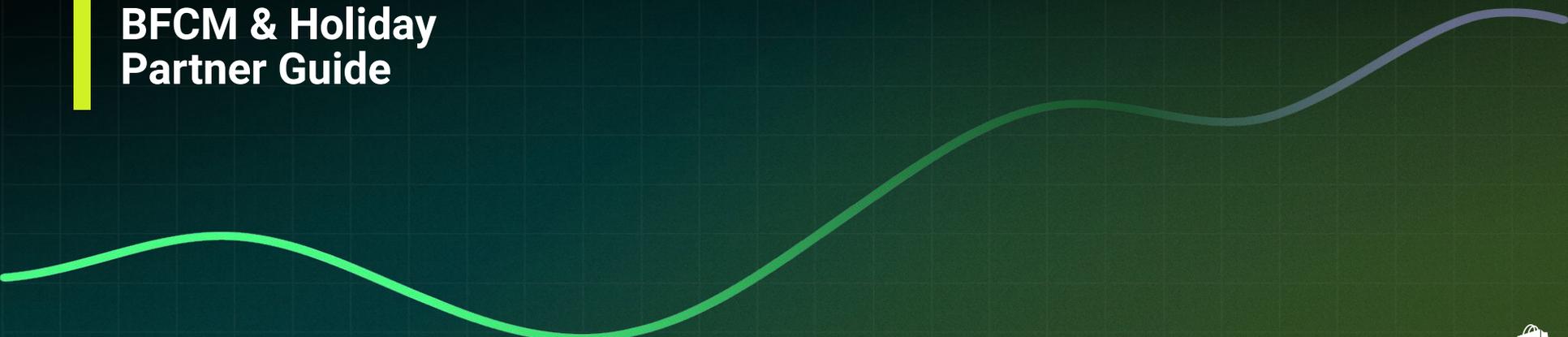


Preparing your Merchants for Peak Season



**BFCM & Holiday
Partner Guide**



Shopify Academy

This guide is a summary of the information found in the **Prepare for a Successful Peak Season 2023** course on Shopify Academy.

Click the link below to see the full course. We recommend that both partners and merchants take this course to prepare for a successful peak season.

[Link to Course](#)



What's in this guide

01

2023 Trends and insights

02

Promotional strategies

03

Peak Season readiness

04

BFCM code freeze & incident response

05

Additional learning

01 | 2023 Trends and insights



Record-breaking
\$190 billion with a
year-over-year
growth of 32%

Online sales during the 2022 holiday season

Smashed records
with **\$11.3 billion** of
online spending, a
5.8% increase

Cyber Monday 2022 over 2021

63% of shoppers
plan to start their
holiday shopping
earlier this year

Indicative of higher demand for online purchases in 2023

Commerce insights

Positive signals despite inflation

Conscious consumption

However, consumers are still cautious

A truly hybrid retail audience

Discounts alone won't win their wallet

Demand for convenience outweighs data privacy concerns

Shipping anxiety

Commerce trends

AI tooling

Live commerce

Seamless conversion

Inventory and shipping transparency

Payment options and flexibility

Social channel diversity

Amplified voices

Personalization as table stakes

Mobile shopping will continue to grow

Real-time customer service/information is essential

Free shipping is sticky

Don't avoid returns

Common barriers

Automate tasks

New customers

Accelerated checkout

Cost to acquire customers

Fulfillment efficiency

Predictable revenue

Incentivize the right fulfillment behavior

Social media-tainment

Influencers

Buyer-conscious shopping

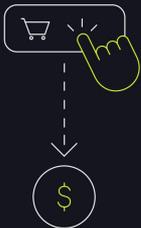
Dynamic experiences

02 | 'Tried-and-True' promotional strategies



Discounts

Buy now, pay later



Shoppers like 0% APR promotions because they feel similar to discounts, without the need to discount your product. This helps immediately free up cash flow for the customers.

Pro tip! Shop Pay Installments is down to raise AOV by up to 50% and increase checkout time by 30%.



