

Marketing for E-commerce Stores — Workbook

This workbook turns the course into a working marketing operation for your own store. You will model your real unit economics and breakeven ROAS, structure a prospecting-and-retargeting paid funnel across Meta, TikTok and Google Shopping, stand up the core email and SMS retention flows and the list that feeds them, run a tracked influencer gifting programme, and lift average order value and repeat-purchase rate against a measured 90-day calendar. Work through one section per course module, then use the action plan and the editable spreadsheets to keep your acquisition profitable and your lifetime value rising. The templates leave every total and calculated cell blank for you to fill, so the numbers are always yours.

The Numbers That Govern a Store: Unit Economics and the Funnel

Model your store's real unit economics and breakeven ROAS so every later marketing decision is judged against profit, not revenue.

Exercise: Find the honest numbers your dashboard hides

Pull a recent representative period from Shopify or your platform (avoid an unusual sale month) and work out the true cost of one order, not the revenue. Use your real figures, not estimates, and do the subtraction by hand so you understand where the margin goes. The point is to see whether the marketing math currently closes.

- What is your AOV (total revenue divided by total orders) for the period, and how many unique customers placed those orders?
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- For one typical order, list every real cost: product cost, shipping you pay, packaging, payment-processor fee (about 2.9 percent plus 30 cents), and pick-and-pack, then state the contribution margin left.
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- What is your average number of orders per customer, and roughly what does that make your working LTV (contribution margin times orders per customer)?
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- Given that LTV, what is the most you can afford to pay to acquire a customer (a common target is LTV divided by 3), and how does that compare to your current CAC?

Worksheet: Store unit-economics model

Record the inputs and the figures you derive from them so you have one honest model to judge every decision against. Fill each input with your real value; calculate and write the derived figures yourself, and leave any cell blank until you have the number.

AOV (total revenue divided by total orders)

Product cost per typical order

Shipping you pay + packaging per order

Payment-processor fee per order (about 2.9% + \$0.30)

Contribution margin per order (you calculate: AOV minus the costs above)

Contribution margin as a percentage of AOV (you calculate)

Average orders per customer (total orders / unique customers)

Working LTV (you calculate: contribution margin per order x orders per customer)

Target CAC (you calculate: often LTV / 3) and current actual CAC

Breakeven ROAS (you calculate: 1 / contribution-margin percentage)

Checklist: Foundations-in-place check

- You know your AOV from real recent data, not a guess
- You have subtracted product, shipping, packaging and processing fees to get contribution margin per order
- You have a working LTV figure based on average orders per customer
- You have set a target CAC below LTV and compared it to your actual CAC
- You have calculated your breakeven ROAS from your margin
- You know your current site conversion rate and whether it is near the 2 to 3 percent norm
- You can state which of the three jobs (acquisition, conversion, retention) is currently weakest

Profitable Paid Acquisition: Meta, TikTok and Google Shopping

Build a prospecting-and-retargeting paid funnel across the three channels that drive most e-commerce sales, judged against your breakeven ROAS.

Exercise: Design your Meta account structure and tracking

Plan the data layer and the campaign structure before you spend, because Meta optimising on bad data wastes budget. Map your audiences and decide your budget split. Confirm the tracking is actually firing before launching.

- Is the Meta Pixel and the Conversions API installed and verified (Purchase, Add to Cart, View Content events firing in Events Manager)?
- What custom audiences will you build for retargeting (site visitors, video viewers, add-to-carts, past purchasers), and what window for each?
- How will you split budget between prospecting and retargeting, and why that split for your store?
- What is your breakeven ROAS, and what ROAS will you require before scaling a prospecting campaign by about 20 percent every few days?

Worksheet: Paid-channel plan across Meta, TikTok and Shopping

Plan each channel's role, setup and target so they work as one funnel rather than competing. Fill each field with your decisions; leave any result or actual-ROAS column blank until campaigns have run.

Meta: tracking status (Pixel + CAPI), prospecting vs retargeting budget split, target ROAS vs breakeven

TikTok: Pixel/Events API status, Spark Ads source posts, weekly creative count, target ROAS

Google Shopping: Merchant Center connected (Y/N), feed disapprovals outstanding, campaign type (Shopping or PMax), target ROAS goal

Funnel role of each channel (top, middle or bottom of funnel)

Hook or angle to test first per channel

How you will cross-check platform ROAS against blended MER

Actual ROAS / CAC after first run (fill in later)

Exercise: Clean your Google Merchant Center feed

Treat the product feed as the campaign, because in Shopping your data is your targeting. Pick your ten best-selling products and rewrite their feed data to win impressions. Actually edit them in your store or feed tool, not just on paper.

