



How to Create an Ecommerce Marketing Funnel that Converts

A Guide to Email Marketing for Shopify

Made with love, by Drip.



Table of Contents

- Why Email Marketing and Marketing Automation Specifically? 3

- Chapter 1: How to Build an Email List for a Shopify Store** 4
 - 4 Forms for Email Capture 5
 - How to Use Email Capture Effectively: Best Practices and Tips 8

- Chapter 2: How to Find Email Capture Tools to Build Your List** 18
 - How to Add an Email Capture Form to Your Shopify Store 19
 - How to Add a Third Party Email Capture App to Shopify 24
 - What to Look for in a Third-Party Email Capture App for Shopify 32

- Chapter 3: How to Send Emails to That Shiny New List** 36
 - Investing in Lifecycle Automation Workflows to Nurture Customers 37
 - 5 Lifecycle Critical Automation Workflows Every Shopify Store Needs 38
 - 1. Welcome Workflows 39
 - 2. Browse Abandonment Workflows..... 44
 - 3. Cart Abandonment 47
 - 4. Post Purchase and Order Confirmation 51
 - 5. Win Back / Reactivation 55

- Chapter 4: How to Build an Email List for a Shopify Store** 58
 - The Pros and Cons of Using Shopify Email 60
 - The Pros and Cons of Using a 3rd Party Email Marketing Tool 61
 - How to Integrate a Third-Party Email App for Shopify 62

- About Drip** 64

Why Email Marketing and Marketing Automation?

What about other marketing channels?

Those channels – social, organic search, ads – are great. But they don't have the one thing that email marketing does.

Unlike the other channels, you own your email list. You're not beholden to some algorithm. You're not in a pay-to-play bid war against your competitors.

This is the only marketing channel where you are truly the master.

You decide when your customer receives a message and what that message is. You control the cadence. You can test to infinity.

Not only do you have complete control over email marketing, but you have a willing, receptive audience.

Unlike ads or social media, your audience is already familiar with your brand. They've manifested *interest* by signing up. This means they're already much more likely to open and read a message coming from you.

This makes email marketing in particular the most powerful and effective marketing channel you can use.

Marketing automation is what takes email marketing to the *next level*. It sends emails out on your behalf based on a trigger that you configure.

Putting a bit of automation behind your most powerful marketing channel is what's going to take you from a basic, run-of-the-mill Shopify store to a sophisticated ecommerce brand (without needing a technical degree from MIT).

Chapter 1: How to Build an Email List for a Shopify Store

4 Forms for Email Capture

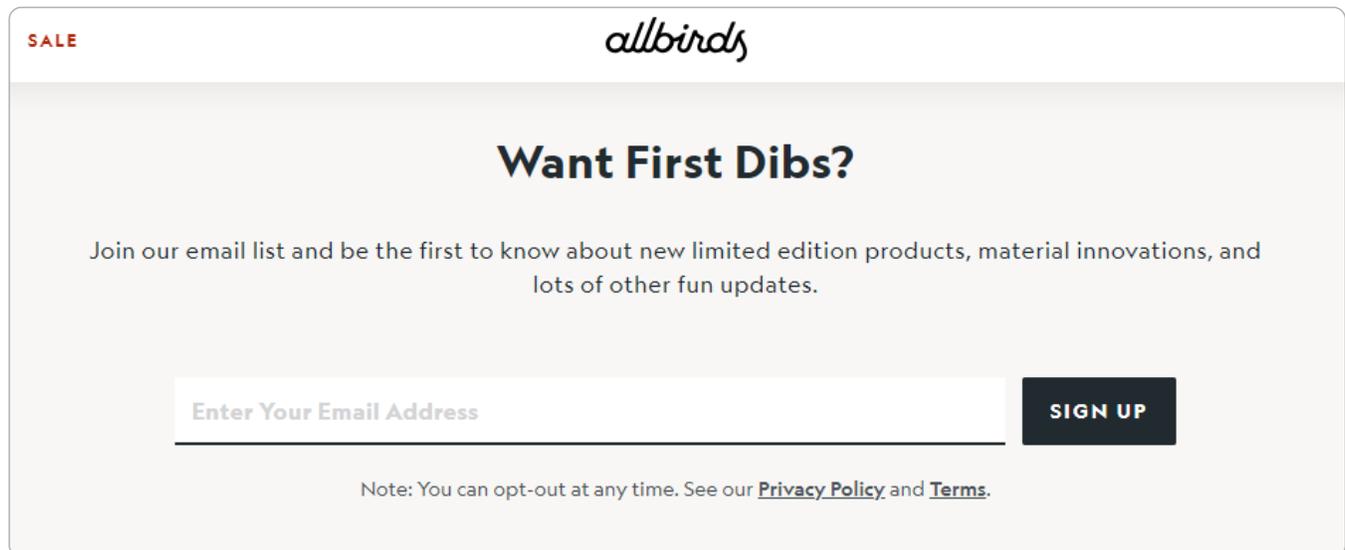
Email capture is simpler than it sounds. If a customer is on your site and they're interested in your products, chances are, they want more information.

So capturing their email is as simple as offering a little incentive.

You'll need a form of some sort on your site. Email forms come in a few different potential formats:

Static Forms:

Static forms are pretty self explanatory – they're just a simple sign-up box somewhere on your site, likely in the footer.



The screenshot shows a static email capture form for the brand 'allbirds'. At the top left, there is a red 'SALE' tag. The 'allbirds' logo is centered at the top. Below the logo, the heading 'Want First Dibs?' is displayed in a large, bold, black font. Underneath the heading, a line of text reads: 'Join our email list and be the first to know about new limited edition products, material innovations, and lots of other fun updates.' Below this text is a white input field with the placeholder text 'Enter Your Email Address'. To the right of the input field is a dark grey button with the text 'SIGN UP' in white. At the bottom of the form, a note states: 'Note: You can opt-out at any time. See our [Privacy Policy](#) and [Terms](#).'

This kind of form is great for always having a way for your customers to sign up. The only downside to this form is that it's not particularly dynamic, and if your customers aren't searching for it, you might not get many sign-ups.

That said, it's a good idea to keep one on your site anyway. Have you ever insta-closed a pop up out of pure habit only to realize later that, yes, you would like to sign up?

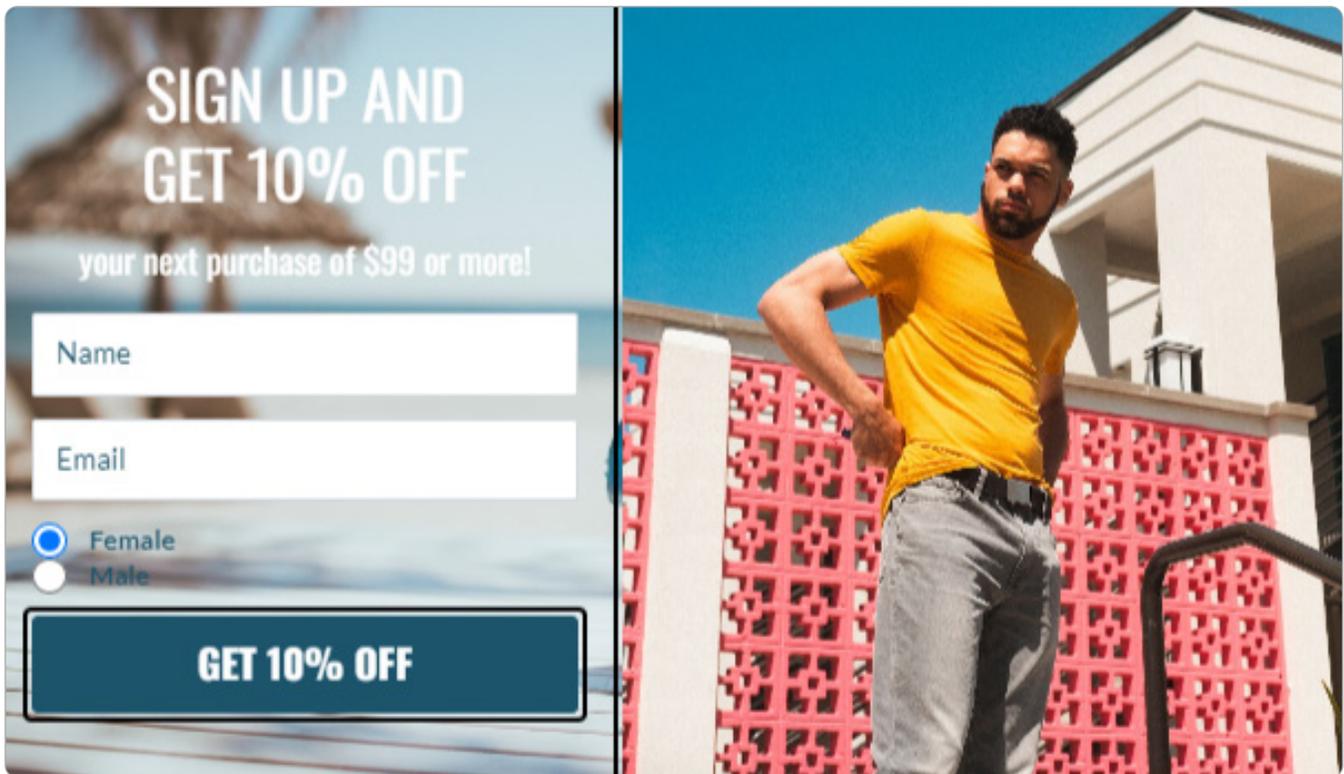
Make sure your customer can always opt-in if they want to.

Popups:

Popups are a much more dynamic way to capture emails from your would-be customers – *when done right*.

They get a bad rap from the early 90s and 2000s when marketers and scammers alike would place 18 unclosable popups in front of your face as soon as you landed on a site.

But, when you focus on *not breaking user experience* on your site, they can be quite effective.

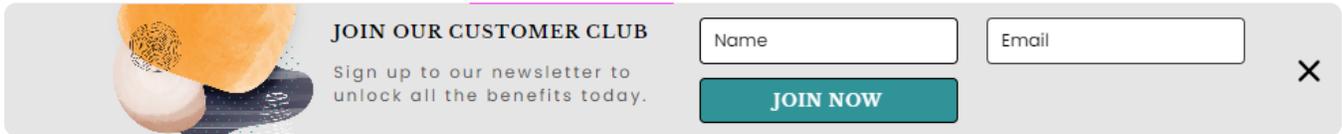


The best version of this uses the exit-intent popup, which appears only when your customer moves their cursor to the upper right corner of the tab or browser window.

They're already planning on leaving – so the UX is already broken at that point. This is just offering them a parting gift, an incentive to come back later.

Sticky Bars:

Far from some sort of no-bake recipe your aunt brought to the most recent holiday, sticky bars are actually another form of embedded form that sticks to the top or bottom of your customer's screen asking for the sign up.

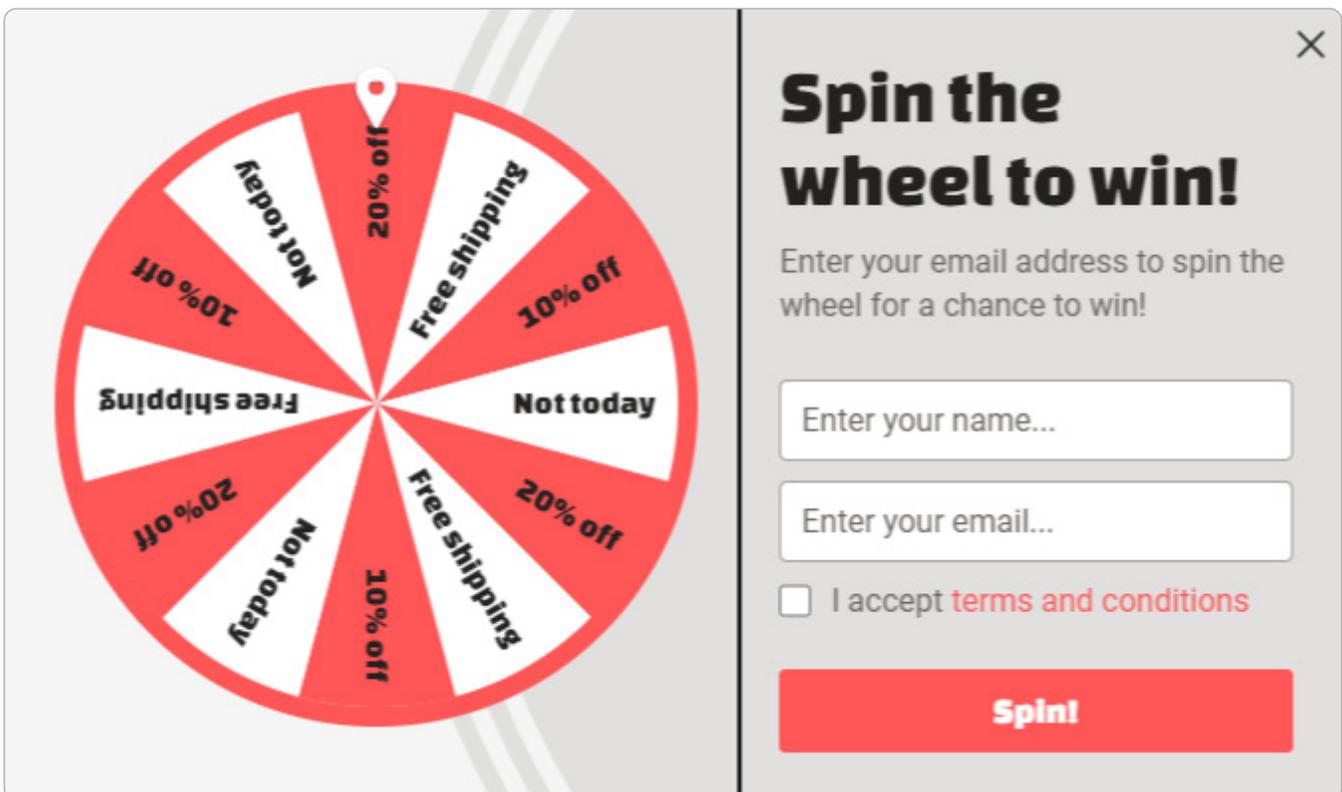


The idea with this form is that it's typically a brighter, contrasting color from your site. This will attract the eye without being "in the way" of your customers' browsing experience.

Gamified Forms and Popups:

Let's face facts – humans love to play. And if you combine that love for play with the possibility of earning a *higher* discount on a first purchase?

Well you've got a winner – in gamified forms that is.



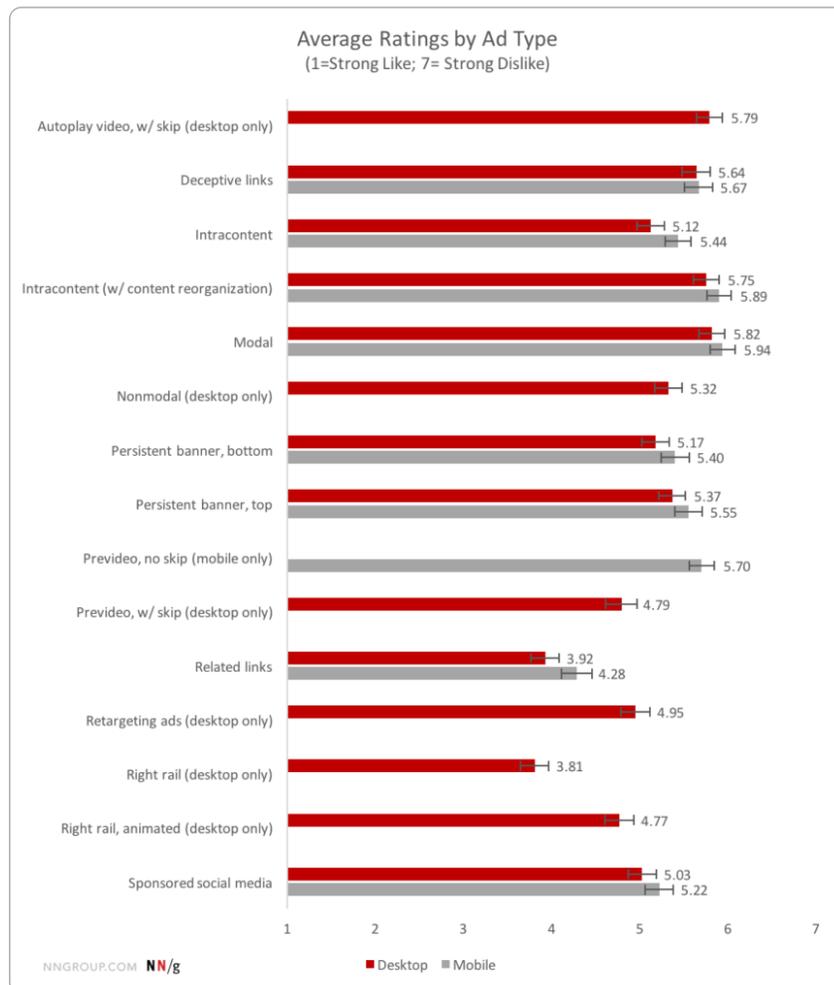
These can either be in the popup version or as an embedded form on your site. Either way, they're a dynamic, interactive way to get your customers to sign up.