Limited quantity exclusives (flash sales)

Consider artificially keeping the quantity of a new, exciting product below the expected demand in order to generate buzz and exclusivity. Launch a flash sale and see how fast a merchant can sell out of all of their stock for that item.

Pro tip! Flash sales can be automated with Launchpad by scheduling product launches, price changes, and theme updates ahead of time.

Gift with purchase



Gift with purchase (GWP) promotions can be incredibly motivating to customers and should be a highly recommended alternative to sitewide discounts, as they provide a way for customers to feel like they're 'scoring a great deal', while helping the retailer to not give away margin unnecessarily.

Pro tip! [Shopify Flow](#) can be used to automate the process of adding a line item to an order.



Bundles

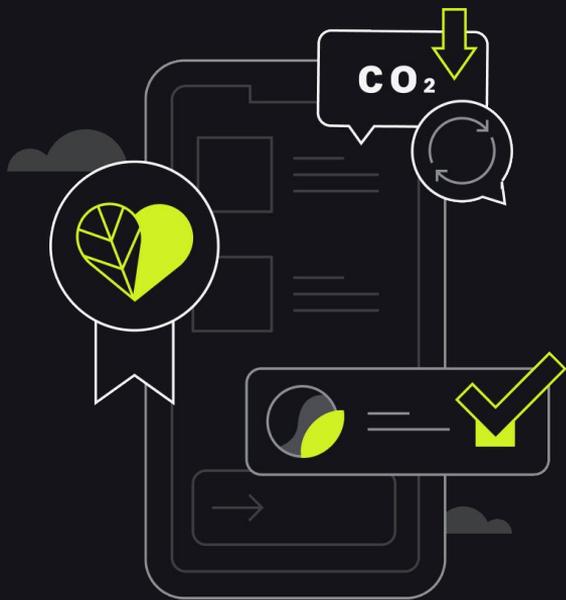
Consider bundles in order to increase average order value, spread profit margin and losses across the entire order (for old stock), or to entice customers to try a new product.

Examples include:

- A 'buy the look' capsule wardrobe bundle (ie: a skirt, a sweater, and a scarf)
- A "free gift" offer in order to spread the margin losses across the order
- Buy X, Y, and Z, Get W% off and/or Buy X, Y and Z, Get \$W off

Ethical promotions

Create discounts like choosing your own discount, pay what you can, or donate to a charity with your order. It's a way to make customers feel good about their purchase and acknowledges the turbulent times we've all been experiencing in the past few years.



Shopify Planet app

With Planet, every time your merchant ships an order, they will support some of the most promising climate solutions on Earth. Each project has been vetted by the [Shopify Sustainability Fund](#), which has committed more than \$30 million to these same projects.

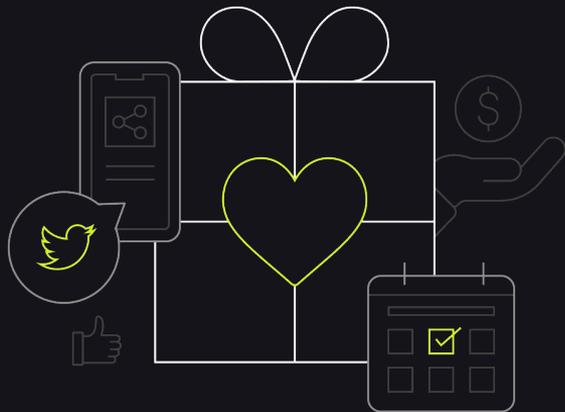
Every month, Planet calculates the total shipping emissions generated by merchants' orders and charges based on the price of the Planet subscription plan selected. The Planet dashboard gives merchants access to real-time data showcasing the total impact of their efforts over time, which they can then share with their customers.

Ethical brands that don't discount

Some companies opt out of discounting as a way to better reflect their beliefs and goals. In many cases, going this route has increased customer loyalty and connection while creating a compelling brand story.

