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How to Set Up an Ecommerce Software Development Partnership

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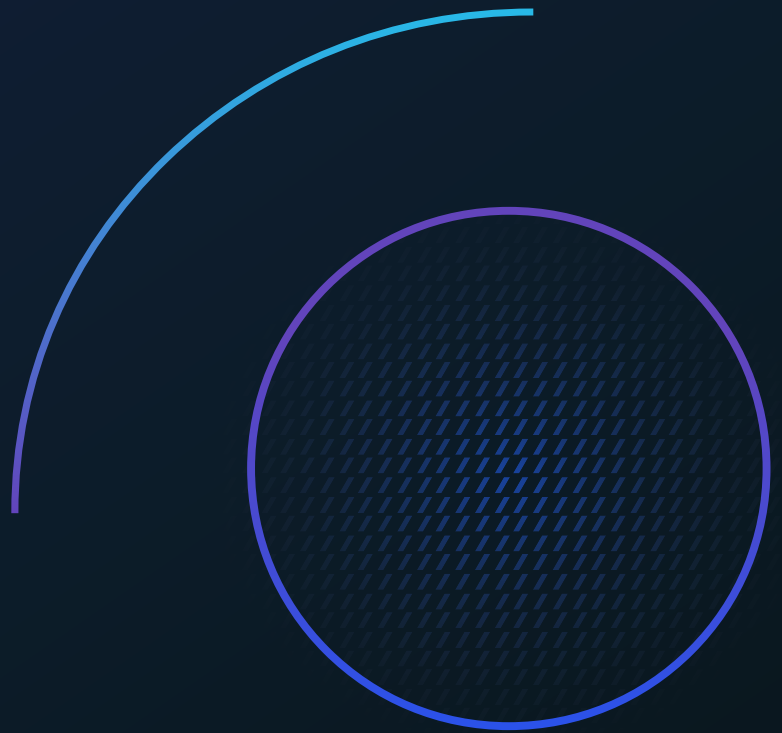
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Introduction

When it comes to technology partnerships with IT outsourcing vendors, there's no industry-approved *"this happens first, then we do that"* framework. Because of this many ecommerce business owners feel reluctant to work with external vendors.

Purchasing IT services is hard as there are no clear-cut standards when it comes to:

- Services scopes and boundaries
- Services delivery models
- Industry-wide quality standards

If you did some research, you've noticed sassy buzzwords such as *"time and materials"*, *"fixed-price"* for describing the collaboration terms. But the reality is that those terms often don't carry any indications of whether your partnership will be successful or not.

So we took it as our goal to **bring clarity** and **repeatability** to the IT outsourcing process. That's why we are sharing a collection of practices for setting up collaboration on BigCommerce development projects.

These principles help establish fair, equitable, and transparent collaboration terms for complex projects.

After reading this playbook you will:

Learn how to operationally prepare for a technology partnership	Enter the ecommerce store development process with sufficient knowledge and groundwork	Develop a staunch base for subsequent mutual accountability and effective management of your IT partner

Ecommerce Technology Partnership Setup: Overview

IT services commissioning and delivery is a semi-structured process. On one hand: there are a lot of variables – project scope, expertise needed, and overall company maturity levels. On the other: there are several repeatable stages IT vendors and their clients go through to get aligned.

"

Working with experienced vendors is the fastest way to make a difference. Get technological solutions and people with varied high-level expertise to work together, and you'll quickly see how much we can empower each other and the merchants we are working with.

Adam Birnbaum,
Partner Marketing Manager

Pre-Engagement Discussions

Customer Workshop (optional)

Preliminary Proposal

Discovery (optional)

