Shopify

PLANNER

THIS BOOK BELONGS TO

_____

_____

_____

BUSINESS OVERVIEW

Use this page to help you get clear on WHO you're selling to and WHY they'll buy. The more effort you put in to crafting a great plan upfront, the easier it'll be to set up a shop that speaks right to heart of the customer you're trying to talk to.

1. What?

What product do you plan to sell?

What makes it special or unique?

Why are you excited to sell it?

What problems does your product solve?

2. Who?

Who's struggling with the problem my product solves?

What specifically are they struggling with or excited about?

How do they feel about the problem?

3. How?

What words can you use or story can you tell to help your customers see your product as the PERFECT solution to problems / feelings you outlined above?

YOUR SHOP GOALS

Use this worksheet to get clear on your goals for Shop Launch.
Knowing where you want to go will help you figure out the right steps to take
to make it happen

How much money would you like to make with your product launch?

What is the retail price of your product (the price you plan to charge your customers)?

How many products do you need to sell to hit your launch goal (divide the amount of money you want to make by the price of your product)?

How many pairs of eyeballs (shop visitors) do you need to get in order to reach your goal?

SHOP BRANDING

SHOP BANNER DESIGN SKETCH

SHOP ICON	SHOP COLOR THEME

NOTES

COLORS & FONTS

Select 2-3 fonts that reflect your brand:

1
2
3

Select 2-3 colors that you relate to and express you. Write down
the hex codes so that you can replicate them perfectly:

1
2
3

What are 3 adjectives your photos/images will have?
Ex: Travel + scenic dramatic photos, photos at work, bright and colorful:

1
2
3

SHOP POLICIES

Write down your shop policies here and make them clear for your customers. Do you allow return and exchange? How will your customers receive the purchased item?

COMPETITOR ANALYSIS

WHO ARE YOUR TOP(3) COMPETITORS?	WHAT ARE THEY OFFERING

WHO ARE THEIR STRENGTHS AND WEAKNESSES?

Strengths:	Weaknesses:

HOW ARE THEY REACHING THEIR CUSTOMERS?

Are they reaching new customers through ads, youtube content, blog posts etc. how did you find out about them?

WHAT IS YOUR COMPETITOR PRICING?

This gives you an idea how much you can/should charge.

SHOPIFY STORE LAUNCH CHECKLIST

1 **GET READY**
Be sure to work on these items before you open your Shopify store.

PLAN YOUR STORE ☐ Done

- Brand and store name
- Logo and color pallette
- Tagline
- Exclusive domain

- Browse other stores that you like and use as a reference.
- Define product categories and plan navigation structure.
- Start browsing Shopify Themes.

GET CLEAR ON YOUR PRODUCTS ☐ Done

- **Selling Digital Products**
- Create digital content.
- Edit content to create shareable formats.
- Define price structure.
- Define product descriptions and product images.

- **Selling Physical Products**
- Get good product pictures.
- Work on product descriptions including materials, details, weight sizing and details.
- Set inventory.
- Create editorial Pictures for banners

- **Print on Demand**
- Choose print on demand platform.
- Pick products.
- Work on product designs.

SHOPIFY STORE LAUNCH CHECKLIST

2 **CREATE YOUR STORE**
Open your Shopify account and start creating your online store.

SHOPIFY ACCOUNT ☐ Done

- Open a Shopify Account.
- Pick a Free, Premium or Custom template.

CUSTOMIZE TEMPLATE ☐ Done

- Add logo and define header.
- Add favicon.
- Pick colors, fonts and accent colors.
- Structure home page (add banners, featured products and collections)

NAVIGATION ☐ Done

- Create main, secondary and footer menus.
- Define mega-menus (if applicable.)
- Add promo bar and pop (if applicable).

CREATE PAGES ☐ Done

- Blog
- Contact Page
- About Page

SHOPIFY STORE LAUNCH CHECKLIST

3 **ADD PRODUCTS**
Add products to your Shopify Store.

ADD PRODUCTS	☐ Done

- **Digital Products**
- Define / Set up how customers will receive the digital products they buy.
- For Digital products download Digital Products Shopify App.

- **Print on Demand**
- Select and integrate your preferred print-on-demand app.
- Upload your designs.
- Create your products and edit product descriptions (if necessary).

- **Physical Products**
- Add products, images, variants, and descriptions.

NOTE

- If you have a large inventory you can upload your products using an Excel spreadsheet.
- For physical products, it's highly recommended that to add product weight.

- If you have SKUs / UPC Codes, add them.
- You can integrate your store with Quickbooks for better control.
- If you offer subscription products there are many apps that can help you set it up.

