

FREE WORKSHEETS AND TEMPLATES

The Store Growth Kit

Eight practical worksheets, templates and planners for ecommerce store owners: audits, product pages, email, product and supplier decisions, marketing, AI prompts, weekly reviews and order economics.

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Replace every [variable] with your own verified details before using a template. Numeric examples are hypothetical. Updated versions, guides and the online assessment and calculator: ecomcoach.xyz/learn/

Ecommerce email templates and flow plans

These are adaptable templates, not messages sent to anyone. Replace every {{token}} with verified store data before use. A token is an intentional template field. Do not invent reviews, delivery promises, deadlines, or customer facts. Use a working reply inbox and the appropriate marketing footer for promotional messages. Examples of delays below are starting hypotheses, not universal best times.

Welcome flow

Entry: eligible marketing subscription, with recorded signup source and permission. Deliver the promised resource or offer promptly. Exclude suppressed profiles. End or change first-purchase sales messaging after purchase; do not suppress a promised resource simply because the person buys.

W1 — Deliver the promise

Subject: Your {{resource_name}} is ready

Preview: Start with {{first_useful_step}}.

Hi {{first_name_or_there}},

Here is the {{resource_name}} you requested: {{resource_link}}.

Start with {{first_useful_step}}. It will help you {{specific_outcome}} before you choose your next step.

At {{store_name}}, we help {{customer_group}} {{practical_goal}}. You can expect {{accurate_frequency_and_content}} from us.

If you have a question about {{relevant_topic}}, reply here. We will point you toward the information you need.

Button: Open the guide

{{sender_name}}

W2 — Help the customer choose

Suggested timing: after the reader has had a reasonable opportunity to use the resource; test by product cycle.

Subject: Choosing between {{option_a}} and {{option_b}}?

Preview: The difference that matters for {{customer_use}}.

Hi {{first_name_or_there}},

The right choice depends on {{decision_factor}}.

Choose {{option_a}} if {{verified_fit_a}}. Choose {{option_b}} if {{verified_fit_b}}.

You can compare {{specific_attributes}} here: {{comparison_link}}. The page also explains {{relevant_limit_or_requirement}}, so you can check before ordering.

Button: Compare the options

Questions? Reply with what you are trying to do, and we can help you find the relevant details.

W3 — Resolve one objection

Subject: A quick answer about {{common_question_topic}}

Preview: What to check before choosing {{product_category}}.

Hi {{first_name_or_there}},

One question we hear is: “{{actual_common_question}}”

{{verified_plain_language_answer}}

We have added {{measurement_photo_guide_or_demo}} so you can see how this works before you buy: {{helpful_link}}.

Button: See the details

If you are still unsure, reply here. We would rather help you choose the right option than leave you guessing.

Checkout recovery flow

Entry: the correct cart or checkout event, identifiable contact data, and applicable marketing eligibility.

Suppress after purchase before every send. Check unsubscribes and unavailable items. Avoid duplicate recovery from another app. The schedule should reflect the actual buying cycle.

C1 — Helpful reminder

Subject: Would you like to return to your selection?

Preview: Review {{product_name}} and your order details.

Hi {{first_name_or_there}},

You recently selected {{product_name}} at {{store_name}}. If you would like to continue, you can review your selection here: {{working_recovery_link}}.

Before ordering, you can check {{relevant_size_or_delivery_information}} here: {{information_link}}.

Button: Review my selection

Need help deciding? Reply to this email.

Implementation: Do not imply the product is reserved. If recovery links cannot reliably restore items, use accurate wording such as “View the product” and link to the correct variant.

C2 — Answer the relevant question

Subject: Still wondering about {{product_question}}?

Preview: Here is the detail that can help you decide.

Hi {{first_name_or_there}},

If you are considering {{product_name}}, {{specific_question}} may be useful to check.

{{verified_answer}}

You can see {{supporting_photo_or_guide}} here: {{supporting_link}}.

Button: Check the details

If this is not the right fit, {{appropriate_alternative_or_help_option}}.

C3 — Optional real offer

Use only when the promotion is authorized, economically sensible, and genuinely available. This email is optional; a flow can end without a discount.

Subject: {{accurate_offer_summary}} through {{real_end_date}}

Preview: The terms for your {{store_name}} offer.

Hi {{first_name_or_there}},

If you are ready to order, {{offer_description}} is available for {{eligible_products_or_audience}} through {{end_date_and_timezone}}.

Use {{code_or_automatic_application_instructions}}. {{minimum_spend_exclusions_and_stacking_terms}}

You can review the full offer and your order total before paying.

Button: Review the offer

If you need help with the product itself, reply here.