Formal Proposal

Co-Creation
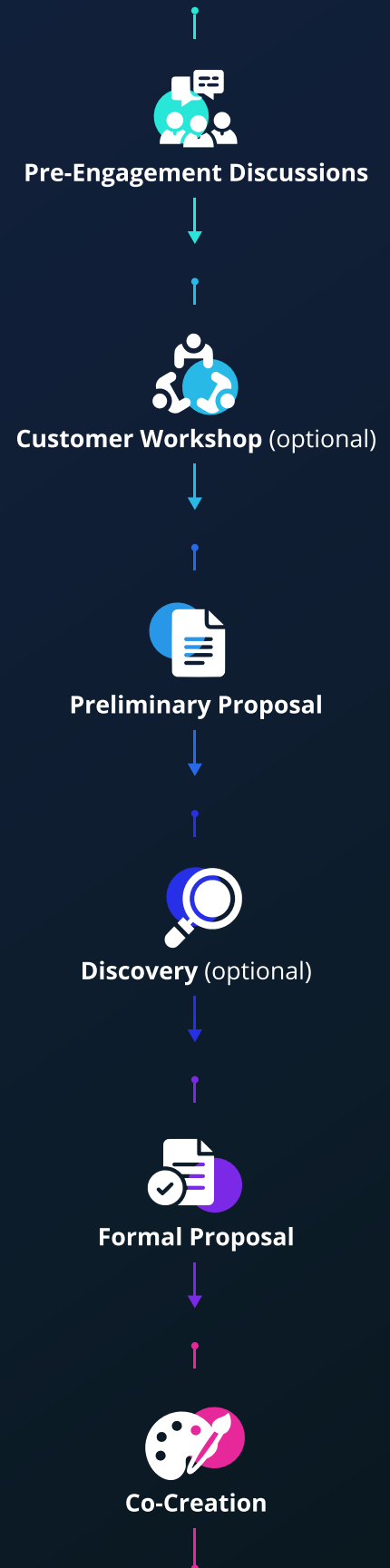
1. Pre-Engagement Discussions

Edvantis and BigCommerce advisory teams analyze the provided project details — the outlined scope of work, any preliminary project requirements, and other types of documents you've felt comfortable sharing. We'll get back to you with questions to further understand your business context and the preliminary scope of engagement.

2. Customer Workshop optional

Designed primarily for clients new to IT outsourcing, a workshop provides an opportunity to gain answers to different types of operational, organizational, and risk management questions you may have about the upcoming partnership. Edvantis and BigCommerce will assess your readiness to outsource, highlight likely constraints, and suggest further steps for ensuring a successful kick-off.

> *Workshops are an optional step we recommend to first-time clients, looking for extra knowledge and operational support.*

3. Preliminary Proposal

Based on the collected intake information, Edvantis team produces a preliminary commercial proposal — a document detailing our understanding of your project goals and business background. It also includes an explorative overview of the expected scope of work, recommended service model(s), and project timelines/budget.

If we have collected sufficient intake information during the previous stage, we'll process your feedback on the preliminary proposal and move forward with a commercial offer. If our team needs extra context and guidance, we'll propose a discovery.

> *A preliminary proposal is up for review and discussion. We expect active input from your end to achieve full alignment and refine our value proposition.*

4. Discovery optional

Discovery is a structured conversation around your project vision, goals, and requirements, concluded with a report on our findings. We'll ask questions about your current tech stack, and point out some earlier operational constraints worth addressing first. Our goal is to draw a clear picture of specific jobs to be done (JTBDs) at different stages of your project.

> **"** We got very fast feedback from Edvantis, and their documentation was higher-quality. They were very proactive in the discovery workshops and asked the right questions. They understood our problems and reacted to them.

Robert Tingaud,
Senior Director SW & Controls Development, Kardex Remstar

5. Formal Proposal

At this point, we have reached a good alignment on your project goals, scope, and ultimate list of requirements. You have high confidence in our ability to deliver. We have sufficient context for committing to a scoped range of deliverables. The two of us are on the same page expectation-wise. All of this knowledge is packed into a formal commercial proposal.

A formal proposal can still be revised. But the goal of previous steps is to minimize the scope of possible revisions to move faster to value creation.

Engagement Kick-Off

After the formal proposal is countersigned, we prepare supporting legal documents such as the Master Service Agreement (MSA) and Statement of Work (SoW). Once the two are signed, we proceed with the follow-up onboarding steps, which slightly differ depending on the selected service model.

At this point, our goal is to ensure efficient work kick-off and minimize administrative and operational delays.

6. Co-Creation

And we are on track! You will now work closely with a dedicated Account Manager (AM) — a person you've got to know during the previous stages. An AM serves as your main point of contact with Edvantis and facilitates the delivery of all aspects of work, as indicated in the formal proposal and statement of work document.

