

# The Ecommerce Automation Playbook



## Note from the CEO

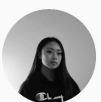
This year's holiday shopping experience will be the biggest year yet for ecommerce stores.

Why? Because the COVID-19 pandemic drastically changed how people shop. Ecommerce adoption is up. Since many countries are still observing some form of quarantine, foot traffic to brick and mortar stores will be down, while ecommerce shopping will explode.

Ecommerce merchants need to be prepared for the influx of traffic and sales they'll see in November and December. With so many moving parts, handling everything through manual tasks is going to be time-consuming and can ruin customers' experience with your brand.

That's why we created this Ecommerce Automation Playbook. Throughout this guide, we'll show you examples of how ecommerce stores can automate tasks that were traditionally done by humans. Learn how automation can help you scale your processes and prepare you for growth during this year's busy holiday season.

Regardless of whether your store is on Shopify, BigCommerce, Squarespace, or a custom-built site, automation can take your ecommerce business to the next level.



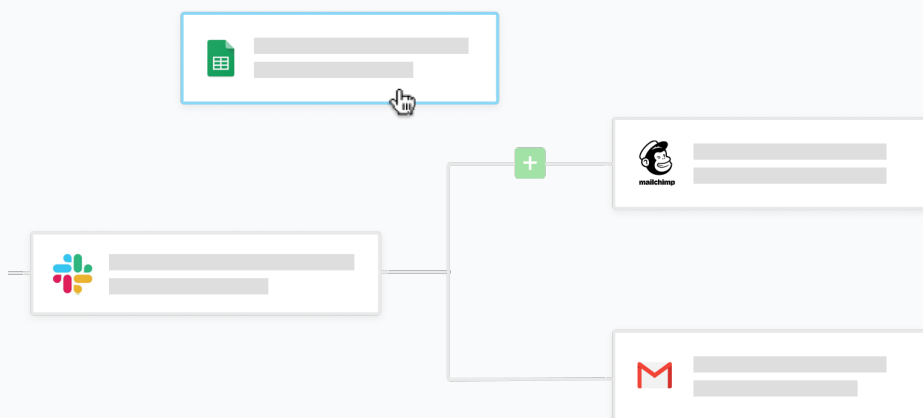
**Sara Du**

CEO & Co-Founder

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# Intro to Ecom Automation 🙌



Chances are, you're already running some automated workflows for your store. Order confirmation emails, segmented email campaigns, referral offers, data collection, and other processes that run in the background are examples of automation.

This guide covers how to go beyond basic automation and implement automated workflows throughout the entire customer journey. With the workflows we provide in this ebook, you'll be able to automate many of your processes for the holiday shopping season.

By automating your tasks and processes, you'll be able to focus on growing your business instead of handling time-consuming manual tasks.

# Why Alloy is the Essential Ecomm Automation Platform ✨

We built Alloy to be the automation platform for ecommerce stores. With Alloy, you can automate your store's operations and integrate your favorite ecommerce apps. Here's why you should use Alloy as your automation platform for the holiday shopping season:

## Built for Ecommerce

Alloy is built specifically to integrate with ecommerce platforms. You can seriously be up and running with automated workflows in 5 minutes. And unlike Shopify Flow which is limited to Shopify Plus, Alloy is available for every Shopify store.

## Integrates your favorite Ecommerce Apps

We have integrations with leading ecommerce apps like ReCharge, Gorgias, ShipBob, Postscript, Smile.io, Shippo, and more. New integrations are available every week. Want to see a specific integration? Contact us and we'll let you know when we can build the integration!

## Pre-built workflow templates

We've built a library of over 100+ workflow templates that you can easily use and customize for your ecommerce store. Best of all, the workflow templates are free!

[Book a demo](#)[Sign Up](#)



# What Parts of Your Ecommerce Store Can You Automate? 🤔

Just about every process and task in your ecommerce store can be automated. To give you an idea of where you can automate, see the areas below that can be automated.

## Email marketing

Automate emails to customers based on their activity, tags, order history to improve deliverability and personalization.

## SMS marketing

Send text messages to customers to give them updates on offers, delivery status, news, and more

## Rewards

Scale up your Rewards program by automating the sign-up process and giving out rewards when customers hit specific milestones.

## Upsells

Upsell customers with recommendations of additional products they can buy based on their purchase history, tags, and more.

## Shipping & Fulfillment

Automate the shipping and fulfillment process to improve how quickly orders are fulfilled and delivered to customers.