Examples of alternative discounting:

- Shutting down for the day and urging customers to spend time outdoors, rather than shopping
- Encouraging customers to donate to charity instead of making purchases
- Pledging to donate a percentage (in some cases 100%) of BFCM profits to a cause the brand supports
- Not offering a discount, but bringing back old styles or limited edition products for the day
- Planting trees for every item purchased



Giving Tuesday

There's a big focus on the holidays - Black Friday and Cyber Monday - but merchants can also take advantage of building their brand image by participating in Giving Tuesday, the day after Cyber Monday.

Some brands have truly championed the giving spirit by turning their Black Friday campaigns into massive charitable drives. Merchants can donate a percentage or dollar amount per sale to an organization of their choosing.

VIP and delight



VIP access

Celebrating customers, even in small ways, can have a tremendous impact on retention and customer lifetime value. A merchant's top 20% of customers likely bring in the majority of their revenue, so let's celebrate them by extending exclusive promotions to VIP customers.

Ideas:

- Offer premium shipping rates like free express delivery or discounted shipping.
- Provide exclusive VIP access to locked content on your site. Locksmith or EasyLockDown are good apps to recommend for this. (Bonus points: Create mystery and drive traffic to the store with an email campaign guiding customers to the locked content)
- Hold a virtual event offering top customers the opportunity to see holiday products first.
- If there's a points-based loyalty program in place, increase the amount of loyalty points earned on every dollar based on the VIP tier the customer has reached.

Moments of delight

Discounts aren't the only way you can celebrate customers this season. Here are some creative ways you can give back to the best shoppers:

Ideas:

- Make a donation in a customer's name to a charity your brand supports
- Send handwritten thank you cards with orders
- Surprise customers with hidden gift cards in their orders
- Offer gift-wrapping services
- Feature a customer on your website in a story of the month
- Hand deliver a local VIP their products in person on the same day they ordered (Bonus points: Get it on video for socials!)
- Create a unique "thank you" interaction for every purchase a customer makes (Bonus points: Automate these with [Shopify Flow](#))



03 | Additional strategies for Peak Season readiness



01 | Ensure financial flexibility

Shopify Capital

Invest with confidence in inventory, marketing, and shipping this season.

What does the product do?

- Offers up to \$5M
- Fast deposits
- Competitive pricing
- Equity-free

Daily sales	\$40.00
 Green Florals x1	
Repayment	-\$4.00
Balance	\$36.00

Available to select, prequalified Shopify merchants in the US, Canada, the UK, and Australia. [Click to learn more.](#)

Shopify Credit

Leverage a pay-in-full business credit card that offers quick access to funding and rewards that maximize savings.

What does the product do?

- No fees, no interest, no personal credit checks
- Cashback rewards designed for businesses
- Free employee cards for business purchases
- Credit lines that grow with your business



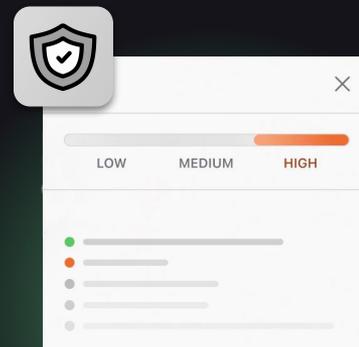
Available to select, pre-qualified Shopify merchants in the US. [Click to learn more.](#)

Fraud Control

Protect your increased spending this holiday season by maximizing revenue and blocking fraud with built-in protection tools.

What does the product do?

- Custom rules to control orders
- Set up allowed and blocked users
- Advanced fraud analytics and tracking



Available to select, pre-qualified Shopify merchants in the US. [Click to learn more.](#)

02 | Optimize merchandising strategy

Bundles app

Increase average order value, curate a better buyer experience, and sync inventory in real-time.

What does the product do?

- Fixed bundles and multipacks
- Mix-and-match bundles through the Shopify App Store for more advanced needs
- Custom bundles using our APIs (exclusive to Shopify Plus)



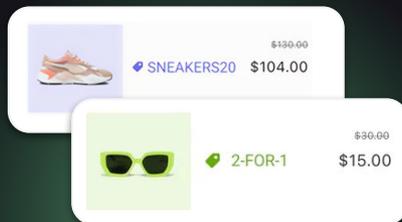
Available now globally for all eligible stores. [Click to learn more.](#)

Discounts

Drive increased sales for your store, while helping customers save on their holiday shopping.