Post-purchase journey

Use the store's native transactional confirmation for essential order information unless a verified replacement is deliberately configured. Do not duplicate it. Marketing eligibility and transactional purpose must be handled appropriately; not every post-purchase email is transactional.

P1 — Prepare for arrival

Subject: Getting ready for your {{product_name}}

Preview: One useful step before it arrives.

Hi {{first_name_or_there}},

Thank you for choosing {{product_name}}.

Before it arrives, {{verified_preparation_step}}. You can find the full preparation guide here: {{guide_link}}.

For the latest order information, use {{secure_order_status_link}}. If you need help with the order, contact us at {{monitored_support_route}}.

Button: Read the preparation guide

P2 — Help with first use

Trigger when reliable delivery information and the intended use window support the message. If delivery is unknown, do not state that the product has arrived.

Subject: Your first {{task}} with {{product_name}}

Preview: Start here, then follow the full instructions.

Hi {{first_name_or_there}},

When you are ready to use {{product_name}}, start with {{verified_first_step}}.

A common point of confusion is {{actual_issue}}. {{verified_explanation}}

The complete instructions are here: {{instructions_link}}. Follow those instructions, including the relevant care and safety information.

Button: See the full guide

If anything is unclear, reply here with your question.

P3 — Invite honest feedback

Subject: How is {{product_name}} working for you?

Preview: Tell us what worked and what could be clearer.

Hi {{first_name_or_there}},

We would like to know how your experience with {{product_name}} is going.

What has been useful? Was anything confusing or different from what you expected?

You can share feedback here: {{feedback_link}}, or reply directly if you need help.

Button: Share my feedback

Your feedback helps us improve the product information and support we provide.

Implementation: Use a fair review invitation process. Do not send public-review links only to customers who first give positive private feedback.

P4 — A relevant next step

Subject: Ready for {{next_customer_task}}?

Preview: An option that works with {{previous_product}}.

Hi {{first_name_or_there}},

If you are ready to {{next_customer_task}}, {{recommended_product}} may help because {{verified_relevance}}.

It is compatible with {{verified_models_or_conditions}}. Check {{important_requirement}} before choosing.

Button: Explore the next step

Still working through your first purchase? You can revisit the guide here: {{first_product_guide}}.

Implementation: Suppress unsuitable recommendations for unresolved service issues, refunds, incompatibility, or an already completed purchase.

Winback flow

Entry: customers past a product-appropriate expected repurchase interval with suitable marketing eligibility. Define the interval from observed behavior and product use, not an arbitrary universal 30-day rule. Stop on purchase, unsubscribe, or other ineligibility.

R1 — Reconnect with relevance

Subject: Still interested in {{customer_interest}}?

Preview: A useful update from {{store_name}}.

Hi {{first_name_or_there}},

Since your last visit, we have {{real_relevant_update}}.

If {{customer_need}} is on your list, this guide can help: {{useful_link}}.

Button: See what is useful for me

If you would prefer fewer messages or different topics, you can update your preferences here: {{preferences_link}}.

R2 — Give the customer control

Subject: What would you like to hear about?

Preview: Choose your interests or take a break.

Hi {{first_name_or_there}},

We want our emails to be useful. You can choose {{available_topics_or_frequency_options}} here: {{preferences_link}}.

If you no longer want marketing messages, use the unsubscribe link below. You can still contact our support team when you need help with an order.

Button: Update my preferences

Implementation: End or reduce marketing to persistently unengaged profiles under a documented list-management approach. Do not keep sending “last chance” messages indefinitely.

Service exception template

Subject: An update on your {{store_name}} order

Hi {{first_name_or_there}},

{{accurate_description_of_issue}}

Here is what we know: {{verified_current_information}}.

Our next step is {{specific_action}}, and we will update you by {{realistic_confirmed_update_time}}.

If you need help with your options before then, reply here or contact {{support_route}}. We are sorry for the inconvenience.

{{sender_name}}

Do not insert an unverified arrival date. State only options that the customer is actually entitled to or that the business has authorized.

Pre-send checklist

1. All template tokens resolve, with sensible fallbacks.
2. The recipient qualifies and has not since become ineligible.
3. Product facts, stock, prices, deadlines, and links are accurate.
4. The message is readable on mobile and images have useful alternatives.
5. Replies reach a monitored route.
6. Marketing messages contain the required identity, address, preference, and opt-out information.
7. Test the flow after purchase, cancellation, unsubscribe, missing data, and a broken integration.
8. Review performance using contribution and customer response, not only attributed revenue.

Further reading: [Klaviyo flows](#), [FTC commercial email guidance](#).