## Fraud

Cut back on fraudulent orders by automatically flagging high-risk orders and potentially cancelling them to save money.

## Abandoned Carts

Automatically recover abandoned carts with personalized offers to win the sale.

## Analytics

Automate the reporting process to get the insights you need about your ecommerce business. Get all your data and reports sent to you via email or Slack.

## Inventory Management

Make inventory management easier by automatically tracking inventory levels to ensure you never run out of inventory, but also aren't overstocked.

## Customer Service

Automatically reply to customers with answers to common questions and pull their data into one central location to get a true overview of their history. With automation, you can build a true customer data platform.

# Apps You Can Automate

Many ecommerce stores use apps to run their marketing, SMS, email, ads, shipping, and other departments. Here are a few examples of apps you can integrate to further increase your automation capabilities:



## Shopify

Shopify is a leading ecommerce platform used by thousands of merchants.



## ReCharge

ReCharge is a leading subscription software for ecommerce merchants.



## Klaviyo

Klaviyo is a leading email and SMS platform for ecommerce merchants.



## Okendo

Okendo allows merchants to generate reviews and UGC to grow their business.



## Postscript

Postscript is a leading SMS / MMS platform to drive revenue for Shopify stores.



## Gorgias

Help desk software to help merchants provide support across any channel.



## ShipBob

Shipbob is a leading 3PL provider to outsource fulfillment and shipping.



## Shippo

Shippo provides merchants with shipping discounts to help reduce shipping costs.



## Mailchimp

Mailchimp is a leading email platform for ecommerce merchants.



## Omnisend

Omnisend is an omnichannel marketing platform for merchants to connect with customers everywhere.

[See Full List](#)[Sign Up](#)

# Ravens Case Study



alloy

50

Hours saved  
per week

30,000

Transactions  
in 1 week

Zapier

Previous  
automation tool

Many NFL teams are this season offering their fans the ability to be in the stands with cardboard cutouts of their pictures.

Learn how the Alloy team helped automate the ordering and production process for the Baltimore Ravens.

[Read Case Study](#)



[Sign Up](#)

# Automated Workflow Examples

There are hundreds of workflows you can automate for your ecommerce store. In the next few sections, we'll show you examples of automated workflows that you can implement for the holiday season.

If you're using Alloy, all of these workflows are available as templates in our [Marketplace](#) which you can use to implement and launch automations in minutes.

Read on for examples, or if you're ready to start building, click the button below!

[Go to Alloy Marketplace](#)[Sign Up](#)

# Marketing

Marketing automation is a big focus for many ecommerce stores. By automating marketing tasks, you can create personalized campaigns for each customer to help improve conversion rates and see a better return on investment (ROI) for your marketing campaigns.

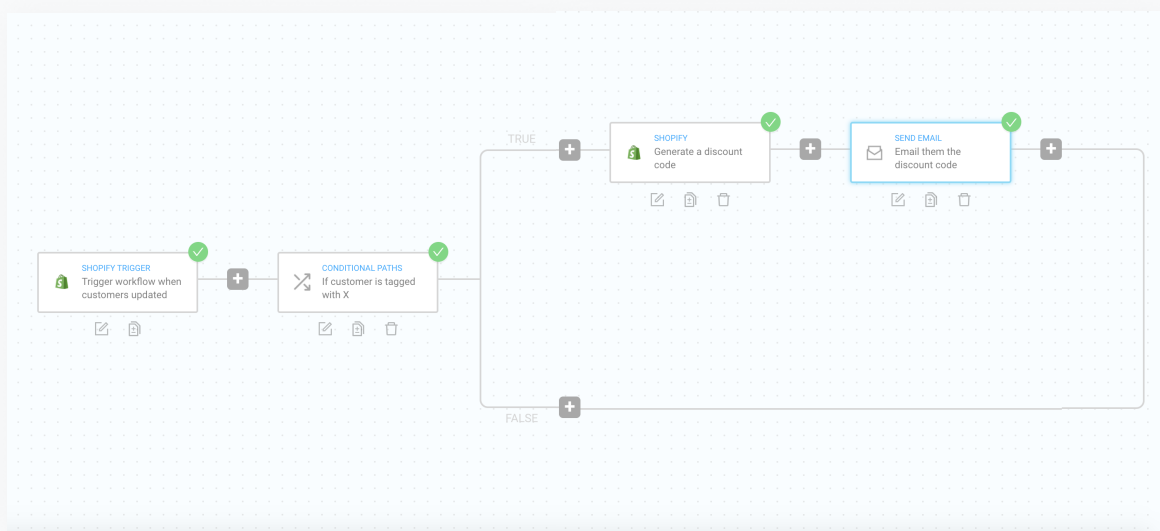


Image: Send coupons to customers who were tagged

## Send a coupon email when a customer is tagged →

Tagging customers is important for segmentation. If a customer leaves a negative review, you could tag them as "negative" and automatically email them a coupon to improve their rating of your business.