What does the product do?

- Combines multiple order and product-based discounts in the same order
- Ensures customers enjoy the maximum discount possible
- Sets up automatic discounts and discount codes to work together



Available globally. [Click to learn more.](#)

Shopify Collective

Connect with other Shopify brands to sell each other's products this season.

What does the product do?

- **Retailers:** Expand your catalog in minutes without buying inventory
- **Suppliers:** Sell your products through other Shopify stores and ship directly to customers



Available now for merchants in the US based on eligibility requirements. [Click to learn more.](#)

03 | Enhance site experience to increase conversion rates

Shopify Magic

Make life easier this holiday season with AI-powered features so you can spend less time on manual tasks, and get more done, faster.

What does the product do?

- Writing made easy with smart replies and engaging emails
- In-admin setup
- Mobile and flexible



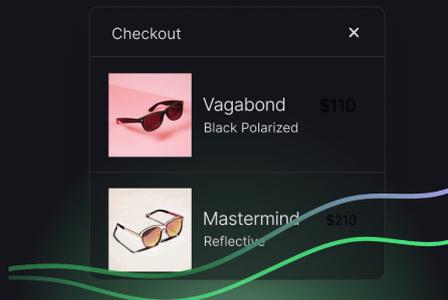
Available now. [Click to learn more.](#)

Shopify Checkout

Proven reliability and flexibility to customize what you need for your unique business.

What does the product do?

- Optimized for conversion.
- Streamlined, faster, friction free
- Shorter load times
- Automated credit card name filling.
- Intuitive by design



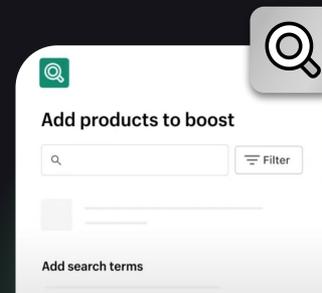
[Click to learn more.](#)

Search & Discovery App

Increase purchases by helping customers find products they love at the moment they're most likely to buy them.

What does the product do?

- Custom filters for multiple search criteria
- Synonym groups, so product descriptions match the terms shoppers are using
- Product boostings to feature products
- Analytics to understand the stores' search performance



Available now. [Click to learn more.](#)

04 | Find more customers on top ad platforms

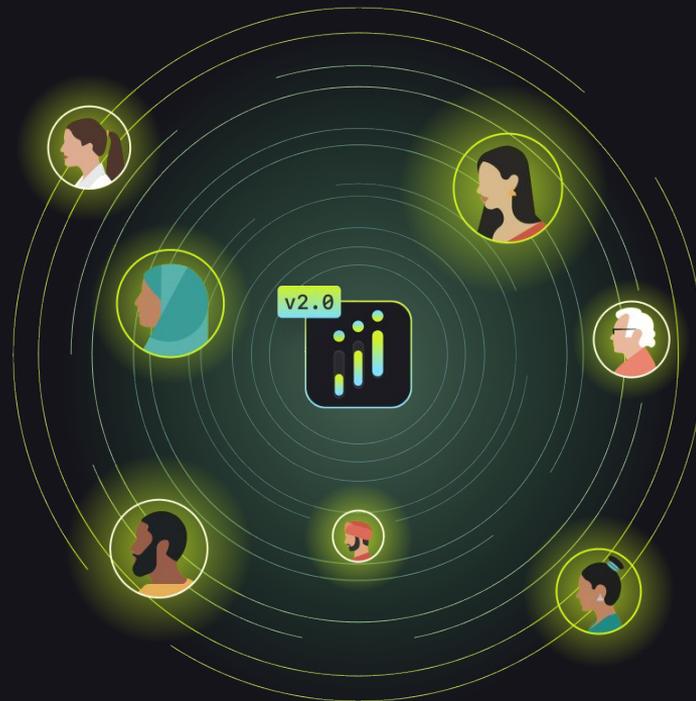
Audiences

Leveraging the scale and volume of commerce that happens on Shopify, this app helps you improve your ad performance across Meta, Google, Pinterest, TikTok, Snapchat, and Criteo.

