitability. We have included six broad insider tips and tactics, some of which will surely resonate with you and your organization.

Undoubtedly you have stories of your own we hope you will share with us for inclusion in future communiqués.

## ii. six secrets to success

### a. strategic business thinking

As companies embark on mission critical re-platforming or redesigns, putting the right strategic thinking in place before beginning the endeavor and thinking strategically throughout will be important for the ultimate success of any project, large or small. One must begin with the big picture and critically look inward by conducting an internal assessment for this initial discovery phase.

#### big picture business thinking

It is important to remember, "You are not just re-platforming for the web but re-platforming for the entire business," so all aspects of the enterprise should be addressed from administrative requirements to inventory control through post-launch reporting needs. Technology is important for solving problems you are facing but first and foremost companies should talk the language of business throughout and ideally be forward thinking in how every aspect of site development, re-platforming, and integration work together to achieve designated company goals.

Rather than getting caught up in short-term thinking and a one-time investment mindset it is wise to take a longer-term view of the process and to assess how much it will cost over a five-year time-frame. It is sensible to be forward thinking as one satisfied merchant noted, "We would still be stuck with all of our existing providers and would not necessarily be seeking out partners who could give us the best deal, the best service or both if we hadn't switched platforms." **One should choose the appropriate platform for the size of your business, and make sure that the features offered are going to take you through the next three to four years of your growth trajectory.**

At the same time, take the opportunity to re-organize your site in a way that makes more sense for where your business has grown and where it is headed. As one retailer emphasized, "I could have kept my existing Yahoo store, put a nice face on but would still have many of the same issues." He reiterated, "In order to make that significant move, it would have to be worth it." He then used an analogy that reflects this thinking, "Don't purchase a one-bedroom house when you're planning a growing family."

Time also must be a consideration as processes typically take more time than you think. An old rule-of-thumb states that one should double the development time that you are initially promised as the platform rarely gets up and running as fast as one plans.

When assessing what platform or which business model is right, articulating your desire for flat fee models versus a revenue share approach and what might work best for your venture is an important step. Explore your tolerance for risk and how that might impact platform selection. Staffing and internal resources should be factored in as well. If you have a small team you may not be in a position to take on platforms that require hands-on administrative control; outsourced partners may provide a much needed support system. You will also want to have a sense of your budget. How much overhead can you carry and how does your company prefer to invest in technology from a balance sheet perspective as SaaS and licensing models present very different options.

## **discovery**

Sharing the “soul of the brand” should be initiated during the discovery phase of the process with attention to detail the mindset. If there is one time to be truly dedicated to your business, this is the moment as it is up to the owner or the team leader to assume that role. Ideally you should start with a short list of guiding principles and business goals. We encourage you to conduct brief interviews with each of the team members or stakeholders to get a clear understanding of internal needs.

### **Moving beyond the business elements the discovery stage should also center on your customers, taking into account their shopping scenarios with a goal of engineering a site experience that exceeds their expectations.**

Building “what if?” scenarios that show customer paths through the site experience simulates shopping patterns. In order to gain insight into customer behavior it is wise to begin with one’s analytics including search data. Simultaneously completing competitive benchmarking of your category and being aware of best practices can serve as an excellent guide. Conversations with non-competitors can also help set the tone for both an elevated ecommerce experience and ecommerce parity. Lastly, educate all of your constituencies as you move through this process from internal audiences (which might include board members and senior executives) to external partners that may be providing services in support of this important endeavor.