## Let customers choose SMS or email as their primary method of communication →

Personalization is a huge topic and customers have different preferences for email and SMS. With a tagging system, you can let customers choose how they want to be notified to further improve their open and conversion rates.

# Marketing

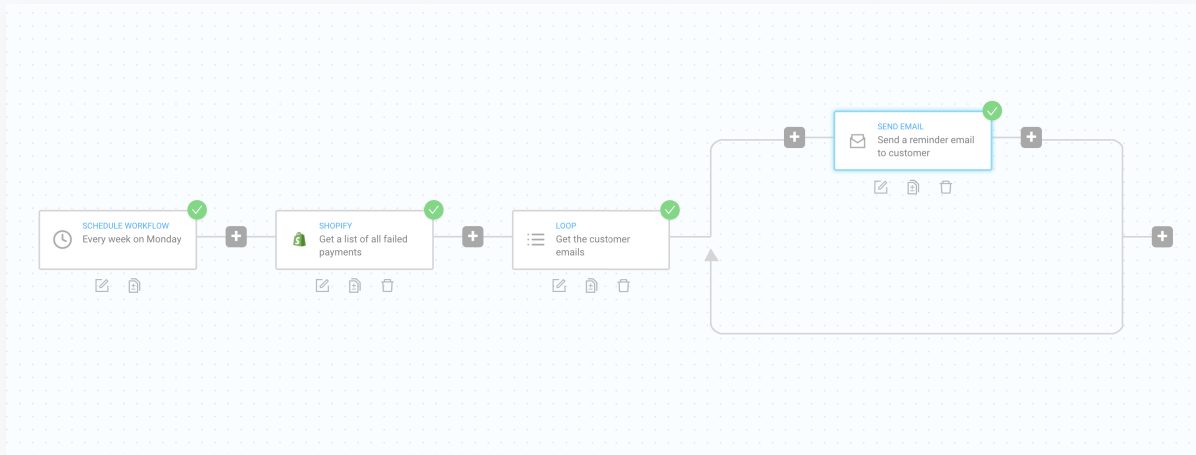


Image: Follow up with customers who had failed payment

## Reward your customers with a discount code when their friends sign up →

Referral marketing is powerful when it's automated. With this workflow, when a new customer makes a purchase, you can collect their friends' email addresses and email them discount codes of X% with suggestions on what to buy.

## Follow up with customers with failed card payment →

If a customer makes a purchase and either their card fails or they contest the purchase, you can send them reminders to update their info so they can receive their products.

# Customer Support 🙏

Automating customer support means you can spend less time on replying to common questions and more time focused on improving products, shipping, and other areas of your business to improve the customer experience.