Store audit and product-page worksheets

60-minute store audit

Store: _____ Date: _____ Reviewer: _____

Customer task: _____ Product/variant: _____

Entry source: _____ Device/browser: _____

Arrival and navigation — 10 minutes

- ☐ The destination matches the promise in the originating link or creative.
- ☐ The product category and intended customer are understandable.
- ☐ Navigation uses customer language.
- ☐ Search returns sensible results and handles no-result queries.
- ☐ Overlays do not block shopping controls.
- ☐ Key actions work with a keyboard and have understandable labels.

Product selection — 15 minutes

- ☐ Product, price, variant, image, and stock status agree.
- ☐ Photos establish scale, detail, and included items.
- ☐ Dimensions, materials, compatibility, and care are verified.
- ☐ The page explains who the product suits and relevant limits.
- ☐ Delivery information is realistic and easy to find.
- ☐ Shipping costs or estimation rules are clear.
- ☐ Returns and support routes are accessible.
- ☐ Claims have evidence; reviews represent real feedback.

Cart and checkout — 15 minutes

- ☐ Add, remove, quantity, and variant changes behave correctly.
- ☐ Discounts apply under the advertised conditions.
- ☐ The final total and shipping options are understandable.
- ☐ Mobile controls remain visible and usable.
- ☐ Validation errors explain how to recover.
- ☐ Appropriate payment success/failure tests have been completed.
- ☐ No live checkout is accidentally left in test mode.

After purchase — 10 minutes

- ☐ Confirmation explains what happens next.
- ☐ Inventory and fulfillment receive the correct order.

- ☐ Tracking links and support routes work.
- ☐ Purchase suppresses recovery messages.
- ☐ Cancellation and refund processes have an owner.
- ☐ Essential messages are not duplicated by multiple apps.

Prioritization — 10 minutes

Finding	Evidence	Customers affected	Severity	Action	Owner	Due	Verification

Severity guide: blocker = prevents or materially misrepresents purchase; high = repeated uncertainty or service failure; medium = plausible improvement needing more evidence. Fix blockers before speculative style changes.

Product-page content brief

Customer and buying situation: _____

Main product promise, supported by facts: _____

Top three pre-purchase questions: _____

Relevant specifications and source of truth: _____

Included / sold separately: _____

Variant differences: _____

Who it suits / when another option is better: _____

Delivery and return information owner: _____

Images needed to explain scale and use: _____

Claims requiring verification: _____

Five observation tasks

Ask a potential customer to:

1. Choose the variant that fits a realistic need.
2. Explain what arrives in the package.
3. Estimate total cost for their situation.
4. Find the likely delivery information.
5. Explain how they would get help or arrange a return.

Record what they actually do and say. Do not direct them to the answer during the task. A small sample identifies possible issues; it does not measure their prevalence in the whole audience.

Conversion change log

Observed issue: _____

Evidence and confidence: _____

Proposed change: _____

Expected customer benefit: _____

Primary business measure: _____

Guardrail measures: _____

Date and affected pages: _____

Concurrent changes or promotions: _____

Results and uncertainty: _____

Decision: keep / revise / revert / collect more evidence.

Product and supplier evaluation workbook

Product opportunity

Product: _____ Customer: _____ Market/channel: _____

Price assumption: _____ Supply model: _____

Alternative the customer currently chooses: _____

Reason to choose this offer: _____

Required gates

- ☐ Intended sale/channel is permitted and applicable requirements are understood.
- ☐ Required intellectual-property and brand permissions are in place.
- ☐ Relevant product claims and documentation can be verified.
- ☐ Supplier can meet the essential product and delivery specification.
- ☐ Expected contribution before acquisition is positive or the model is deliberately being reworked.

A failed gate means pause and resolve the issue. It cannot be cancelled out by a high score elsewhere.

Weighted comparison

Score 0–4 based on evidence. Use “unknown” where evidence is missing. Do not calculate a complete score until all dimensions are evaluated.

Dimension	Weight	Score	Evidence/source	Confidence	Next question
Customer demand	25				
Contribution potential	25				
Differentiation	15				
Operational fit	15				
Supplier reliability	10				
Marketing fit	10				

Weighted score = $\text{sum}((\text{dimension score} / 4) \times \text{weight})$.

Planning bands: 75–100 consider a limited pilot; 50–74 resolve uncertainties; below 50 rework/deprioritize.

These are editorial planning thresholds, not validated success probabilities.

Example: scores 3,3,2,4,3,3 produce 75/100.