There are a lot of other ways to get your customers to sign up with your store, but they're usually variations of these four forms.

How to Use Email Capture Effectively: Best Practices and Tips

1. Get Your Timing Right

One major study from [Nielsen Norman Group](#) found that modal popups – those that show up when you first land on a page, forcing you to close them before interacting with the site's content – are the most hated form of online advertising among both mobile and desktop users:

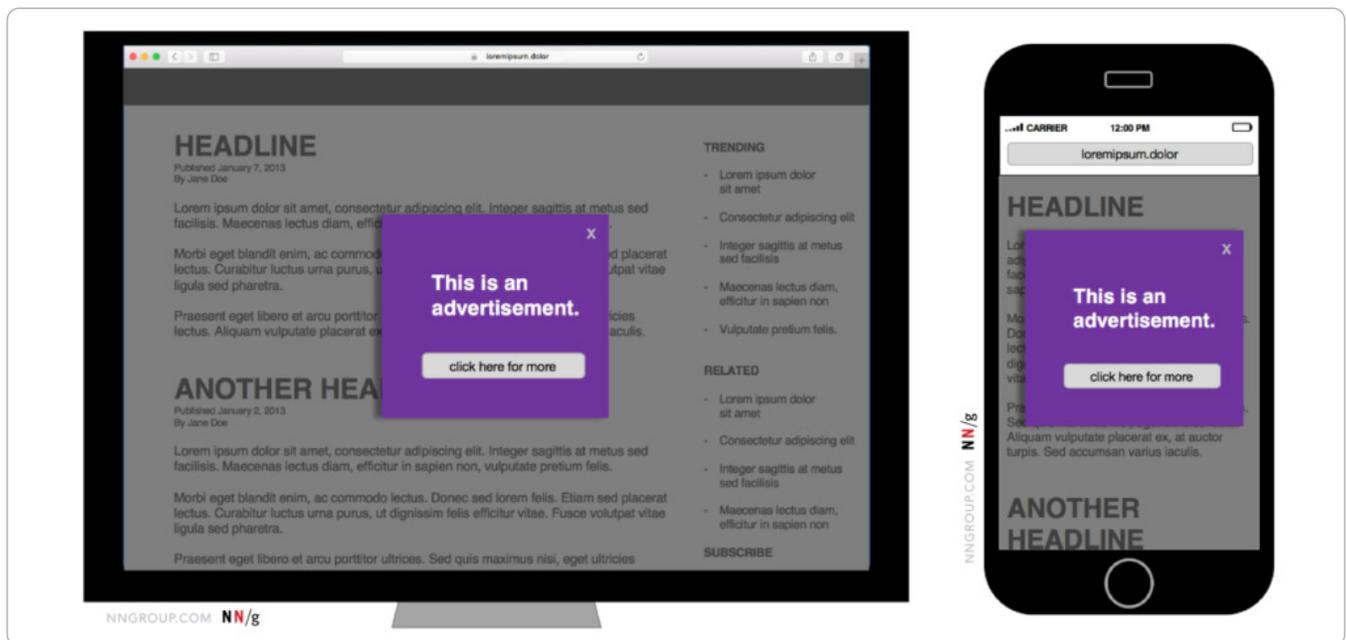


Even retargeting ads aren't that unpopular, and they're basically tantamount to online stalking.

Why do people loathe modal popups so much? As far as I can tell, there are two main reasons:

1. They disrupt our browsing experience, actively hampering us from finding what we're looking for; and
2. They're asking for something from us – often an email address – without having earned it.

That second point is key. After all, why would I hand over my email address if I've not even taken a cursory glance at your content?



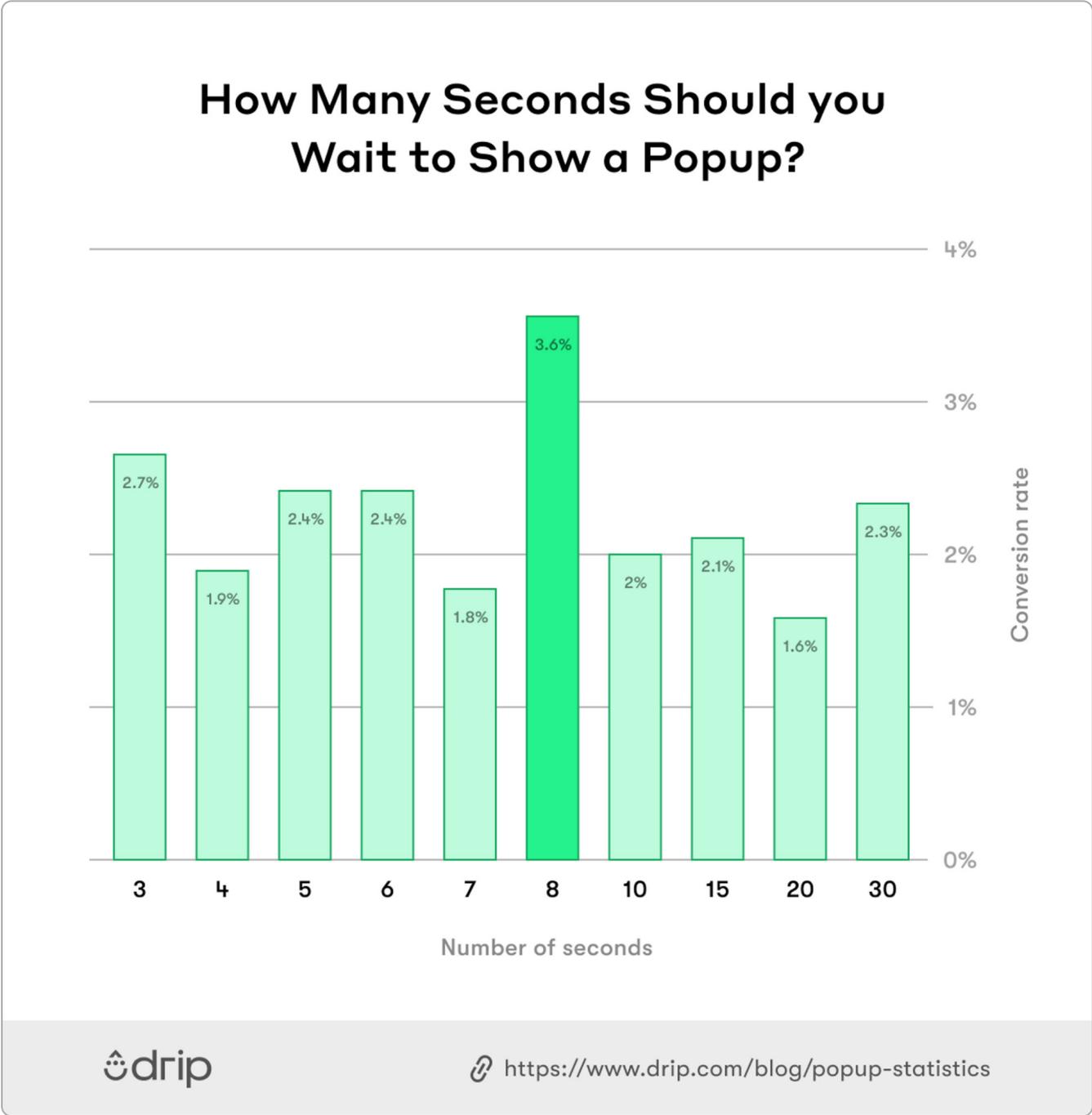
That's why timed triggers are so valuable.

If you're unfamiliar, a timed trigger lets you show your Shopify popup based on how much time a visitor spends on a page. That way, they can at least confirm they're in the right place for a few seconds before your popup appears.

While you don't want to jump the gun, you also don't want to leave it too long. There's no point in having a 30-second timed trigger on a page that most people only read for 29 seconds or less.

So what's the magic time for displaying a popup on your Shopify store?

According to our research, popups shown after eight seconds convert at a rate of 3.62 percent – higher than popups shown before or after.

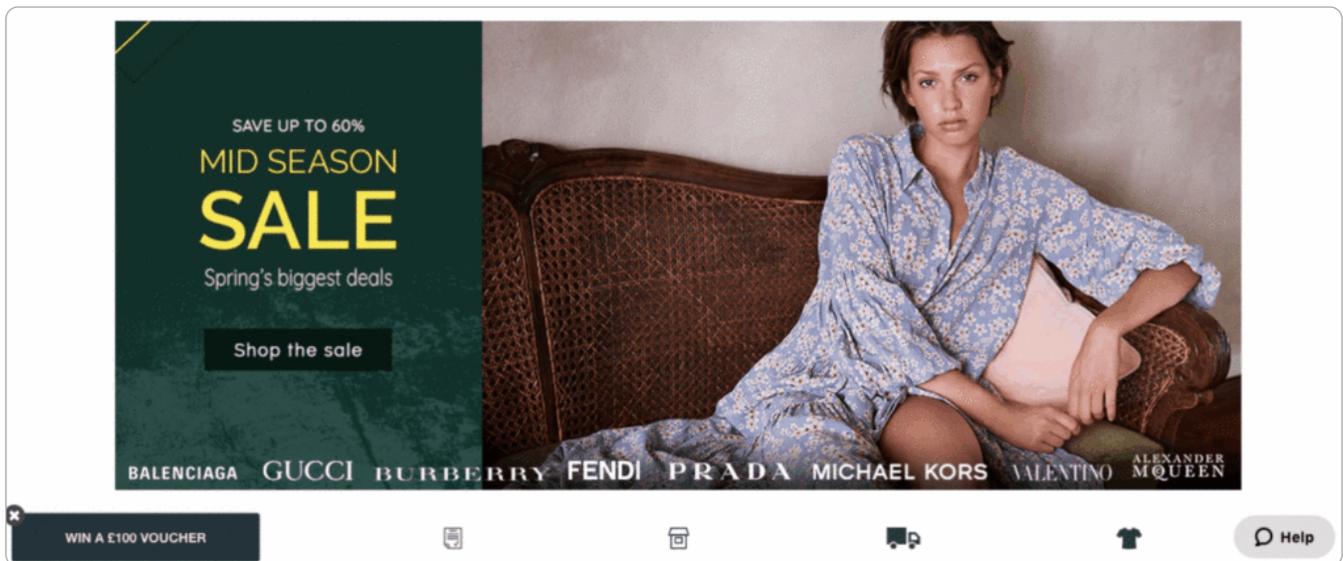


2. Give People a Reason to Engage

It's a fact that most visitors to your site aren't going to give you their email address unless there's something in it for them. That "something" might be:

- A [discount code](#)
- An opportunity to [win something](#)
- A code for free shipping
- A free gift

Here's a great example of this in action from Danish fashion brand [Miinto](#):



First, you're presented with an unobtrusive yet compelling offer – the chance to win a £100 voucher. Click that panel and you're presented with an [email capture form](#). Simple but effective.

However, your "offer" doesn't necessarily need to cost you money. For instance, if you're trying to drive [newsletter](#) signups, you can set out the specific benefits of subscribing, like:

- Sneak peeks at new product launches;
- News on [brand partnerships](#) and influencer collaborations; or
- A first look at [sales and other promotions](#).

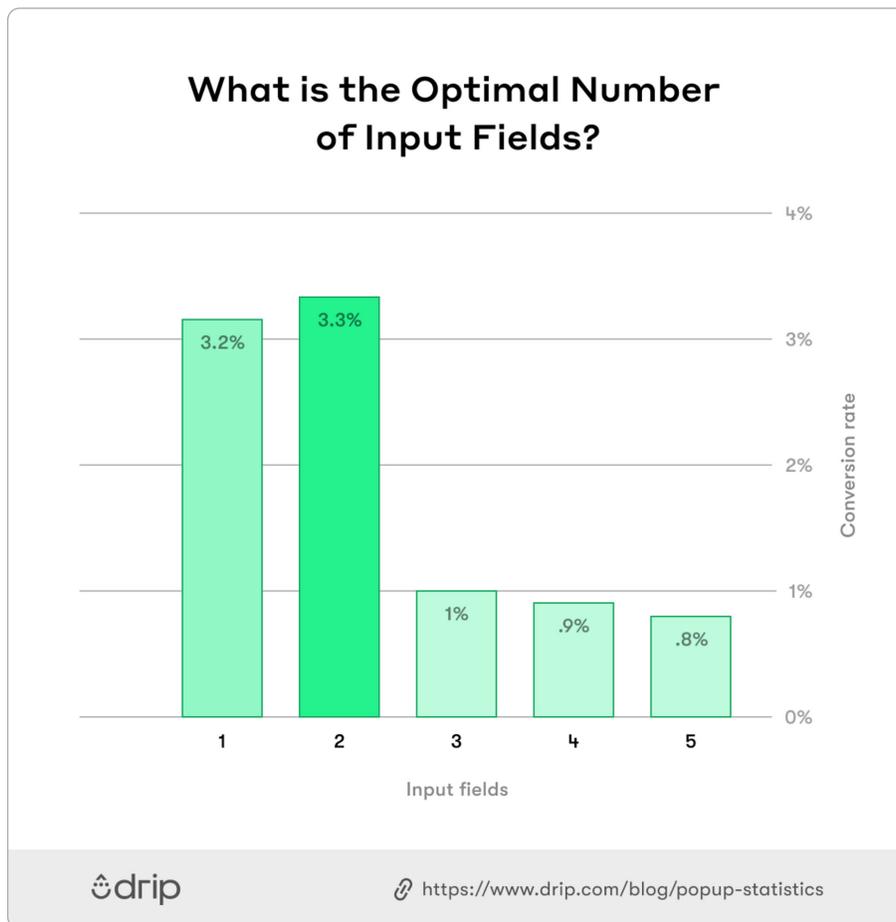
Ultimately, the right "offer" will depend on your brand and audience. Test multiple options to learn what works best for you.

3. Don't Be Greedy

Naturally, you want to capture as much information as possible from your ecommerce leads. But do you really need to know their mother's maiden name and their dog's inside leg measurement?

Asking for too much information upfront will harm your conversion rate. One study found form completions [drop off dramatically](#) when forms have more than three fields.

What's more, our own research found popups with two input fields convert at a rate of 3.31 percent – or 206.48 percent higher than those with three fields.



4. Stand Out From the Crowd

Unless you've asked a friend to print this guide out for you, it's safe to assume we're all web users.

That means we're bombarded with popups, not to mention countless other ads and marketing tools, every day. If you're going to generate real results, your popups need to stand out.

Clearly, in order to craft a [top-performing popup](#), you first need to understand what an average (or bad) one looks like. Here are some typical popup characteristics, plus pointers on how to differentiate yourself:

- Most Shopify popups don't include visuals. Those retailers are missing out because our analysis shows popups with imagery convert 83.57 percent better than those without.
- Most popups don't feature animated elements. Breathe some life into your popup by adding a video or GIF when it appears on-screen.
- Most popups are square or rectangular. There's no real reason for this – it's just how they've always been. Break the mold by adding rounded edges or [graphical elements](#) that stand apart from your popup (hint: Drip makes this easy).

Think about what kind of [email capture tool](#) you'll choose and whether or not they can both accommodate the above best practices, and if they play nicely with Shopify.

5. Create Multiple Popup Formats

“Popups” aren't just a single entity. There are multiple [popup types](#), and the type that performs best for one brand might not work as well for you.

So it makes sense to try out as many formats as possible, right?

Fortunately, there's plenty of scope to do just that. Just consider the online shopping experience of an average customer. They might:

- Land on your homepage via a Google search;
- Head to one of your [Shopify collections](#) pages;
- Click through a product they like the look of;
- Check out your shipping and returns policies;
- Return to Google to look at other brands; and
- Add your product to the bag, then get distracted and abandon the basket.