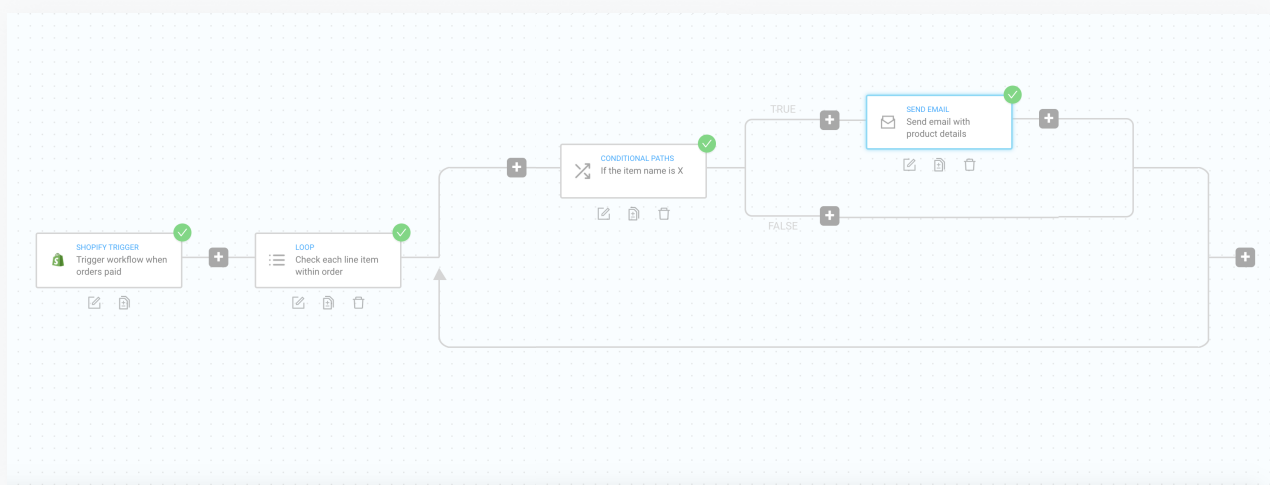


Image: Email customers who've purchased a specific product

## Ask the customer for a review after their order is delivered →

Happy customers tend to leave positive product reviews, but many Shopify businesses don't ask for reviews when a product is delivered. By using this workflow when an order is marked as delivered, an email or SMS message is sent to the customer asking for a review.

## Email customers who've purchased a specific product →

Order confirmation emails are pretty standard these days and every Shopify store needs to use them. When an order is processed, you can send the customer an email after making the purchase to confirm their purchase and its estimated delivery date.

# Customer Support 🙏

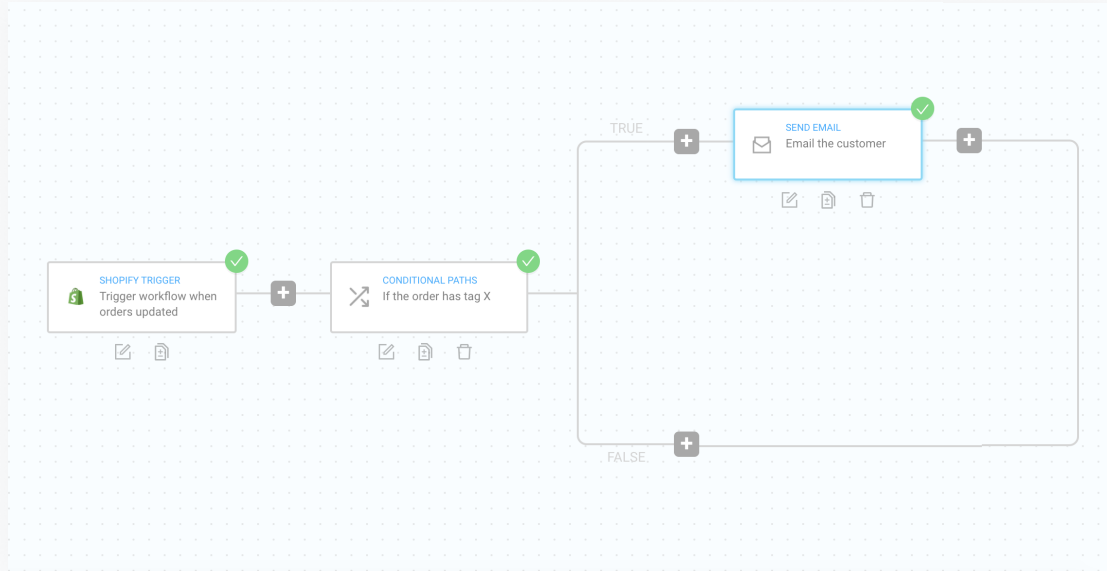


Image: Send an email to a customer when their order is tagged

## Send an email to a customer when an order is tagged →

Sometimes, an order needs to be tagged for a specific reason. Some of those reasons can include fraud detection, shipping delays, out of stock notifications, and more. So when an order is tagged, an email is sent to the customer notifying them about their order.



# Shipping & Fulfillment

Shipping and fulfillment automation allows you to speed up delivery rates and more efficiently pack your orders. It also allows you to better manage your inventory to ensure products don't go out of stock.