SHOPIFY STORE LAUNCH CHECKLIST

4 **SHOPIFY SET UP**
Get ready to launch your store.

GENERAL SETTINGS ☐ Done

- Add Store Address.
- Define and create shipping zones.
- Set up Store Unique URL.
- Set up notifications for orders.
- Add Shopping Policies.
- Add Privacy Policies.

- Add Refund Policies.
- Add Store Description
- Remove Store Password Set Up other channels such as Facebook / Instagram / Pinterest / Amazon.

PAYMENT SETTINGS ☐ Done

- Activate Shopify Payments and add your bank details.
- Add additional payment methods such as PayPal and Apple Pay.

OTHER ☐ Done

- Download Shopify App to receive notifications on your phone.
- Order FREE Shopify Card reader included with your account.

NOTE

- Create the first discount for friends and family and share it.
- Create a discount on incentive newsletter subscriptions.
- Create a Google Analytics Account and add code to your store.

DAY BY DAY ACTIONS

DAY 1

CREATE YOUR SHOP SHELL

- [ ] Choose a name for your store
- [ ] Setup your Shopify account
- [ ] Choose your plan level

DAY 2

DESIGN YOUR SHOP

- [ ] Choose your theme
- [ ] Work on your main home page graphic
- [ ] Work on your story for the home page

DAY 3

CREATE KEY PAGES

- [ ] Create your Contact Us page
- [ ] Create your Privacy Policy page
- [ ] Create your Shipping & Retuns page

DAY 4

ADD PRODUCTS

- [ ] Create a product page
- [ ] Write out your first product description
- [ ] Upload 1-3 product photos (Ideal size: 2000 x 2000 pixels)
- [ ] Duplicate product page and update for each additional item

DAY BY DAY ACTIONS

DAY 5

CONTINUE ADDING PRODUCTS

☐ Use the template you set up yesterday to continue building out your product pages

☐ Setup any unique collection pages and add links in your Shop Navigation menu

DAY 6

FINALIZE YOUR SHOP

☐ Use today to finish up any remaining tasks

☐ Set your sales tax jurisdiction

☐ Setup your shipping profiles

☐ Optional: setup PayPal business account and add as a checkout option

LAUNCH DAY

LAUNCH YOUR STORE

☐ CONGRATULATIONS!!! You now have a fully functional Shopify store!

☐ EXTRA CREDIT: If you decided to grab Jumpstart, choose one of the strategies and launch your shop with a bang!!

PRODUCT DESCRIPTION

Use the AIDA formula for your product descriptions. AIDA identifies cognitive stages an individual goes through during the buying process for a product or service. It's a purchasing funnel where buyers go to and fro at each stage, to support them in making the final purchase.

ATTENTION

Attention (Awareness): attract the attention of the customer. Stand out!

INTEREST

Interest: raise customer interest by demonstrating features, advantages, and benefits.

DESIRE

Desire: convince customers that they want and desire the product or service and that it will satisfy their needs.

ACTION

Add call to action such as "Get it Now".

LAUNCH TRACKER

3 Months Before

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

1 Month Before

- ☐ _____
- ☐ _____
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2 Weeks Before

- ☐ _____
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1 Week Before

- ☐ _____
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- ☐ _____

RESOURCES

1   ## Shopify

Sign up for a free trial

2   ## Privacy Policies

Use privacy policy generators, such as: termly.io; getterms.io

3   ## Images

Use Canva.com or Pickmonkey.com to design your banners. Canva enables you to create graphics quickly and easily, even if you have little to no graphic design skills.

4   ## Taxes

Information on State taxes: TaxJar

5   ## Payment Gateway

Add your stripe of paypal account.

6   ## Active Campaign

ActiveCampaign is ranked #1 by G2 in Marketing Automation and ranked #1 by TrustRadius in Email Marketing.

7   ## Shopify Apps

Collect reviews with Yotpo; Upsell app with Bold Upsell, Personalization app with Infinite Options; and finally Cart Abandons with Beautiful Abandon.

ECOMMERCE CHECKLIST

DECIDE

Ecommerce software
_____
Shopify?

Domain name
_____
Available?