There are so many opportunities to target them with popups throughout that journey. How about:

- Displaying a simple [email capture popup](#) on the homepage
- Adding an [exit-intent popup](#) for people who leave a product page
- Creating a [cart abandonment popup](#) at the checkout stage



finish your order and get 10% off

sign up for our newsletter and get 10% off your order.

get discount code now

yes, i accept the [terms and conditions](#)

Now, I'm not suggesting you need to hit every customer with every one of those popups, every time they visit your site. But testing will show you what works (and what doesn't).

6. Give Shoppers Space to Engage

Let's talk about Walmart greeters.

Greeters are good because they take a softly-softly approach. They wouldn't be good if they started shouting about the store's fantastic products and offers the second you crossed the threshold.

Shopify stores are really no different — yet that point seems to be lost on a lot of retailers. Every time you immediately display a popup when someone lands on your site, you're basically yelling in their face.

One way around this is by adding timed triggers, which we've already discussed. Another option is to use a scroll trigger.

Scroll triggers are pretty much what they sound like.

Rather than being triggered when a user spends a certain amount of time on a page, they show up after that user scrolls a certain way down the page.

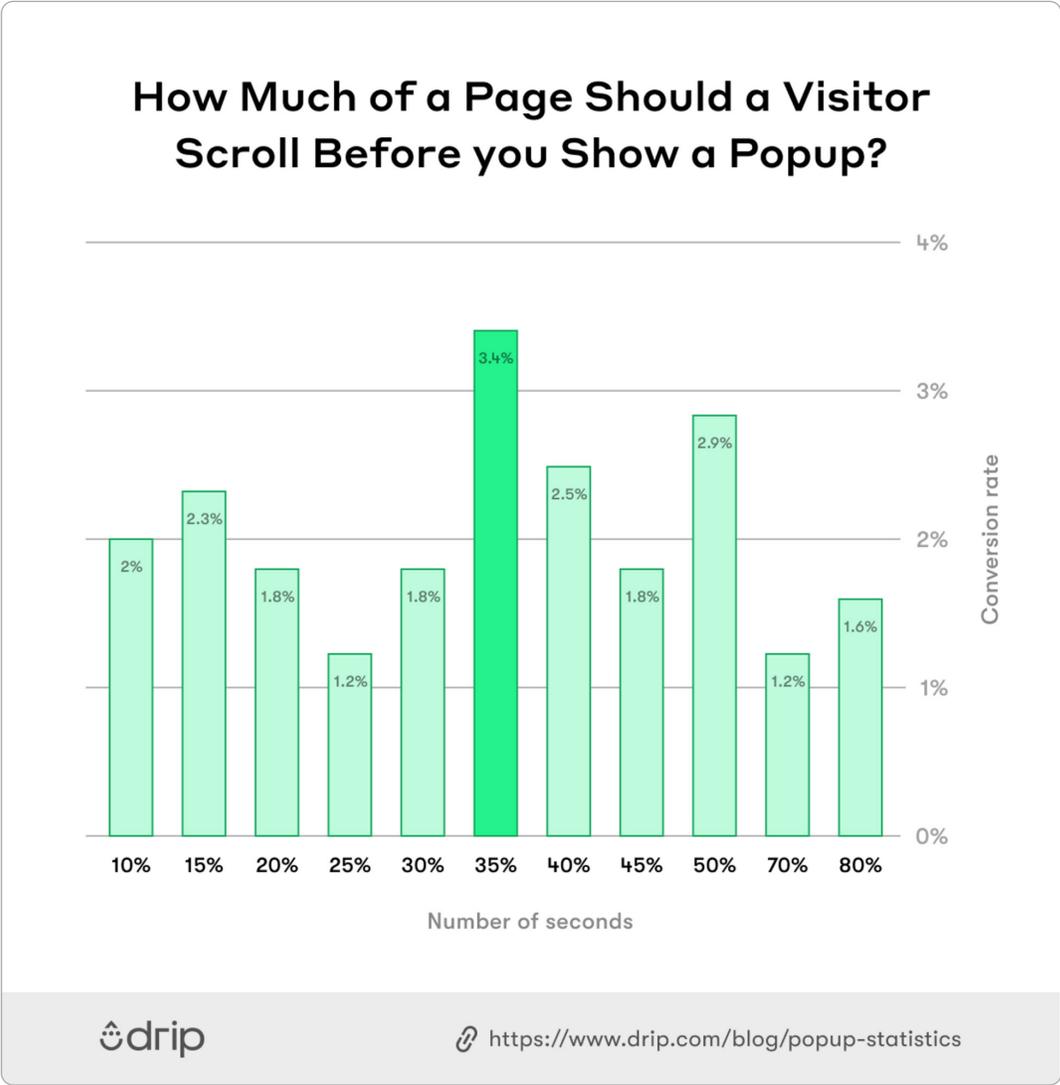
That way, you're only reaching out to people who've shown a certain level of engagement.

Unsurprisingly, as with timing, scroll depth is an important factor in popup effectiveness. Wait too long and you'll effectively disqualify a big chunk of your website visitors.

But do it too soon and you risk scaring them off.

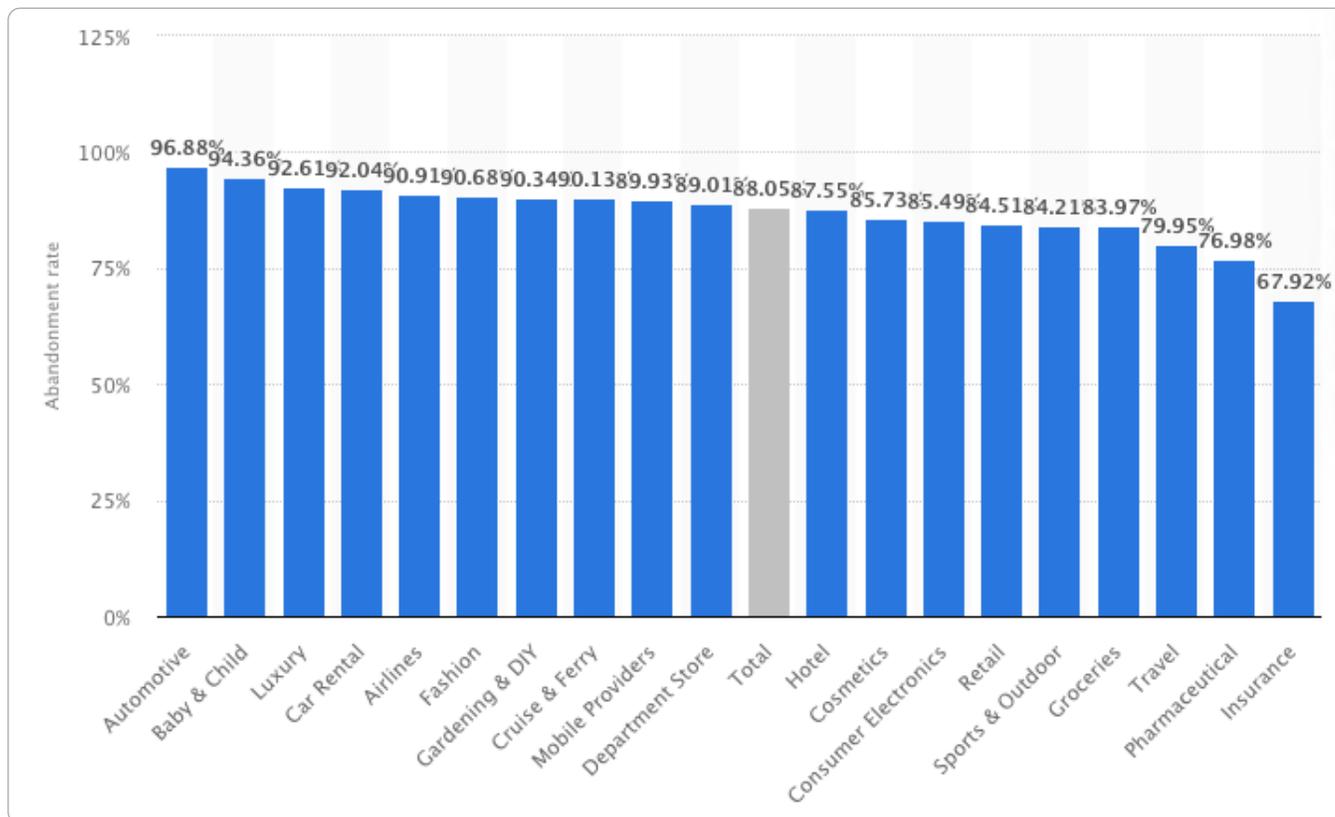
Fortunately, we've crunched the numbers on this as well.

Our analysis showed popups triggered at a scroll depth of 35% have the highest conversion rates, whereas those triggered at depths of 25% and 70% perform worst:



7. Use Exit-Intent Popups Intelligently

On average, an astonishing **88%** of online shopping orders are abandoned, although rates are even higher in some industries.



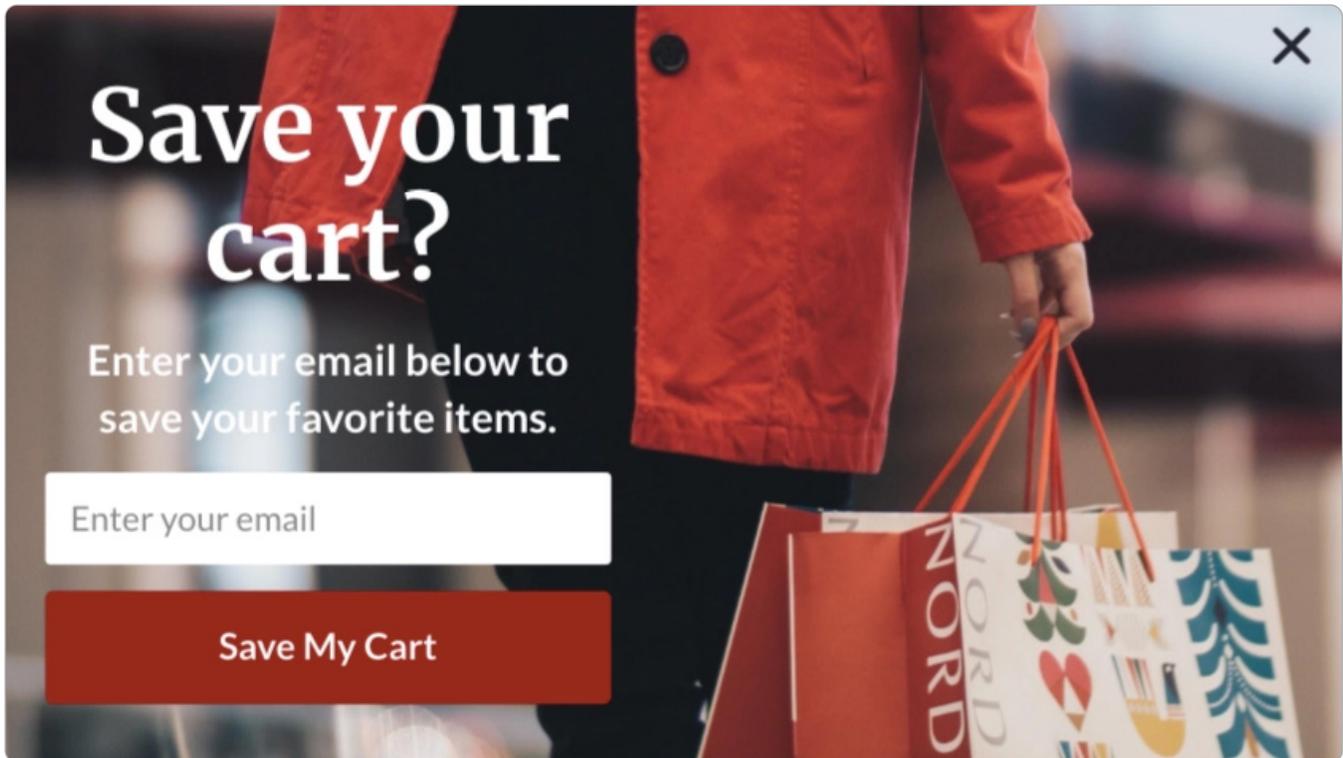
That means **cart abandonment** is almost certainly costing you a lot of money.

One way to claw back some of that lost cash is through **exit-intent popups** which appear when a user signals they're about to leave a page or bounce off your website. A well-timed popup can be all it takes to persuade a shopper to complete their transaction right now.

These popups are most effective when targeted at your shopping cart or **checkout page**. When a user moves the cursor outside the browser window, your popup will be triggered, presenting them with an incentive to remain on your site or give you their email address.

That incentive could be:

- A special offer;
- A [limited-time](#) discount code;
- A coupon to buy in-store rather than on your website;
- A reminder that the user has items in their cart; or
- A newsletter signup box.



However, you need to be smart about the way you use these powerful popups.

If a user is still actively shopping around on your site, they don't need to be told they've got items in their cart. It's interrupting their experience and nagging them to take immediate action, which might annoy them to the point of leaving.

Chapter 2:

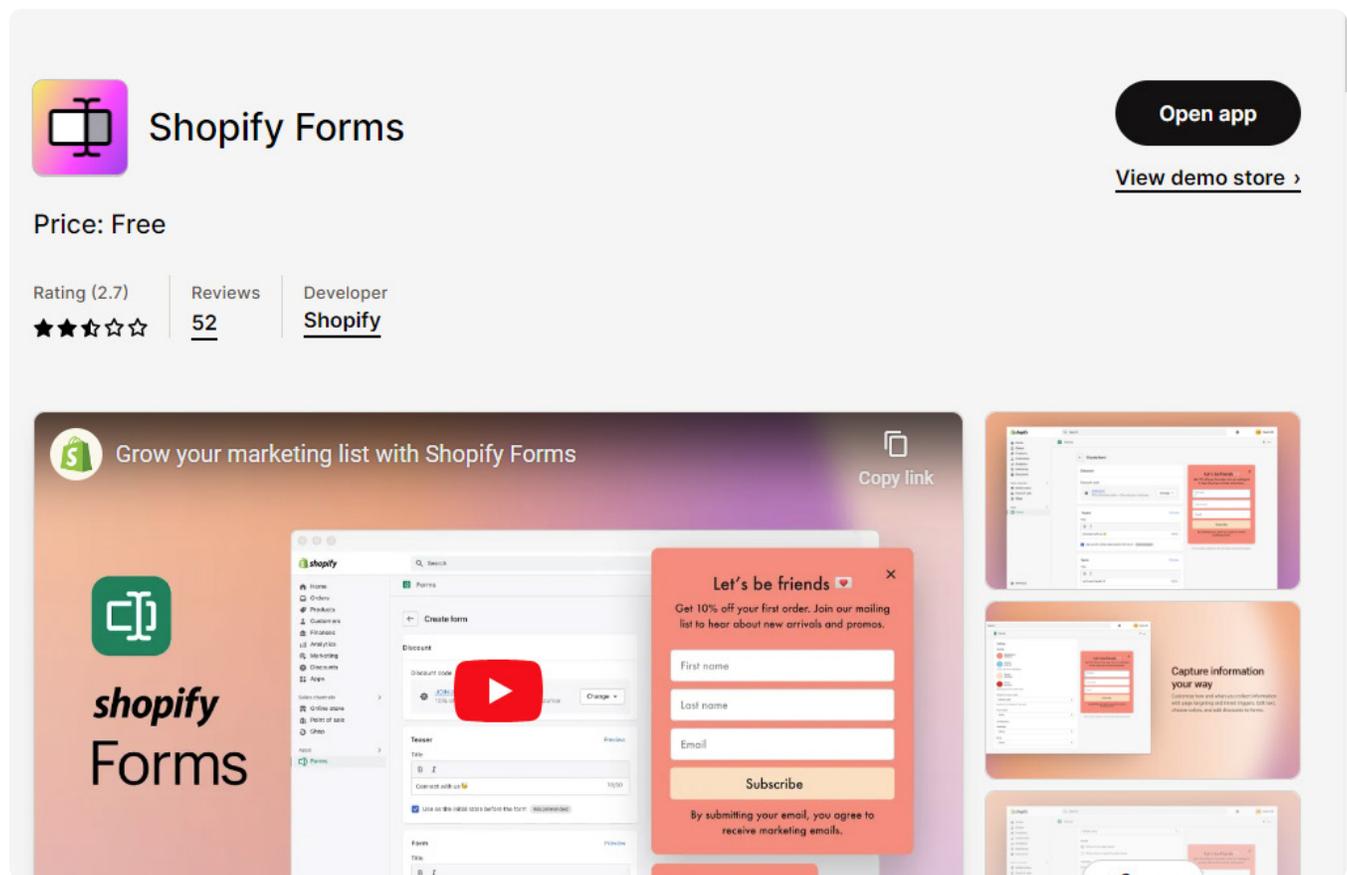
How to Find Email Capture Tools to Build Your List

How to Add an Email Capture Form to Your Shopify Store

Shopify does have a native form app that you can use to capture your customers' email addresses.

