Ecommerce Automation Checklist

For Executives

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Spending time on your business, not in it, is crucial to growth. Instead of investing your resources on low-impact tasks, ecommerce automation frees you to lead. To focus on the strategic vision of your company. And to experiment with new streams of revenue.

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.
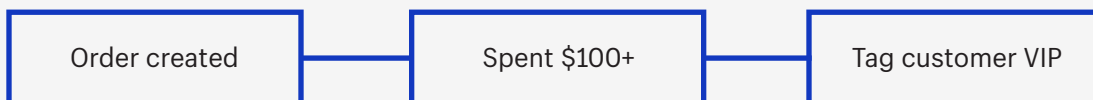
Trigger

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

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

Growth on the double

Accelerate revenue growth with ecommerce automation to reward loyal customers and accelerate the time between purchases and revenue growth.

Say thank you

Reward your most valuable customers with incentives each time they cross a spending threshold.

- [ ] Segment customers by lifetime spend (e.g. $100 or $200) or frequency (e.g. 3, 5, or 10 orders)
- [ ] When a purchase moves customers up a threshold, tag them to receive reward points, a handwritten note, or a VIP-only sale invitation
- [ ] Segment high-intent customers who are more likely to purchase again

Secure the second order

Encourage repeat purchases by segmenting high-intent customers who are more likely to purchase again.

- [ ] Tag customers who purchase quickly after their first website visit (based on your average time to conversion)
- [ ] Trigger a nurture campaign across email and ad platforms to encourage a second order

Growth on the double

The keys to productivity

Amplify employee productivity with automated workflows that enable them to focus on high-impact activities.

The supply-demand balance

Use data from your site search solution so employees can make smarter inventory decisions.

☐ Track the most popular search terms on your site

☐ Trigger a daily alert with the day's top searches to align inventory supply with demand

Push the top performers

Get real-time data on the performance of your sales channels to allocate resources and ad dollars.

☐ Tag new orders by sales channel

☐ Track orders by channel in a spreadsheet or tool to identify top performers

☐ Adjust your resources and marketing spend accordingly

The keys to productivity

Safeguard your brand

Use workflows to prevent chargebacks before they happen, flag high-value returns, and address negative reviews.

Fraud stoppers

Cancel high-risk orders and reduce your chargeback liability by preventing fraud before it happens.

- ☐ Tag high-risk, fraudulent orders that make you susceptible to chargeback fees
- ☐ Cancel high-risk orders before capturing payment to prevent the order from being fulfilled

Less risk on big returns

Monitor big-ticket returns in real time so you can identify problems before they become widespread.

- ☐ Determine your average order value
- ☐ Trigger a workflow when a return is above that amount, meaning most or all of a customer's order was returned
- ☐ Notify your support team to contact the customer and address issues before they impact your brand
- ☐ Track returns and the items involved in a spreadsheet or project management tool to identify trends across products

Review negative reviews

Track and consolidate negative customer reviews to identify trends across your products.

- ☐ Define a negative review (e.g. 1 star, 2 stars, thumbs down)
- ☐ When reviews meet that criteria, track them in a spreadsheet or tool like Trello
- ☐ Alert your customer service team through a communications tool (e.g. Slack) so they can address issues before they impact your brand

Safeguard your brand

Automate your growth

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> **Ecommerce automation allows me to focus on growing the business I love and doing more of the things that have long-term impact. You're able to focus on growing revenue but still improve the customer experience. That has a multiplier effect that ripples across your business.**
>
> **Nicholas Montgomery**
> CEO, Shelfies

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](#).