Web hosting
_____
Provider chosen

Email hosting
_____
Provider chosen

Payment gateway
_____
Provider chosen

Shipping options
_____
Carriers & methods to offer

Tax rate
_____
% for state / exempt status

Accounting
_____
Software chosen

Security
_____
Responsibilities

Shipping orders
_____
Whom & how

Customer service
_____
Whom & how

Site design
_____
Theme or designer

Product photography
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Whom & how

Product descriptions
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Whom & how

Home page text
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Whom & how

About page text
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Whom & how

PREPARE

- ☐ Signed up
- ☐ Purchased
- ☐ Purchased or NA
- ☐ Purchased or NA
- ☐ Purchased or NA
- ☐ Software bought
- ☐ Tax paperwork
- ☐ Purchased
- ☐ Purchased
- ☐ Supplies purchased

- ☐ Purchased/Hired
- ☐ Photos taken
- ☐ Written
- ☐ Written
- ☐ Written

ACTIVATE

- ☐ Make site visible
- ☐ Point to Website
- ☐ Test and receive
- ☐ Activate
- ☐ Set up on site
- ☐ Set up on site
- ☐ Linked to site
- ☐ Working on site

- ☐ Visible on site
- ☐ Photos on site
- ☐ Product on site
- ☐ Ready to go
- ☐ On site with photo

NOTES

MOVE FROM ETSY TO SHOPIFY

☐ Evaluate your current products and inventory

Move to Shopify

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Discount & Sell on Etsy

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☐ Update your product descriptions

Sample Copy	Technical Specs
	exact dimensions:
	weight:
	materials:
	instructions:
	disclaimers:

☐ Critique your product photography

1. Can I show the materials or textures of the product in a unique way? If not, how can I achieve this?

_____

_____

2. Have I showcased all of the unique aspects and features visually? If not, how can I achieve this?

_____

_____

CONT.

3. Do I have an image of the product in use?　　　YES　　　　NO

_____

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4. Have I covered every angle?　　　　YES　　　　NO

_____

_____

Do I have an image demonstrating size in context?　　YES　　　NO

_____

_____

Plan your Shopify user experience

1. How many products will I be listing?

_____

_____

2. How will they be categorised?

_____

_____

3. What products are my biggest priority to sell?

- _____　　- _____
- _____　　- _____
- _____　　- _____
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CONT.

☐   Choose your Shopify theme

My Top Three Themes

☐   Update your visual identity

1. Does my current branding reflect the goals and values of my shop? If not, how can I achieve this?

_____

_____

2. Does it visually tell my brand story in a rich and compelling way? If not, how can I achieve this?

_____

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4. Do I have custom branded illustrations and icons to add depth to the workings of my site?
For example, Category illustrations, opt-in graphics, etc.

_____

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5. Have I established a brand color palette (including any brand patterns or textures) that aligns with my visual brand identity?

Name:
Hex Code #

Name:
Hex Code #

Name:
Hex Code #

Name:
Hex Code #

PRODUCT INVENTORY

Move to Shopify

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Discount & Sell on Etsy

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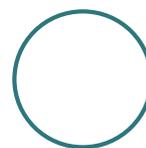
YOUR LOGO

What colours work best to communicate your business?
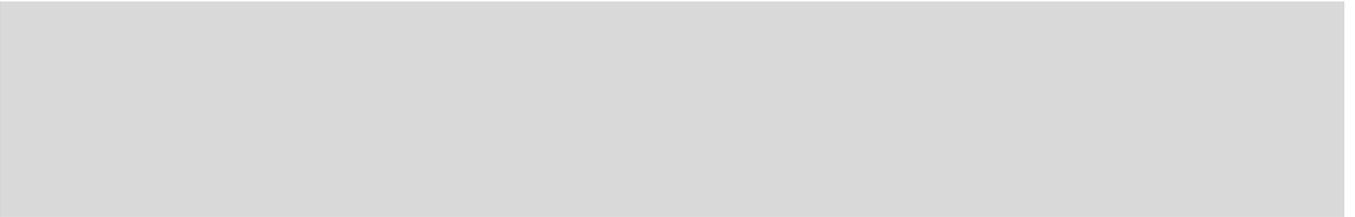
What are the 3 main platforms you will use to promote your brand?