Depending on the selected service model, Edvantis' involvement levels will vary from baseline administrative and operational support to more hands-on team performance management.

Benefits for you:

Benefits of working with Edvantis

01. Faster time-to-value

02. Clear-cut and transparent offers

03. Predictable results

04. Operational risk mitigation

Benefits of using BigCommerce

01. Unlimited flexibility at a fixed cost

02. Native core commerce features

03. High scalability

04. Topmost security

Step 1:
Pre-Engagement Discussion Sessions

At the pre-engage stage we touch bases and develop tentative assumptions about your project. Typically, you'll have a short call with one of Edvantis' Account Managers (AMs) or Engagement Managers (EMs).
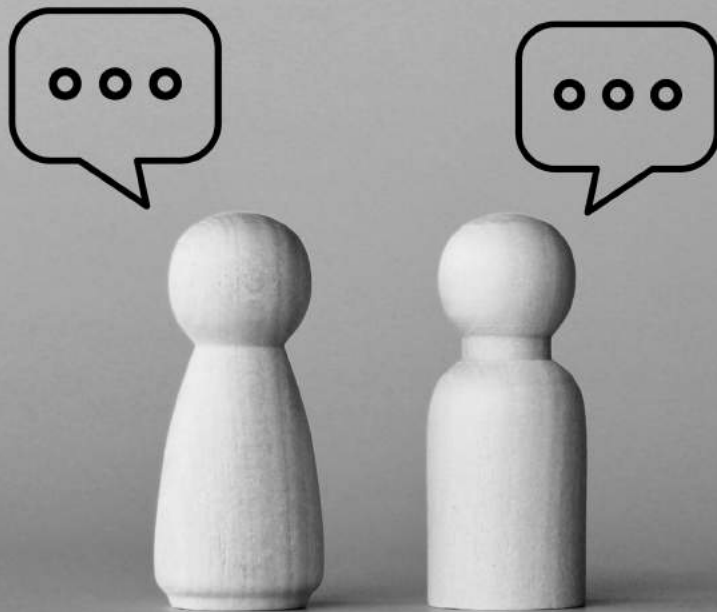
Be Ready to Talk About:

1. Your project vision and goals

2. Technical requirements

3. Pre-planned scope of work

4. Potential project constraints

5. Past experience with IT outsourcing (if any)

We use the provided information to analyze the project scope, identify potential project risks and blockers, estimate your capacity needs, and suggest the optimal service model.

Your Template for Collecting Project Requirements

To collect accurate project requirements engage other stakeholders — project sponsors, line of business leaders, and end-users. Ask them to comment on current ecommerce platform constraints, missing integrations, and other hindrances to their day-to-day work. Consolidate and organize their input into the below table

Here's how a sample list of requirements may look:

	Description	Priority (1-10 scale)	Constraints
Functional Requirements	Product catalog must allow users to capture a maximum of 25 product attributes. Website visitors must be automatically redirected to a localized version of their website, based on IP and browser settings.	8 9	N/A Design-wise localized storefronts are at the wireframing stage.
Marketing, Sales, & Service Requirements	Must deeply integrate with ConvertKit and/or Mailchimp	6	No native ConvertKit integration is available
Technical Requirements	Main headless storefront must be built on Next.js	10	N/A
Performance Requirements	Average web store page loading speed must be at 3-3.5 seconds	8	We also want to use 3D product images which may slow down page loading speed
Future/Deferred Requirements	Migration from WP CMS to Contentful	0	N/A

Other Documents To Prepare For Pre-Engagement Discussions

Project vision

Can be an informal summative description of the type of software you'd like to develop, upgrade, extend, or modify.

Project goals

Bullet points, summarizing what you'd like to achieve (e.g. migrate from legacy codebase to a newer framework).

UI/UX mockups `optional`

Good to have, but not necessary. Mockups and product demos help our BA experts better understand your product.

Expected scope of work & project requirements

If you have a formalized list of jobs-to-be-done, excellent! If not, we can work on this together, based on the available data and documents.