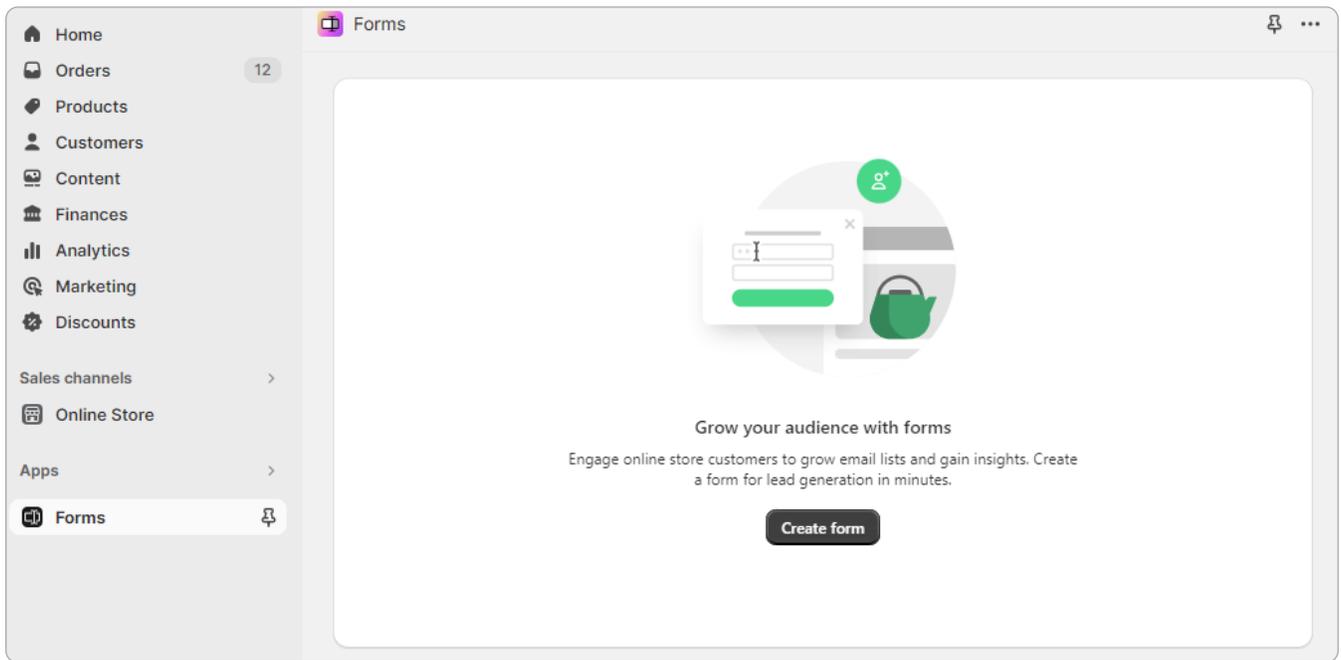
Here's how you add Shopify's native app to your store:

Step 1: Go to their [app store page here](#).

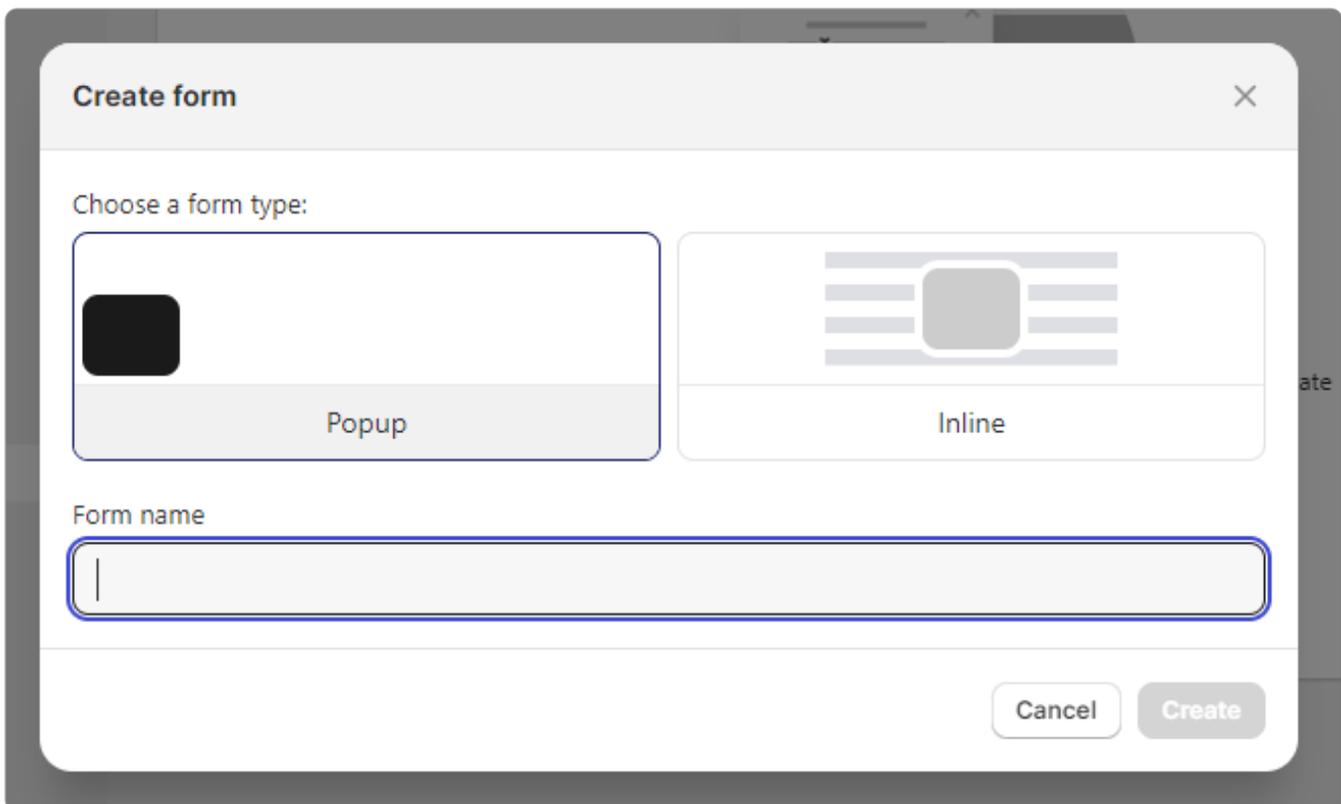


And click “Install” in the upper right corner. You’ll be brought to a permissions page on your Shopify store where you can give the app access to the data it needs to function.

Then, simply click “Create form” to begin.



From there, you can opt for one of two options to add the form to your ecommerce site.



Choose whether you'd want to use a popup or an embedded "inline" form, and name it.

You'll be brought to a screen where you can create your form in a basic editor.

Forms
🔒 ...

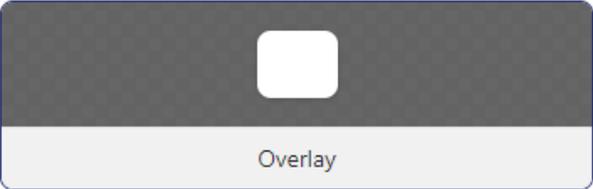
← Create form

Form Display

Display type



Floating



Overlay

Overlay Color
 #000000, 60%

Teaser Preview

Show If the customer closes the form without subscribing

Position on your store

Bottom left

Title

Don't miss out!
15/50

Form Preview

Title

Sign up
7/50

Content

Once you complete the design and parameters of your form, you have to then navigate to your site and install the Forms theme app embed. This sounds complicated, but you just click “Go to your online store” and toggle the switch next to Shopify Forms on.

The image shows a screenshot of an online store interface. On the left, there is a sidebar titled "App embeds" with a search bar and a list of four app categories, each with a toggle switch:

- Forms** (Forms) - Toggle is off
- Reviews Tab Widget** (Yotpo Product & Phot...) - Toggle is off
- Yotpo Reviews** (Yotpo Product & Phot...) - Toggle is on
- Drip** (Drip: Email Marketing...) - Toggle is on

Below the list, it says "Browse apps built for Online Store 2.0 themes. [View apps](#)".

The main content area features a dark grey header with the text "Talk about your brand" and a "Shop all" button. A white pop-up window is overlaid on the main content, containing the following text and elements:

- 10% Off Men's Fashion**
- Join our exclusive list of men who get the latest trends, inspiration, and offers directly in their inbox.
- We'll send you a 10% discount code when you join.
- A teal button labeled "Just a redirect".
- An email input field with a dashed border and the placeholder text "Email".
- A black button labeled "Yes, Give Me 10% Off".

Then you should be good to go!

Pros and Cons to Using the Shopify Forms App

Pros	Cons
Free: It's a completely free add-on.	Basic: It also feels free.
Native Integration: As it's developed by Shopify, it has the deepest, most automated integration possible.	Lack of triggers: You can only trigger a form based on the number of pages visited or the amount of seconds a person has been on your site.
Works with Shopify Email: You can simply automatically toggle a welcome workflow on from the form creation menu, which is handy.	One step only: The most you're going to get out of these forms is the initial form and the "thank-you" screen. No quizzes, no multi-step forms, just basic stuff.
	Only basic popups and embedded forms: There is no gamification, nor sticky bars.
	Very basic analytics: You have a dashboard with the number of submissions and the percentage of completions. That's about it.
	No testing: A/B testing is really useful for forms when you're shooting for conversion rate. Shopify Forms doesn't seem to contain any A/B testing to speak of.

To sum up, if you're just getting started, and you need to get something going to start building your email list, Shopify Forms are a great fix.

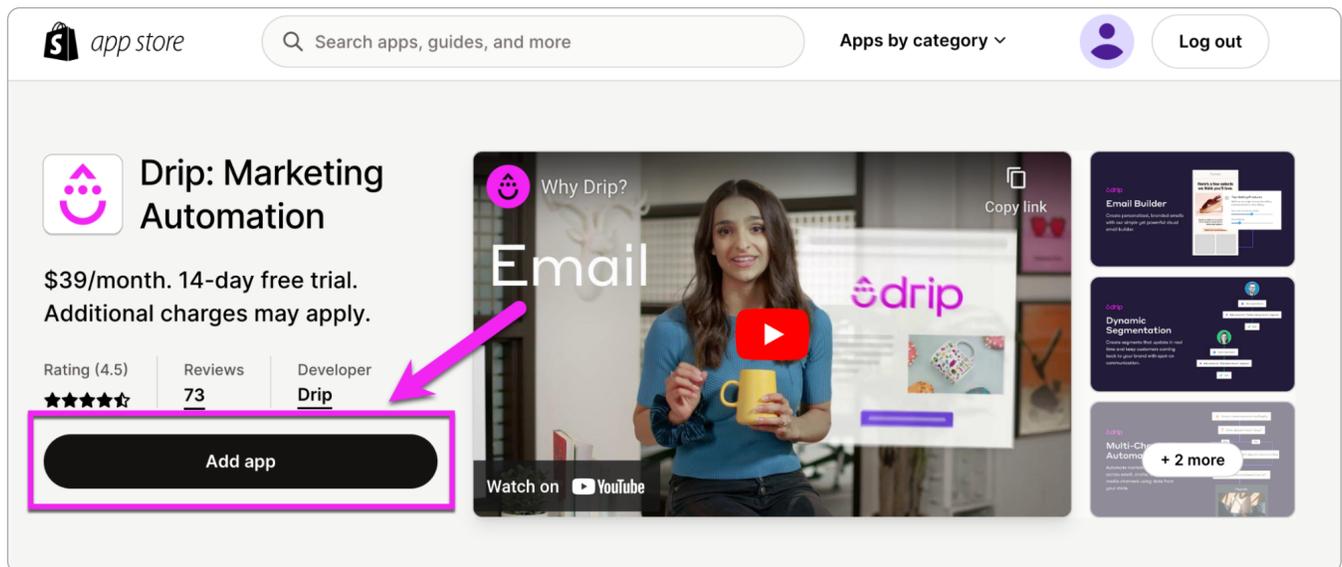
But when you find that you're starting to really drive traffic and email captures, it's time to look into a third-party app that will make the most of that.

How to Add a Third Party Email Capture App to Shopify

There are a number of popup apps available, one of which is our own solution, [Drip](#). We'll show you how to add a third-party email capture app with Drip.

1. Add Popup App To Your Shopify Store

Head into the Shopify App Store, and [add Drip to your Shopify store](#).



Just click on 'Add app,' and you'll be redirected to Drip's registration page.

If you haven't created a Shopify store at this point, you should do so since it's necessary to install Shopify Apps.

2. Create Your Free Account

To begin creating your popup, start your 14-day free trial with Drip.

drip + shopify

Create your Drip account to connect My Store.

Company email*

Create a password*

Minimum is 8 characters

I'm not a robot

reCAPTCHA
Privacy · Terms

Create an account

By signing up, you're agreeing to Drip's [Terms of Service](#) and [Privacy Policy](#)

Already have an account? [Sign in](#)

"I switched to Drip from Mailchimp and enjoy their automatic re-targetting and it's just so much easier to use and design emails and automatations. Love it."
Ixil Collective

It only takes a few minutes to set up, there is no credit card needed, and you'll be asked to provide information like store URL, email address, and password.

From there, you'll be able to access Drip's dashboard, where all the tools for creating popups are located.

Create a new...

Onsite Campaign
Grow your list and turn drive-by visitors into customers.

Single Email Campaign
Send a one-time promotional email to a segment of people.

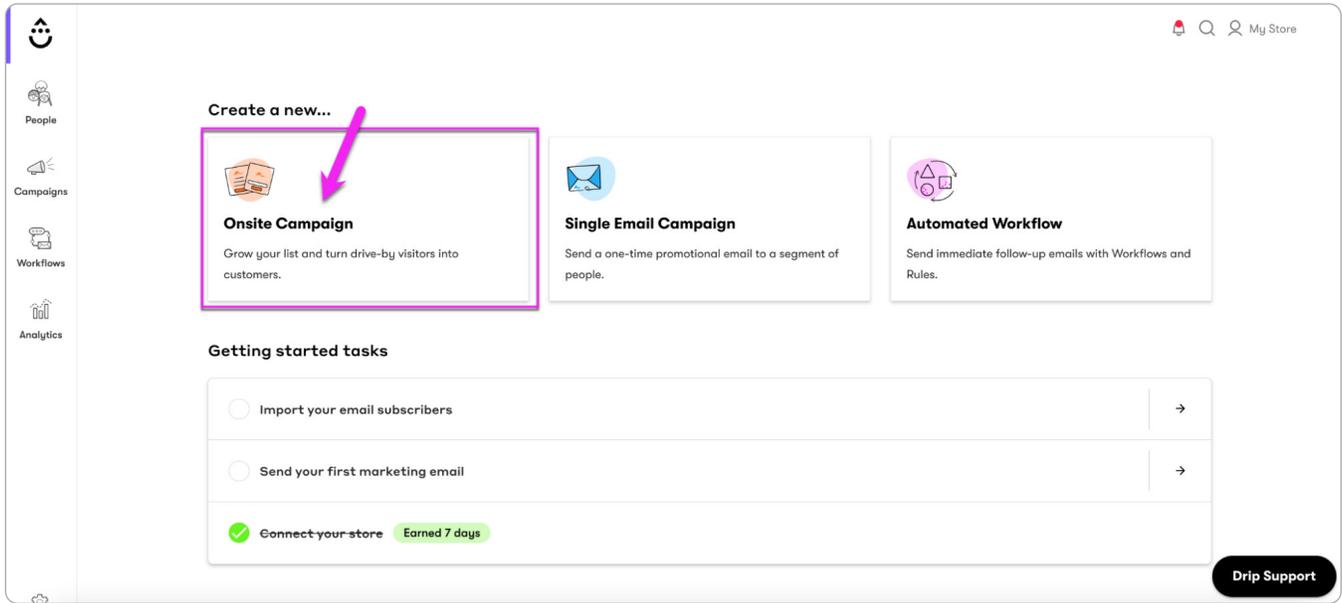
Automated Workflow
Send immediate follow-up emails with Workflows and Rules.