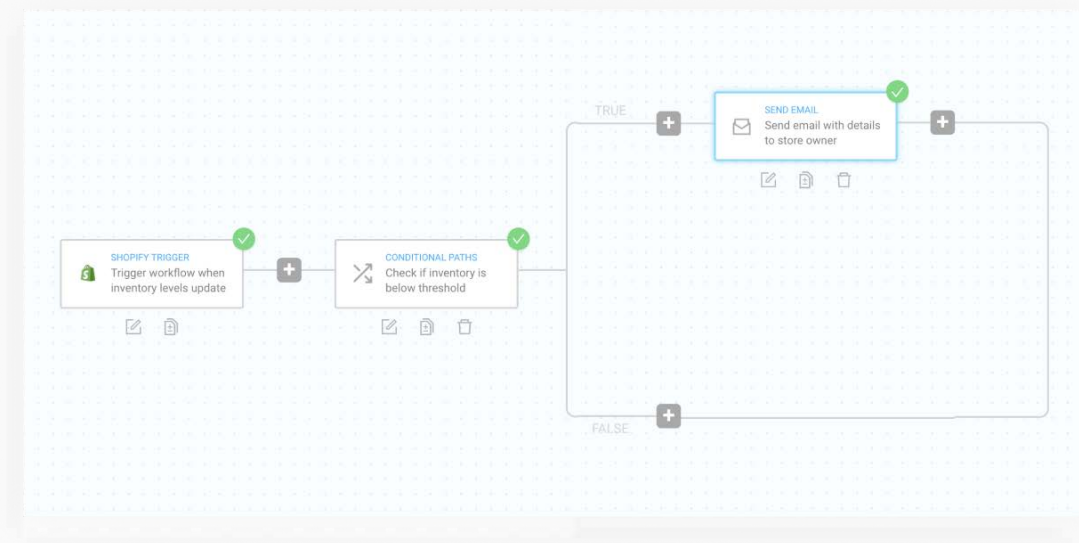


Image: Send yourself customized low stock notification

## Automatically pause advertising when inventory starts running low →

If you're running a successful ad campaign that's causing your inventory to run low (congrats on the successful campaign btw!), you can use this workflow to automatically turn off the ads once you reach a specific inventory threshold.

## Send a low stock notification when product variant inventory drops below a threshold →

Can't sell products without inventory right? If inventory drops below a certain threshold, an email or text is sent to your team to let them know it's time to reorder the product(s).

# Shipping & Fulfillment

Shipping and fulfillment automation allows you to speed up delivery rates and more efficiently pack your orders. It also allows you to better manage your inventory to ensure products don't go out of stock.

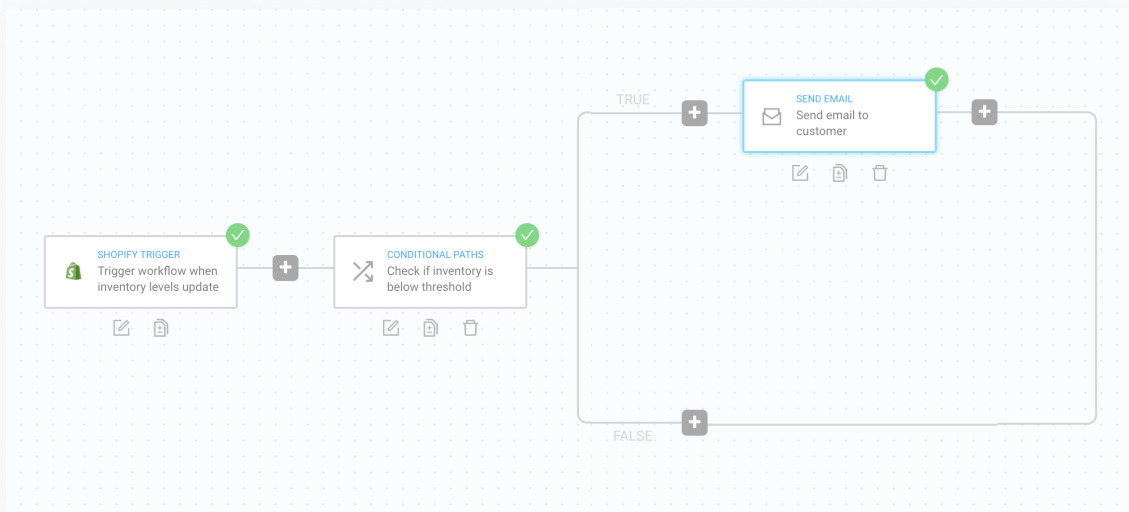


Image: Notify customers of low inventory to generate FOMO

## Notify customer that order is low inventory, buy fast →

The fear of missing out (FOMO) can be a powerful incentive to make customers buy your products. Once the inventory level for a specific product reaches a certain threshold, you can send a text or email your customers to notify them that the product is running out fast and get them to make a purchase.

