



WORKBOOK

Start & Scale by Foundr

with Gretta van Riel

foundr

WELCOME

Meet your instructor:

Gretta van Riel

Founder of SkinnyMe Tea, Dropbottle, Skintox and The 5th

As the founder of 4 multi-million dollar ecommerce businesses, I've been through it all. The framework I've developed through that experience is exactly what I'm going to break down for you in this course.



Gretta van Riel

*Founder of SkinnyMe Tea, Dropbottle, Skintox and The 5th
Instructor of Foundr's Start & Scale course*

ABOUT THE COURSE

This course will give you everything you need to know and do to start and scale a successful online store. There's nothing better than building a brand and a product you can call your own. Whether you already have one or are just starting out, if you follow the step-by-step framework laid out for you, you'll be able to transform your business into something bigger than yourself.

From validating your idea and setting up your ecommerce website to manufacturing and processing orders, you're about to learn the proven methods to ecommerce to success. All you have to do commit to the challenge and follow the steps.

What to expect

My goal is to bring my real-world experience of starting my ecommerce empire from scratch to this course. I boil my strategies down into actionable, easy-to-digest exercises and examples that any entrepreneur and business owner can follow and apply to get massive results.

Each lesson comes with:

- A bite-sized video
- Action items
- A corresponding workbook
- Tools & Resources

Who this course is for?

This course is for people who want to create an ecommerce business or those who have an existing business and need that extra push to grow it.

How to get the most from the course?

In order to maximize your results and get sales upon launch, we strongly recommend that you:

- Mark your calendar to block out a daily slot for at least 1 hour to fully commit to learning. Remember, success is a habit.
- Watch every video in the course, take lots of notes, do the workbook exercises and check out the tools and resources provided.
- Most importantly — TAKE ACTION. Nobody said building a successful ecommerce business was easy, and you will at times run into blockers. But action now is better than perfection later.

By the end of this course, you'll have a comprehensive understanding of starting and scaling an online store! It's time the world experiences your amazing ideas!

*Cheers to your success,
Gretta and the Foundr Team*

Course objectives

By the end of the course, you should have:

- **A perfectly validated product idea** that is unique and different from others in the market without necessarily needing to reinvent the wheel.
- **A rock solid brand.** You'll learn to build top-of-mind positioning for your brand and create a business that people trust and rave about.
- **A product that's designed, manufactured and shipped.** I'll give you the scripts and templates to use when building a prototype, reaching out to a manufacturer and the process I use to get my products shipped.
- **A product generating sales upon launch** and not just "launching to crickets." I'll show you how to build a hype machine for the weeks prior to launch and how to hack your way into getting more sales using social media.

COURSE OVERVIEW

MODULE 0:

Welcome

- ❑ Welcome
- ❑ If You Already Have A Store

MODULE 1:

Finding Your Idea

- ❑ How To Come Up With An Idea
- ❑ The P.S.S.P. Framework For Ideation
- ❑ Choosing The Right Idea
- ❑ How To Make Your Product Different & Better: Design + Function
- ❑ How To Make Your Product Different & Better: Price + Time
- ❑ How To Find Your Target Customer
- ❑ Crafting Your Customer Persona
- ❑ How To Plan An Idea (Canvases)
- ❑ How To Validate Your Idea

MODULE 2:

Branding & Store Setup

- ❑ What Is a Brand?
- ❑ Minimum Viable Brand (MVB)
- ❑ Choosing a Name (Namestorming)
- ❑ Brand Look & Feel (Logo, Color Palette, Fonts)
- ❑ Store Options
- ❑ Set Up Your Shopify Store

MODULE 3:

Developing & Planning Your Idea

- ❑ Introduction to Start & Scale Manufacturing
- ❑ Validation (MVP)
- ❑ Designing Your Prototype
- ❑ Packaging Design, Look & Feel
- ❑ Finding a Manufacturer for Your Packaging
- ❑ How To Find A Local Manufacturer
- ❑ Finding A Global Manufacturer On Alibaba
- ❑ Shipping & Tracking

MODULE 4:

Making Your Product Profitable

- ❑ Finance 101 (Costs, Margins, Profits)
- ❑ Product Pricing
- ❑ Placing Your First Stock Order With A Local Or Global Manufacturer
- ❑ Product Inspection
- ❑ Trademarks & Patents
- ❑ Breaking The Mould
- ❑ Profit Margin