> *Are you an experienced buyer with a formal request for proposal (RFP) document?* *If your template covers all of the above points and provides sufficient intake information, we'll complete it and send it over to you with extra clarifications (if necessary).*

Recommended Legal Document: Non-Disclosure Agreement (NDA)

At Edvantis, we recommend **counter-signing** an NDA during the early stages of the engagement. Why? Because signing an NDA early on has a number of benefits:

Facilitates free discussion of technical and business information

Safeguards any confidential details from disclosure

Establishes trust between you and us

Step 2:
Customer Workshop

If you are new to IT outsourcing, a customer workshop gives you an opportunity to talk with Edvantis team about the prerequisites for a successful engagement. Our specialists can help you determine your readiness for outsourcing and advise on the scope of required operational changes.
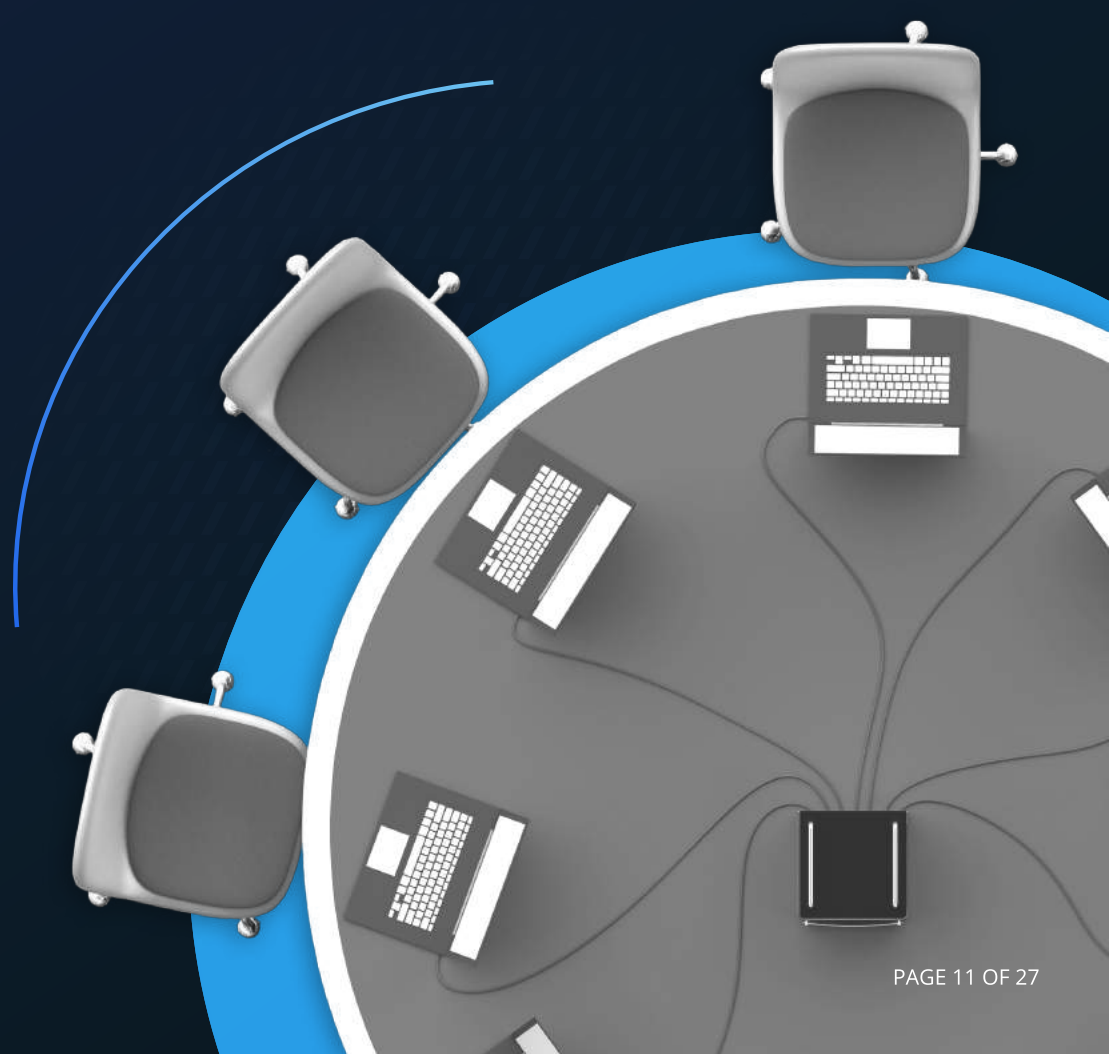
For First-Time Buyers, We Offer to Host an Onboarding Workshop

Typically, it's a virtual or in-person event with our team who'll provide a detailed lowdown on:

- IT outsourcing general best practices
- Process readiness for outsourcing
- Knowledge management for distributed teams
- Billing and contractual obligations
- Overall responsibilities of both parties

Get ready to pose your questions too! Our goal is to make sure that you walk away with a comprehensive understanding of the follow-up steps and insights for optimizing your operational process for the upcoming collaboration

Having a counter-signed NDA at this stage is crucial.

