

Hiring an ecommerce agency can feel like pressing a reset button: new people, fresh ideas and, ideally, better results. But the first month can disappear into introductions, access requests and presentations if the agency has to piece together how your business works from scratch.

Ecommerce is harder than it looks. An advert can generate clicks while the products, delivery proposition or checkout lose the sale. A rise in revenue can still mean weaker profit if discounts, advertising costs or returns have increased. And your competitors' prices, reviews and delivery promises are visible to customers before they choose you.

A useful brief helps an [delivery options conversion](#) agency make decisions in context, not just produce activity. It does not need to be a glossy presentation. It needs to give the team enough accurate information to understand what success means, what limits apply and where to look first.

Start with the business outcome, not a list of tasks

"Improve our marketing" is too broad to guide useful work. So is "get more traffic" if the extra visitors do not buy profitably. Begin by explaining what the business needs to achieve and how you will judge progress.

Be clear about the commercial outcome. For example, are you trying to grow profitable sales, reduce reliance on one acquisition channel, improve repeat purchasing, or build demand for a particular product range? You do not need to prescribe the agency's solution. You do need to describe the problem it should help solve.

Share the measures you trust, the period you use to review them and any important caveats. Revenue, orders and conversion rate are useful, but they rarely tell the whole story. If you can, explain how you think about gross margin, contribution after marketing, returns, discounting and customer lifetime value. If some figures are estimates or not readily available, say so rather than presenting them as precise.

- **State the priority:** what is the most important business change you want to see?
- **Define the guardrails:** what must not be sacrificed, such as margin, brand standards or stock availability?
- **Name the useful measures:** which numbers help you make decisions, and where are their limitations?
- **Set the time horizon:** distinguish immediate trading priorities from longer-term growth.

Explain your margins and best sellers

One of the most valuable things you can give an agency is a practical picture of what is worth selling. The best sellers and margins are not always the same products. A popular item may have little room for discounting or expensive delivery; a higher-margin product may be a better acquisition opportunity but need more explanation before a customer buys.

Share product or category performance in a format the team can use. Include sales, margin information where available, stock position, seasonality, returns and any restrictions. You do not have to disclose more commercially sensitive detail than necessary, but the agency needs enough to avoid steering investment towards products that cannot support it.

Information to share Why it helps Best sellers and priority ranges Shows where demand already exists and which products matter commercially. Margin or contribution guidance Helps assess whether sales growth is likely to be profitable. Stock levels and replenishment constraints Reduces the risk of promoting products that are unavailable or close to selling out. Returns, cancellations or product issues Highlights apparent sales opportunities that may be

poor for the business or customer. Seasonal peaks and buying deadlines Gives the agency context for planning and interpreting performance.

If your margin data is incomplete, explain how product decisions are made today and who can confirm them. A simple “prioritise these ranges; check with us before promoting these” is more useful than silence.

Give the agency brand positioning notes, not just brand assets

A logo folder and a brand guide can show how your business should look. They may not explain why customers choose you, who you are trying to reach or what you want to be known for. Add concise brand positioning notes to fill that gap.

Cover your main customer groups, the needs that bring them to you and the reasons they might choose a competitor instead. Describe what makes your offer distinctive, what proof supports that claim and which messages feel credible. Include language you use, terms you avoid and examples of marketing that feels on-brand or off-brand.

Be honest about where positioning is still evolving. Agencies can help identify and test messages, but they should not have to guess whether “premium”, “affordable” or “expert” is central to your offer. If different stakeholders have conflicting views, flag that early and name the person who can make the call.



Make promo and delivery details impossible to miss

Promotions and delivery are not small operational footnotes. They influence what customers compare, what an advert can promise and whether a visitor completes a purchase. Because online shoppers can check rival prices quickly, a discount may be the difference between winning a sale and reducing margin on a customer who would have bought anyway.

Share promo and delivery details in one place. Include current offers, planned campaigns, eligibility, exclusions, codes, start and end dates, and who approves changes. Clarify whether an offer can be combined with other discounts and which products are excluded. If the terms are liable to change, explain how the agency will be notified.

For delivery, set out the options, costs, thresholds for free delivery, typical dispatch and delivery times, regions served and any cut-off dates. Include known constraints, such as carrier limitations, busy-season delays, bulky-item rules or products that cannot be delivered everywhere. Tell the agency what customers are actually told on product pages, in the basket and at checkout.

Delivery is a conversion driver because it affects both confidence and total cost. Reviews are another: customers look for reassurance that the product and service will meet expectations. Share review sources, recurring praise or complaints and any themes around delivery, quality or returns. Do not ask the agency to paper over operational problems with stronger claims. Better marketing cannot make an unreliable promise true.