MODULE 5:

Building An Audience Before You Launch

- ❑ Market To Product Fit
- ❑ The 3 C's Of Community
- ❑ Content Territories
- ❑ Content Weighting
- ❑ Content Curation
- ❑ Brand-Generated Content (BGC) vs. User-Generated Content (UGC) vs. Influencer-Generated Content (IGC)
- ❑ Building Your Content Funnel
- ❑ Post-Purchase Stage
- ❑ Giveaways
- ❑ Marketing Psychology
- ❑ Your Waitlist Landing Page

MODULE 6**Million Dollar Influencer Marketing
Blueprint**

- ☐ Getting Started With Influencer Marketing (Part A)
- ☐ Getting Started With Influencer Marketing (Part B)
- ☐ Identifying The Right Influencers
- ☐ Audience Analysis
- ☐ Macro Vs. Micro Influencers
- ☐ How To Find Influencers
- ☐ Outreach To Influencers
- ☐ Negotiating With Influencers
- ☐ Leveraging Assets To Maximize Results
- ☐ Measuring ROI Of Your Campaign
- ☐ How To Use Hey To Scale Influencer Marketing

MODULE 7:**Launch & Operations**

- ☐ Launch Checklist
- ☐ Free Shipping
- ☐ Afterpay Or Zip Pay
- ☐ Logistics - Holding Stock
- ☐ Customer Support
- ☐ Gretta's Marketing Stack
- ☐ Reiterate/Optimize Your Product

MODULE 8:**Scaling Your Store**

- ☐ Cart Abandonment
- ☐ Thank You Cards In Order
- ☐ Raising Your AOV
- ☐ Upsells/Cross Sells
- ☐ Growing Your Email Database With Pop-Ups
- ☐ Email Marketing
- ☐ Offers & Coupon Codes
- ☐ Customer Reviews & Social Proof
- ☐ 3PL - Third Party Logistics (Warehouse To Customer)
- ☐ Freight Forwarding - Moving Product From Manufacturer To 3PL
- ☐ When To Create Your Next SKU
- ☐ A Story About Getting Started

MODULE 0:

Welcome

LESSON:

Welcome to the Course

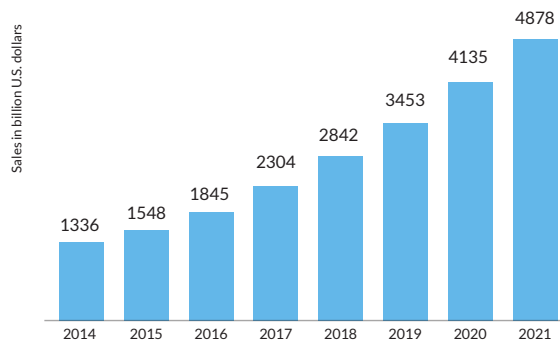
"Communication is at the heart of ecommerce and community."

- Meg Whitman, President and CEO of Hewlett-Packard

Welcome to Start & Scale!

My name is Gretta van Riel and I'm excited to collaborate with the team at Foundr to create this course on starting an online store. Throughout this journey, I will spill all of the knowledge and learnings I gathered starting four ecommerce businesses.

This course was designed for ecommerce entrepreneurs worldwide no matter what product you choose to sell. According to Statista, ecommerce is estimated to become a nearly \$5 billion dollar global industry by 2021. I'll teach you how to tap into this growing international market and get customers that will trust and rave about your brand for years to come.



Retail e-commerce sales worldwide from 2014 to 2021 (in billion U.S. dollars.) Credit: Statista 2019

My goal in this course is to get your idea out into the world. However, this will take TIME and PATIENCE and can't be achieved overnight. I recommend that you take your time with each lesson to make sure you've truly learned and acted on it before moving onto the next. As long as you're willing to learn and experiment, I'm certain that you're going to get huge value out of this course.

ACTION ITEMS

- ☐ Join the Facebook group.
- ☐ Introduce yourself and your idea.