Getting started tasks

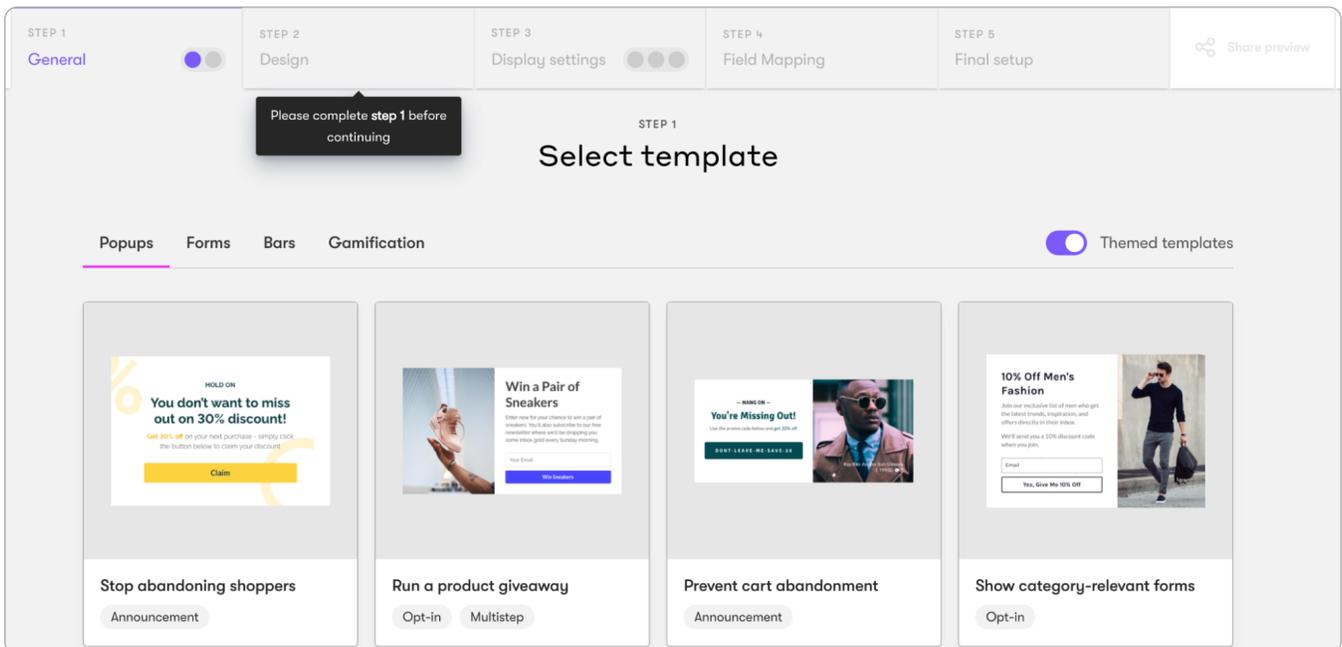
- Import your email subscribers →
- Send your first marketing email →
- Connect your store Earned 7 days

3. Create Your First Popup Campaign

Once you have access to Drip's dashboard, you can immediately start creating your popups. Start by clicking on the 'Onsite Campaign' in the admin dashboard.

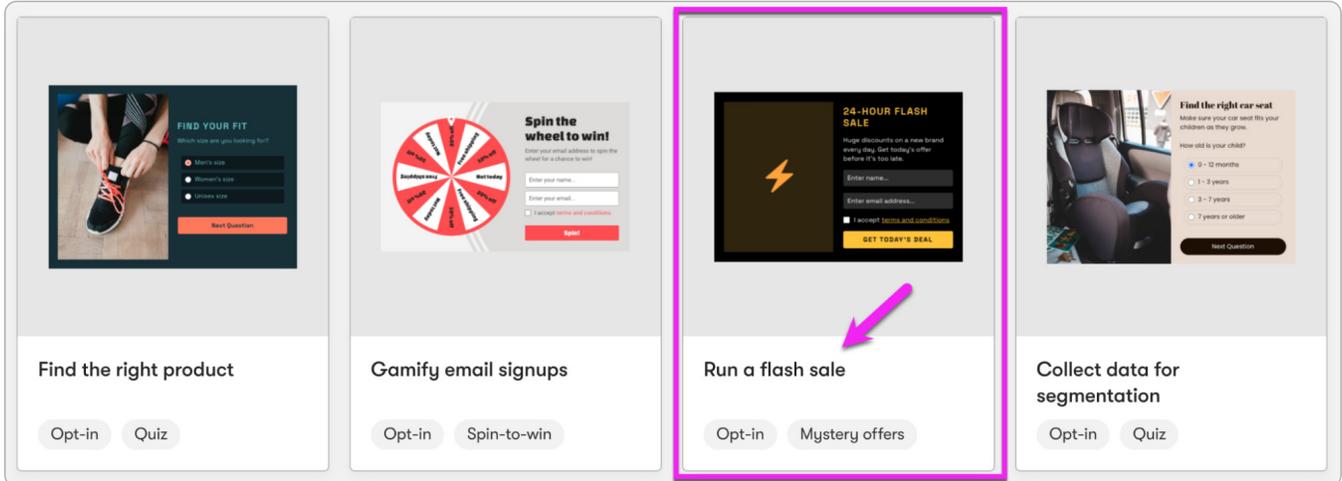


The first step of the campaign setup is to select a template for your popup.



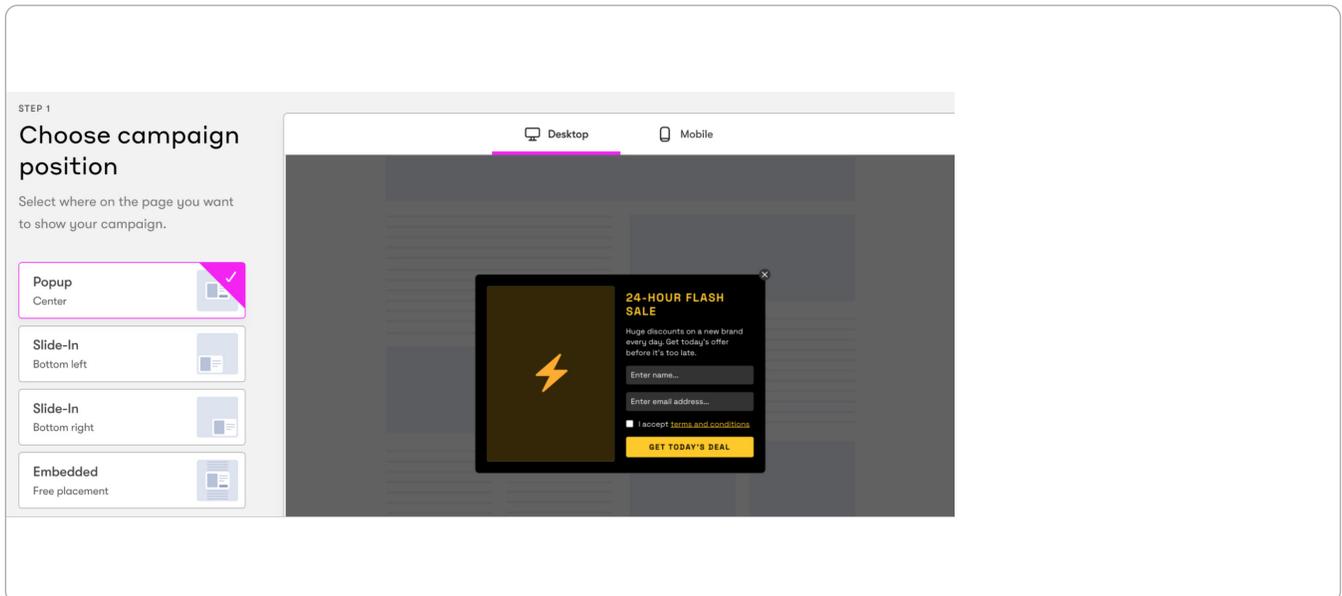
Selecting a template does not commit you to anything, and you can change or customize the template later on for your own needs. You can also start from a blank template.

For this example, I will select one of our most popular templates, which is the ‘Run a flash sale.’



Once the template is selected, you get to choose your popup placement.

The popup can be shown in the center, bottom-left, bottom-right, or embedded in any other position on your website.



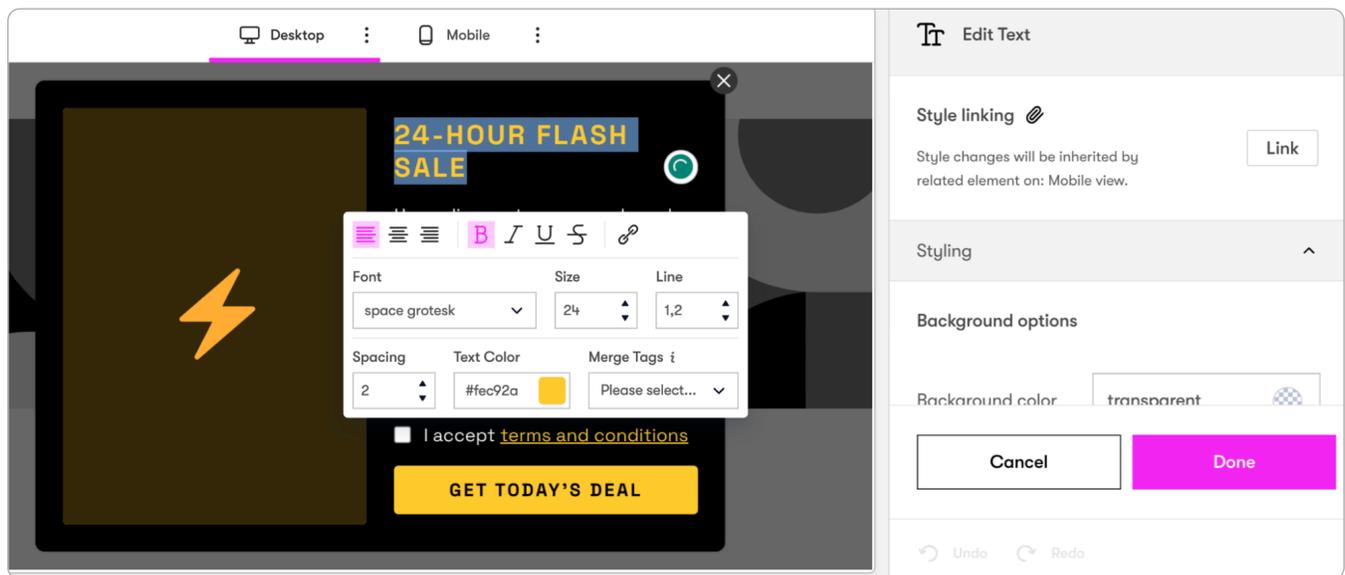
In most cases, the center is a good choice for displaying your popup.

4. Design Your Popup

For the design, you have two options: you can use the popup as it is in the template or customize it further.

Even though Drip's popup templates are proven to work, you may want to add your own style to the popups.

Customizing your popups is easy with our point-and-click editor.



You can change almost anything, including the background image, available offer, and other visual elements like headings, text, and buttons. If needed, you can also add additional elements like images or videos.

And a key point, all of Drip's templates are optimized for mobile devices, which is crucial in today's market since almost 60% of website traffic comes from mobile devices.

5. Set Up Display Settings

Display settings, i.e., the conditions under which the popup is shown, are an important aspect of your campaign for maximizing your conversions.

You can set up rules to trigger the popup, such as when someone is about to leave your site or when they scroll X% of the page or spend X amount of time on your site.

<input checked="" type="checkbox"/> ON	 Show after Show when a visitor has been on a page for more than X seconds
Show campaign after <input type="text" value="8"/> seconds on your page	
<input type="checkbox"/> OFF	 Scroll Show when a visitor scrolls X% of your page.
<input type="checkbox"/> OFF	 Exit-Intent Show the exact moment a visitor is about to leave your website.

If you prefer, you can choose the Automated Triggering option to let our algorithm find the best option for your situation.

<input type="checkbox"/> OFF	 Automated Triggering Let our algorithm find the most effective trigger for your website.
------------------------------	--

Aside from the display settings, you can choose the pages that the popups apply for, as well as other targeting rules to determine who should see your campaign.

<input checked="" type="checkbox"/> ON	 Target all pages Your campaign will be displayed on all pages of the domain you've entered
<input type="checkbox"/> OFF	 Target specific sub-pages Your campaign will be displayed on specific sub-pages of the domain you've entered

If you want to further personalize your popups and use [custom fields](#), you can set up the input fields before the last step.

Map your campaign fields to people's profiles

Map your campaign's input fields to your [Custom fields](#) to include custom data. [Refresh fields](#)

Campaign fields		Custom fields
<input type="text" value="Enter name..."/>	→	<input type="text" value="Choose or create a field..."/>
<input type="text" value="Enter email address..."/>	→	<input type="text" value="Merged automatically"/>
<input checked="" type="checkbox"/> I accept terms and conditions	→	<input type="text" value="Choose or create a field..."/>

6. Set Your Popup Campaign Live

One of the fun parts: making the popup live.

As a last step, you can name your popup campaign to stay organized.

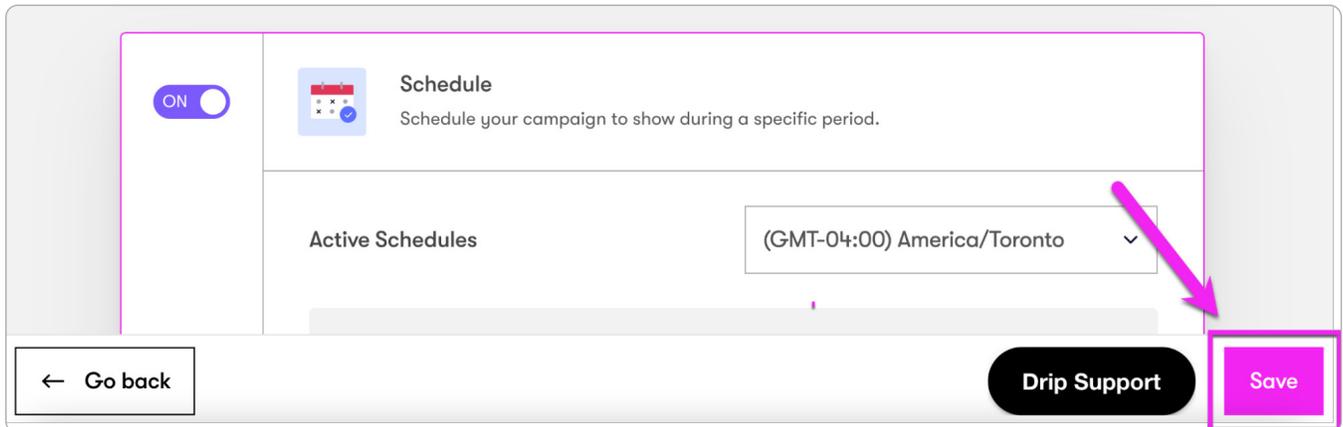
Name your campaign

Give your campaign a descriptive name (so you can easily find it again.)

If you want, you can schedule your popup to appear at a certain time.

If you're running a seasonal sale or a specific sales promotion, you may want to turn this on.

After this, just by clicking on 'Save,' the popup will go live on your site and you will be able to preview how it looks.



What to Look for in a Third-Party Email Capture App for Shopify

If you're going to add and pay for a 3rd-party email capture app in lieu of using Shopify Forms, it needs to have functionality that you can't find from native Shopify.