- Which products have feed disapprovals or missing GTINs, prices or images in Merchant Center, and what is the fix for each?
 - For your top ten products, how will you rewrite each title to front-load brand, product type and key searchable attributes (e.g. Mens Waterproof Hiking Boot Brown Size 10)?
 - Are your Google product categories and detailed, keyword-rich descriptions set correctly for those products?
 - Which low- or no-margin products will you exclude from paid Shopping, and which queries will you watch in the search-term report?
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Checklist: Paid-acquisition launch check

- Meta Pixel and Conversions API installed, domain verified, conversion events prioritised
- Prospecting and retargeting separated into distinct campaigns with sensible budgets
- TikTok set up with the Pixel/Events API and Spark Ads using authentic creator-style posts
- A weekly creative pipeline exists rather than one-off ads
- Merchant Center connected, feed disapprovals cleared, titles rewritten for search
- Every campaign has a target ROAS aligned to your breakeven, not a generic number
- You cross-check platform ROAS against blended MER and real store revenue
- Scaling is done gradually (about 20 percent every few days) to avoid resetting learning

Retention and Owned Channels: Email and SMS That Keep Customers

Build the always-on email and SMS flows that earn the majority of email revenue, and grow a compliant list you own.

Exercise: Build your core flows before any campaign

Stand up the automated sequences that earn around the clock, in the order that pays. Choose an e-commerce-native tool (Klaviyo, Omnisend, Drip) so flows can use real store data. Map the timing and content of each flow specifically, not vaguely.

- What incentive will your sign-up pop-up offer to trigger the welcome series, and what are the 3 to 5 emails in that series?
- What are the three messages and their timing in your abandoned-cart flow (a reminder within an hour, objection-handling next day, an incentive after a couple of days)?

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- What does your post-purchase flow say at each step (thank-you and reassurance, product education, then a cross-sell or replenishment nudge), and when does each send?
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- Which steps will also send an SMS to opted-in subscribers, and why those moments?
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Worksheet: Email and SMS flow plan

Document each core flow so it can be built and maintained. Fill the trigger, message sequence and timing for each; leave any performance column blank until the flow has run.

Welcome series: trigger, number of emails, offer delivered, content of each step

Abandoned-cart flow: trigger, 3-message sequence and timing, where an incentive appears

Browse-abandonment flow: trigger and softer nudge content

Post-purchase flow: thank-you, education, and cross-sell or replenishment steps with timing

Winback flow: inactivity window (e.g. 60 to 120 days) and re-engagement offer

SMS steps added (which flows, what message) with opt-in confirmed

Tool used (Klaviyo / Omnisend / Drip) and store integration verified

Revenue or recovery per flow after launch (fill in later)

Worksheet: List capture and compliance setup

Record every place you capture subscribers and confirm you are compliant and deliverable. Fill each field with your actual setup so no capture point is missed and no rule is broken.

Pop-up sign-up incentive and the discount or offer used

Additional capture points enabled (footer, checkout opt-in, back-in-stock, quiz/spin-to-win)

SMS consent collected separately and explicitly (yes / no) with STOP opt-out wording

Email unsubscribe link present and honoured promptly (yes / no)

Sending domain authenticated with SPF, DKIM and DMARC (yes / no)

Suppression rule for chronically unengaged contacts (after how many months)

Applicable regulations noted (TCPA / CASL / CAN-SPAM / GDPR) and how you comply

Checklist: Retention live check

- [] An e-commerce-native tool is connected and reading real store data (orders, browsing, value)
- [] A welcome series, abandoned-cart flow and post-purchase flow are all live
- [] Browse-abandonment and a winback flow are built
- [] SMS steps are added to high-intent flows for opted-in subscribers only
- [] A sign-up pop-up with a real incentive plus additional capture points are running
- [] SMS uses express written consent and a clear opt-out; email has a working unsubscribe
- [] The sending domain is authenticated and unengaged contacts are periodically suppressed
- [] Flows are personalised with the product and history data the tool already has

Influencers, AOV and the Repeat-Purchase Engine

Run a tracked influencer gifting programme, raise average order value, and engineer repeat purchases against a measured 90-day plan.