TOOLS & RESOURCES

Facebook Group: [Start and Scale Your Online Store by Foundr Magazine](#), Facebook

Lesson Transcript: [Welcome](#), Foundr

Blog: [21 Ecommerce Industry Trends to Watch for in 2019](#), Coredna

Notes:

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MODULE 0:

Welcome

LESSON:

If You Already Have An Online Store

In this course, I'll be teaching you how to scale your pre-existing business, perfect your brand, properly launch new products and lay the groundwork for growth. This will be your step-by-step guide that will make sure you're doing it right.

ACTION ITEMS:

- ☐ Commit to approaching this course with a growth mindset.
- ☐ Join the Facebook group and introduce yourself!

TOOLS & RESOURCES

Facebook Group: [Start and Scale Your Online Store by Foundr Magazine](#), Facebook

Lesson Transcript: [Welcome](#), Foundr

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MODULE 1:

Finding Your Idea

LESSON:

How To Come Up With An Idea

"An idea is always the answer to a question or the solution to a problem."

In this lesson, I'm going to teach you how to come up with an idea for your ecommerce product, and show you how I research and come up with ideas for new products again and again.

It's an important first step to get these great ideas out of your head and onto paper, so we can start working through them together.

Problem-First Approach

1. Think of a few problems you've experienced yourself.
2. Which problem do I wish to solve?
3. What's the answer to that problem?
4. What product would help answer that problem?

ACTION ITEMS:

- ☐ Fill out the Idea-Storming exercise to come up with the areas and topics you're passionate about.
- ☐ Choose 3 ideas from the previous exercise and think of the 5 biggest problems in each area.
- ☐ Brainstorm product solutions to each problem.

Idea-Storming

Write down the top 5 ideas that come to your head?

What products are you interested in?

What niches are you interested in?

What industries are you interested in?

What pain points do you have in your life or with the product you use?

The Problem-First Approach

Choose 3 ideas from the previous exercise and think of the 5 biggest problems in each area.

When coming up with a product:

- An idea is always the answer to a question or the solution to a problem
- You don't need to reinvent the wheel
- Use your idea to create value for the customer

Idea #1: _____

PROBLEM

SOLUTION

Idea #2: _____

PROBLEM

SOLUTION

Idea #3: _____

PROBLEM	SOLUTION
_____	_____
_____	_____
_____	_____
_____	_____

TOOLS & RESOURCES

- Website: [Trendhunter](#), Popular Trend Site
- Website: [Kickstarter](#), Idea Crowdfunding Site
- Website: [Uncrate](#), Buyer's Guide for Men
- Blog: [The 17 Best Places Ecommerce Entrepreneurs Go to Find Product Ideas](#), Shopify

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MODULE 1:

Finding Your Idea

LESSON:

The P.S.S.P. Framework for Ideation

In this lesson, you'll learn about my framework for coming up with a successful product. I call it The P.S.S.P Framework. This method helps contextualize your problem in a way that's tangible for an audience or customer.

The P.S.S.P Framework

P = Problem

S = Statistic

S = Solution

P = Product

ACTION ITEMS:

- ☐ Place the ideas you previously brainstormed into the P.S.S.P. Framework. Pay special attention to the "statistic" part of the framework. This will help drive your brand's purpose and end up being the tangible problem your brand will aim to solve.

The P.S.S.P. Framework

Idea #1

Problem: _____

Statistic: _____

Solution: _____

Product: _____



Idea #2 _____

Problem: _____

Statistic: _____

Solution: _____

Product: _____

Idea #3 _____

Problem: _____

Statistic: _____

Solution: _____

Product: _____

TOOLS & RESOURCES

- Website: [Dropbottle](#)
- Instagram: [@dropbottle](#)
- Website: [Skintox](#)
- Instagram: [@skintoxco](#)
- Website: [SkinnyMe Tea](#)
- Instagram: [@smtofficial](#)
- Website: [The 5th Watches](#)
- Instagram: [@the5th](#)



Notes:

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MODULE 1:

Finding Your Idea

LESSON:

Choosing the Right Idea

Before really digging deep into starting a brand, it's important to note that not every idea will be viable for an ecommerce business. Some ideas may just not have enough demand. Others might just be too big or heavy to produce sustainably.

In this lesson, I'll help you answer the following questions:

Is there a market for my product?
Is there demand for my product?
Is my product viable for ecommerce?