## **pearls of wisdom: strategic business thinking**

### **the big picture**

- Focus on the business needs and don’t worry about what technology can do at the outset
- Ensure that the customer experience is driven by a retail mentality
- Consolidate functionality into one software package
- Identify point solutions that will be required to support your new platform
- Design and build in a way that allows you to grow into the future needs of the business
- If you’re in it for the long haul you can scale cost appropriately
- Determine the level of control your company needs
- Set realistic deadlines and never try and deliver for Christmas

### **discovery**

- Know the ins and outs of your business
- Gather input from everyone but ultimately don’t design by committee
- Understand your customer and only prioritize functionality that truly matters
- Ensure everyone has input on what you want the site to be as many ideas can come from beyond the core team
- Cut to the chase on best practices and incorporate them into the discovery phase
- Be specific about what you use on a daily basis and discuss day-to-day operations from both a customer facing and administrative perspective
- Cut through the hype quickly to come to consensus about what’s ideal for development

## **b. develop a well designed project plan**

eCommerce should be a channel, like others, where you are prepared to make a long-term investment and one where expenses can be amortized over time. One merchant had a wonderful perspective and saw their redesign as an attempt at a stimulus package, keeping staff employed during tough times. Of course it can be difficult to know specifics and to budget accordingly so that is where a statement of work is critical to nail down costs. Whether the project is being handled internally or via external partners, going through that exercise will help to define the scope of work, assessing both the front-end development as well as back-end integration requirements. It is ideal to start with visualization as part of that process including how you will visualize the site experience. One merchant noted that they have always worked with straw man wireframes to accomplish this objective.

Every merchant had a unique approach to tackling their project plan but the following should provide **food-for-thought** and a basis to structure individual needs:

- Create a one page PowerPoint slide that summarizes the plan in less than 10 lines and share it throughout the company
- IT work streams and marketing milestones should be noted for overview perspective
- Use a gant chart to address the work stream in weeks and months including design wireframes; once completed individuals can reference these for documentation and visualization needs for interim status checks
- Have a list of goals for each page and guidelines for the designer and work with a usability consultant to review design
- Reach consensus faster through the use of visual tools such as wireframes which yield alignment

### **address the financials**

Start with topline goals and establish the appropriate timeline. From there focus on what the end results would look like addressing the cost, revenue, visual dynamics, and an appropriate timeline. Without a real defined scope of needs that addresses storefront, system, and integration a good estimate is not realistic. Even with such an arduous effort, one can miss important components but without a plan one may grossly underestimate costs.

When it comes to planning, money is usually at the core of discussions. Most merchants began with a laundry list of features that were ultimately built into a statement of work with the developer submitting a flat fee bid. From there negotiations typically ensued where merchants faced the tough decision of separating the essentials from the non-essentials using a merchant mindset centered on "ask for the world and negotiate from there." Of course every project has its contingencies and merchants often spoke of needing more money and having to cut features to compensate for lack of funding. Once the fixed fee was negotiated the merchant sentiment was that all contractual elements would need to be delivered even if that developer went overtime.

Larger companies manage the P&L with the financials dictating decision-making followed by CEO buy in. All elements are considered on a line item basis, rolling up to total cost of ownership (TCO). "Investments are based on contribution margin and choices justified through an ROI analysis that starts with the overall ecommerce opportunity, addressing each investment from a marketing or technology point-of-view."

One cautionary note came from a retailer who saw the developer's role to work within the pre-established budget and theirs to define the scope of the project. They advised however that one should look forward beyond launch, ask about funding for future initiatives, and budget into the existing project cost-effective upgrades as your negotiating power may be stronger upon project initiation.

## **define all integration points**

For many merchants the back-end and integration aspects of the project were the last phase they worked on, typically taking much longer to complete. Advice from merchants suggested not selling this component short especially as poor integration can be detrimental to one's customer experience. Some waited on the technology until they could better control the platform and others that had experienced cost prohibitive integrations also recommend waiting to do it right.

There needs to be an understanding of who will be handling the integration, whether that will be internal or outsourced to a third-party. Platform selection will also play a role in the complexity of integration and one specifically cited choosing an open source platform as there were a lot of "bolt-on" options. It allows for scale and in many cases today everything else is built into the platforms selected such as shipping and payment options.