Get your ads in front of the most interested buyers and maximize your results with custom audience lists and performance benchmarks generated by powerful Shopify algorithms and millions of commerce signals.

What does the product do?

- Targets people who are more likely to buy with audience lists built specifically for your store
- Cuts customer acquisition costs using our best performing algorithms yet
- Moves faster with automatic audience list creation, exporting, and refreshing
- Reaches the right audiences across the funnel with lists that support multiple goals, from awareness to conversion
- Refines your ad strategy with access to performance benchmarks of similar stores, only available on Shopify



05 | Expand reach through new sales channels

Marketplace Connect

Boost sales this season by selling across top marketplaces and managing it all in one place.

What does the product do?

- Connects your product catalog to top global marketplaces like Amazon, eBay, and Walmart
- Manages and syncs listings, orders, inventory, and performance reporting across channels
- Boosts conversions by tailoring the product experience to each online marketplace



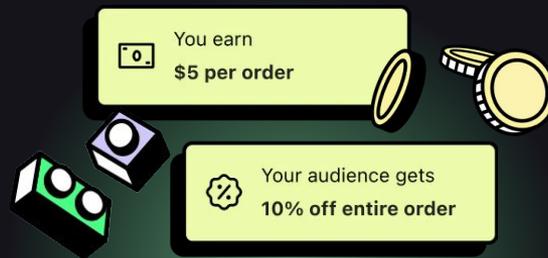
Available now globally. [Click to learn more.](#)

Shopify Collabs

Stand out during this busy time and drive more sales with creators who love your products.

What does the product do?

- Offers an all-in-one solution to find influencers and run an affiliate program that boosts sales – all within your Shopify Admin
- Creates a new affiliate tier to offer higher incentives and discounts for your products to help your sales stand out



Available now globally. [Click to learn more.](#)

06 | Double-down in-person selling

Shopify POS

Shopify POS syncs with Shopify to track your orders and inventory across your retail locations, online store, and other active sales channels. You can choose your level of POS app subscription for each of your locations to ensure all individual retail needs are met.

What does the product do?

- Seamless shopping experiences in-store and online
- Buy now, pay later - convert and increase AOV
- Gift cards
- Mobile POS hardware



Available now globally. [Click to learn more.](#)

Shopify POS Go

New devices for in-person selling in Canada. Canadian businesses can now purchase POS Go, our all-in-one POS device for on-the-floor selling and checkout. For an iOS and Android compatible card reader, we're introducing the WisePad 3, which features a customer display and integrated PIN pad.

What does the product do?

- Allows merchant to create a custom point-of-sale setup
- Enables sales from anywhere with mobile hardware



Available in US, Canada, UK & Ireland. [Click to learn more.](#)

07 | Fine-tune shipping strategy

Shopify Shipping

Reduce the cost of shipping and offer an exceptional customer experience this holiday season with industry-leading rates from Shopify Shipping.

What does the product do?

- Amazing savings with USPS, UPS, DHL Express, and Canada Post through Shopify Shipping
- Customize your shipping rates (flat, free, carrier-calculated) and carriers by zone
- Increase average order value with free shipping thresholds



Available now in the US, CAD, UK, AUS, IT, SP, and FR. [Click to learn more.](#)

Shopify Markets Pro

Along with tools that help you set up and manage selling in international markets, Shopify Markets Pro offers additional features powered by Global-e to help you scale operations directly from your Shopify admin.

What does the product do?

- Offers fast, affordable shipping
- Allows for local payment methods
- Incorporates duties and tax compliance, and customs pre-clearance
- Filters for regional import and carrier restrictions
- Mitigates financial exchange risk, fraud, and chargebacks



Early access for eligible merchants. [Click to learn more.](#)

08 | Streamline fulfillment to reduce delivery lead times

Shop Promise

With Shop Promise you can turn more visitors into customers by committing to providing reliable and fast delivery, and show it off with the Shop Promise badge on your store.

What does the product do?

