

Shopify Success Checklist

This free checklist covers everything I have learnt over 10 years of helping Shopify stores ranging from \$0 to \$50M+ in sales improve their shopping experience and grow their conversions. Whether you are just getting started or looking at next steps for improving your store, take a look at my recommendations below.

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The Basics

These are the most critical and fundamental tasks that every store should do before considering other strategies and optimisations to grow their sales.

Get set up properly

Skipping crucial steps while setting up your Shopify store can lead to a number of problems that inhibit growth. Review my Shopify Launch Checklist to make sure you haven't missed any important tasks.

<https://mitchjohn.nz/shopify-launch-checklist>

Intermediate

Critical

Source the best products

All of the recommendations on this page are no replacement for having a good product. If your products are not up to the standard of quality that people expect, you will have a very difficult time retaining customers and building a good reputation. Do your market research, test the quality of the products yourself, and avoid sourcing products from cheap websites targeted at high-volume dropshippers.

Intermediate

Critical

Check your grammar and replace placeholder content

Poor spelling or grammar can give a poor impression to customers, as it makes your site look less trustworthy. Similarly, placeholder images or text also make your website look unfinished, which will make customers concerned about purchasing anything off the store.

Intermediate

Critical

Use high quality photos

High quality photos are one of the most important factors in conversion rate. If you don't have good photos available, consider investing in a professional product photographer, or a lightbox for good quality product photos.

Intermediate

Critical

Check your website links

Click every link on every page of your website, and make sure that they all navigate to the right page, or use an online tool to scan for broken links.

Intermediate

Critical

Website Optimisations

These tasks focus on what you can do to improve your customer's shopping experience. Some may require a developer to make the necessary changes to your Shopify theme, or installing Shopify apps.

Create a loyalty program

A loyalty program increases customer retention by giving them an incentive to make repeat orders to your store over shopping with competitors. The app I most often recommend for this is [Smile](#).

Intermediate

Medium Impact

Set up analytics

If you have not done so already, make sure you have connected Google Analytics using the [Google app](#), as well as set Google Search Console. Another tracking tool to consider would be [HotJar](#) for site heatmaps and on-page surveys.

Easy

Medium Impact

Referral program

A referral program encourages your existing customers to find you new customers for your online store, often with the incentive of discounts or cash reward. The loyalty program app [Smile](#) can also facilitate your referral program as well.

Intermediate

Medium Impact

Add a product reviews app

Product reviews are valuable to help you build up social proof for your store. Use an app that automates collecting reviews for you and supports photo reviews, such as [JudgeMe](#) or [Loox](#). Once you have collected enough reviews, feature them on your product pages, homepage, and a standalone "reviews" page.

Easy

Medium Impact

Optimise with Google PageSpeed

Google PageSpeed is a tool by Google that evaluates the loading speed of your website. A faster website means an improved shopping experience for customers, and often a higher ranking in Google as well. Aim for a score of at least 75/100 for performance on desktop and mobile, and at least 90/100 on the rest.

Expert

Medium Impact

Make your key selling points obvious

Your key selling points should be clearly seen on every page. For most stores, these may be your generous returns policy, free shipping offer, great customer service, loyalty program, quality of your products, or payment methods you support. Think about what you can provide to customer's shopping experience that makes you different from similar stores.

Easy

Medium Impact



Show social proof

Another important factor of turning website visitors into paying customers is social proof. This can be in the form of product reviews, written testimonials, video testimonials, user generated content, awards you won, or good press. You should have at least one section featuring social proof on every page, and a standalone page linked in the main menu that aggregates all of your social proof.

Intermediate

Critical



Add an app for post-purchase feedback

Collecting feedback from customers is invaluable to know where you can improve and what to work on next. I use [Zigpoll](#) because it has a generous free plan.

Easy

Medium Impact



Refine your navigation

Common links to include are links to collections, links to customer support and policy pages, a link to your informational pages, a link to customer reviews or other social proof, and and a link to your contact page. Use mega-menus where possible, and look at how similar stores structure their menus for inspiration.

Easy

Medium Impact



Offer your products in bundles

Using [Shopify's free bundle app](#), group your products into a bundle and offer a discount for purchasing them together, increasing your average order value and net sales. If you're looking for inspiration, [The Oodie](#) did this to great success.

Easy

Medium Impact



Offer your products as a subscription

Similar to the bundling strategy, use a subscription app to offer your products on a recurring subscription with a small discount, increasing customer retention and repeat sales.

Intermediate

Medium Impact



Review your competitors

Find at least the top 10 competitor websites for your specific industry & location segment, then go through their entire website noting what you think they did well, then do it on your website with your own unique twist. You can also find what Shopify apps they use with [Storetrends](#).