Who Can Benefit from Ecommerce Outsourcing?

"

Everybody struggles to hire developers right now. The talent crunch is acute in DACH and beyond.

In my experience, working with a reliable outsourcing partner benefits:

- Larger merchants with short-staffed in-house IT departments
- Companies with legacy on-premises systems or open-source platforms
- Mid-market players lacking particular tech expertise
- B2B merchants, launching their first online store
- New market entrants, looking for a fast launch and subsequent scale-up

Pretty early in the discovery process, we ask: How is your internal IT team structured? Would you need help? What you might be struggling with? We are happy here to make recommendations for a suitable partner to bring it in or them in right

Michael Arndt,
Country Sales Lead DACH at BigCommerce

Your Checklist To Assess Your Operational Readiness for Outsourcing

Strategic Assessment

To determine how IT outsourcing fits into your overall business strategy and how you can maximize the value from the vendor, discuss the following:

- What are our main reasons for outsourcing ecommerce development?
- What types of IT expertise do you need (select all that apply)?
    - UX/UI design
    - Front-end web development
    - Back-end web development
    - Mobile app development
    - Quality Assurance services
    - Data science expertise
- Would you rather augment an in-house team with extra talent or hire a cross-functional team to cover a certain project aspect?
- What capacity you might need:
    - At the beginning – for proof-of-concept / minimal viable product creation?
    - Later on – for full-scale development?
    - In the future – for ongoing maintenance and support?

Operational Assessment

Next, evaluate whether your company has established processes to effectively support and manage an external vendor. Discuss:

- Do you have an appropriate governance process in place to oversee the development?
    - Who will be involved in making important decisions on the next steps?
    - Who will serve as the main point of contact with the vendor – CTO, project manager, product owner?
    - What's your process for escalating bottom-up issues and communicating downstream changes?
- How do we have to adapt your current operating model to accommodate distributed collaboration?
    - Which business components (business applications, processes and workflows, software components, and infrastructure management) can be transferred to an external vendor?
    - How do you plan to onboard remote team members and share internal knowledge with them?

- Does our current work infrastructure support distributed work?
  - Which permissions and access rights will we need to provide to a third party? Is there any sensitive data involved?
  - How will our software licensing/subscription costs change with new members joining?
  - Which extra IT infrastructure resources we may need to purchase or provision (e.g. extra virtual machines, cloud storage, IDEs, etc)?

Strategy Alignment

Brainstorm how you will integrate your ecommerce development partner into your current operations. Your goal is to cultivate a strong alignment between in-house and remote people i.e. get everyone on the same page.

Discuss:

- Which process alignments do we need to make?
  - Operational standards & standard operating procedures (SOPs)
  - Corporate standards and security
  - Joint software development life cycle (SDLC) process setup
  - Communication
  - Knowledge sharing
- Which technology alignments do we need to make?
  - Share codebases, joint code repositories, version control tools
  - Project management apps onboarding (JIRA, Confluence)
  - Access to technical documentation and coding standards
  - Shared integrated development environments (IDEs)