Customer data was also cited particularly if your customer database-of-record resides where the choice can be either outside of the ecommerce environment or contained within the platform. This will have impact on all third-party programs such as mobile, personalization, and ratings/reviews. Understanding if this data and corresponding attributes will be pulled from the data warehouse or site itself is critical information. Many believe that if you house the data internally it makes integration much easier extracting through application programming interface (APIs). Implications for search engine optimization (SEO) should also be taken into account. Product information supplied by vendors was an area of focus for one interviewee since each manufacturer has their own platform and information can be difficult to access. "Our inability to access that information can result in up to 80 calls per day and is an area that all merchants should monitor." An assessment of your vendors' abilities to support data communication requirements is important where automation goes to the heart of that efficiency.

**In conclusion, a complete plan with a comprehensive scope of work that enables partners to provide a fixed fee bid will serve your team well.**

## **pearls of wisdom: project plan**

### **strategic**

- Leave no stone unturned; lay the groundwork with a sound planning including numbers/processes
- KISS (Keep it simple stupid); fight the tendency to overcomplicate things
- Prioritize determining what you can wait on; don't overemphasize the sexy stuff; nail the basics
- Do the design with the replatform as it saves heartache and pain
- Test the waters by starting development then cut off if not happy and simply pay for time and materials
- Be realistic about what your development team can deliver and know that narrowing the scope may be wise in early stage site development
- Before you talk to vendors defining everything you want both textually and visually is imperative

### **money**

- The notion of working on a fixed cost basis and being aligned to a statement of work gives you peace-of-mind that otherwise might cause consternation
- Understand that this investment is long-term and amortized over time
- Have a rainy day fund as things come up last minute where you will need both time and money
- When asked for your budget, share a number that is \$20,000 less than the actual budget

- Budget for hardware needs when running two sites as this will be needed when working through a redesign or replatform
- When hiring new developers to rewrite the platform build in a buffer for double-dipping as you will be paying both old and new developers

### **individual elements**

- Get any key legal issues out of the way early as they can take time
- Save on photography needs by taking multiple shots of single products when first shooting new items
- Be creative in gathering photographic assets and plan for incremental needs as you will never find money to accommodate your customers' needs later

### **timing**

- Don't get too ambitious or you will lose track of details when you're trying to get everything done; it will then be difficult to attribute your success to any specific element you may have altered
- Phase it in as it's less risky
- It's often better to address ecommerce changes on a project by project basis as doing it all at once can mean costs spiraling out of control

### **data**

- Be in the know about the data that you house and how it will be used
- Define data requirements and how information will be reported back to the enterprise to ensure a platform selection that accommodates those needs

### **integration**

- Keep the team updated often on integration requirements and development status given implications for overall site development
- Take a hard look at necessary internal needs as anything can be done - it just costs money and you may want to table internal integration until the ecommerce front-end is complete

### **c. structure a winning organization**

At the e-tailing group we are often asked about the best way to structure one's organization. In my outreach many voices were heard regarding how each company approaches organization and requisite team composition. Their own visions, insightful commentary, and shared lessons provide a flavor of that diversity. This is an area where talking with non-competitors to understand how their organizations are structured can provide insights that may mesh well with your own needs.

#### **organizational insights**

- "Our organization was very matrix managed and vertical in nature; unfortunately the tech project manager worked in a different division; in the future we would refrain from using a hybrid model as under such a scenario we found ourselves with merchants who couldn't agree on the merchandising direction and too many chiefs"
- "Combining two existing business units was particularly unsuccessful given disparate goals and direction"
- "A flat organization has worked well as everyone is involved; at the core we have marketing and merchandising and the COO is the driver"
- "As a manufacturer with no ecommerce we were fortunate as we had the opportunity to build the organization right from the outset; we wisely didn't separate digital marketing from ecommerce and that team was focused on building the brand beyond sales"
- "Whether solo or sophisticated from an organizational perspective put a structure in place keeping your team small and tight so you can then move fast and make quick decisions"