What type of logo works well on these platforms? Square? Circle?
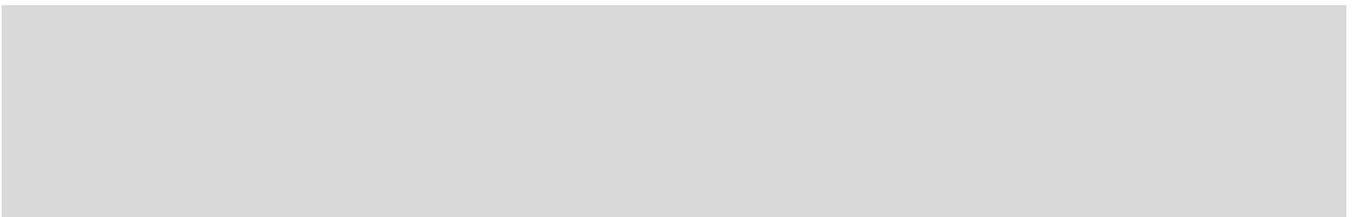
Do you need graphics to help you communicate your brand message?
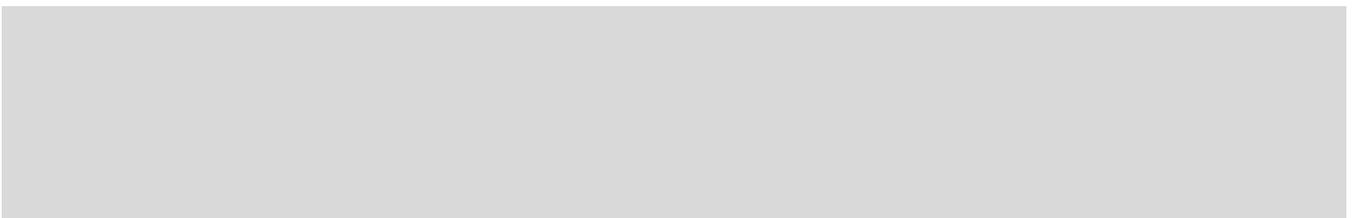
ABOUT ME PAGE

1. Who is your site for? Who are you talking to?

2. What value is your site providing to the reader?

3. List a few details about yourself.

ABOUT ME PAGE

4. List ways you can show your expertise. Or why the reader should trust you. What do you bring to the table that other bloggers don't?

5. Call to action. What action do you want the reader to take after reading this page?

6. Is there another place in this site that you want to direct the reader? Is there a post or page you want to highlight?

PRODUCT KEYWORDS

Use this page for your keyword research. Brainstorm the keywords for each of your product.

Product:

Product:

Product:

Product:

Product:

Product:

PRODUCT TAGS

Use this page for your tags research. Brainstorm the tags for each of
your product.

Product:

Product:

Product:

Product:

Product:

Product:

SHOP INVENTORY

Month: Year:

Item	Quantity	Price	Date Listed	Sold?

ORDER TRACKER

MONTH OF			YEAR	
DATE	ORDER #	QUANTITY	CUSTOMER	DONE
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ORDER MANAGEMENT

CLIENT NAME

ORDER DATE

TOTAL Q-TY

DELIVERY DATE

TOTAL PRICE

PAYMENT METHOD

CLIENT NAME

ORDER DATE

TOTAL Q-TY

DELIVERY DATE

TOTAL PRICE

PAYMENT METHOD

CLIENT NAME

ORDER DATE

TOTAL Q-TY

DELIVERY DATE

TOTAL PRICE

PAYMENT METHOD

CLIENT NAME

ORDER DATE

TOTAL Q-TY

DELIVERY DATE

TOTAL PRICE

PAYMENT METHOD

CLIENT NAME

ORDER DATE

TOTAL Q-TY

DELIVERY DATE

TOTAL PRICE

PAYMENT METHOD

ORDER FORM

COSTUMER DETAILS

NAME:	
PHONE NO.	EMAIL:
SHIPPING ADDRESS:	
SHIPPING METHOD:	
ORDER NO.	ORDER DATE:
TRACKING NO.	

ORDER STATUS	PACKED		SHIPPED		RECEIVED	

ORDER DETAILS

ITEM NO.	ITEM DESCRIPTION	ITEM CODE	QTY	PRICE	TOTAL

RETURNS & EXCHANGE

FROM:		REPORT DATE:
SHIP TO:		REPORT ISSUE:
		DATE OF REPORT/EXCHANGE:

ITEM	ITEM DESCRIPTION	QTY	UNIT PRICE	AMOUNT	

DATE SHIPPED	CREDIT ISSUE
CUSTOMER ORDER #	
DATE SHIPPED	

NOTES

RETURN TRACKER

Order #	Order date	Return date	Reason for return	Received	Refunded
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				☐	☐
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				☐	☐

SHIPPING LOG

Date	Product Name	Customer	Tracking No	VIA

PURCHASE TRACKER

Month:

Date received	Item	Supplier	Price	Quantity	Cost

SALES TRACKER

MONTH OF			YEAR			
DATE	ITEM SOLD	ORDER #	SALE PRICE	YOUR COST	FEES	REVENUE

INCOME TRACKER

MONTH OF		YEAR	
DATE	DESCRIPTION	SOURCE	AMOUNT

EXPENSES TRACKER

MONTH

DATE	CATEGORY	DESCRIPTION	AMOUNT
		TOTAL:	

TASK CHART

TASKS	M	T	W	T	F	S
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NOTES

TO DO LIST

Checklist

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Notes

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CHECKLIST

DATE

NAME

THINGS TO DO	ACTION DATE

IMPORTANT NOTES

MY NOTES

NOTES

Thank You

alettlewis.com