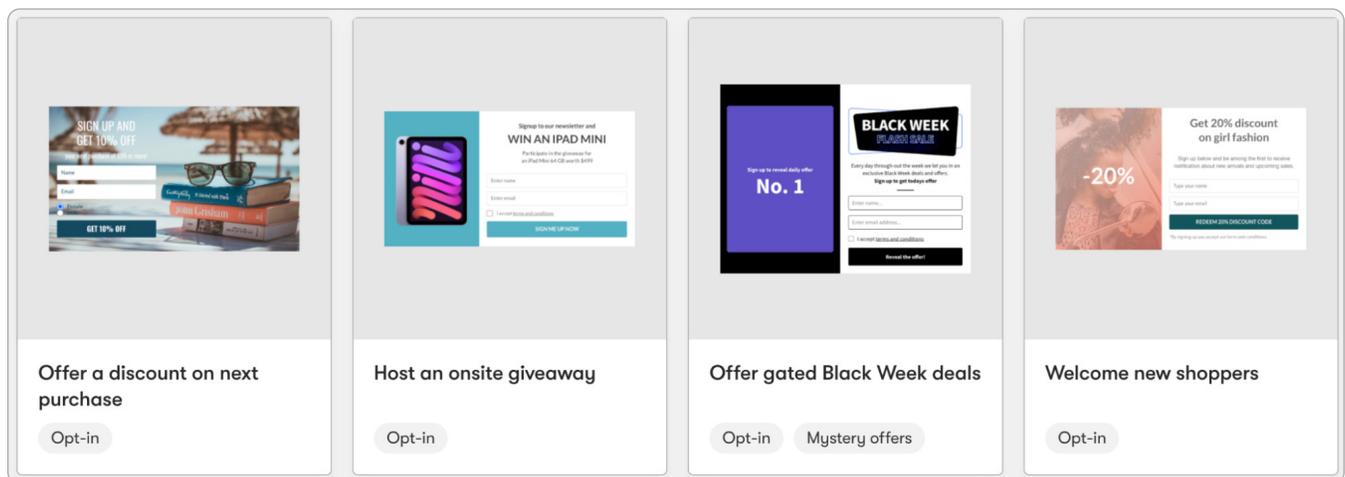
After all, it's not worth paying for something you can get for free, right?

So you'll want your email capture app to go above and beyond – and rightfully so. Here's what you'll ideally need.

1. Available Templates

Templates can give you a good starting point for your popup designs. Look for a popup tool that offers different templates, so you can customize them to match the look and feel of your store.

As an example, Drip has more than 50 ready-to-use templates that customers can use as they are or further customize for their needs.



And an important thing: The templates should not limit your options when it comes to creating popups.

Regardless of if you want to promote a seasonal sale, set an exit-intent, or create a giveaway, you should be able to create a popup.

The point is there should be templates for popups with different goals.

2. Ability To Do More Than Just Create Popups

Capturing the customer information with popups is the first step, but you also have to send out the emails, do A/B testing if needed, and measure the performance.

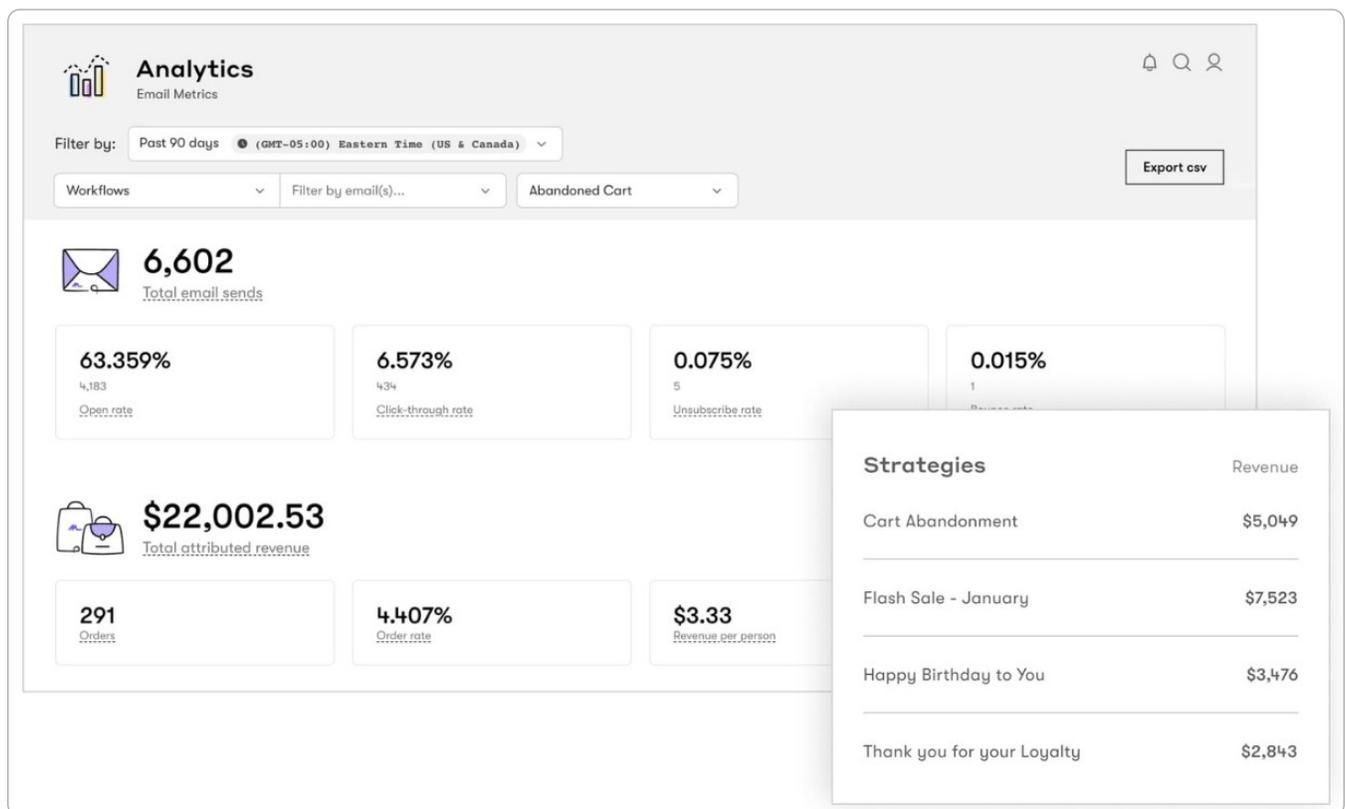
If your popup tool is not able to send out the actual emails, you have to integrate it with an email marketing platform, which can get expensive quickly.

For this reason, choose a popup tool that can do more than just create popups.

3. Available Free Trial Or Plan

Most of us prefer trying out a platform with a free trial or plan before deciding to invest in it. Make sure the popup tool offers a free trial or plan so you can test out its features before committing to it.

4. Customer-Focused Reporting and Metrics



It's one thing to create popups and another thing to track how they perform.

Without proper reporting and metrics, you can never know what actually works and double

down on that.

In the best-case scenario, you should see your campaign and revenue performance as well as metrics including open rate, click-through rate, and order rate.

5. Multiple Triggers and Personalization

If you're going to go with a third-party email capture tool, you'll want something you can personalize.

This is about control, and knowing exactly who is going to see your message and when.

A lot of great third-party forms (and frankly, ESPs who offer email capture as standard), will give you tons of options for triggering your popups.

For example:

<input type="checkbox"/> OFF	 Automated Triggering Let our algorithm find the most effective trigger for your website.
<input checked="" type="checkbox"/> ON	 Show after Show when a visitor has been on a page for more than X seconds Show campaign after <input type="text" value="8"/> seconds on your page
<input type="checkbox"/> OFF	 Scroll Show when a visitor scrolls X% of your page.
<input type="checkbox"/> OFF	 Exit-Intent Show the exact moment a visitor is about to leave your website.
<input type="checkbox"/> OFF	 Click trigger Trigger your campaign when a visitor clicks a class or ID on your pages.
<input type="checkbox"/> OFF	 Manual trigger Trigger your campaign manually by JavaScript.
<input type="checkbox"/> OFF	 SiteData trigger Trigger your campaign based on any data you have on your site..

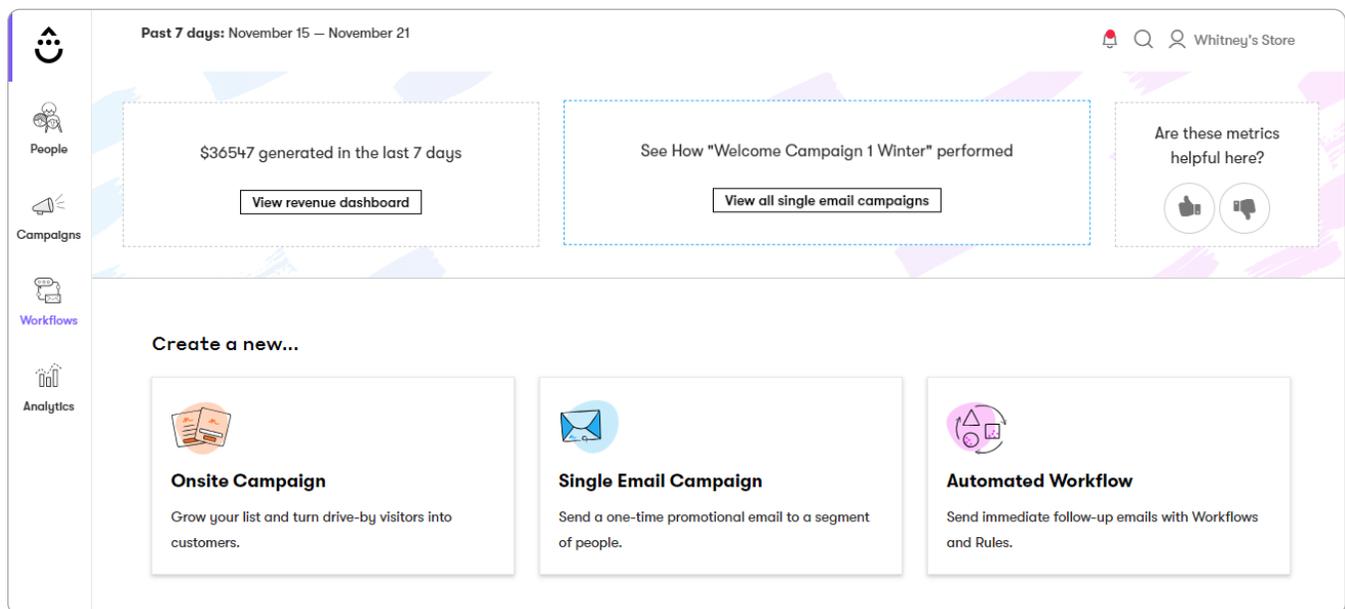
And an excellent email capture tool will make sure that if your customer has closed your form or popup, they won't see it again for a certain amount of time.

6. Native Integration with both Shopify and Your Email Service Provider (Shopify Email or Third Party)

When choosing a 3rd-party email capture tool, you'll want something that integrates both with Shopify and with the email platform you're using.

Whether you're using Shopify email or another ESP, it's really important that all the little moving parts move in the same direction.

Now typically, while there are stand-alone email capture tools that exist, most great email platforms will offer most of the above features too.



That'll help you kill two goals with one tool.

Then, all you'll have to do is worry about how well it integrates with Shopify. As long as it does that well and transfers the right data back and forth, it's smooth sailing from there.

Chapter 3: How to Send Emails to That Shiny New List

Investing in Lifecycle Automation Workflows to Nurture Customers

Now that you've captured them, what's next?

Capturing your customers' email addresses is only the first step to converting them. But here's the good news: *they've officially entered the part of your sales funnel that you control.*

And that's exactly where you want them.

The next step is setting up lifecycle-critical automation workflows built to pull them deeper into your funnel and towards a purchase.

Sometimes, the very first workflow will get the job done. Sometimes, a customer might convert on your 100th email to them. Whether they need 1 or 99 emails before they end up purchasing from you, it's important to have those emails in place.

Now, I'll walk you through the most important workflows you absolutely need, what to send, and who should get that workflow.

(But that's a lot – here's a quick reference table)

5 Lifecycle Critical Automation Workflows Every Shopify Store Needs

Quick Workflow Reference Sheet:

Workflow Name	Goal	Who it's sent to	When to Trigger it	What to Send
Welcome	Welcome a customer in, get that first purchase	People who have just signed up for your emails	5-10 minutes after the initial sign up (if not immediately)	3-5 emails with an incentive, brand story, social proof
Browse Abandonment	To bring a customer back to your store	People who have browsed a category but didn't make a purchase	1 to a few hours after the customer has left your site	1-2 emails with product suggestions from the same category
Cart Abandonment	To get a customer to complete their purchase	People who abandoned a cart with products in it	0-1 hours after the initial abandon	1-3 email reminders with the abandoned products, urgency, and finally an incentive
Post-Purchase	To create a great post-purchase customer experience	People who just completed a purchase on your Shopify store	Immediately after purchase	1-3 emails confirming purchase (and maybe cross selling related items)
Win Back / Reactivation	To bring lapsing customers back to your store	Those who have not purchased or engaged in a certain amount of time	30-90 days from their last purchase/engagement	An incentive to come back and purchase

1. Welcome Workflows:

Welcome workflows are the *real* first impression that your customer has of you and your brand voice.

It not only makes sure that you deliver on the promised incentive you offered at sign-up, but it's the first direct communication between you and your customer.

So here's how to nail it.

The Goal:

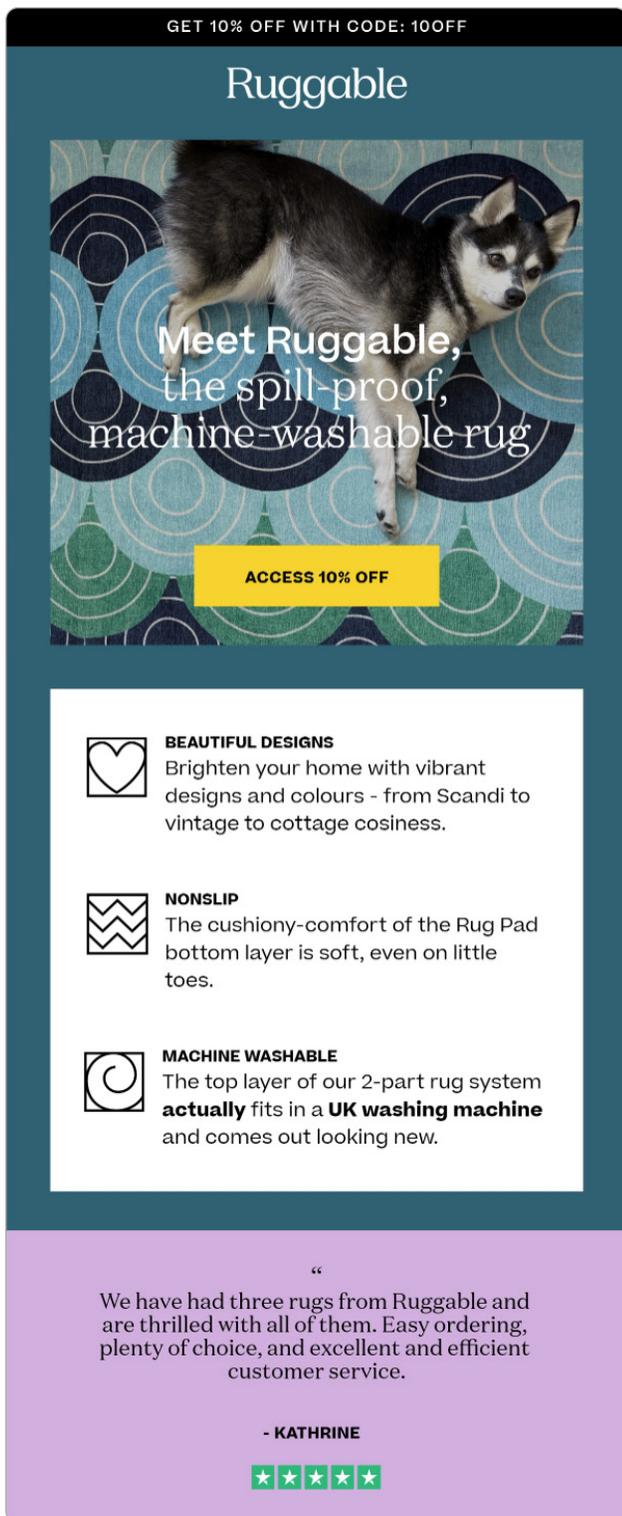
This workflow welcomes your customers into the fold. You're trying to push them towards that first purchase, and also let them know a little bit more about your brand.

Who to Send it to:

A welcome workflow goes out to the people who have just subscribed to your email list, or have made an initial purchase.

What to Send:

We recommend a 3-5 email workflow for your welcome series.