- Displays expected delivery dates
- Highlights fast and free shipping
- No extra fees or subscriptions



Early access available to merchants who 1) fulfill orders from at least one US location and 2) have Shop Pay activated. [Click to learn more.](#)

Smart Order Routing

Multiple warehouse locations? Deliver orders faster and reduce shipping costs this holiday season.

What does the product do?

- Automatically prioritizes the best location to fulfill an order from
- Rank a set of order routing rules and/or locations, in order of priority
- Stay within destination market
- Minimize split fulfillments



Available to merchants with 2+ fulfillment locations. [Click to learn more.](#)

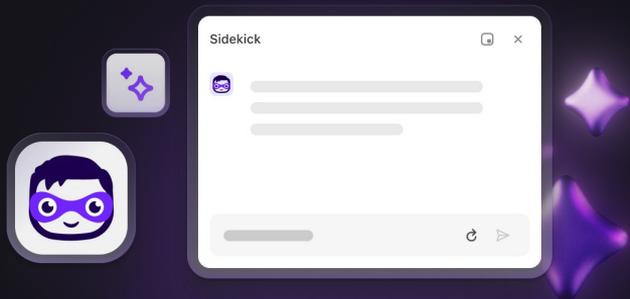
09 | Leverage analytics to maximize performance

Shopify Sidekick

The first AI-enabled commerce assistant who helps you operate and grow your business.

What does the product do?

- Achieves more, faster
- Accesses commerce data and expertise
- Unlocks creativity
- Enhances security



Early access to select merchants. [Click to learn more.](#)

Shopify QL Notebooks

Combine metrics from different business domains so you can explore, visualize, and analyze shop data to make better decisions. You can add business context through images or text, all within a single interface.

What does the product do?

- Visualizes and analyzes shop data with a powerful query editor
- Gets answers quickly, using a query language built with commerce syntax
- Uses the presentation mode to share your data story with business stakeholders



Available to Plus merchants globally. [Click to learn more.](#)

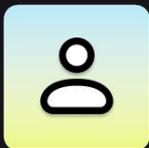
10 | Turn first-time buyers into repeat customers

Shopify Marketing tools

Start and scale your marketing on Shopify by reaching more customers and boost sales with connected marketing tools that work seamlessly together. Create loyal customers and keep them coming back with the latest updates to segmentation, Shopify Inbox, Shopify Email, Shopify Forms, and automations.

Segmentation

With Segmentation you can create and engage unique customer groups.



Shopify Inbox

With Shopify Inbox you can convert more customers through chat.



Shopify Email

With Shopify Email you can create, send, and manage custom communications.



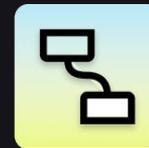
Shopify Forms

With Shopify Forms you can grow your marketing lists and convert new leads.



Automations

With Automations, you can set up effective marketing workflows.



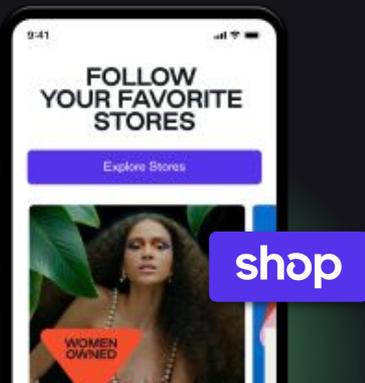
11 | Activate Shop for more mobile sales

Shop App

Reach and retain millions of mobile shoppers as they do their holiday shopping.

New updates:

- Customizable app storefronts
- Reviews syndication
- Increased shopping feed personalization



Available now in countries with the Shop app. [Click to learn more.](#)

Shop Cash

Provide real incentives for buyers and quality acquisitions for merchants by boosting the value of a buyer's Shop Cash at checkout. Offers are low-effort, risk-free, and growth-orientated, and merchants only pay when a new customer converts.

What does the product do?

