Ecommerce Automation Checklist

For Marketers

Overseeing your brand's marketing and growth means juggling multiple projects on tight deadlines. To succeed, you need to prioritize projects and resources.

Ecommerce automation can help. Instead of focusing on repetitive, manual, and time-consuming tasks, automating your online store can attract higher value customers, reduce campaign costs, and earn a greater return on your marketing dollar.

What's ecommerce automation?

Ecommerce automation allows you to automate your online store, much like supply-chain, inventory management, and marketing automation systems. Your team can automate processes by building simple three-step workflows.
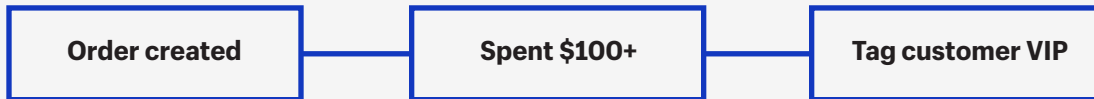
Trigger

Select a trigger to start the workflow

Condition

Set conditions for the workflow to run

Action

Select an action to take place

| Order created | Spent $100+ | Tag customer VIP |

Marketers at growing brands use ecommerce automation to offload manual chores, reduce apps, and execute on three key growth drivers.

Turn shoppers into loyal customers

Increase customer lifetime value and drive sales with targeted marketing communications, customer rewards, and geo-specific promotions.

Make things personal

Target customers with personalized marketing communications.

- [ ] Segment customers by items purchased, lifetime spend, or items abandoned in cart
- [ ] Tag segments to trigger personalized marketing communications:
    - [ ] Send a handwritten note to VIP customers who spend the most money
    - [ ] Send a personalized email with recommendations based on purchase history
    - [ ] Send an abandoned cart email offering a discount to complete the checkout process

The wonder of rewards

Increase the amount customers spend with each order using incentives.

- [ ] Calculate your average order value
- [ ] Establish a threshold (the amount you want customers to spend above this average)
- [ ] Offer customers an incentive like a free gift to add items to their cart and reach the threshold
- [ ] Tag orders to add the incentive at checkout when the threshold is reached

Celebrate your way to sales

Take advantage of customer birthdays or geographically relevant promotions to boost purchases.

- [ ] Use birthday data from your loyalty program to trigger birthday emails with special offers
- [ ] Tag customers by city or region to trigger geo-specific postcards or incentives

New customers can come cheap

Spend less on customer acquisition when you optimize your marketing spend, reduce churn, and increase the ROI of your campaigns.

Hit the pause button

Pause marketing campaigns if inventory is low and order more stock.

- [ ] Alert your marketing team through a communications tool (e.g. Slack or Trello) to pause campaigns and avoid wasted ad dollars

Keep customers active

Reduce customer churn rates to help maintain your relationship and revenue.

- [ ] Define the criteria for inactive customers, using metrics like time since last session, login, or purchase
- [ ] When a customer becomes inactive, trigger a win-back campaign (e.g. an email sequence offering incentives like discount codes or loyalty program points)

Bigger campaigns are around the corner

Personalize your online store, improve site search functionality, and automate push notifications to boost campaign conversion rates.

Make it easy to buy

Offer customers consistent merchandising and make it easy for them to find what they're shopping for.

- ☐ Tag items of the same color, fit, or size for consistent product discovery and organization
- ☐ Tag SKUs with similar product descriptions to add to appropriate collections
- ☐ Integrate collection tags with your site search solution so customers can filter results

Be a little pushy

Use browser push notifications to communicate quickly with customers and encourage them to buy.

- ☐ Segment customers by purchase history (e.g. tag customers when they make a second purchase)
- ☐ Target customers who have purchased items similar to new products and notify them of the release

The price (and currency) is right

Use customer preferences to tailor promotions.

- ☐ Segment customers by preferred currency based their last purchase
- ☐ Tag each segment to receive checkout promotions tailored to country or currency

Automate your growth

> **"**
>
> **We're using ecommerce automation to help us allocate marketing spend and protect profit margins. We tag our less profitable items, which informs our decisions regarding which channels to sell through and how much to spend on PPC campaigns.**
>
> **Katie Knoll**
> Digital Marketing Manager, EmazingGroup

You can implement ecommerce automation using third-party applications, but you'll probably find yourself stitching together solutions and finding workarounds. Putting your online store on autopilot demands an ecommerce automation tool that is embedded in your commerce platform.

Find out how automation is built into [Shopify Plus](#).