Foundr's 5-Step Market Research Process

Step 1: Look at Amazon book reviews around your topic

Step 2: Look at podcasts in your topic/niche

Step 3: Assess popularity with BuzzSumo

Step 4: Identify the top 10-20 influencers in this space

Step 5: Look at Facebook groups for FAQs and pain points

ACTION ITEMS:

- ☐ Fill out the Ecommerce Viability exercise for each of your product ideas.
- ☐ Rank your ideas from most to least viable and cut the lowest ranking ideas



Ecommerce Viability

Idea #1: _____

Is the product lightweight and easy to ship?

☐ Yes ☐ Maybe ☐ No

Is the product fragile or breakable in any way?

☐ Yes ☐ Maybe ☐ No

Is the product dangerous or could it be considered a shipping hazard?

☐ Yes ☐ Maybe ☐ No

Rank: _____

Idea #2: _____

Is the product lightweight and easy to ship?

☐ Yes ☐ Maybe ☐ No

Is the product fragile or breakable in any way?

☐ Yes ☐ Maybe ☐ No

Is the product dangerous or could it be considered a shipping hazard?

☐ Yes ☐ Maybe ☐ No

Rank: _____



Idea #3: _____

Is the product lightweight and easy to ship?

☐ Yes ☐ Maybe ☐ No

Is the product fragile or breakable in any way?

☐ Yes ☐ Maybe ☐ No

Is the product dangerous or could it be considered a shipping hazard?

☐ Yes ☐ Maybe ☐ No

Rank:

Winning Idea: _____

TOOLS & RESOURCES

- Blog: [Evaluating Your Product and Niche](#), Shopify
- Blog: [The 16-Step Guide to Evaluating the Viability of Any Product Idea](#), Shopify
- Blog: [What is a Minimum Viable Product](#), Leanstack
- Blog: [15 Niche Ecommerce Business Ideas You Bank On](#), ecommerceCEO



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MODULE 1:

Finding Your Idea

LESSON:

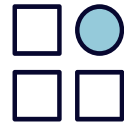
How to Make Your Product Different and Better Than Others - Design + Function

“The most successful ecommerce brands take existing problems and solve them in a different way.”

In the next two lessons, I'll be teaching you how to find your Unique Value Proposition (UVP), or what sets your product apart, by altering one of four product dimensions, starting with Design and Function. This will ensure your product is truly unique and set your business apart from the competition.

Product Innovation Canvas - Change one product dimension to find your UVP

1. Design - The look and feel of the product
2. Function - How your product works
3. Price - The perceived value of the product
4. Time - When and how long the product is available

Importance of UVP

It differentiates you from your market.



It's what sets you apart from your competition.



It's what will add value in people's lives.

TOOLS & RESOURCES

Image: [Example Product Innovation Canvas Exercise](#), Foundr

Website: [Daily Edited](#), Monogrammed Accessories

Website: [LuMee](#), Light-Up Selfie Cases

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MODULE 1:

Finding Your Idea

LESSON:

How to Make Your Product Different and Better Than Others - Price + Time

In this lesson, I'll go into detail about the last two product dimensions to consider when crafting your UVP; Price and Time. Always keep in mind that you don't need to reinvent the wheel to have a totally unique product.

ACTION ITEMS:

- ☐ Pull up your 3-5 best ideas from the previous lessons.
- ☐ Come up with ways to add value by changing a single dimension in the Product Innovation Canvas exercise.

TOOLS & RESOURCES

Image: [Example Product Innovation Canvas Exercise](#), Foundr

Website: [Daily Edited](#), Monogrammed Accessories

Website: [LuMee](#), Light-Up Selfie Cases

	Idea	Design	Time	Function	Price
Idea 1					
Idea 2					
Idea 3					
Idea 4					
Idea 5					

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MODULE 1:

Finding Your Idea

LESSON:

How to Find Your Target Customer

“If your customer persona is everyone, you’re doing it wrong. Nobody can afford to market to everybody.”

In the next two lessons, I’m going to teach you how to come up with your buyer or customer personas. Basically, your customer persona is a representation of your ideal customer. This could be based on market research or real data about your existing customers.

This is important as it will influence the way you market your brand and how you communicate with your customers.