#### **team**

- Assess real resource needs
- We used people's best skills to direct assignments as programming and design had varying needs and skill sets did not crossover well
- Pick and choose what the experts should do and what you can handle internally
- eCommerce platforms must be run by users so learn the tool to control your own destiny
- Keep communication open with team; we intend to sell our technology to smaller retailers in our vertical so while our thinking centered on our own site we also factored in global needs
- Our core team consisted of VP IT, Marketing, ecommerce individuals and an executive sponsor; throughout the process we reached out to individuals outside that core team as they felt they were not being heard
- View this process similarly to launching a new business where your day-to-day team is tactical and your new business group forward thinking individuals who are more strategic and sophisticated in nature
- For smaller merchants, many will have a very flat org structure consisting of 1-2 individuals who may be the primary leads on decision-making and execution; paying first for the redesign and then learning how to do the rest on our own was imperative; we needed to know how to run the site in the absence of being able to afford consultants to do the day-to-day maintenance and adding of products

#### **d. partner smart**

Choosing the right vendor partners to support the demands of your business can likely be the difference between a replatforming that goes sour and one that succeeds. As there will likely be a multitude of vendors contributing an array of technology, having a vendor selection and evaluation process in place is important. Many of the merchants preferred not to be the guinea pigs but rather selected more established players. Your own risk tolerance should also be scrutinized at this juncture. Approaches discussed when asked “how do you find your best vendors?” ranged from the formal to the informal. The end goal must be kept in mind and rather than be solely driven by process, it has been wisely suggested that it is best to initially look for quality and negotiate later. This includes looking around for sites you like and finding out who built them; following up with client interviews and reference checks to ensure the right decisions are being made.

#### **finding the right fit**

Knowing who you are culturally is an excellent starting point when merchants must select a series of quality vendors who they both trust and respect. Several executives shared their preference for small companies where more personalized service is usually forthcoming. One can also take advantage of firms such as FitForCommerce as one retailer found their service invaluable to identify the right technology firms for their business. Their process facilitated building consensus in the organization for those choices, along with a short list of companies best suited to bid on the project. Others discussed the challenge that while some vendors seem like they might be appropriate, truly discerning that they are a good match for your business spared unnecessary aggravation.

Suggested sources for finding vendors included industry colleagues, trade publications, particularly where case studies were presented or simply googling for merchants with experience in a given platform or point solution. At the same time one should stay plugged into the industry by attending trade shows such as Shop.org, Internet Retailer, and Etail. As several merchants noted, if you skip them you are missing out as scouring the exhibit floor can quickly get you to a short list for platforms and point solutions alike. Another merchant was emphatic expressing, “I’m a lunatic about new vendors and beyond selection I often try to bring vendors together, connecting them to solve problems that benefit the entire project and the industry at large.”

#### **doing the vendor dance**

From these meetings and calls can quickly discern the quality of any given candidate. At the same time one must be clear whether they are buying a Ferrari or a Ford Explorer where the latter seeks out the trusty, reliable, and dependable model versus its more exhibitionist counterpart. As part of the process of evaluating vendors, if one listens well, vendors will often educate you as a byproduct of the time you invest. It is important to put vendors in a position to prove their competence and capabilities. That can best be accomplished by identifying a series of tasks and leaving out key issues that would support that effort. One merchant shared that a one-hour conference call where vendors must flush out requirements will enable you to quickly see who asks the right questions relative to project needs. Additionally you also gain a chance to clearly assess who’s going to conduct the greatest pre-work effort indicating how eager they are along with their ability to deliver on a timely basis which typically translates into a dedicated partner.