Step 3:
Preliminary Proposal

After initial discussions, Edvantis and BigCommerce conduct a background assessment of your business needs, project scope, and expected outcomes.
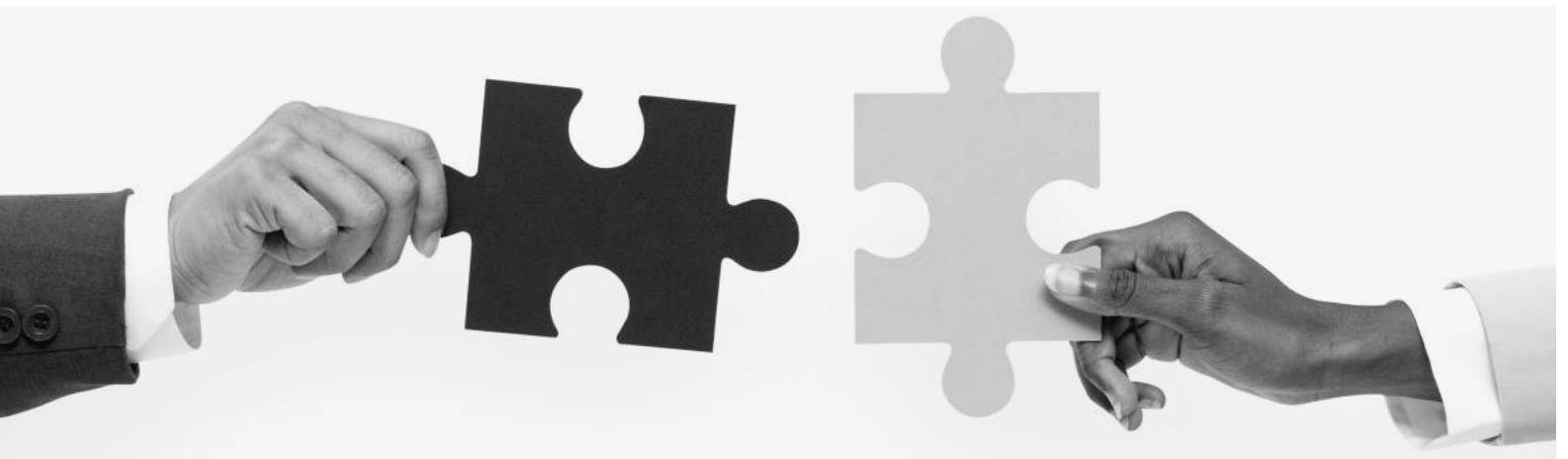
We Prepare a Formal Commercial Proposal Based on the Collected Data. The Document Includes:

1. Our understanding of your company needs and project goals

2. What kind of value we can deliver and how we'll do it

3. Recommended service model and team composition

4. Pre-planned scope of work

5. Project timelines and budget estimates

6. Identified risks and risk mitigation plan

At this point, we operate based on our assumptions. Thus, we are fully open to further discussions. In fact, that's what we expect from you! How can we establish better synergy? How can we align better? These are the points up for debate.

> **Our position is simple:** we try to manage customer expectations before placing them in a rigid contract. We proactively acknowledge risks, known constraints, and the feasibility of delivering on the set demands, rather than letting these slip into the later stages of the project (and compromise the success rates).

Ihor Ohorodnyk,
Director of Business Development at Edvantis

Primer on Team Roles and Composition

Zone of responsibility	Staff Augmentation	Managed Team	Managed Project
0. Infrastructure support (candidates sourcing, hiring, HR, workspace, payroll support, IT infrastructure)	Edvantis	Edvantis	Edvantis
1. Selection/specification of required resources and their skillset (team composition)	Client	Shared	Edvantis
2. Day-to-day workload allocation	Client	Shared	Edvantis
3. Software development life cycle (SDLC) setup	Client	Edvantis	Edvantis
4. Team management	Client	Edvantis	Edvantis
5. Compliance to the stable performance (identified KPI's like velocity, Sprint burndown, etc.)	Client	Edvantis	Edvantis

Step 4:
Discovery

The project discovery phase provides the "headspace" to formalize your project vision and finalize the list of requirements. It's a critical step for determining the optimal team composition, service model, and overall approach to ecommerce development.

Doing discovery helps you frame:

1. Main problem statement
2. Project scope and boundaries
3. Required team size and tech stack
4. Possible risks and bottlenecks
5. Preliminary store development roadmap

You can skip discovery if you already have a well-defined project vision, scope of work, and a clear list of project requirements

How Can We Help BigCommerce Clients During Discovery?

Doing a discovery with the Edvantis team makes sense if you want to right-size BigCommerce to your business goals. BigCommerce has a multitude of competitive core commerce features – and even more native and custom integrations for retail leaders to leverage

During the discovery phase, Edvantis can help audit your current ecommerce stack: identify its shortcomings and suggest the optimal way forward based on your goals.