Easy

Medium Impact



Test that your website is mobile responsive

Use Google's official testing tool on each of your pages to confirm that it is mobile friendly. Also consider what design changes you can do to make your shopping experience better for mobile users.

Intermediate

Critical

Crosslink your website and social media profiles

All of your social media profile pages should link back to your website, and your website should link back to your social media profiles. This makes your website look more trustworthy, and helps you convert social media traffic into new customers.

Easy

Medium Impact

Add 3–7 images to each product

Multiple images of a product gives the customer a better idea of the experience they will get if they purchase it. For most stores, this may look something like your featured image being the product with a transparent background, the second image being a mise en scène, and the rest being the product in different angles or contexts.

Intermediate

Medium Impact

Add a video of your product

Product videos can sell the customer on the experience of purchasing or using the product, and when done correctly increase your conversion rate. This could be a demo video showing how it works, a "runway" video if you are selling clothing, or an "unboxing" video. If you do make any video content, make sure to also use it in your marketing and advertising for maximum impact.

Expert

Medium Impact

Add more product information

The more information you can add to product pages, the more you can create trust with prospective customers. More content on product pages can also help their SEO ranking. Consider adding information as collapsible tabs, modals, or below the fold sections such as: shipping info, care instructions, a size guide, technical specifications, or customers testimonials.

Easy

Medium Impact

Use autocomplete with fuzzy-searching for your search bar

When the customer types into the search bar, it should automatically suggest categories, products, or search terms related to what they are typing. Make sure the search is fuzzy as well, meaning that minor spelling errors will be automatically corrected in the suggestions. For this, I typically use [this app](#).

Intermediate

Medium Impact

Show your categories and brands on the homepage

If your website has a lot of different brands or product categories, display the most popular 8–20 collections on the homepage in either a grid or carousel format.

Easy

Medium Impact

Show savings on discounted products

If a product is discounted, instead of only showing the old price, also show how much in total the customer saves. You can either display this as a percentage or fixed dollar value, whichever looks better.

Easy

Medium Impact



Sticky add to cart button

When the customer scrolls past the buy button on mobile, show a copy of the buy button fixed to the bottom of the screen. This improves the conversion rate for mobile purchases, especially for product pages with a lot of content.

Easy

Low Impact



Turn popular filters into subcategories

Monitor which filters are used the most and turn them into a new collection to add to the main menu. For example, if you see customers often filter for a "Accessories" under the "Womens" collection, make a new collection called "Womens Accessories".

Easy

Medium Impact



Avoid empty pages

Show suggested or popular products on your 404 page template, and on your search results page when there are no results. This increases the likelihood that customers will stay on your website.

Easy

Low Impact



Use product badges

Product badges convey key information or selling points to customers on the product card. Ideas for product badges are "Sale", "Pre Order", "Coming Soon", "Popular", "Staff Pick", and "Low Stock".

Easy

Low Impact



Make your featured product images consistent

Your website will look more professional if the featured image of each product follows a consistent format. Each product's featured image should either all have a transparent background or the same background colour, and be the same dimensions/aspect ratio.

Easy

Medium Impact



Show a second image on hover for product cards

When a customer hovers over one of your product cards, show the second image in the gallery for that product. This makes your website feel more interactive, improving the shopping experience.

Easy

Medium Impact



Show available sizes or colours on product cards

Each option available for a product should either be immediately visible on the product card, or shown upon hovering over the product, and visually show what options are out of stock. This improves the shopping experience for customers looking for a specific size, colour, or other option.

Easy

Medium Impact



Order your filters by what is most used

Do not order your filters alphabetically, but instead order them by what is most used by your customers. Consider removing filter groups that are not used often to declutter your collection pages.

Easy

Low Impact



Show model size and fit

For clothing stores, showing the model's size and fit helps improve the shopping experience, and reduces the rate of customer returns due to ordering the wrong size/poor fit.

Easy

Low Impact



Suggest similar or alternative products

Suggest similar or alternative products on your product page to make it easier for customers to find what they are looking for. For example, if you were a fragrance company, you may show on the product page of a candle the same fragrance but in different sized candles, incense sticks, diffusers, etc.

Easy

Medium Impact



Show recently viewed products

Show the products that the customer recently viewed at the bottom of your product pages, collection pages, and cart page.

Easy

Medium Impact



Support mobile gestures

Supporting mobile gestures improves the shopping experience for mobile device customers. Any carousel or scrollable element on your website such as image galleries or slideshows should be swipeable on mobile. Mobile users should also be able to zoom in on a gallery image by tapping on it, and any tap elements, such as buttons, should be at least 48 pixels wide and tall.