Pilot decision

Largest uncertainty: _____

Smallest honest test: _____

Budget/time limit: _____

Evidence needed to continue: _____

Conditions requiring pause: _____

Outcome and revised assumptions: _____

Supplier comparison

Question	Supplier A	Supplier B	Evidence needed
Product specification matches?			
Minimum quantity and lead time?			
Sample represents ordinary stock?			
Packaging/instructions acceptable?			
Stock update method?			
Tracking and delivery experience?			
Defect and return responsibility?			
Cancellation/change process?			
Landed cost and payment terms?			
Required documentation verified?			
Named support contact and response process?			

Sample-order inspection

Record order, acknowledgement, dispatch, tracking, and delivery dates. Photograph the package and item. Check dimensions, material, function, variants, instructions, included items, damage, and consistency with the listing. Record unresolved questions before buying more.

Pass/fail criteria: _____

Defects and corrective action: _____

First-order quantity and cash exposure: _____

Reorder conditions: _____

Backup plan: _____

Ecommerce marketing and promotion planners

One-page marketing plan

Customer and buying situation: _____
Product/collection and verified promise: _____
Current constraint: demand / traffic / conversion / economics / retention / operations / unknown.
Evidence for that constraint: _____
Primary acquisition channel and why it fits: _____
Landing page and next customer action: _____
Budget or weekly time allocation: _____
Maximum affordable test loss: _____
Primary metric and exact definition: _____
Guardrails: contribution, returns, support, fulfillment, cash.
Review window and why it is suitable: _____

30-day working rhythm

Week	Work	Evidence to produce
1	Customer research, cost model, analytics verification	Clear customer, offer, and measurement definitions
2	Product page, useful creative, welcome flow	A tested shopping journey and launch assets
3	Limited acquisition test and customer observation	Actual behavior, questions, costs, and exceptions
4	Review and choose continue/change/pause	A documented decision and next experiment

This is an execution schedule, not an earnings or sales guarantee.

Creative brief

Customer situation: _____
One question the creative answers: _____
Verified product facts: _____
Demonstration and evidence: _____
Hook: _____
Main explanation: _____
Next action and destination: _____
Required rights/disclosures: _____
Claim and destination review owner: _____

Promotion economics

Baseline net merchandise revenue/order: _____

Baseline variable cost/order: _____

Baseline contribution/order: _____

Proposed discount or benefit cost: _____

New revenue/order: _____

New variable costs/order: _____

New contribution/order: _____

Baseline orders: _____

Required promoted orders to match baseline contribution = $\text{baseline orders} \times \text{baseline contribution} / \text{new contribution}$, when new contribution is positive.

If new contribution is zero or negative, show “no finite volume restores positive contribution under this model.” Include acquisition changes and fixed campaign costs separately.

Example: $10 \text{ orders} \times \$22 \text{ contribution} / \$13 \text{ new contribution} = 16.923 \text{ orders}$, rounded up to 17. This ignores acquisition and fixed-overhead changes.

Offer eligibility, dates/timezone, exclusions, stacking, stock, and return terms: _____

How the checkout will be tested: _____

How incremental demand will be assessed: _____

Operational stop conditions: _____

Creator partnership brief

Objective: audience access / content production / both.

Creator audience and evidence of fit: _____

Deliverables, formats, timing, revisions: _____

Verified claims and prohibited unsupported claims: _____

Usage rights, duration, paid use, editing rights: _____

Material-connection disclosure plan: _____

Fixed costs including samples: _____

Variable costs/commission: _____

Contribution per incremental order after variable partnership cost: _____

Break-even incremental orders = $\text{fixed partnership costs} / \text{contribution per incremental order}$, if positive.

Tracking links/codes and attribution limitations: _____

Review of content usefulness, customer response, contribution, and rights compliance: _____

Practical AI prompt library for ecommerce

Use approved tools, verified business information, and de-identified data where possible. The prompts assist work; they do not grant permissions or replace technical access controls. Review customer-facing claims and consequential actions. Replace all bracketed inputs before use.

1. Product-page audit

Act as a customer-experience reviewer. Evaluate the supplied product page against this buying task: [task]. Use only the page content and verified product facts provided. Identify unanswered purchase questions, conflicting information, and functional issues visible in the evidence. Separate confirmed observations from hypotheses. Return a prioritized table with issue, evidence, customer consequence, proposed fix, confidence, and how to verify. Do not invent analytics or claim a guaranteed conversion lift.

2. Factual product description

Using only [verified specifications], draft a product description for [customer/use]. Include a short overview, factual benefits, specifications, included items, limitations, and FAQs. Mark missing facts separately. Do not invent safety, sustainability, health, performance, warranty, review, or delivery claims. Preserve variant distinctions. Return a fact-check table mapping claims to input facts.