Customer Persona

- A representation of your ideal customer
- Demographics
- Behavior Patterns
- Motivations
- Goals

TOOLS & RESOURCES

Blog: [How to Build Buyer Personas for Better Marketing](#), Shopify

Blog: [How to Ethically Spy on Your Competition](#), Cardenal Group

Blog: [The Definition of Buyer Persona \[In Under 100 Words\]](#), HubSpot

Website: [Likealyzer](#), Analyze Facebook Pages Without Using Insights

Website: [Klear](#), Analyze Influencers

Website: [Similar Web](#), Competitor Research

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MODULE 1:

Finding Your Idea

LESSON:

Crafting Your Customer Persona

In this lesson, we'll dive deeper into customer personas and create some of our own. It's important to be as descriptive as possible when thinking about these. They'll lay the groundwork for your brand tone and overall branding discussed in the next module.

ACTION ITEMS

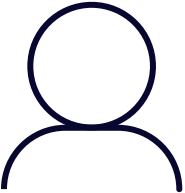
- ☐ Fill out 2-3 customer persona canvases in the exercise below.
- ☐ Use the Sample Customer Personas document provided in the Tools & Resources as guides.

TOOLS & RESOURCES

- Document: [Sample Customer Personas](#), Foundr
- Document: [Customer Persona Canvas Example](#), Foundr
- Website: [Taylor](#), Online Board Shorts Store

Customer Persona Canvas

This is the easiest way to come up with a persona. Fill it out with everything you know about your target audience such as age, gender, basic demographic data, workplace, details about their role, salary, education, and basic elevator pitch.



Name

AgeGender

Location

Education level

Workplace

Job position

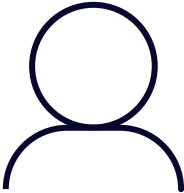
Salary

Buying motivation

Buying concerns

Problems currently facing

Extra Details



Name

AgeGender

Location

Education level

Workplace

Job position

Salary

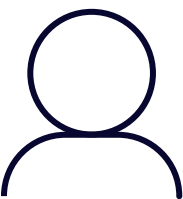
Buying motivation

Buying concerns

Problems currently facing

Extra Details

Name _____



Age _____ Gender _____

Location _____

Education level _____

Workplace _____

Job position _____

Salary _____

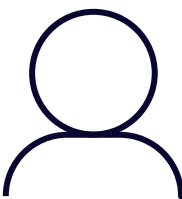
Buying motivation _____

Buying concerns _____

Problems currently facing _____

Extra Details _____

Name _____



Age _____ Gender _____

Location _____

Education level _____

Workplace _____

Job position _____

Salary _____

Buying motivation _____

Buying concerns _____

Problems currently facing _____

Extra Details _____

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MODULE 1:

Finding Your Idea

LESSON:

How to Plan An Idea (Canvases)

In this lesson, I'm going to teach you how to plan your idea using a Lean Canvas - a way of pulling all of your high-level thinking and ideas into one readable document.

This is important because it will influence the way that you market your brand from the outset and any time you're communicating with your customers.

ACTION ITEMS

- ☐ Fill out the Lean Canvas document for your best idea in the Tools & Resources below.
- ☐ Leverage the Facebook group for feedback!

TOOLS & RESOURCES

- PDF: [Lean Canvas Startup Blueprint by Ash Maurya](#), Foundr
- Facebook Group: [Start and Scale Your Online Store by Foundr Magazine](#), Facebook

Notes:

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MODULE 1:

Finding Your Idea

LESSON:

How to Validate Your Idea

In this lesson, I'm going to take you through how to validate your idea. This is important so you don't waste unnecessary time and money on a product that your audience fundamentally doesn't want.

Basically, you need to know if this idea has legs before you do anything else.

Validation Pro Tips



You need to know if this idea has legs before you do anything else.



Don't get obsessed with the way you want your idea to be, you need to be willing to listen to the market and iterate accordingly.



The best validation for your product is always going to be your first sale.



You don't need to be intimidated by your competition. They are there for you to learn from.