Email 1:

Welcome [First_Name], Your X% Discount Inside 👁️

This is a great first email from Ruggable. No fuss, just the discount code that was promised at sign up, gorgeous imagery, and a scrolling gif with social proof to showcase other happy customers.

Note how you have the discount code at the top, plus a CTA that stands out with the discount too.

Ruggable also leads with their **unique selling proposition (USP)**: spill-proof, machine washable – two huge value-adds for any rug retailer.

They follow this up with a few secondary USPs and explanations, plus a bit of social proof from their recent reviews.

This is a great first email to welcome your customers and put the value you offer first.

But what do you do if it doesn't get your customer to purchase?

OBTENEZ 10% DE RÉDUCTION AVEC LE CODE : 10OFF

Ruggable

**Lavable.
Antidérapant.
Interchangeable.**

Achetez des tapis lavables et antidérapants pour toutes les pièces de votre maison. Bénéficiez d'une remise de **10 % dès maintenant.**

OBTENIR 10% DE RÉDUCTION

Voici ce que vous avez laissé derrière vous...



[Kamran Hazel Rug](#)

RETOURNER SUR LE SITE

Email 2:

Don't forget your X% off!

The second email leads with the code reminder at the very top, and then leads with “Washable, Non-slip, Interchangeable.” We still have the CTA “Get Your 10% Off.”

Then, what's interesting is they show me the product I was looking at originally when I signed up. This is a great way to remind your customer of why they were interested in the first place.

They accompany that product image with a CTA saying “Keep Shopping.”

I love this CTA for a few reasons. First, it's low-commitment. “Keep shopping” is such a lower bar of entry than “buy now.”

Psychologically, “buy now” is a lot of commitment. But just asking someone to come back and take a look is a much easier sell.

OBTENEZ 10% DE RÉDUCTION AVEC LE CODE : 10OFF

Ruggable

Bonjour,
nous sommes
Ruggable!

Nous créons de beaux espaces,
un tapis lavable à la fois.

[ACHETER LES MEILLEURES VENTES](#)

RENCONTREZ JENEVA BELL

Notre fondatrice



Il y a des années, mon chien a abîmé mon tapis tout neuf. C'est alors que j'ai réalisé que j'avais besoin d'un tapis qui s'adapte à mon style de vie, et non l'inverse. J'ai pensé que le nettoyage de votre tapis devait être aussi facile que celui de vos serviettes ou de votre literie. Et c'est pourquoi j'ai créé Ruggable.

Geneva

[ACHETER LES NOUVEAUTÉS](#)

Comment ça marche



Email 3:

The Brand Story

From here, Ruggable follows up with their brand mission and story. We can see their mission statement: “We create beautiful spaces, one washable rug at a time.” Then, they offer a much more generalized CTA here: “Shop Our Bestsellers.”

From there, they introduce their founder, Geneva Bell, and launch into the reasons she founded Ruggable. According to her, the common pain point customers feel about rugs (the inability to keep them clean or switch them out easily) was her big reason for creating the company. Just below her founder story, they follow up with the CTA: “Shop New.”

Introducing the founder helps them put a face to the brand, and understand that there are real people behind the company. This is actually a huge part of getting your customer to trust you for the first time.

The email even continues with an explanation of how to wash the rugs, and why they're better than traditional rugs. Notice how there's no mention of that lingering discount except for the sticky bar at the top of the screen.

You could continue on from this point with more social proof and product recommendations. Not every person who enters a welcome workflow is ready to purchase – and that’s okay. The welcome workflow can help set the foundation for your customer’s purchase journey.

When to Send It:

For a welcome series, we generally recommend the following schedule:

- **Email 1:** Immediately after signup.
- **Email 2:** 1-2 days after the first email is received.
- **Email 3:** 2-3 days after the second email is received.

And any emails tacked on to the end of that welcome series would follow the same 24-48 hour schedule as the first three.

One thing to note: If your customer is in the middle of this workflow, it’s important to set it so they won’t receive other emails from you while they’re getting these. It’s also a good idea to have them exit the workflow after they’ve made a purchase and end up on your regular promotional list you send to all those who haven’t yet purchased from you.

2. Browse Abandonment Workflows

Browse abandonment is for those who have come to your site and have browsed through some categories without purchasing. They've manifested interest, and have checked out what you've got.

The Goal:

Browse abandonment, like cart abandonment, is a manifestation of interest. However, unlike cart abandonment, browse abandonment indicates interest – *but not intent*. So we want to bring people back to our site, with a much softer sell than we would with cart abandonment.

Who to Send it to:

Browse abandonment workflows are sent to those who came to your site and browsed a certain amount of time or number of items before leaving without making a purchase or adding anything to their carts.

What to Send:

For browse abandonment, you'll want to make sure you're being timely, but not *creepy*. For example, if a customer browses five products before leaving, sending an email with a photo of the last item they browsed might be more *timely*.

However, if you send an email with every single item they looked at, we might be crossing into *creepy* territory.

What we recommend: Send 1-2 emails with a *few* or *one* of the products they left behind. Offer up some product recommendations that are similar or from the same category.

Killstar does a great job with their browse abandonment emails with the subject line: "Something catch your eye?"



Email 1:

We Caught You Looking!

Killstar sends a very simple email with the last few items you checked out. They have a very subtle CTA: “Take another look at these haunting styles.”

They usually send 1-2 emails within a day or two of the abandonment. Where they really shine is in their subject lines:

- Something catch your eye?
- We caught you looking
- See something you like?

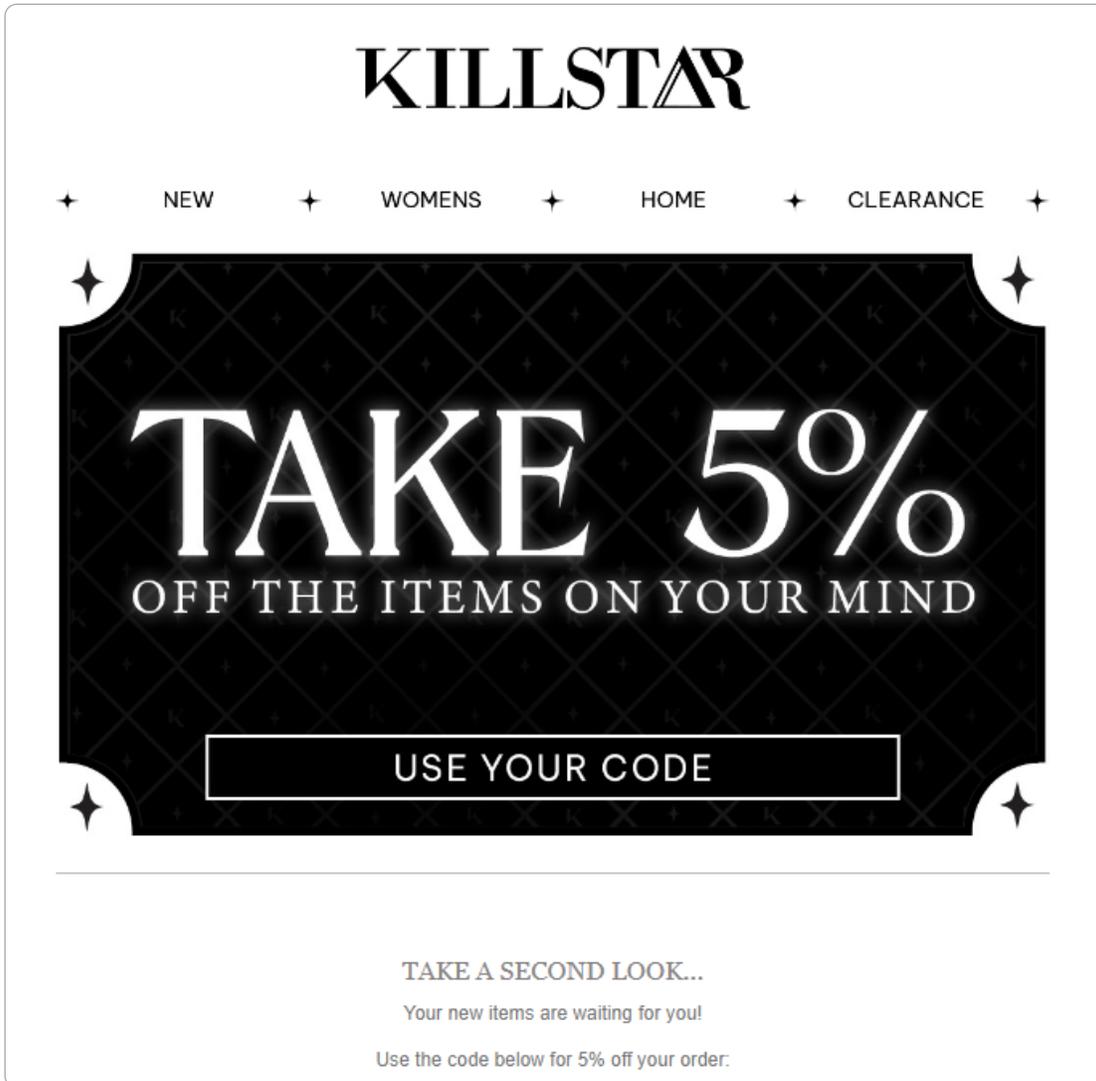
When to Send it:

For browse abandonment workflows, you’ll want to give customers more space than you would with cart abandonment. Shoot for the day after the original abandonment – 24 to 48 hours if you’re sending two emails. Keep it light and casual.

Email 2:

Take a Second Look

Then, just to sweeten the deal, Killstar offers a slight discount for anyone still on the fence.



This is a great way to incentivize that purchase without discounting too much.

3. Cart Abandonment

Unlike browse abandonment, when your customer has added things to their cart or started the checkout process, there's a clear manifestation of *intent to purchase*.

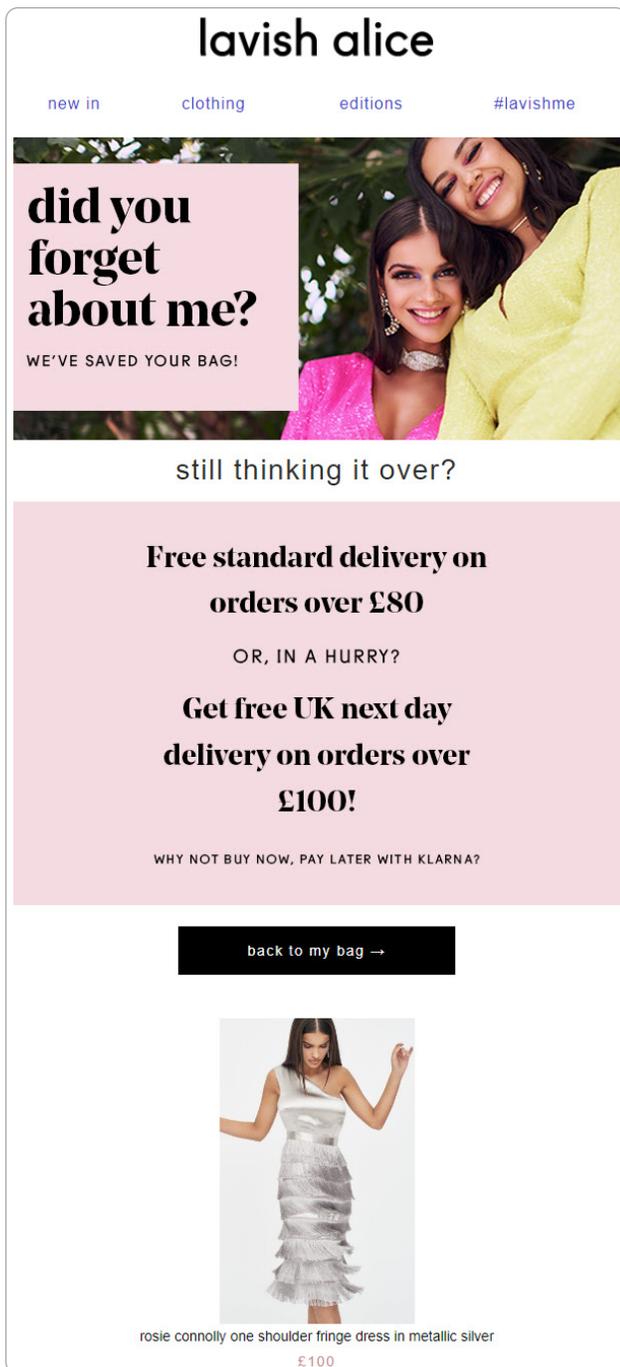
These are the ones you can't let get away. And with so many ecommerce carts getting abandoned, this is one workflow you can't live without.

The Goal:

Your customer already wants to purchase from you: just remind them of what they left behind.

Who to Send it to:

You want to send this workflow to the people who have added a product to their cart or have even started the checkout process without completing the purchase.



What to Send:

Email 1:

Did you forget about me?

Lavish Alice nails their cart abandonment flow. They send three emails overall (we recommend 3-5 emails).

They don't start off with the discount right out of the gate – instead, they send a simple reminder with a photo of the product we abandoned.

Note the tone of the email: there's far less of a promotional tone and more of a support tone.

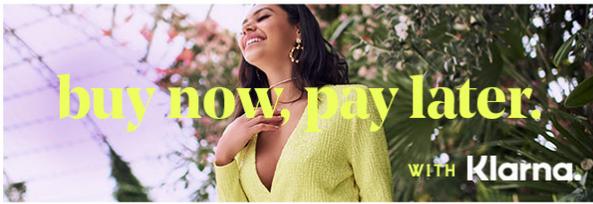
They also bring the value they offer front and center:

- There's free shipping with a purchase threshold
- Free next-day delivery at a certain threshold
- Buy now and pay later options

This is a great first email because it focuses on that added value and gives your customer great reasons to come back plus a few added bonuses.

lavish alice

new in clothing editions #lavishme



choose pay later with klarna at checkout and you get 30 days to pay, so no need to wait for payday! there is no interest and no charges to pay.

Free standard delivery on orders over £80

OR, IN A HURRY?

Get free UK next day delivery on orders over £100!

WHY NOT BUY NOW, PAY LATER WITH KLARNA?

show me my bag →



rosie connolly one shoulder fringe dress in metallic silver

£100

Email 2:

Extra Payment Options

For the second email, they highlight more of their buying options briefly touched on in the first email.

This is a great idea if your customer is on the fence about spending right this second.

Note how this is the second cart abandonment email and there's still no discount to be found.

Lavish Alice simply highlights their added value and offers more options in a support tone.

We love this CTA: "show me my bag." It's far less commitment than "buy now."

10% off your order, just for you for 48 hours only [view in browser](#)

lavish alice

new in clothing editions #lavishme



you deserve to treat yourself, and we're here to help...for the next 48 hours get 10% off your order

use your code [c48t-11bg](#) at checkout

Free standard delivery on orders over £80

OR, IN A HURRY?

Get free UK next day delivery on orders over £100!

WHY NOT BUY NOW. PAY LATER WITH KLARNA?

[complete your order →](#)



rosie connolly one shoulder fringe dress in metallic silver
£100

Email 3: Treat Yourself

It's only in the third email that Lavish Alice sends out a 10% discount code.

The strategy of waiting for the third email before discounting helps you recover the people who simply got distracted or needed payment options to seal the deal.

There are also people who abandon carts *specifically* to get a discount from merchants in their email.

Note the urgency and FOMO used here: there's only 48 hours to take advantage of this offer.

This way, if someone was waiting on a discount, they have a limited time to use it.

When to Send it:

As we recommend anywhere from 3-5 emails for cart abandonment, you'll want to space out your emails.

- **Email 1:** Immediately to 1 hour after the initial abandonment. We want to try to capture the people who just got distracted.

- **Email 2:** We want to send this out 24 hours after the first email was received.
- **Email 3:** We want to send this out another 24 hours after email 2 was received.

And so on. So you have an email reminder going out every 24 hours or so.

4. Post Purchase and Order Confirmation

For post purchase emails, there's a lot you can do. This kind of workflow can be customized to infinity.