Exercise: Brief one trackable creator gifting collaboration

Plan a single gifting partnership end to end so it produces performing content and you can prove whether it worked. Favour micro-creators on fit and engagement over follower count. Make it specific enough to send today, including the tracking and disclosure.

- Which micro-creator (a few thousand to ~100k engaged followers) fits your customer and brand, and what real engagement signals confirm it?

• Is the deal product-only gifting or product plus a fee, and what is the budget?

• What is the short brief: product to feature, one or two key messages, must-mentions, required tags, and the unique code or tracked link?

• How will you secure usage rights to repurpose the best content as paid Meta and TikTok creative, and what disclosure (ad / gifted / sponsored) is required?

Exercise: Choose your AOV levers and protect the margin

Pick the average-order-value tactics that fit your products and model the trade-off so you raise profit, not just the headline number. Set up at least one on-store this week. Check each lever against contribution margin, not revenue.

- What free-shipping threshold sits just above your current AOV, and does the extra item's margin exceed the shipping you would absorb?

• Which cross-sells and bundles will you add (full-margin complements rather than deep discounts), and where (product page, cart, post-purchase)?

• What one-click post-purchase upsell will you offer on the thank-you page, and with which tool (ReConvert, AfterSell, Zipify OneClickUpsell)?

• How will you test one change at a time while watching AOV alongside contribution margin per order?

Worksheet: 90-day retention and repeat-purchase plan

Turn the whole operation into one coordinated quarterly rhythm with named owners. Fill the owner, timing and target for each; leave any actual-result or rate columns blank to complete as the quarter runs.

Acquisition channels running this quarter, budgets and owner

Email and SMS campaigns (on top of always-on flows): topics, send dates, owner

Creator gifting each month: how many, who sources, content-rights owner

AOV mechanics live (threshold, bundles, post-purchase upsell) and owner

Repeat-purchase mechanics live (loyalty, replenishment, subscriptions, winback) and owner

Seasonal anchors this quarter (sale, launch, holiday) and dates

Metrics reviewed monthly: MER, contribution margin per order, repeat rate, LTV-to-CAC (fill values in later)

Checklist: Engine and measurement check

- At least one micro-creator gifting collaboration is briefed, disclosed and trackable with a unique code or link
- Usage rights are secured so winning creator content can run as paid ads
- A free-shipping threshold and at least one cross-sell or bundle are live and margin-checked
- A one-click post-purchase upsell is active on the thank-you page
- Repeat-purchase mechanics (loyalty, replenishment, subscriptions or winback) are in place for your product type
- A 90-day calendar coordinates acquisition, retention, influencers and AOV with named owners
- A monthly dashboard tracks MER, contribution margin, repeat rate, orders per customer and LTV-to-CAC
- Tactics that widen the gap between customer cost and value are doubled down on; the rest are dropped

Your Action Plan

1. Pull a recent period from your store and build the unit-economics model: AOV, contribution margin per order, average orders per customer, working LTV, target CAC and breakeven ROAS.
2. Install and verify the Meta Pixel and Conversions API, then structure the ad account into separate prospecting and retargeting campaigns with a sensible budget split.
3. Set up TikTok with the Pixel or Events API and Spark Ads, and start a weekly pipeline of authentic, creator-style video creative.
4. Connect Google Merchant Center, clear every feed disapproval, and rewrite your top product titles to front-load brand, type and searchable attributes.
5. Choose an e-commerce-native email and SMS tool and build the core flows in order: welcome series, abandoned-cart, post-purchase, then browse-abandonment and winback.
6. Launch a sign-up pop-up with a real incentive plus additional capture points, collect SMS consent separately, and authenticate your sending domain (SPF, DKIM, DMARC).
7. Brief and run one trackable micro-creator gifting collaboration with a unique code, clear disclosure, and usage rights to repurpose the content as paid creative.
8. Set a free-shipping threshold just above AOV and add cross-sells, a bundle and a one-click post-purchase upsell, checking each against contribution margin.
9. Put repeat-purchase mechanics in place for your product type: loyalty, replenishment reminders, subscriptions where they fit, and a winback flow.
10. Build a 90-day retention calendar with named owners and a monthly dashboard tracking MER, contribution margin, repeat rate and LTV-to-CAC, and review it each quarter.