3. Customer-feedback analysis

Analyze [de-identified records] for [product]. Group buying motivations, unanswered questions, fit problems, usage issues, and defects. Give source IDs and distinct-record counts for each theme. Flag duplicates. Separate observations from explanations. Do not invent quotes or infer sensitive traits. Recommend what to investigate before changing the page or product.

4. Welcome-flow draft

Draft a three-message welcome sequence for [store/customer]. The promised resource is [resource]. Use the verified product and offer facts below. For each message provide purpose, subject, preview, body, CTA, needed data, and exit conditions. Do not invent deadlines or discounts. Explain what changes after a purchase and where marketing eligibility must be checked.

5. Post-purchase education

Map helpful messages for [product] from purchase through successful use. Inputs: [delivery events available], [verified instructions], [common customer questions]. Distinguish essential order updates from marketing. Use event-based timing where supported; label assumptions. Include suppression for unresolved

delivery issues, refunds, and completed next purchases. Do not claim delivery without reliable data.

6. Support draft

Draft a response to [de-identified case] using only [approved policy and product knowledge]. Cite the source for policy statements. Do not approve refunds, change orders, invent delivery dates, or make safety claims. If information is missing or conflicting, ask one focused question or recommend escalation. Provide the draft and a reviewer checklist.

7. Weekly performance review

Review [exports] for [periods/timezone/currency] using [metric definitions]. Identify missing values, duplicates, incompatible scopes, and zero denominators first. Show calculations for changes. Separate facts from hypotheses. Return three investigations and at most three actions with evidence and guardrails. Do not invent benchmarks or causal conclusions. Label forecasts and estimates.

8. Product opportunity research

Evaluate [product idea] for [customer/channel/market] using only [research evidence]. Separate demand, differentiation, contribution, operations, supplier, and marketing fit. List unknowns and any failed requirements. Do not invent market size, search volume, supplier certifications, or success probabilities. Propose the smallest honest test of the most important uncertainty.

9. Product video brief

Write a demonstration script answering [one buying question] for [product]. Use [verified facts]. Include hook, shot list, spoken copy, captions, and next action. State which variant appears. Avoid unsupported claims and misleading edits. List assets and permissions needed. Do not present generated scenes as real customer evidence.

10. Catalog quality review

Compare [catalog records] with [required-field schema]. Report missing fields, inconsistent units, duplicate SKUs, variant conflicts, and unsupported claims. Do not change records. Return proposed corrections only where the supplied authoritative data supports them; otherwise flag a question. Include row IDs and a reversible review plan.

11. Automation design

Map [manual process] into trigger, eligibility, inputs, action, confirmation, duplicate prevention, failure handling, logging, and owner. Prefer deterministic rules where sufficient. Identify where AI classification would need validation. Keep financial commitments and customer-impacting changes behind appropriate approvals. Propose a limited test and rollback plan; do not execute actions.

12. Promotion review

Review [offer] using [revenue basis and cost inputs]. Calculate baseline and promoted contribution, required volume to match contribution, and risks from discount stacking, returns, and acquisition costs. Do not double count refunds or overhead. Flag missing data. Review whether the landing page and terms match the offer. Do not invent urgency or claim incremental impact without evidence.

13. Search-content brief

Using [customer research and verified catalog], propose a buying guide for [question]. Explain the intent, useful comparisons, facts needed, internal links, and customer next step. Avoid invented keyword volumes and ranking promises. Identify what requires original observation or demonstration. Keep the guide distinct from existing supplied pages.

14. Compare platform requirements

Compare [candidate platforms] against [must-have workflows, budget, team skills]. Use only current official documentation supplied or retrieved with source dates. Separate native, extension-dependent, and custom work. Include ongoing ownership and total cost categories. Do not invent current prices or assume every plan includes a feature.

15. Prioritize next actions

Given [store observations, metric definitions, resource limits], recommend at most three next actions. Prioritize confirmed purchase or fulfillment failures, then unresolved economics or measurement, then evidence-backed growth opportunities. Explain the evidence, uncertainty, expected customer benefit, effort, and verification for each. Do not infer a universal bad conversion rate from a small sample.

Weekly review and cash-planning workbook

Metric dictionary

For every dashboard field, record: name, source, formula, numerator, denominator, time period, timezone, currency, revenue basis, treatment of refunds/tests/cancellations, attribution model, and owner.

A blank is not zero. Compare cohorts with equal observation time. Keep session counts, event counts, users, customers, and orders distinct.

Weekly operating review

Period: _____ Comparison: _____ Known context: _____

Measure	Current	Prior	Absolute change	Percentage change	Definition/source
Net revenue					
Orders					
Sessions / purchasing sessions					
Conversion					
AOV					
New customers / acquisition cost					
Contribution before / after acquisition					
Returns / refunds					
Fulfillment exceptions					
Cash / near-term commitments					

Percentage change = (current – prior) / prior when prior is nonzero. Otherwise report the absolute change and state that percentage change is not defined under this formula.