The Goal:

You want to achieve a few things with this workflow:

- **Confirmation:** Trust is a huge factor in ecommerce. We want to build trust with our customers and let them know we're dealing with their order ASAP.
- **Up Sell/Cross Sell:** If there's potential for another product or an upgrade to their current order, there's never a better time to offer it than in a post-purchase workflow.
- **Incentivize Next Purchase:** In the same vein, we want to get them at least thinking about the next purchase with you.
- **Update Shipping:** It's just a great experience when you offer shipping updates – at minimum when it leaves your warehouse.
- **Ask for a Review:** If someone purchased from you, you definitely want to know how they enjoyed their experience. Asking for feedback or calling them to leave a review will help you better understand them.
- **Offer Referral/Loyalty:** If they had a good experience with your brand, a referral or loyalty program is a great way to bring them into the inner-circle, so to speak.

The overall goal of a post-purchase workflow is to offer an incredible post-purchase customer experience. You want your customer to walk away with a positive impression of your brand.

Who to Send it to:

You want to start this workflow as soon as your customer places an order with your store. There's no reason to delay here – they want to know their order has gone through.

What to Send:

For exactly what to send, we recommend at least three emails.

Hey 🙌 This is your *order*

On behalf of the big razor companies - we are sorry you have been overpaying for razors all this time. <3 We've received your order, and will be sending you something really sharp & crazy smooth in the mail very soon.

Also, a portion of every order you make through Estrid will go to our charity partners Kvinna Till Kvinna and Fawcett Society, so thanks for being super awesome and making a difference.

Smooth, shaggy or in-between - welcome to the selflove club.

We are doing everything we can to deliver Estrid to your mailbox as soon as possible! You will receive a shipping confirmation once your order has been shipped.

Thank you!
See you in the bathroom. ❤️



Estrid Startkit Space x 1

**75
DKK**

1 razor handle
2 five-blade cartridges
1 shower hook

Ship to:

Seray Keskin, [redacted] Aarhus, 8000

Shipping method:

Free standard shipping

Email 1: Confirm the Order

The first email you send after a purchase is a Thank-you and order confirmation message. Nothing else matters.

It's important to show your customer, especially after a first purchase, that you can be trusted and that everything is okay.

After all, they've just handed their money and credit card information over to you. That's a vulnerable place to be with a new seller. Reward them for their confidence by showing them a full recap of what they've ordered plus their shipping address.

They'll likely want to check and make sure everything is correct.

In your order confirmation email, as long as you have all the basics in there, you can also try for an up- or cross sell. Try a product recommendation that well-complements the product your customer purchased.



Email 2: Thank You!

With the next email, you'll want to thank your customer for purchasing with you.

A great strategy for this email is to offer up more information about your brand and products, and maybe even include a discount for the next purchase.

There's something terribly tantalizing about a permanent life-time discount as a thank you for my initial purchase.

You don't have to go that far – but a little appreciation goes a long way. You could offer a multitude of value-adds to thank your customer, like free or reduced shipping on their next order, or a cool freebie *just for them*.

Email 3:

Ask for a Referral or a Review

If you didn't offer an incentive as a thank you in the last email, a discount is a great thing to exchange a review or referral for.

THE
BLACKENED
TEETH

Hi Whitney,

We hope you love your new products! If you have a few moments we would love to get your feedback. You also get points added to your Blackened Rewards account when you leave a review!

What do you think about your purchase?

Baroque Gothic Sconce



[Review now](#)

Not only did this email update on how many loyalty points were earned from the purchase, but it also asked me to review my recent order. It's pretty rare that a customer will come back to review a purchase on their own (unless it's really bad – and you don't exactly want that).

When to Send it:

It's important to have a good sense of your shipping times when you're setting up a post-purchase workflow.

There's nothing more *awkward* than when a customer receives an email asking for a review and they haven't even received their order yet.

Oops.

In general, you'll want to follow this:

- **Email 1:** (Order confirmation) Send it immediately.
- **Email 2:** (Thank you) 1-3 days after the purchase was made
- **Email 3:** (Ask for a review/referral) Choose about 1-4 days after when the order should have arrived.

5. Win Back / Reactivation

Win back is also known as a lapsed purchaser or reactivation workflow. No matter what you call it, it's mission-critical for the health of your email program.

The Goal:

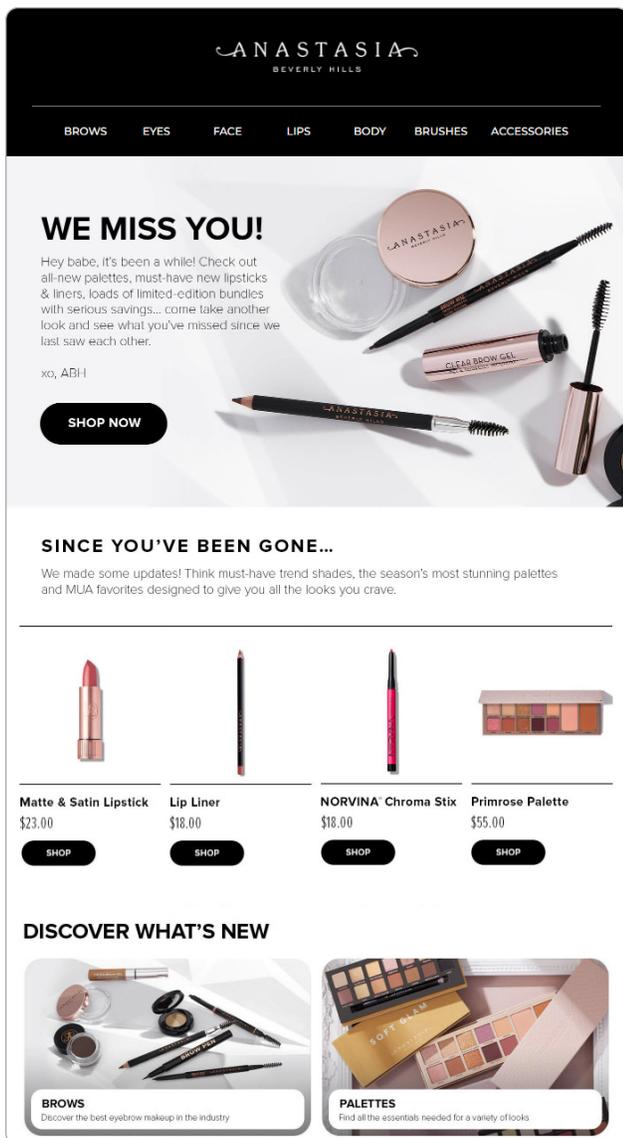
The goal for win back workflows is clear: this is your last attempt to bring back your customers into the fold. If this doesn't work, it's time to cut them loose.

Who to Send it to:

A win back campaign gets sent out to customers who haven't purchased or engaged with one of your emails in some time. Maybe they haven't even visited your site in months.

The point is, they're dead weight tying your list down – and potentially even affecting your deliverability. And the golden rule of email marketing is this: *we don't send emails to people who don't want to get them.*

If they've gone a long time without opening or clicking on your messages – they don't want to get your emails anymore. It's just that simple.



What to Send:

Email 1:

We miss you

Typically, you'll want to use language like "We miss you" in the subject line and email.

You can opt either to offer a discount incentive to come back and shop, or you can simply try a few product recommendations.

If you do go the incentive route, make sure you have that value-add in the subject line or preview text. Give your customer every opportunity to interact with you.

If they don't respond to this kind of campaign, it's now time to segment them out into their own list and remove them from your promotions and regular sends.

You can follow up with a last-chance style email. For example, you could put in the subject line “Is this really goodbye?”

Then, in the email copy, lay it out with a simple CTA: Do you want to keep hearing from us? If the customer doesn't click that CTA, they've no longer consented and it's time to let them go. There's nothing wrong with customers that fall out of the fold for a while and eventually find their way back.

When to Send it:

This is going to depend on your average purchase cycle. For example, if you have customers that are regularly opening and clicking emails but they're not purchasing, that's enough engagement to keep them around.

That goes double if you sell high-ticket specialty items that people don't need to purchase often.

But if they haven't purchased in a long time (as per your purchase cycle) *and* they're not opening or engaging with you, it's time to add them to your win back list.

Chapter 4:
Shopify Email vs
Third Party Shopify
Email Apps

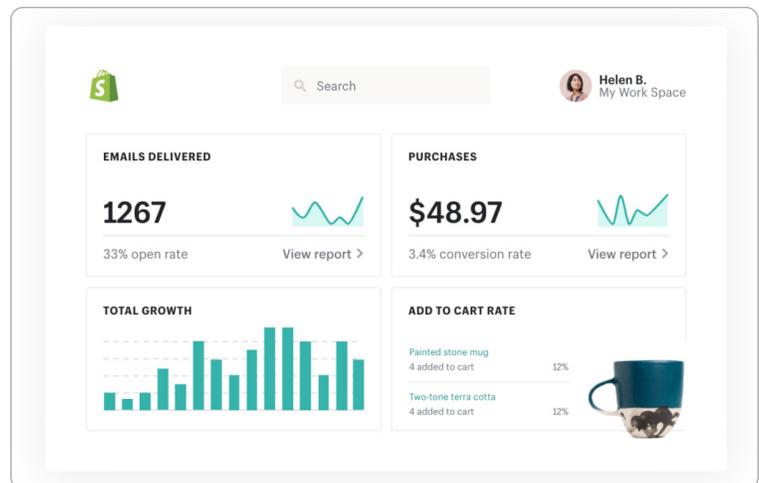
In April 2020, [Shopify released its own email marketing](#) tool within the Shopify platform.

Since Shopify Email is native to Shopify, it will automatically pull your store's logo, products, and branding elements and place them in your email, which can save you a ton of initial set-up time.

Rather than designing everything from scratch and having to double-check the product description, pricing info, etc., you get an email up and going in no time.

Everything is saved automatically, and you can go back whenever you'd like to make changes. And when it comes to sending emails, you can set up your campaigns so they include your domain name.

This is important because it reduces the likelihood of your messages ending up in spam folders, and it helps readers instantly recognize your brand, which can create stronger equity long-term.



The Pros and Cons of Using Shopify Email

Shopify Email does come with certain benefits for their ecommerce merchants.

Pros	Cons
Native integration means faster load times and potentially better analytics.	Basic marketing automation and triggers. If you want to use custom or more interesting triggers, you'll need a 3rd party ESP.
Templates you can plug and play in seconds, automatically integrated with your brand, products, and store.	Very few templates: Shopify emails all tend to look the same.
Free Emails every month (10K). The next 10,000 emails cost \$1 USD.	Lack of advanced features, as well as customer-focused analytics, and more sophisticated marketing automation features.

If you have really basic needs, Shopify email is the way to go. But if you need something a little more sophisticated, a third-party email marketing tool is a better choice.

For example, automation is possible with Shopify Email, but there's a lot less that you can control – like what triggers that automation workflow, how many messages it sends, when it sends those messages, etc.

And for a marketing channel we have control over, it makes perfect sense if you want *complete* control over it.

Luckily, there are tons of great email marketing tools that integrate almost as natively with Shopify as Shopify Email does.

The Pros and Cons of Using a 3rd Party Email Marketing Tool

A lot of what you get with a 3rd party email app for Shopify is really going to depend on the app itself.

But nearly all of them will be more sophisticated and have more features than Shopify Email does – it really just depends on how user-friendly you want it to be. Take the pros and cons of using Drip instead of Shopify Email, for example:

Pros	Cons
More templates for both email and automation workflows that make it easy to get started right away.	Too many options? You might feel a bit overwhelmed if you don't want a lot of templates and options for customization.
Integration that's almost as native as Shopify Email , letting you import all the aspects of your brand, store, and products.	A separate dashboard: You'll need to manage another tool to use Drip for email marketing.
Customer-focused analytics that go deeper than just basic transactional analytics.	Cost: It might cost a bit more to use a third-party ESP.
User-friendly: It's easy to get started and set things up – you can even opt to have us help you with migration.	

There are clear advantages and disadvantages to both using Shopify Email and a third-party ESP. It really depends on your needs. If you need something more basic, Shopify Email is probably the best choice. If you need something a little more robust, you're better off with an external email app.

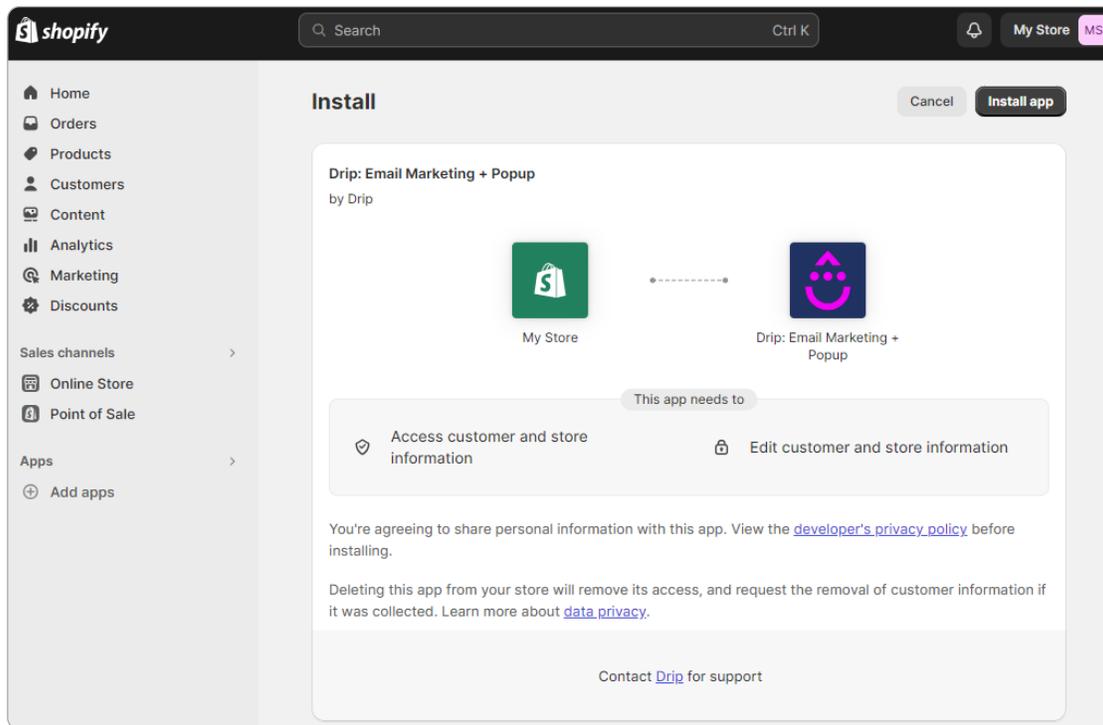
How to Integrate a Third-Party Email App for Shopify

Integration with a third-party email app shouldn't be difficult. It usually takes a few clicks and you're on your way.

First, go to the app store and choose an ESP to install. If you're not already signed in to Shopify and your email tool, do that to make the process easier.

The screenshot shows the Shopify App Store interface. At the top, there's a search bar with the text "Search apps, guides, and more" and buttons for "Browse apps", "Log in", and "Sign up". The main content area features the app "Drip: Email Marketing & Popups" with a purple icon. The app is priced at "\$39/month. 14-day free trial. Additional charges may apply." It has a rating of 4.5 stars from 78 reviews, developed by "Drip". Below the app details is a large promotional banner titled "Why Drip?" with a grid of icons representing features: Email Campaigns, Surveys, Customer Insights, Countdown timers, Cart abandonment, Workflows, Gamification, Product recommendations, and Shipping Bars. To the right of the banner are three smaller screenshots showing email templates and dynamic segments.

This will take you to the backend of your Shopify store, where you have to grant the app permission to access Shopify data.



And you should be good to go – it's really that simple.

Putting It All Together

Email marketing is one of the most powerful ways to connect with your customer, with the added bonus of having home-field advantage.

While email marketing and list building can be complex, it's only as complicated as you design it to be. If you follow just a few of these best practices and guidelines, you'll create an email program that will earn you more revenue hand over fist.

Start by weighing your options and finding an email tool that makes the most sense for what you need, both now and for the future. Then, set up the lifecycle-critical automation workflows you need to get started.

From there, set up your popups, static forms, and other email capture tools so you can begin pulling customers into your sales funnel.

At that point, you get to test, iterate, and play around with all of the moving parts until you have a funnel that converts.

About Drip

Drip is a marketing automation platform that helps ecommerce businesses build brand love. Connect with your customers, send relevant and timely messages, and increase your revenue with workflows that ensure no customer slips through the cracks.

Drip's easy-to-use platform helps you always look your best – no coding needed. We offer email and automation workflow templates so you can get up and running in minutes. Try it free for 14 days, and make the most of your Shopify store today!

Get My Free Trial!