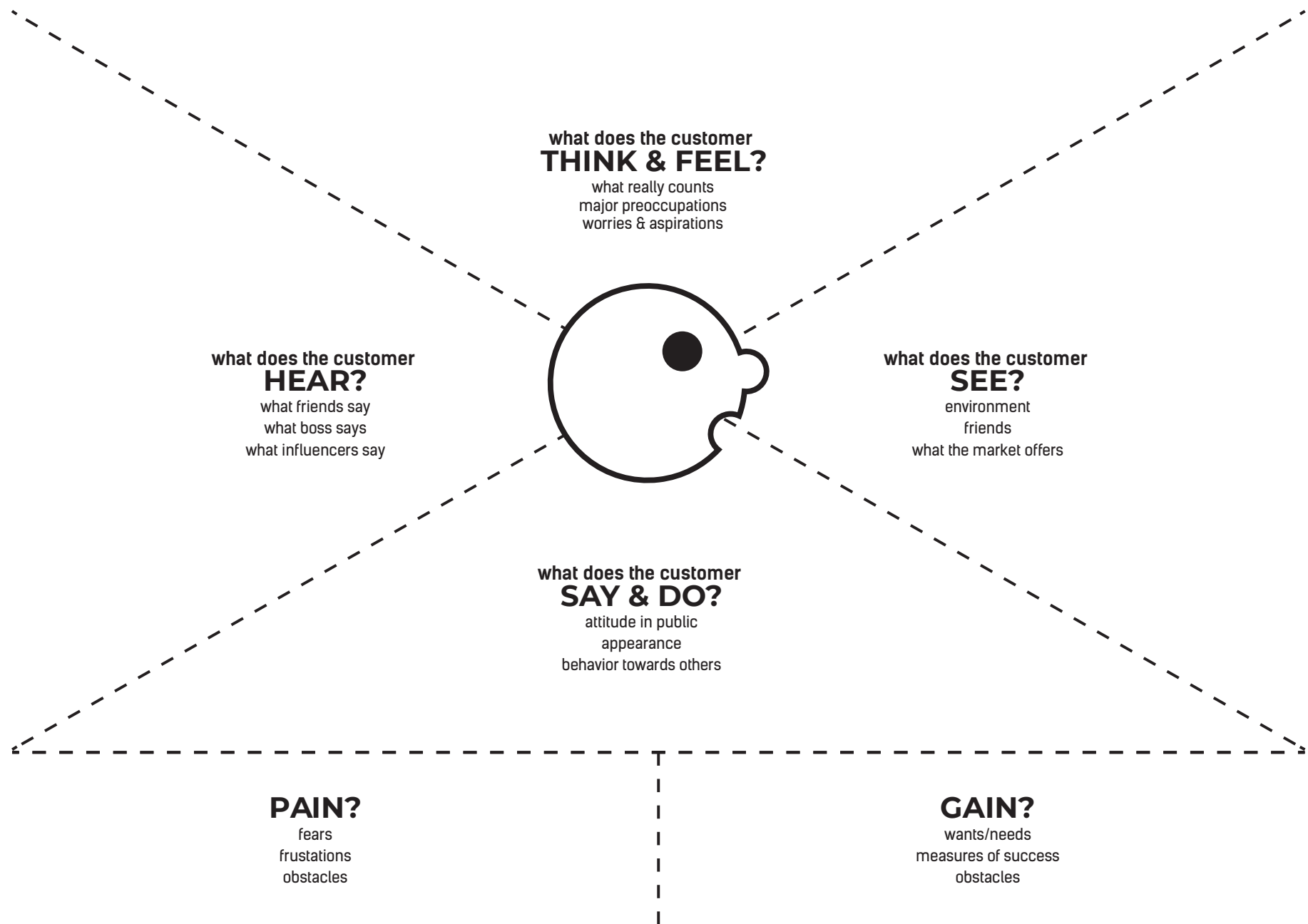


You simply want to know if there are buyers out there and if so where they are.

Congratulations! You've made it through the first module and have laid some critical foundations. It's important to make sure that you have not only watched these lessons but taken action and completed the workbooks. Be sure to head on over to the Facebook group to get some feedback on your idea, discuss your progress and get help if you need any!

ACTION ITEMS

- ☐ Speak to 20 people (preferably in-person) that fit your customer persona.
- ☐ Capture their responses on the Product Validation Insights table.