- Grows your business sustainably
- Promotes your brand to millions of buyers across push, email, and the app
- Attracts high-value buyers and expands your customer base by incentivizing purchases
- Provides marketing opportunities by re-engaging existing customers



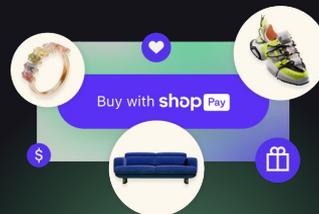
Available to [eligible merchants](#) who meet a set of requirements. [Click to learn more.](#)

Shop Pay

The internet's best-converting accelerated checkout that allows shoppers to speed through every purchase with one tap. Shop Pay unlocks your brand's potential to acquire, convert, and retain more customers.

What does the product do?

- Boosts conversions across channels
- Reaches 100M+ global shoppers to drive growth
- Secures against fraud-based chargebacks (US only)
- Fights fraud with free, built-in protection tools (non-US)
- Builds brand loyalty and reduce store's carbon footprint



[Click to learn more.](#)

Search & Discovery App

Available both online and in-store, Shopify's native buy now, pay later solution lets shoppers pay over time with interest-free payments, or monthly installments up to 24 months.

What does the product do?

- Allows customers to maximize their budgets, and increase your AOV by as much as 50%
- Reduces cart abandonment rate by up to 28%
- Integrates seamlessly with online store and Shopify POS
- Lets you get paid up-front

shop Pay

installments in partnership with **affirm**

US merchants using Shop Pay. See [eligibility criteria](#) here. [Click to learn more.](#)

04 | BFCM code freeze & incident response



BFCM code freeze

Shopify understands the importance of a smooth shopping experience for both our merchants and their customers. To ensure platform stability, **we enforce a code freeze during the week leading up to BFCM**. This means that we don't make any modifications to the product or infrastructure, except for addressing bugs, incidents, and implementing marketing code specifically designed for peak season.

Throughout the BFCM period, **November 23-28**, we continue to uphold the code freeze and only introduce business-critical changes if they are absolutely necessary. These changes undergo a rigorous approval process to ensure their significance and impact on your store. The result of these efforts is a stable platform for you and your customers during the busy peak season.

BFCM incident response

Shopify's teams prepare for BFCM with the intention of it being "just another week at Shopify," with the same platform reliability and speed that our merchants and partners count on throughout the year, regardless of the increased traffic and sales.

With that said, **if a merchant experiences an issue during BFCM**, below are our recommendations for connecting with Shopify Support:

- Refer to Shopify's [status page](#) for updates.
- Encourage your Shopify Plus merchants to contact support in the Admin.
 - Click Profile > Contact support
 - Your merchants will have the option to connect with our support team via live chat, email, or phone
- Merchants can also visit help.shopify.com/support.
 - Use the search bar at the top of the page
 - Ask the virtual assistant to speak to a Plus Support Specialist
 - Chat with us
 - Request a callback

Plus Support

Offered 24/7

1. Login to merchant Admin
2. Click profile (top right)
3. Contact Support

Phone

Chat

Email

Client/Merchant admin questions

General support or troubleshooting when logged into merchant Admin.

Partner Support

Offered 24/7

1. Login to Partner Dashboard
2. Click Support tab
3. Contact Partner Support

Chat

Email

Partner account questions

Partner dashboard, account settings, payouts and revenue share, Partner Program offerings, events, and more.

Developer Support & Solutions

1. Login to Partner Dashboard
2. Click Help Center
3. Select **API Support**

Email

Community

App bugs / API Troubleshooting

Technical troubleshooting and solutioning

App development, theme development, bug reporting, developer tools, and more.

Partner Solutions and Services

Email

Book via Calendly for Plus Office hours

Solutioning, consultancy, and best practices

05 | Additional learning



Additional learning

Shopify Editions **Master the Holidays**
Top 10 strategies for a successful season

[Article](#)

[Webinar](#)

Prepare for a Successful Peak Season 2023
course on Shopify Academy

[Academy course](#)

BFCM **2023 Planning Recommendations Guide**
for internal planning purposes

[Planning guide](#)

Peak Sales Season Checklist to prepare for
BFCM and other sales events

[Slide deck](#)

Klaviyo's Preparation Guide for
BFCM 2023

[Web guide](#)

Loop's BFCM Tactics
Slide Deck

[Slide deck](#)