Share the customer and competitor context

Explain what you know about customer behaviour, not only what you hope is true. Useful evidence might include common pre-purchase questions, customer-service contacts, review themes, search terms, repeat-purchase patterns and reasons for returns. These details can reveal friction that is not obvious in a platform report.

Give a grounded view of the competitive landscape. Identify the competitors customers mention, the alternatives they may choose and what you believe you do better or differently. Note visible price and delivery comparisons, but avoid assuming that the lowest price always wins. Trust, availability, product information, reviews and a clear returns policy can all affect the decision.

Tell the agency where your view is based on evidence and where it is an assumption. That makes it easier to agree which questions need research or testing rather than treating every opinion as a fact.

Prepare access, data and decision-makers before the start

A brilliant brief cannot compensate for an agency spending weeks waiting for permissions or answers. Before work begins, list the platforms and information the team will need, identify an internal owner for each and arrange access through your normal security process. Use appropriate user permissions rather than sharing personal passwords.

Depending on the work agreed, this could include ecommerce and analytics platforms, advertising accounts, product feeds, email tools, reporting, creative assets and relevant documentation. Confirm who owns the accounts and billing, and how access should be requested or removed. Do not assume that an agency can see a platform merely because another supplier used it before.

Also name the people who can approve commercial decisions, creative and technical changes. If every change requires several rounds of internal discussion, say so. Agree how urgent issues will be handled, who can sign off promotions and what lead time your team needs to make site or stock changes.

Agree what the first month should produce

The first month should not be judged by how many slides or calls it contains. Agree the practical outputs you expect from the initial period, while leaving room for the agency to recommend the right approach after reviewing the evidence.

A sensible start usually establishes a shared view of the business, checks what data and tracking can be trusted, identifies the main risks and turns findings into prioritised actions. Ask the agency to distinguish quick fixes from work that depends on more investigation, development or internal approval.

1. **Set up access and confirm responsibilities.** Resolve permissions, owners and communication routes promptly.
2. **Review the evidence.** Check performance data alongside margins, stock, customer feedback and operational constraints.
3. **Identify the biggest opportunities and risks.** Explain why each matters commercially, not just why it is easy to measure.
4. **Agree priorities and dependencies.** Record what will happen, who needs to do it and what could delay it.
5. **Set a review rhythm.** Keep decisions moving and record what has changed, what has been learned and what comes next.

Ask for recommendations to be prioritised by likely impact, confidence, effort and dependency. This helps prevent a long list of interesting observations from being mistaken for a plan. It also gives you a way to challenge activity that sounds impressive but does not connect to your business goals.

Write down constraints and unknowns

Tell the agency what it cannot change. Constraints may include limited development capacity, approval processes, restricted claims, a fixed promotional calendar, stock uncertainty or a migration already in progress. These are not excuses; they are planning inputs.



Then list the questions you do not yet know how to answer. Perhaps attribution is unreliable, product-level margin data is delayed or customers regularly abandon at a particular step without an obvious reason. Mark these as unknowns and agree how the team will investigate them. A good working relationship makes uncertainty visible instead of hiding it in optimistic forecasts.

Use a short brief that people will actually read

There is no need to produce a lengthy document if a clear working brief will do. Put the essentials near the top: business outcome, best sellers and margins, brand positioning notes, promo and delivery details, customer evidence, access owners, constraints and decision-makers. Link to supporting files rather than burying key facts in folders.

Ask the agency to play the brief back to you. If they describe your priorities differently, correct the misunderstanding before work is under way. Invite them to flag missing information and assumptions. That conversation is often more valuable than adding another page to the document.

A simple pre-start checklist

- Have we explained the commercial goal and what profitability means to us?
- Have we shared best sellers, margin guidance, stock risks and product priorities?
- Are our brand positioning notes clear enough to guide messaging?
- Are promo and delivery details accurate, current and easy to find?
- Have we shared customer reviews, common questions and relevant operational issues?
- Do the right people have access, and does everyone know who can approve decisions?
- Have we agreed what the first month should clarify, prioritise and deliver?

Make the first month useful

The aim is not to hand an agency a perfect answer or dictate every task. It is to give them enough context to focus their expertise on the right commercial problem. When an agency understands your margins, products, positioning, promotions, delivery realities and customer feedback, it is less likely to optimise a convenient metric while missing the reason shoppers buy—or leave.

Keep the brief alive as the business changes. Update it when stock, offers, delivery promises or priorities shift, and make decisions visible to the people doing the work. That will not guarantee instant results, but it will give the first month a much better chance of producing shared understanding and useful action rather than avoidable admin.

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