# Product Listings

Create products in multiple stores at once, with exactly same listing  
Running multiple stores? Instead of manually creating each listing for one store, you can create multiple listings at once.

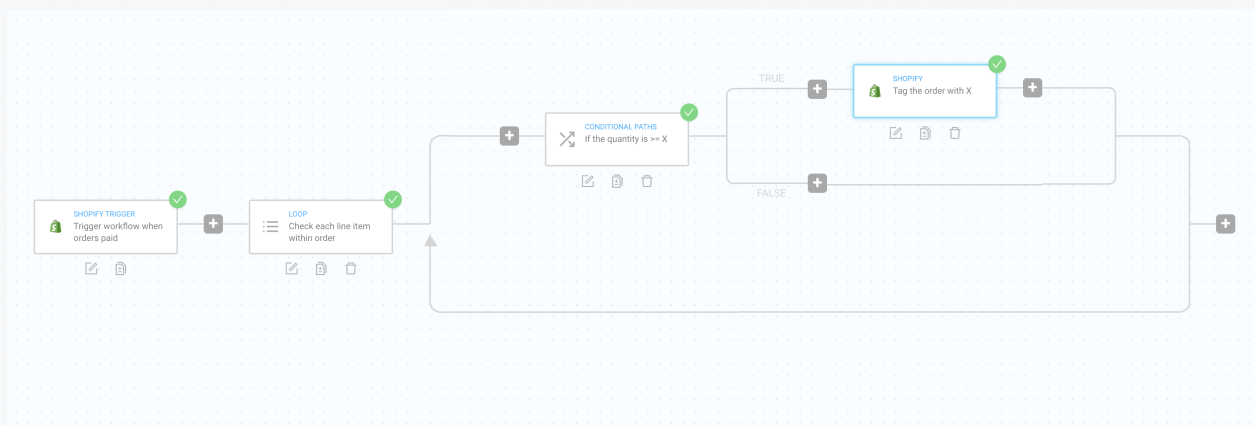


Image: Tag order if it contains a certain line item quantity

## **Automatically add, remove, and re-sort products within collections →**

Collections are some of the most visited ecommerce pages but managing them can be difficult. With this workflow, you can keep your collections clean and sorted by making use of tags or conditional rules.

## **Tag an order when it contains a certain quantity of an item →**

If an order has a large quantity for a specific SKU, you can tag the order to notify your fulfillment team that this order might need special attention or packaging.

# Fraud 🤪

Fraudulent orders and chargebacks can be a big drain on your profits. With automation, you can prevent fraud to protect your Shopify store.

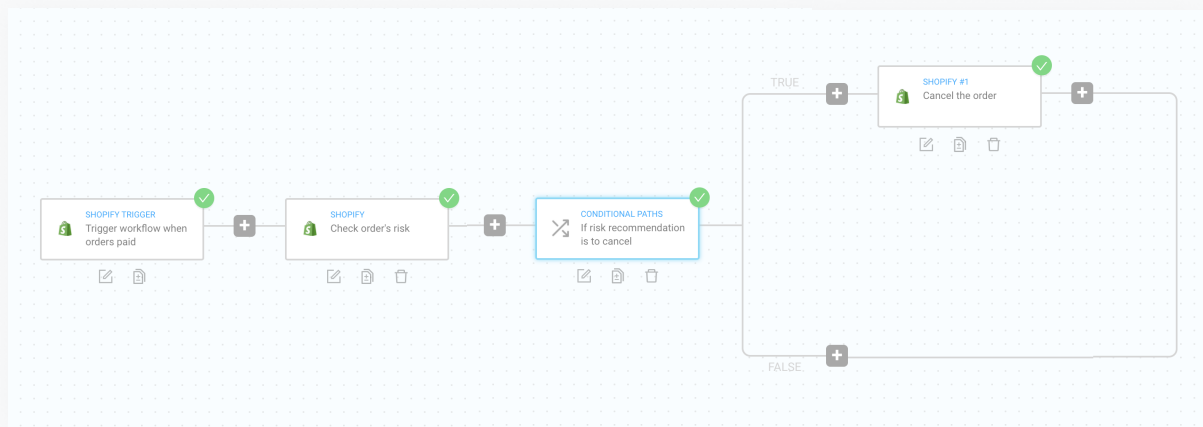


Image: Cancel order if risk is too high

## Notify staff and tag fraudulent orders →

Your team has to be made aware of any fraudulent orders. When an order is placed and it's high-risk, a "Risky" tag is applied and a team member can begin verifying the order.