### **pearls of wisdom: partner smart**

- Ensure that you have someone who truly understands web design including what you can and can't do
- Match the size of company you hire with your own size and cultural dynamics
- Include legally binding terms on delivery dates with subsequent penalties for nonperformance
- Do your due diligence by reading industry publications, talking to peers, and attending trade shows
- Move beyond vendor references to get an objective view from unhappy people who have left a platform or designer
- Word-of-mouth should not be underestimated and maintaining a core group of industry peers is ideal to gauge performance, general satisfaction, and disappointment
- Serendipity can play an important part in the selection process so be around and aware

### **e. perfect project management**

I have personally been involved in ecommerce for 14 years with website development and project management often part of our consulting practice. Over the course of that time I have encountered only a handful of strong managers and they are certainly worth their weight in gold.

The stories of failed projects often stem from poor project management or lack of any project management at all. The person well suited to this assignment is clearly a super multi-tasker who is able to keep track of many moving parts. Their temperament requires that they have a strong personality yet not be afraid to be direct where they can be confrontational without being offensive. Lastly, once the project is completed a good project manager will keep you organized and stay involved after launch, ensuring a smooth transition.

Their job is also to raise risks; being clear and concise relative to choices that the team must make. It is essential that they are able to show the implications of any given choice. Project management is about keeping people on task and staying focused, including internal and external coordination. Empowerment from the organization and an ability to make decisions will produce desired results. An understanding of retail perspectives and how systems work coupled with the ability to drive day-to-day requests and deliverables is important and will impact future decisions as well.

Some of the companies I reached out to were fortunate to have project management departments dedicated to the site who manage schedules and set up meetings. Staying on top of the timeline and being distinctly separate from product managers allows them to maintain goodwill within the team. They are in an excellent position to quickly assess the number of hours for each aspect of the redesign of any individual features or desired functionality.

Even in an organization where internal redesigns are commonplace one merchant acknowledged project management is an issue. He cited that they began with a roadmap of 200 potential ideas with 90 more remaining in the queue. Finding someone to edit the options and an executor to prioritize and get things done has always been difficult. Despite the difficulty, project management does not seem to be high on the list of hires and this he acknowledged must change.

If you are working on a re-platforming, dependence on your partners to have a process in place should begin with an initial roadmap that can be scaled back pending project progression. This effort is contingent on a robust statement of work (SOW) and strong documentation so that there is a plan for what it looks like when the site is done. An organized system for keeping

track of open issues, defects, and tasks is the key. Ideally there needs to be a central location, specifically not emails flying back and forth but a place to hold the implementer and the client accountable to deliverables.

Several suggested utilizing project management software such as SharePoint that can track every email request, assigning responsibility by individual with a corresponding timeline. Ideally there will also be a visual component which facilitates timely explanations to C-level management while simultaneously addressing marketing, merchandising, and technology demands.

## pearls of wisdom: project management

### personnel and process

- Put in place a dedicated full-time person at a senior level who owns the project
- The best project managers know your business and understand the technology process
- Be incredibly organized about the effort and what needs to be done; document and understand the ramifications of decisions
- Project management should know about ecommerce technology to talk to individual stakeholders
- Enable the project manager to make decisions on what to keep and what to cut
- Know what your company's role is and rather than imposing your will and taking the reins let the firm you hired drive the process
- Make an effort to develop personal relationships with external project managers very quickly and get their mobile phone numbers
- Ensure that the team is trained in how to use the site and all administration tools

### timing

- Include a hard stop-date for project completion and project manage to that date
- Allow enough time to get the project done and don't shave time without reducing scope
- If the project manager is not enabled, you won't be successful; keep things on time removing every roadblock in place
- Project management individuals should have "skin in the game" so consultants are not always right for this part of the development

## f. demand more testing

My interviews suggested that testing is valued in the merchant community but that most retailers do not practice what they preach. While merchants are anxious to go live after arduous work on the site, failing to test sufficiently with real consumers upon re-platforming or simply making changes at the feature level can be a recipe for disaster. Things never turn out exactly how expected so better that you and the team find and work out problems before they become service issues for your customers. One merchant cautioned that with any bugs or any issue you stand a chance to scare a customer away, potentially forever.