Observed facts: _____

Hypotheses requiring investigation: _____

Three actions with owner, date, and guardrails: _____

Prior actions reviewed and lessons learned: _____

Revenue reconciliation

Use a small authorized sample with order IDs rather than unnecessary personal information.

Order ID	Store date/value	Refunds	Net value	Ad claim	Email claim	Known discrepancy

Check date/timezone, currency, taxes, shipping, discounts, order status, test orders, event duplication, and attribution windows. Do not sum channel claims as unique revenue.

Rolling cash forecast

Use actual payment dates and realistic payout timing. Forecast at least far enough to cover important supplier and operating commitments; a 13-week view is a practical optional starting format, not a universal requirement.

Week	Opening cash	Expected receipts	Committed payments	Optional spending	Refund/other allowance	Closing cash
1						
2						
3						
4						

Closing cash = opening cash + receipts – committed payments – optional spending – other allowance.

Next opening cash = prior closing cash.

Scenario A: expected trading. Scenario B: slower sales or delayed receipts. Scenario C: higher returns or an urgent supplier payment. Replace estimates with actuals weekly. Do not count restricted or remittable funds as discretionary cash.

Questions for a qualified adviser where relevant: accounting treatment, tax obligations, financing terms, reserves, and the treatment of inventory and refunds. This workbook supports operational planning and does not establish those obligations for a particular business.

Find Your Store's Next Best Improvement

Answer eight practical questions about your store. Get a suggested next step, useful guides, and a worksheet. This is a planning aid based on your answers, not an automated audit or prediction of sales.

You can view your result without providing an email address.

Questions

Where are you now?

- I am choosing products or planning a store
- I am building and have not launched
- My store is live

Do you know of a problem that prevents customers from ordering?

- Yes, a payment or shopping function is failing
- No known blocker
- I have not checked

Are existing customers experiencing unresolved fulfillment problems?

- Yes, orders or delivery promises are at risk
- No significant unresolved issue
- I do not have a reliable view

Do you know what a representative order contributes after variable costs?

- Yes, it leaves positive contribution before acquisition
- Yes, contribution is zero or negative
- I have not calculated it reliably

Can you reliably follow visits, cart activity, checkout, and purchases?

- Yes, definitions and tracking have been checked
- No, tracking is missing or inconsistent
- I am unsure

What is your strongest current observation?

- Too few relevant people discover the store
- Visitors struggle to choose or add a product

- Shoppers begin buying but struggle in cart or checkout
- First purchases happen, but suitable customers rarely return
- Purchasing is working and I want to improve operations
- I do not have enough evidence yet

Does the product have a sensible repeat or complementary purchase?

- Yes, there is a relevant next purchase
- Usually not, or it is a long buying cycle
- I have not established this

Is repetitive administration a major constraint?

- Yes, it takes time away from important work
- No, another issue is more pressing

How results are selected

The first applicable rule wins. This prevents a growth suggestion from overriding a known ordering or fulfillment failure. Missing data is not treated as poor performance. Scores and universal conversion-rate thresholds are deliberately not used.

1. Known purchase blocker -> checkout
2. Known fulfillment issue -> operations
3. Known nonpositive pre-acquisition contribution -> economics
4. Planning -> validate
5. Building -> prepare
6. Live: missing/unknown economics or measurement, unchecked purchase/fulfillment, or unknown funnel -> measure
7. Product or checkout friction -> conversion
8. Too little relevant traffic -> acquisition
9. Repeat concern with plausible repeat fit -> retention
10. Stable funnel with repetitive administration -> automation
11. Otherwise -> review

Result: Make ordering reliable first

A known purchase blocker deserves attention before more acquisition spending.

Your next action: Reproduce the issue on the affected device, repair it, and complete a controlled test of the full purchase journey.

1. Record the exact product, device, payment method, and error.
2. Assign an owner and verify the fix across the affected path.

3. Monitor error recurrence and completed purchases without claiming a lift from a tiny sample.

What to watch: Functional success and checkout completion using consistent session definitions.

Read next: [How to Audit Your Ecommerce Store in 60 Minutes](#) · [Why Customers Add to Cart but Do Not Check Out](#) · [Why Is My Online Store Getting Traffic but No Sales?](#)

Optional help: [Get help reviewing the purchase journey](#)

Result: Stabilize the orders you already have

Customers need the promised product and a reliable resolution before the store takes on more demand.

Your next action: Create an exception list for delayed, incorrect, or unresolved orders and assign an owner to each.