## Cancel the order and email the store owner if the order risk level is high to prevent fraud →

Want to automatically cancel high-risk orders? When a new order is placed, check if the order is listed as high risk and if the conditions are met, cancel the order and email your team notifying it was canceled.

# Upselling

Upselling can be a great way to improve customer retention and AOV - especially if you personalize recommendations for each customer.

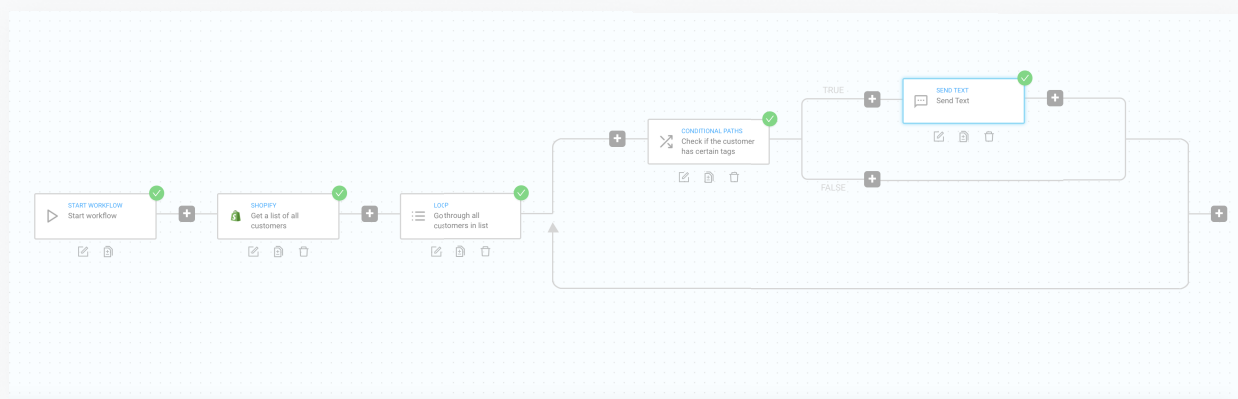


Image: Send tagged customers SMS offer

**Use email to cross-sell products that are complementary to the ones they'll be receiving in their next shipment →**

Here's an example of an automated personalization email: When a customer makes a new purchase, get all the items in the same product category and trigger an email campaign to the customer with product recommendations.

**Send tagged customers an SMS message with a special upsell offer →**

SMS is a great channel on its own. For customers with a certain tag, you can send them an SMS message with a discount code.

# Expert Ecommerce Automation with Agency Partners

We know you only have so many hours in one day, and more things to manage than just your campaigns this upcoming holiday season. In that case — consider using an agency to manage your automation.

Alloy's agency partners are trained on how to use Alloy to deliver the best results possible. With additional certifications for Shopify Partners, you're getting qualified experts who can help you get the most out of automation.



**carson**



**hawke**media

**Miscreants**

[Meet Our Partners](#)



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# Gorgias

Gorgias is the ecommerce helpdesk that turns your customer service into a profit center.

“ We are big on automation here at Gorgias, and we’ve built our customer support help desk with it in mind to automate repetitive tasks and free up important bandwidth for your CS team. By leveraging the Gorgias platform, merchants can set up automatic responses to questions that are classified with machine learning, for instance, as a “where is my order?” ticket, which gets an auto-response with the tracking info. This saves your CS team precious time, which will be especially helpful during BFCM, where customer support requests can increase by 80-100%. By leveraging a Gorgias/Alloy integration, merchants will be able to take their automation to the next level with highly customized workflows. Responding to a customer ticket? Then set an automation to include BFCM promotions in your response to make customers aware of all your great deals. This is just one of the many ways Gorgias helps turn customer support centers into profit centers. ”



**Romain Lapeyre**

Co-Founder & CEO of Gorgias

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# Pixlee

Pixlee is a visual marketing platform that helps brands leverage user-generated content to improve their marketing performance.

“ Digital marketers today need to wear many hats. The fragmentation of the tech stacks required to deliver a good customer experience is a challenge for every marketer. Having automation and integration between different customer touchpoints allows for marketers to work smarter, not harder. At Pixlee our goal is to provide customers with cost-effective content created by their community. UGC and Influencer content is a cost-effective way to unlock unlimited marketing automation opportunities that delivers a better shopping experience ”



**Kyle Lee**

CEO & Founder of Pixlee

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Hawke Media is a full-service marketing consultancy. We act as an Outsourced CMO for our clients, growing businesses of all sizes and industries.