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A presentation slide with a light blue background and horizontal lines. On the right side, there is a dark blue rectangular box containing the title "TOOLS & RESOURCES" in white, bold, uppercase letters. Below the title is a list of five items, each preceded by a blue circular bullet point. The items are: "Document: [Customer Validation Outreach Template](#), Foundr", "Blog: [Noah's Coffee Challenge](#), Life-Long Learner (Do the coffee challenge to get over the fear of asking!)", "Website: [Google Trends](#), Trending Searches", "Website: [Trend Hunter](#), Industry Trends", and "Facebook Group: [Start and Scale Your Online Store by Foundr Magazine](#), Facebook".

- Document: [Customer Validation Outreach Template](#), Foundr
- Blog: [Noah's Coffee Challenge](#), Life-Long Learner (Do the coffee challenge to get over the fear of asking!)
- Website: [Google Trends](#), Trending Searches
- Website: [Trend Hunter](#), Industry Trends
- Facebook Group: [Start and Scale Your Online Store by Foundr Magazine](#), Facebook

MODULE 2:

Branding & Getting Your Store Set Up

LESSON:

What is a Brand?

“A brand is something you can sell even if you no longer have any products or services to sell.”

- Toby, Strategy Director at Love and Money

This module will teach you how to distinguish your online store through branding. Contrary to popular belief, a brand is not simply a logo or branding. In this lesson you'll learn exactly what the concept of brand means and why a strong brand is the key to your business' success.

A brand is NOT:

A logo
Branding

A brand IS:

Perception
Experience
Association

ACTION ITEMS

- ☐ Use the Direct-to-Consumer Brandspo spreadsheet under Tools & Resources to round up a list of 5 brands that inspire you.
- ☐ Examine what attracts you to these brands in the Brandspo worksheet below.

My Brandspo

Jot down the brands you admire and, in the spaces provided, write down your observations. What do they excel at? Where does your eye gravitate toward when you first enter their site? Then gather your learnings and write down how your brand could apply these best practices to your own brand.

Brand #1:

- 1
- 2
- 3
- 4
- 5

Learnings:

Brand #2:

- 1
- 2
- 3
- 4
- 5

Learnings:

Brand #3:

- 1
- 2
- 3
- 4
- 5

Learnings:

Brand #4: _____

1 _____

2 _____

3 _____

4 _____

5 _____

Learnings:

Brand #5: _____

1 _____

2 _____

3 _____

4 _____

5 _____

Learnings:

TOOLS & RESOURCES

- Spreadsheet: [Direct-to-Consumer Brandspo](#), Foundr
- Ebook: [Top 100 Most Valuable Global Brands of 2019](#), BrandZ
- Infographic: [Top 100 Most Influential Valuable Global Brands of 2019](#), BrandZ
- Presentation: [The Brand Gap](#), LinkedIn



Notes:

[illegible]

MODULE 2:

Branding & Getting Your Store Set Up

LESSON:

Minimum Viable Brand (MVB)

"Think of your brand as a person. What would its traits be?"

In this lesson, you'll learn how to create top-of-mind positioning. For instance, if you sell shoes, you want your brand to come to mind whenever your customer thinks of shoes. To do that, I'll show you how to create a Minimum Viable Brand and brand persona dictating how your brand is seen by the public.

Minimum Viable Brand (MVB)

The fewest consistent assets and tools needed to define and differentiate your brand

Brand Pyramid

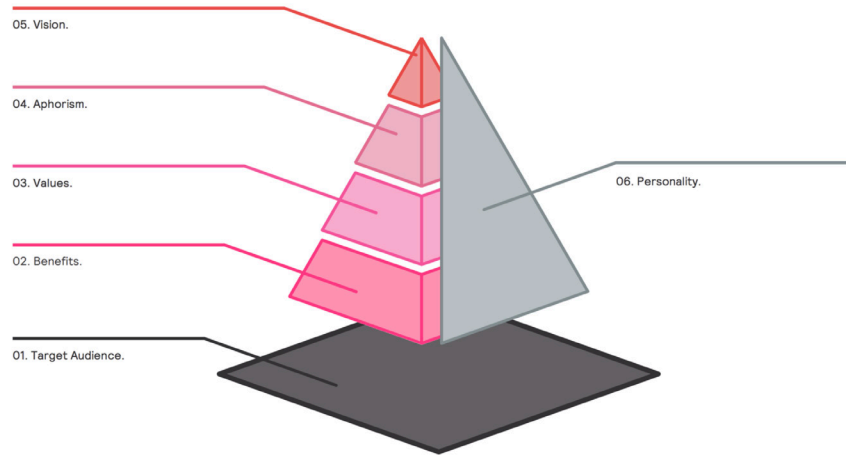
Six elements to shape your overall brand strategy and position your brand