Easy

Medium Impact



Merchandise your collection pages

Merchants with physical stores will be familiar with the practice of merchandising, which is to promote a product or brand through use of techniques such as putting it closer to the entrance. Similarly, consider the order of products you would want customers to see first, and manually organise your collections to fit. Clothing stores will often do this on their new arrivals page by putting the most anticipated products at the top of the collection.

Easy

Medium Impact



Use easily understood terminology

Do not invent your own names for categories and menu links. Use descriptive links, and look at how your competitors label theirs.

Easy

Medium Impact

Marketing & Automations

The backbone of any successful Shopify store is a good marketing strategy. Recently, automations have also been growing increasingly important for Shopify stores to personalise the shopping experience for your customers, improving customer retention in an increasingly competitive landscape.

You may notice that I frequently recommend attaching discounts to your email automations, the reason why I advocate for this is:

- We're rewarding your existing customers, which are more likely to become repeat purchasers. They are also more likely to appreciate any discount codes you give them if it's tied to their activity/involvement with your store.
- By comparison, if you hypothetically ran a blanket sale on your online store, that may produce more orders in the short-term, but more of those purchasers will be fair-weather customers that don't become repeat purchasers. One of your biggest goals should be increasing your average customer return rate.
- The amount you'd typically need to spend on retargeting ads for these customers is usually a lot more than what you're providing as a discount code in your email, if we can instead net repeat sales through a simple discount code, not only does that cut out all of the middle steps, but it provides a better return on investment. Advertising of course still has it's place, but it shouldn't be generating 100% of your online sales.



Email & SMS marketing

Every time you launch a new line of products, run a promotion, or anything else substantial, share it with your customers in an email campaign. Consider also engaging with your customers on SMS, but be wary of over-sending through this channel (I would recommend once every two weeks at most).

Easy

Medium Impact



Increase touchpoints

Increasing your touchpoints helps you stay top of mind with your customers, increases the trustworthiness of your website (due to customers recognising your brand), and gives you a way to push your latest products and promotions. Think about where your customers are, online and offline, then create a plan to authentically engage with them on these platforms or places.

Easy

Medium Impact



Video content

Engaging, informative, or entertaining video content can help your brand reach new customers, convert website visitors into buyers, and make your brand be more authentic. Where possible, take videos of your products and put the video onto the product page, and always look for other opportunities to share video content such as short-form videos on YouTube Shorts, TikTok, and Instagram/Facebook.

Intermediate

Medium Impact



Optimise your on-page SEO

Your on-page SEO affects where and how your website will appear in Google and other search engine's search results. There is a lot to cover for this, but the basics are: Have a detailed (and accurate) title and description on each page, share valuable information, make sure the website loads quickly without errors, make sure your website is crawlable by search engines, and avoid AI-generated or duplicate content where possible.

Expert

Medium Impact



Create custom landing pages

Take the competitive topics for your store or industry, such as key brands, product categories, or purchase intent questions, and turn them into a dedicated landing page. By creating a custom landing page for these topics, you can increase your ranking for the topic in the search results, and potentially run targeted advertising campaigns that direct customers to your custom landing page. On your custom landing page, you should include whatever is relevant to the buyer, such as relevant products, product guides, answering frequently asked questions, or curated inspiration.

Easy

Medium Impact

Collect UGC

User generated content is a valuable form of social proof that can be displayed on your website, marketing, and advertising campaigns (with the creators consent) to show consumers that other customers love your products, customer service, and shopping experience. You may also want to consider rewarding customers that produce UGC on social channels as a form of micro-influencer engagement.

Easy

Medium Impact

Offer free downloads

Offering a free download on your website is a quick and easy way to potentially net new email subscribers, get your brand shared online or through word of mouth, and engage prospective customers through a series of automated emails. Think about what tools or resources are relevant for your brand or industry, and turn them into a free download or online tool on your website.

Easy

Medium Impact

Incentivise subscribers with a welcome discount

Offer a welcome discount in return for subscribing to your newsletter. Make the offer obvious on your website, such as in your website footer, on your product page, and in a popup. Test different types of discounts or other incentives such as giveaways.

Easy

Medium Impact

Recover abandoned carts

An abandoned cart email gets sent to customers who reached the checkout but did not purchase, and is an effective sales recovery strategy. Make sure you have the abandoned cart recovery automation enabled in Shopify (or Klaviyo), and consider offering free shipping or a small discount to incentivise completing their purchase.