“ Automation in marketing is important, especially in Q4 and the lead up to Black Friday and Cyber Monday! The more you can prepare ahead of time for those key retail holidays - the smoother the customer’s experience will be and the greater return you will see from your marketing campaigns. ”

A great place to start preparing for the holidays and a good use of automation is scrubbing your email list. The importance of email list hygiene should not be overlooked and you should do an email list cleanup at least a few times a year. However, list or database cleanup can be a tedious process when done manually so utilizing a tool that does it automatically instead is the way to go!

Once your email list is nice and clean, it’s important to ensure your email service provider is connected to Facebook if you are running paid ad campaigns on the platform. This will ensure that all your custom audiences are being dynamically updated, and in turn your lookalike audiences. Connecting the two can drive much greater results and efficiency across your campaigns as you are targeting and excluding audience segments in real time. Inversely this can also ensure that any emails captured from Facebook Lead Ads are being emailed in a timely manner.

Hawke Media can not only set up these and other tools and platforms for success, but also best in class marketing campaigns across lifecycle, social, and other channels to leverage your data and reach your audience on an ongoing basis.



**Ashley Scorpio**

VP Partnerships at Hawke Media

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## Okendo

Capture powerful customer content including product ratings and reviews, customer photos, videos, questions & answers and comments.

“ Automation allows eCommerce brands to streamline processes and save time. With Okendo, merchants can capture high-impact customer reviews & UGC through automated review request emails and incentives for shoppers. Merchants also have the ability to autopublish reviews by star rating to enhance customer experiences and increase conversion rates on site during the holiday season. ”



**Rachel Tyers**

VP Strategic Partnerships at Okendo



# Postscript

Postscript is an SMS / MMS marketing platform for Shopify stores. Send campaigns, create automations, and drive new revenue for your store. Guaranteed ROI.

“ With this year slated to be the best BFCM yet, the more you can make your technology work for you, the better. Gone are the days of set-it-and-forget-it campaigns. While your automations are working on your behalf, you should be knee-deep in analytics, looking at what is working and not working in real-time, and changing as needed. This will give you a competitive edge. ”



**Corinne Watson**

Sr. Content Marketing Manager at Postscript

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# Klaviyo

Klaviyo is an email marketing platform created for online businesses — featuring powerful email and SMS marketing automation.

“ With this year's holiday shopping season set to be the biggest ever for ecommerce stores, automation is going to be vital to keeping up with customer demand. With the Klaviyo + Alloy integration, merchants can personalize and automate the customer journey via email and SMS without the normal restrictions associated with integrating different technologies. ”



**Stewart Wesley**

Strategic Partner Manager at Klaviyo



# Omnisend

Omnisend is an all-in-one omnichannel marketing automation platform built for growth-focused ecommerce brands.

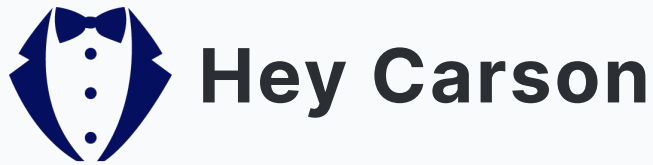
“ The three automations you have to have in place before holiday is a welcome flow, abandoned cart and a post purchase thank you. This will cover the entire customer journey making sure you have shared the differentiators of your brand, provided urgency by reminding them of their saved cart full of limited products and thanked them for making a purchase with an easy to convert opportunity to buy again ”



**Gabe Macaluso**

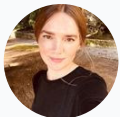
Director of Customer Success at Omnisend

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Hey Carson handles small theme tweaks, app integrations, custom development and graphics adjustments for your Shopify store. They don't have minimum project sizes and in fact, love doing small, quick tasks for store owners.

“ With BFCM right around the corner, merchants cannot underestimate the importance of automation to help streamline their checkout and order fulfilment flow during high-demand periods ”



**Irina Lanina**

Partnership Manager at Carson

## Closing Thoughts 🙌

Now that you've seen how your store benefits from automation for the holidays, get started on your automation journey with Alloy!

[Install Alloy](#)

or

[Book a demo](#)