Store Operations Responsibility & Order Handling Planner

Plan What Happens Behind the Website

Section 2: Ecommerce Business Fundamentals

Video: Website vs Ecommerce Operation

A Website Is Only One Part of Ecommerce

Customers see your storefront, product pages, checkout, payment options and tracking information.

But behind those screens, your business still needs people, processes and decisions to make every order work.

Use this planner to define who handles each operational task, identify gaps, and make sure your store can support real orders before launch.

Website vs Operation Quick Check

Every screen a customer sees depends on work the customer never sees.

CUSTOMER-FACING WEBSITE	BEHIND-THE-SCENES OPERATION
Homepage	→ **Product readiness**
Product page	→ **Stock confirmation**
Cart and checkout	→ **Order review**
Payment options	→ **Payment/COD status check**
Shipping information	→ **Packing**
Order/tracking information	→ **Courier handover**
Contact page	→ **Customer support**
Return/refund policy	→ **Actual return/refund handling**

Which side have I thought about more?

- ☐ Mostly the website
- ☐ Mostly operations
- ☐ Both reasonably well
- ☐ I still need to plan operations

The operational area I understand least right now:

_____

_____

_____

PART 2 OF 4 · ORDER HANDLING

What Happens After a Customer Places an Order?

The website can record an order, but your business still needs a clear process for what happens next.

Name who handles each step. If you cannot name someone yet, tick Needs Planning.

Operational Step	Who Handles It?	Status
1 New order is noticed/reviewed		☐ Clear ☐ Needs Planning
2 Payment or COD status is checked		☐ Clear ☐ Needs Planning
3 Actual stock availability is confirmed		☐ Clear ☐ Needs Planning
4 Order is accepted for processing		☐ Clear ☐ Needs Planning
5 Product is picked, prepared or produced		☐ Clear ☐ Needs Planning
6 Product is packed		☐ Clear ☐ Needs Planning
7 Shipping/courier handover is arranged		☐ Clear ☐ Needs Planning
8 Tracking information is shared		☐ Clear ☐ Needs Planning
9 Delivery issue is handled if something goes wrong		☐ Clear ☐ Needs Planning
10 Return/refund request is handled if required		☐ Clear ☐ Needs Planning

My most unclear order-handling step:

One thing that could delay an order:

Who Owns Each Operational Responsibility?

A task should not exist without someone knowing who is responsible for it.

Tick one owner for each task. Tick Not Decided if you cannot say yet.

Task	Me	Team Member	Supplier	Fulfilment Partner	External Service	Not Decided
Product information updates	☐	☐	☐	☐	☐	☐
Stock/inventory updates	☐	☐	☐	☐	☐	☐
Incoming order review	☐	☐	☐	☐	☐	☐
Payment/COD verification	☐	☐	☐	☐	☐	☐
Product preparation	☐	☐	☐	☐	☐	☐
Packing	☐	☐	☐	☐	☐	☐
Courier coordination	☐	☐	☐	☐	☐	☐
Tracking updates	☐	☐	☐	☐	☐	☐
Customer questions	☐	☐	☐	☐	☐	☐
Delivery complaints	☐	☐	☐	☐	☐	☐
Return approval	☐	☐	☐	☐	☐	☐
Refund processing	☐	☐	☐	☐	☐	☐
Returned product handling	☐	☐	☐	☐	☐	☐

Areas where responsibility is still unclear:

1. _____
2. _____
3. _____

Shopify Helps — My Business Still Decides

SHOPIFY CAN HELP ME MANAGE

- Products
- Inventory records
- Orders
- Customer information
- Payment status
- Fulfilment status
- Notifications
- Apps and integrations

MY BUSINESS STILL NEEDS TO DECIDE

- Whether stock is actually available
- Who prepares the order
- Who packs the order
- Who physically hands it to the courier
- Who follows up on delivery problems
- Who answers customers
- Who approves returns
- Who processes refunds
- Who receives returned products

Shopify can record and organise information, but the business still needs a real person, team or service responsible for operational action.

Make the Operation Clear Before Launch

1 Where Could My Operation Break?

Tick any risk that could realistically create a customer or order problem.

- ☐ Stock shown online but actually unavailable
- ☐ Order received but not noticed quickly
- ☐ Payment received but order not processed
- ☐ COD order not reviewed properly
- ☐ Product preparation delay
- ☐ Packing delay
- ☐ Courier handover delay
- ☐ Wrong or missing tracking information
- ☐ Customer cannot reach us
- ☐ Delivery issue is not followed up
- ☐ Return request is ignored or delayed
- ☐ Refund is delayed
- ☐ Inventory is not updated after sale
- ☐ Team member assumes someone else handled the task
- ☐ Other

My three biggest operational risks:

1. _____
2. _____
3. _____

2 How Does Information Move?

OPERATIONAL HANDOFFS

When one step is completed, how will the next person or system know?

- ☐ Shopify notification
- ☐ Email
- ☐ WhatsApp/internal message
- ☐ Courier dashboard
- ☐ Spreadsheet
- ☐ Internal task system
- ☐ Manual verbal communication
- ☐ Supplier communication
- ☐ Not decided

Where do I currently depend on manual communication?

_____

_____

3 My Minimum Operating Process

WRITE MY BASIC ORDER FLOW

Customer places order → _____ → _____ → _____ → _____ → **Delivered** → *After delivery* _____

Before launch, I need clarity on:

- ☐ Who checks orders
- ☐ Who confirms stock
- ☐ Who prepares the product
- ☐ Who packs
- ☐ Who handles dispatch
- ☐ Who shares tracking
- ☐ Who handles customer questions
- ☐ Who handles delivery issues
- ☐ Who handles returns
- ☐ Who handles refunds

My Biggest Operational Gap

The one operational area I need to clarify before launch is:

_____

_____

FINAL REMINDER

Your ecommerce operation does not need to be complicated. It does need to be clear.

A simple store with clear responsibilities and a reliable order-handling process is more useful than a polished website with no operational plan behind it.

Continue to Store Planning

Keep this planner with your Business Model Comparison Sheet and One-Page Store Brief.

You are now ready to move into practical store planning.

You now understand:

- what kind of ecommerce business you are building,
- what happens across the customer journey,
- and how the business needs to operate behind the website.