Here's how a sample audit might go:

Current Architecture
- Which ecommerce platform do you currently use? What are your biggest issues with it?
- Is your current ecommerce platform coupled (monolith app) or decoupled (microservices-based)?
- Do you plan to adopt headless commerce and or MACH architecture?
  - If yes, which front-end technologies do you expect to use – a DXP, a custom front-end, built on a certain web framework?

Scalability
- What is your current website traffic?
  - Are there any seasonal fluctuations?
  - By what percentage do you expect it to increase?
- What is your current platform downtime per year? Is it acceptable?

- What is the current size of your product catalog? Do you expect it to increase?
- Are you planning to launch any resource-heavy features such as AR functionality or custom website analytics solutions?
- Do you host any corporate data or run any workloads on-premises? Do you intend to move some of them to the cloud?
- What is your current CDN setup? Does it fulfill your needs?

Integrations

- What types of critical system integrations do you currently have? Please name all ERP, OMS, WMS, CRM, and 3PL integrations.
- Do you plan on adding any extra business system integrations? Please indicate which ones.
- What are your current middleware/API messaging practices for ensuring interoperability/ data exchanges? Are you satisfied with them?
- Which other integrations with third-party software you'd like to have? Name payment gateways, marketing tools, and shipping solutions.

" To ensure our clients get the maximum value from BigCommerce, we tend to ask a lot of questions about the current tech stack, adoption plan, anticipated project timeline, budget, stakeholder management plans, and development partner needs. These questions are meant to draw your attention to possible risks or adoption bottlenecks – and set you on a straight path to success.

Michael Arndt,
Country Sales Lead DACH

Step 5:
Formal Proposal

The talks are done. All points are discussed. Edvantis team makes the final move and sends you a formal commercial proposal — a document explaining at length how our partnership will work

The Standard Commercial Proposal Includes:

1. Executive summary
2. Problem statement and solution
3. Scope of work
4. Team composition
5. Assumptions and limitations
6. List of deliverables
7. Project schedule
8. Billing information and payment schedule
9. The acceptance (project sign-off)

The formal proposal details all the earlier discussed aspects of cooperation — team composition, selected service model, timelines, budgets, constraints, and the actual jobs-to-be-done. It sets proper expectations and detailed responsibilities at both ends.

> *Unlike a preliminary proposal, a formal proposal sets forth more concrete terms of collaboration and serves as a blueprint for follow-up legal contracts. While it is still revisable (if needed), our goal is to minimize any potential gaps or omissions, through the previous steps.*

Only the acceptance of a formal proposal and signage of a **Master Services Agreement (MSA)** and **Statement of Work (SoW)** will signify the engagement kick-off — the actual delivery of the outlined ecommerce development services.

An MSA further formalizes the collaboration objectives, and operational and service levels commitments Edvantis will take. Typically, you have one MSA for the duration of the entire collaboration.

An SoW provides extra context to the project details. It specifies the number and type of deliverables provided under the set terms. You may have several SoWs signed during the course of the collaboration as your outsourcing needs evolve.

Master Service Agreement (MSA)

Master Service Agreement (MSA), also known as a Framework Agreement, is a contract that contains information about the future relationships with your outsourcing vendor, detailing the collaboration principles and agreement terms among other operational commitments. MSA sets the baseline expectations for each party. Basically, this document is a "promise" of collaboration that summarizes the terms but does not call for any actions or obligations on either party's part.

What an MSA Covers:

1. The terms of a partnership
2. Each party's commitments
3. Payment conditions
4. Terms of termination
5. IP provisions (ownership, disclosures, etc)
6. Liabilities and liability indemnification
7. Warranties/guarantees (if applicable)

Statement of Work (SoW) Agreement

Statement of Work (SoW) is a document that sums up and describes the scope of the project — what should be done and what's excluded. This is a legally binding document, specifying the type of work the vendor commits to delivering under the set terms. A clear, concise, and easy-to-read SoW is imperative to the project's success so it shouldn't leave room for doubt or ambiguity.

The contract clarifies such aspects of a project as deadlines, terms, standards, payment information, acceptance criteria, estimations, etc. SoWs can also include other project information, like security concerns, post-project support, or terms for early termination.