Testing is also optimal for performance where users can quickly share likes and dislikes along with you and your development partners. With a new site confidence is king, so you need to make sure that when people visit your home page, their potential experience is solidly tested or else they may not be back too soon. This typically starts with cosmetic "look and feel" elements and moves into the more technical aspects of the site including transaction processing. Assess if the process works properly and if not, what it takes to unravel and make the necessary adjustments.

Testing also needs to ensure that the front-end shopping experience is effectively tied to the back-end and that all systems are

performing as planned. If one has created a strong functional spec, this should serve as a perfect launch-pad from which to develop a testing plan.

Testing goes hand-in-hand with producing a high quality RFP and the test plan can also be derived directly from that document. The more clearly and completely you define the requirements and expectations the less time the overall testing should take. Ideally it will be an enterprise-wide process where individual departments (customer service, fulfillment, and operations) address their specific demands. Once testing is part of the program one must identify use cases to assess the experience and how effective they are to date. Ideally test scenarios can be formulated before you write code (for example a customer logs into the site, clicks on button and submit button plays out).

Of course the level of testing required depends on site complexity, the number of integration points, development time, and scope of a project. There were many perspectives shared on how much time should be set aside for testing. One merchant suggested using a benchmark of development time +25% for testing and another felt that testing might even take as long as development. Another suggested six weeks for a hard core assessment to ensure things look right and work properly. Another interesting perspective was that one can never spend enough time or money on testing. This particular merchant suggested that when it's 80% fixed you should let users tell you what's not working. If ready allow 2-3 weeks of beta testing to go through the process of placing orders to returns processing via multiple browsers.

Depending on complexity merchants believed that at least a third of the project budget and project time should be dedicated to debugging and testing the application. Of course this is ideal as many merchants simply launch and fix on the fly. Either way it's important to have the discipline to demand sufficient testing take place where one is not succumbing to internal pressure to go live.

Based on your budget there are certainly third-parties who you can contact that specialize in testing and quality assurance. One service with a simple concept recommended by several merchants is [usertesting.com](http://usertesting.com). Merchants send in their URL, scenarios, and desired demographics and the experiences are recorded including audio and screen videos.

One merchant even went so far as to say that five users are all you need as beyond that they saw the same mistakes and issues being experienced. A/B testing was also cited for being relatively inexpensive where low fidelity comps can be utilized to help gauge consumer sentiment on what is working and what needs further improvement. In terms of testing some retailers confessed to literally dragging people off the street to look at navigation and checkout. Whatever your methodology, certainly moving beyond core departments that work on the site is optimal and a range of level of users also makes for a more well-rounded experience. The best advice we could share is to invest the necessary time upfront so you do not pay a steep price later.

### **pearls of wisdom: testing**

- Build testing into the work stream
- Ensure testing is part of the contract with your developer
- User testing should run concurrently to evolve site design
- Invest adequate funds in quality assurance
- Take advantage of friends and family to save money on testing
- Ensuring that the site works across multiple browsers must be taken into consideration

### **iii. e-tailing group checklist to successfully replatform and redesign**

1. Be strategic in your thinking by covering all bases from the big picture to the basics, taking the time to complete an extensive discovery process
2. Design a plan that will serve as a guide to initiate and sustain the project that is detail-oriented addressing both front-end and back-end needs
3. Ensure that your organization and team are solid and appreciate the challenge ahead of them
4. Pick the right partners that align with your organization's needs
5. Select a project manager internally that can drive the effort and work both internally and externally to swiftly deliver the desired site on time and on budget
6. Allocate enough time to adequately test the site from the customer's perspective building scenarios from your statement of work
7. Training in site usage, particularly the administrative aspect of your business, is important to control your selling and site destiny

## iv. about us

### the e-tailing group

The e-tailing group, inc. is the multi-channel merchant's eye, bringing a merchant's sensibility to evolving the multi-channel shopping experience. A Chicago-based consultancy, they provide strategic and e-commerce merchandising solutions to merchants selling online as well as to firms targeting that market.

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