Easy

Medium Impact

Customise your order notification email

Personalise the order notification emails that get automatically sent out by Shopify. Examples of what you could add are when they can expect the order to be fulfilled, restating your shipping & returns policy, sharing how they can contact customer service, or a short paragraph showing your appreciation for their order.

Easy

Low Impact

Email customers when they have enough points to get a discount code

If you have a points-based loyalty system, make sure an email is sent out to customers once they have enough points to redeem a reward. This encourages repeat purchases and loyalty system adoption.

Easy

Low Impact

Automated email for the customer's first and second order

The first three orders a customer makes are the most important, because after they place a third order on your store they are significantly more likely to purchase from you again. To help you reach this point, send an automated email after the customer's first and second order with a discount code to encourage their next purchase. Other good elements to include are thanking them for their order, a little bit of your story, reiterating your great returns policy, and restating any other selling points such as your loyalty program or fast shipping.

Easy

Medium Impact



Re-engage inactive customers that have not ordered in over 90 days

The goal of this email automation is to re-engage inactive customers back to your store. Show them your latest products, restate your key selling points, and consider offering a discount code to incentivise their next purchase. For most stores they set this to 90 days of inactivity, but make sure to pick an amount of time that makes sense for your products & audience.

Easy

Medium Impact



Marketing & ads plan

Every store needs a detailed marketing and advertising plan. This plan should encompass your short term and long term strategies for each touchpoint you have with your customers, including but not limited to Facebook, Instagram, Facebook Ads, Google Ads, your website's blog, Tiktok, Pinterest, etc.

Expert

Critical



Be active on socials, communicate frequently

You should post at least once a week on your social media profiles to show that you are an active business, and to keep your customers engaged. Frequent communication with your customers keeps your store and products top of mind, securing their next purchase.

Intermediate

Medium Impact



Send wishlist reminders

Leverage your customer's wishlists by sending out automated emails when a product on their wishlist goes on sale or is restocked.

Easy

Medium Impact



Send back in stock notifications

If you have evergreen products, meaning you restock the same product(s) frequently, install a [back in stock](#) app and make sure to send email reminders when the product is restocked to get a quick surge in sales.

Easy

Medium Impact



Send purchase reminders for items that customers restock

If you have products that are the kind that customers restock on a cycle, e.g. because they last for a fixed amount of time, then send automated reminders to customers when it's time to restock. Consider pairing this with a subscription app to convince customers to turn their next order into a regular subscription.

Easy

Medium Impact

Ecommerce Strategy

These recommendations focus more on your business model than your online store. While I've tried to keep these recommendations as applicable for all stores as possible, such as trust signals and selling strategies, there may be unique opportunities in your specific industry that you can find through researching competitors and customer feedback.



Free shipping goal

Customers expect free shipping or free shipping on orders over a certain amount of spend. Presenting shipping rates at the checkout increase cart abandonment, and reduce your conversion rate. A free shipping goal can also be used as a way to increase average order value, and a selling point to share across your website, marketing & advertising.

Easy

Medium Impact



Returns policy

A good returns policy increases conversion rate by building up confidence with your customers that they will not regret their purchase. Look at what your competitors offer for returns, and offer either an equally or even more generous returns policy on your store. Make your returns policy obvious on your website by adding it to your website footer and product page.

Easy

Medium Impact



Fast shipping

Fast shipping is directly tied to customer satisfaction. How fast you can reliably ship will depend on your location and products, but do what you can to make it as fast as possible. Share shipping time estimates across the website as a selling point, and consider using it as a source of urgency on your product page, e.g. "Order before 12pm and get it tomorrow".

Easy

Medium Impact



High touch sales

Store owners hate high touch sales because it's not a passive source of income, but if you are looking to increase your sales, a high-touch strategy can set you apart from competitors and help close some large orders. For clothing stores, this may look like a free personal styling session, or for furniture stores, this may be an interior design consultation for office spaces.

Easy

Medium Impact



Sell your products wholesale

If you manufacture your own products, or if your supplier agreement allows for it, consider selling your products wholesale to other businesses. Wholesale orders help create reliable income sources and gives your products more ways to reach new customers.

Intermediate

Medium Impact



Set up a dropshipping program

A dropshipping program is where you other stores sell your products, but you ship them on the store's behalf. This can be another great way to diversify your sales and reach new customers, but also make sure to closely vet each prospective dropshipper upfront, and set expectations for how invoicing, returns, and customer support will be handled.