A signed SoW marks the beginning of the actual work.

What an SoW Covers:

1. Service description
2. In scope/out of scope
3. Team composition/roles (if applicable)
4. Deliverables
5. Schedules
6. Requirements
7. General budget
8. Team ramp-up/down rules (if applicable)
9. Organizational aspects of work
10. Acceptance criteria (if applicable)
11. Payment terms

What Are You Expected to Do at the Engagement Kick-off?

Service delivery starts on the pre-agreed date, set after the signage of all legal documents. In most cases, the engagement can kick off within 1-2 months after the document signage.

During this time, you have several important tasks to complete.

Appoint the main project lead and point of contact at your company

- This can be a Product Owner, CTO, Technical Team Lead, or another person, who'll be driving the managerial work at your end and engage with our team(s).

Establish communication plans and schedules

- Determine the best schedule for status updates, general check-ins, and demos at different project stages.

Prepare the necessary work infrastructure for the new team

- Including access to specific tools, IDEs, code repositories, technical documentation, etc.
- Map and describe the optimal communication procedures i.e. who to contact for specific types of issues/information, what channels to use, and how to escalate queries.

- Make a quick presentation about your project — share your vision, goals, and important KPIs. Explain your coding standards, quality measures, Definition of Ready (DoR), and definition of done (DoD).

Knowledge Sharing Best Practices Before Project Kick-Off

	Staff Augmentation	Managed Team	Managed Project
Knowledge needed for kick-off	• Integration into your SDLC • Access to collaborative coding tools (IDEs, version control software, and coding repositories) • Access to project planning & management tools (JIRA, Asana, etc) • Technical documentation • Product/project specifications • Programming style guides • Code quality metrics and other IT KPIs • Communication tools and communication schedule	• Overview of your SDLC for mirroring • Access to collaborative coding tools (IDEs, version control software, and coding repositories) • Access to project planning & management tools (JIRA, Asana, etc) • Technical documentation • Product/project specifications • Programming style guides • Communication tools and communication schedule	• SDLC setup by Edvantis • Technical documentation • Product/project specifications • Functional and non-functional requirements • Programming style guides

Step 6:
Co-Creation

While the scope of Edvantis engagement varies depending on the selected service model, our **Account Management** remains proactively present to resolve any operational, communication, or team performance issues.

BigCommerce also has implementation project managers who are most responsible to get a client live. Then we have solution architects who could come into play when there are technical questions from day one (after contract signage) or throughout the development process. On top of that, you can also select a technical account manager who would be more comfortable talking the "development language" if there's a need for that.

At every stage, we remain lean to changes and eager to help you discover more value from our partnership.

Edvantis Operating Principles:

From beginning to end, we aim for transparency and consistency in collaboration to cultivate win-win partnerships.

Therefore, we clearly communicate our responsibilities, potential risks, and terms of co-creation. We also establish an effective communication & reporting process to keep you, as well as ensure diligent business record-keeping.

We honor commitments and focus on results.

Quality comes first. We proactively advise our clients on how to get the most value from their investments through continuous recommendations on better team management, technology, and operational practices. Our goal is to become an organic extension of your business and ensure your success at different stages of your journey.

Customer data confidentiality and security are of the highest priority.

Edvantis takes proper steps to ensure that information entrusted to us is secure. Signing NDA is standard practice before we begin our collaboration, and we strictly follow the ISO 27001 standard. All our employees receive the *"Information on Security Policy and Anti-Phishing"* training guide.

> **CHECK EDVANTIS**

BigCommerce Operating Principles:

Customers always come first.

Every decision we make is aimed at improving the service levels for our customers. Our company exists to help merchants sell more, scale faster, and profit from innovative technologies.

Acting with integrity.

We prefer honest and transparent communication. On the inside, we collaborate to help our customers achieve what's best for their business. On the outside, we ensure that prospects and current customers make informed choices. We have no tolerance for hidden agendas or sneaky hard selling.

Making a difference every day.

We constantly push ourselves to be our best. We never settle and challenge our ideas to deliver even more innovation and excellence in execution. We focus on solutions and arrive every day inspired to make an impact through our talents, passion, and hard work.

> **CHECK BIGCOMMERCE**