

A Shopify Plus publication



Ecommerce Automation Checklist

For Managers

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Managing every aspect of your brand's digital storefront takes unlimited creativity, experimentation, and optimization. From site design to multi-attribution modeling, the customer experience you create is judged on traffic, conversions, and sales results.

Ecommerce automation frees you from many of the time-consuming processes standing between you and the user experience you dream of delivering.

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

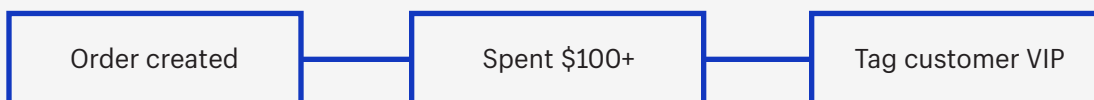
Select a trigger to start the workflow

Condition

Set conditions for the workflow to run

Action

Select an action to take place



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

Make shopping memorable

Differentiate your brand with a memorable customer experience: Address negative experiences, predict customer demand, and customize your online store based on data.

A store worth shopping at

Use customer data to tailor your online store to customers and drive growth.

- Segment and tag customers by purchase history, browsing behavior, or gender (e.g. show only female fashions to female shoppers)
- Email customer segments with an incentive to create an account on your store
- When tagged customers log in, show personalized products and relevant recommendations

Low stock? No problem.

Stimulate product demand by alerting customers when you're running low on an item they're interested in.

- Tag inventory when stock is low and place an order with a vendor
- Receive alerts when a certain number of customers sign up for back-in-stock notifications to determine which products are in demand

Don't sweat the bad

Get alerts when customers leave a negative review so you can respond quickly.

- Define a negative review (e.g. 1 star, 2 stars, thumbs down)
- When reviews meet that criteria, create a ticket in your customer support tool (e.g. Zendesk, Gorgias)
- Assign the ticket to your customer service team so they can address issues before they impact future purchases

From shopper to brand loyalist

Turn shoppers into buyers and customers into brand loyalists when you improve store merchandising, allow wish lists, and reward repeat purchases with personalized gifts.

Sell in real time

Improve the customer experience with real-time merchandising and instantly show or hide products from customers based on stock levels.

- Set a threshold to notify you of low inventory
- Hide sold-out products on your online store to prevent unhappy customers
- Show products on your online store when they're back in stock

Wishes and rewards

Give customers the opportunity to create wish lists and offer incentives when they plan future purchases.

- Let customers create wish lists in your store
- Reward customers with loyalty points when they add items to their list
- Send follow-up email marketing campaigns featuring items on their list

Keep them coming back

Increase loyalty with personalized discounts and gift cards.

- Segment customers by purchase history (e.g. tag customers when they purchase)
- Send a discount code by text message when customers place their second order
- Send an email, push notification, or Facebook Messenger communication with a gift card when customers place their third order

Their satisfaction. Your success.

Manage fraud risk, accelerate fulfillment, and identify unmet customer demand to maximize your operations while providing a great customer experience.

Manage risky business

Protect yourself from chargebacks by tracking and reviewing high-risk orders.

- Tag orders identified by your ecommerce platform as fraudulent
- Send an email or forward the high-risk order to tools like Slack, Asana, or Trello for review before fulfillment

Ship with urgency

Alert your fulfillment team so it can prioritize orders that need to be shipped before others.

- Tag high-priority orders as next-day or two-day shipping
- Notify employees to prioritize rush orders

Easy to find. Easy to buy.

Mine your site search solution to understand what customers want but aren't finding.

- Track "no result" searches in a spreadsheet or tool
- Identify trends and opportunities to inform your product roadmap, or conduct customer interviews

Automate your growth



Ecommerce automation can amplify and streamline customer happiness. Every point of failure is an opportunity. When your team is supported by powerful technology and empowered to deliver exceptional customer experiences, magic happens.

Paul Austin-Menear

Director of Digital Strategy, Nanoleaf

Automate your growth

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](#).