1. Confirm stock, supplier, and fulfillment information.
2. Send accurate updates with a real next-update commitment.
3. Review acquisition activity against the capacity to fulfill new orders.

What to watch: Unresolved orders, resolution time, cancellations, and customer support needs.

Read next: [How to Use Email to Improve Your Customer Experience](#) · [How to Choose a Supplier and Test Your First Sample Order](#) · [How to Automate Repetitive Store Management Tasks](#)

Optional help: [Get help untangling store operations](#)

Result: Repair the order economics

The current cost model does not leave positive contribution before acquisition.

Your next action: Recalculate your three key products with consistent revenue and cost definitions, then test realistic pricing or cost changes.

1. Check for double-counted refunds or costs.
2. Compare product, fulfillment, fee, and return assumptions.
3. Pause decisions to scale paid acquisition until the model supports them.

What to watch: Contribution before and after acquisition, with cash commitments visible.

Read next: [The Ecommerce Profit Calculator: What Do You Keep From Each Order?](#) · [My Store Has a 4× ROAS. Why Am I Still Losing Money?](#) · [How to Plan a Promotion Without Giving Away Your Profit](#)

Optional help: [Get help understanding your store economics](#)

Result: Validate a focused product and customer

Your next useful milestone is evidence that a specific customer wants an offer you can deliver economically.

Your next action: Choose one product opportunity and test its largest uncertainty with a small, honest pilot.

1. Write the customer, buying situation, and alternative solution.
2. Calculate initial economics and inspect a sample.
3. Record what evidence would justify a larger commitment.

What to watch: Actual buying evidence, successful fulfillment, and realistic contribution.

Read next: [How to Start an Ecommerce Business: From Idea to First Customer](#) · [How to Find Products People Want to Buy](#) · [Is This Product Worth Selling? A Practical Evaluation Scorecard](#)

Optional help: [Get help shaping your first store offer](#)

Result: Complete the store before opening

A prelaunch store needs a tested purchase and fulfillment journey.

Your next action: Run the launch checklist with a representative product and a controlled test order.

1. Resolve missing product, delivery, returns, and support information.
2. Check payment, inventory, confirmation, and fulfillment.
3. Choose one manageable acquisition test after the store is ready.

What to watch: Launch checklist completion and verified order handling.

Read next: [How to Set Up Shopify: A First-Store Launch Checklist](#) · [How to Audit Your Ecommerce Store in 60 Minutes](#) · [Your First Ecommerce Marketing Plan: What to Do Now, Next, and Later](#)

Optional help: [Get help reviewing launch readiness](#)

Result: Build a reliable baseline

Missing definitions or unverified tracking make the next growth decision difficult to interpret.

Your next action: Verify one order journey and calculate contribution for one representative product.

1. Record metric definitions, date range, timezone, and revenue basis.
2. Check funnel events and compare them with store orders.
3. Identify the biggest known gap without inventing a universal benchmark.

What to watch: Completeness and consistency of the baseline, not a speculative health score.

Read next: [Ecommerce Metrics Explained: The Numbers That Help You Run Your Store](#) · [The Ecommerce Profit Calculator: What Do You Keep From Each Order?](#) · [Why Your Ad Platform, Email Platform, and Store Report Different Revenue](#)

Optional help: [Get help making sense of your store data](#)

Result: Resolve the buying question that stops progress

Your observation points to difficulty choosing or completing a purchase.

Your next action: Observe a realistic customer task and fix the most strongly evidenced uncertainty or friction.

1. Match the entry promise to the product page.
2. Check fit, price, delivery, total cost, and usable controls.
3. Record one change and monitor customer behavior plus contribution.

What to watch: The affected funnel step, completed purchases, and return or support guardrails.

Read next: [Why Is My Online Store Getting Traffic but No Sales?](#) · [The Product Page Checklist: What Customers Need Before They Buy](#) · [How to Improve Conversion When You Do Not Have Enough Traffic for A/B Testing](#)

Optional help: [Get help finding your conversion barriers](#)

Result: Create one relevant traffic path

Your current observation is that too few suitable customers discover the offer.

Your next action: Choose one acquisition channel based on how customers find and evaluate this product.

1. Define the audience and one clear buying promise.
2. Prepare a matching destination and useful creative.
3. Set an affordable test limit and review contribution alongside traffic.

What to watch: Relevant visits, new customers, acquisition costs, and contribution.

Read next: [Your First Ecommerce Marketing Plan: What to Do Now, Next, and Later](#) · [Google Shopping vs. Meta Ads vs. TikTok: Where Should Your Store Start?](#) · [Ecommerce SEO: Product Pages, Collections, and Buying Guides](#)

Optional help: [Get help choosing your first marketing priority](#)

Result: Help the next purchase make sense

Your product has a relevant next purchase, and the first-customer journey deserves attention.