Expert

Medium Impact

Design intrinsic virality

Intrinsic virality describes a phenomenon where your products or buying experience naturally encourages word of mouth with your customers, pushing your brand and products to new customers intrinsically. Think about what you can uniquely do to make your products, website, or shopping experience more viral. This could be unique packaging that inspires people to share it on social media, incentives for customer referrals, or selling your products in a way that's designed to be shared, such as a gift box.

Expert**Medium Impact**

Always be testing

Every store is unique in its products, target audience, opportunities, and challenges. While it can be tempting to make decisions based solely on your experience or intuition, the only way to know for sure the best strategy or approach without bias is to test it. Test everything that you can realistically test, such as product pricing, website design, incentives, and communication. Ideally, when testing you should use an A/B or multivariant testing model so that you can truly measure the impact of your change against a control.

Expert**Medium Impact**

Seasonal promotions

Seasonal promotions are recurring events that happen within your industry or country every year at the same time, such as the Black Friday Cyber Monday promotion for New Zealand stores, or Australia Race day for Australian clothing retailers. Make sure you have a plan for every upcoming seasonal promotion that's applicable for your store, including an email marketing campaign, social marketing campaign, how you will update the website, what products you will be putting on sale (if applicable), and potentially an advertising strategy.

Intermediate**Medium Impact**

Find your flywheel

A flywheel for ecommerce describes a model where, when designed correctly, your customer base can grow by itself. This often takes the form of a strategy to attract new customers that involves engaging or leveraging your already existing customers or their sales. For Amazon, their flywheel was selling goods at lower prices with a wider range of options than their competitors, which attracted customers to Amazon, which allowed them to lower their prices further on a wider range of items, which attracted even more customers. You will likely will not be able to set up a flywheel as easy and as at a large scale as Amazon did, but think about what you can uniquely do to reinvest your sales into growth.

Expert**Medium Impact**

Administration

Doing work to improve your logistics and admin processes may not be as satisfying as some of the other recommendations on this page, but for established stores committing some time to simplifying your administration can help save you a lot of time in the long run and potentially avoid some massive headaches in the future.

Back up your store

Many stores don't think about backing up their online store until it's too late. Backing up your store will give you a way to recover lost data in the event of an emergency, such as getting hacked or accidental deletions. For this, I recommend [Rewind Backups](#).

Intermediate**Critical**

Enable online returns

Shopify's new online returns feature simplifies return requests for your customers, and gives you a simple dashboard to approve/reject returns. To enable this, active the new customer account experience in Shopify, then enable online returns.

Easy**Low Impact**

Track admin activity

Similar to my previous recommendation, many stores think about tracking admin activity too late. Shopify has its own built in activity log, but there's no ability to search with it, and not every admin action is recorded inside of it. Tracking admin activity will help you audit apps (including private apps) or incidents to understand how they modified your store and what actions you can take to prevent unwanted changes from happening again. For this, I use [Smartlogs](#).

Expert

Medium Impact

Create SOPs

SOPs, or standard operation procedures, are important for stores because they establish consistency and reduce errors made when handling routine tasks. They also help significantly when onboarding new hires and to avoid information silos. To help introduce SOPs with your team, document the procedures in a shared place everyone can access, such as Google Docs or [Notion](#).

Intermediate

Medium Impact

Don't use automatic discounts for sales

A lot of store owners use automatic discounts to run their sales or promotions because it's easy to set up, but this is not good for your shopping experience or conversion rate. Automatic discounts don't clearly show your products as discounted when viewed in collection pages, product pages, or through your other channels such as advertising or social media. Instead, using the bulk editor or one of the many bulk editing apps on Shopify, use the price and compare price field to run the sale.

Intermediate

Medium Impact

Track broken links in Search Console

When a link on your website doesn't navigate to a page anymore, this is called a broken link. A surge in broken links often mean that the either a lot of pages, collections of products have changed their URL or have been deleted, which creates a bad experience for customers and hurts your SEO. To mitigate this, regularly check the broken links report in Google Search Console, and redirect broken links to valid pages on your website.

Intermediate

Medium Impact

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Expert

Medium Impact

Limit fraud orders

Fraud orders can be a massive pain for Shopify stores. The common strategy is ordering products with a stolen card which will get a chargeback later, but even if you don't ship the order, processing the refund incurs losses from the transaction fees. To mitigate this, use Shopify's [Fraud Filter](#) and [Fraud Control](#). If you find yourself heavily targeted by fraud orders, consider setting your payment capture method to manual to avoid the transaction fees from fraud orders.

Intermediate

Medium Impact

Do you need help implementing these recommendations?

For one flat monthly fee, I help Shopify businesses with custom development, ecommerce strategy, growth consulting, and more.

<https://mitchjohn.nz/shopify>