Your next action: Map delivery, successful use, feedback, and the next useful purchase before adding a promotion.

1. Check the first experience and common service questions.
2. Create a helpful post-purchase sequence with exception rules.
3. Compare first-customer cohorts with equal time to repurchase.

What to watch: Time to second order, cohort repeat rate, contribution, and support outcomes.

Read next: [Your First-Time Customer Email Journey: From Purchase to Second Order](#) · [The First Four Email Automations to Build for Your Store](#) · [How to Increase Sales With Email Without Sending Constant Discounts](#)

Optional help: [Get help improving your customer email journey](#)

Result: Remove one repetitive operating task

Your stated constraint is administrative effort while the buying journey is working.

Your next action: Choose a bounded workflow with reliable inputs, a clear owner, and visible failure handling.

1. Measure the manual task and its error risk.
2. Define trigger, action, duplicate prevention, and escalation.
3. Pilot with review and compare total time including corrections.

What to watch: Time saved, error rate, exception resolution, and customer impact.

Read next: [How to Automate Repetitive Store Management Tasks](#) · [How Does AI Help Ecommerce? A Practical Guide for Store Owners](#) · [Build a Weekly Ecommerce Performance Review With AI](#)

Optional help: [Get help designing a practical store workflow](#)

Result: Choose the next improvement from customer evidence

The answers do not establish one dominant growth constraint, or the repeat-purchase assumption needs more evidence.

Your next action: Complete a focused store audit and customer review before choosing another channel or automation.

1. Review product fit, customer questions, and contribution by product.
2. Observe a real shopping task.
3. Choose one evidenced improvement with a clear verification method.

What to watch: The measure associated with the chosen problem, plus contribution and service guardrails.

Read next: [How to Audit Your Ecommerce Store in 60 Minutes](#) · [Turn Customer Reviews Into Better Product Pages With AI](#) · [Build a Weekly Ecommerce Performance Review With AI](#)

Optional help: [Get help prioritizing your next improvement](#)

Order economics calculator guide

What the calculator shows

See what remains from an order after your selected costs. Enter a representative order, then compare scenarios. The result is modeled contribution, not final business profit or a prediction of future sales.

What to enter

Label	Helper text
Net merchandise revenue	After discounts and expected merchandise refunds; exclude taxes and shipping collected.
Product cost	Use your consistent landed product-cost definition.
Fulfillment and packaging	Include costs not already in product cost or shipping.
Net shipping cost	Shipping cost minus shipping collected from the customer. This can be negative.
Payment fees	Enter the actual or estimated dollar fee on the transaction's applicable payment total.
Other variable costs	Marketplace fees, variable commissions, return handling, and other costs not already counted.
Acquisition allocated to this order	Keep its scope consistent with the revenue. This is not automatically fully loaded new-customer CAC.
Desired overhead contribution	A planning allocation, not another product cost.
Desired profit after this allocation	A planning target; broader business costs and taxes may remain.

All inputs share one currency. Blank is missing, not zero. All must be finite numbers. Only net shipping cost may be negative. Explicit zero is valid. Store decimal precision and format money for display without rounding intermediate formulas.

What you get back

- Total included variable costs before acquisition.
- Contribution before acquisition.
- Contribution margin before acquisition.
- Contribution after acquisition, before fixed overhead.
- Break-even ROAS before fixed overhead.
- Allowable acquisition cost at your overhead and profit target.

- Modeled revenue-to-acquisition ratio at that target.

If merchandise revenue is zero, show “Enter positive revenue to calculate ratios.” If contribution is zero or negative, show “Current unit economics do not support positive acquisition spending.” If the target leaves no acquisition allowance, show “Your overhead and profit target leaves no room for paid acquisition under these assumptions.” Do not display Infinity, NaN, or a misleading zero ROAS.

Reference scenario

Revenue \$60; product \$24; fulfillment/packaging \$3; net shipping subsidy \$5; payment fees \$2; other variable costs \$4; acquisition \$15; overhead target \$6; desired profit \$4.

Expected results: variable costs \$38; contribution before acquisition \$22; margin 36.6667%; contribution after acquisition \$7; break-even ratio 2.72727×; allowable acquisition \$12; modeled target ratio 5×.

User reminders

Do not deduct refunds twice. Do not subtract an overhead allocation per order and then subtract the same full overhead again in the monthly total. Keep the revenue scope aligned with the spending scope. Estimates should be compared with actual orders and a higher-cost scenario.