1. **Target audience** - The type of people your brand wants to speak to
2. **Benefits** - The rational benefits your product offers your audience - the reason why you created the product in the first place
3. **Values** - The common emotional ground between your brand and your audience
4. **Aphorism** - A concise and bold observation which contains a general truth that defines your brand
5. **Vision** - What your business aspires to achieve beyond your bottom line
6. **Brand personality** - The traits your brand exhibits in service of getting your message across

ACTION ITEMS

- ☐ Fill out the blank Brand Pyramid below as it relates to your brand.
- ☐ Decide on your brand persona using the Brand Archetypes chart in the Tools & Resources. Then mold your brand into a desired archetype in the My Brand Archetypes exercise below.

Brand Pyramid



My Brand Archetypes

Primary Archetype: _____

Secondary Archetypes: _____

What does this mean for your:

- Customer interactions
- Tone of voice on social media
- Emails
- Website copy
- Products
- Blog content
- Brand/influencer partnerships

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The image shows a worksheet designed for brand strategy planning. It is divided into two main sections. The left section consists of multiple horizontal lines for taking notes. The right section has a light blue background and contains the title "TOOLS & RESOURCES" in bold black font. Below the title is a bulleted list of ten resources, each starting with a bullet point followed by the type of resource (Blog, Instagram, PDF, Article, or Graphic) and a link to the specific resource.

TOOLS & RESOURCES

- Blog: [Four Steps to Defining Your Brand’s Tone of Voice](#), Brand.ing
- Instagram: [Brand.ing](#)
- Blog: [Summary of Positioning by Al Reis and Jack Trout](#), Medium
- PDF: [Why Brand Personality Matters](#), Millward Brown
- Article: [Brands Are Like People](#), Forbes
- Graphic: [Dropbottle Brand Pyramid](#), Love & Money
- Graphic: [Blank Brand Pyramid](#), Love & Money
- Graphic: [Brand Pyramid Explained](#), Love & Money
- Graphic: [Brand Archetypes](#), Millward Brown

- Blog: [Four Steps to Defining Your Brand's Tone of Voice](#), Brand.ing
- Instagram: [Brand.ing](#)
- Blog: [Summary of Positioning by Al Reis and Jack Trout](#), Medium
- PDF: [Why Brand Personality Matters](#), Millward Brown
- Article: [Brands Are Like People](#), Forbes
- Graphic: [Dropbottle Brand Pyramid](#), Love & Money
- Graphic: [Blank Brand Pyramid](#), Love & Money
- Graphic: [Brand Pyramid Explained](#), Love & Money
- Graphic: [Brand Archetypes](#), Millward Brown

MODULE 2:

Branding & Getting Your Store Set Up

LESSON:

Choosing a Name (Namestorming)

In this lesson, I'll teach you exactly how I go about choosing a name for my brand. You'll learn about what makes a good brand name and common pitfalls many entrepreneurs face when naming their brand.

The most important thing to think about when picking a name is not to let it get in the way of what you're trying to do. It's very easy to fixate on getting the name perfect and as we know perfection is a myth. It's time to move forward and choose a name for your brand.

A Name SHOULD:

Be easy to remember
Pique interest
Be distinct
Be malleable
Make sense

A Name Should NOT:

Tell the whole story
Be too literal
Box you in
Steal the show
Slow things down

ACTION ITEMS

- ☐ Brainstorm 15 words that come to mind when thinking of your product or brand. Consider function, benefit, and value.
- ☐ Break out the thesaurus and look for synonyms of the words you just brainstormed.
- ☐ Narrow down your list and check the 3-5 names you like most.



Namestorming

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The 4 Naming Categories

Type	Literal / Generic	Descriptive	Associative / Suggestive	Coined / Random Abstract
Example	Hotels.com Cars.com	All Bran Cereal Europcar National Australia Bank SkinnyMe Tea Kars 4 Kids	Apple MeBank Nike Dropbottle Skintox The 5th Uber	Kodak Xerox Microsoft

TOOLS & RESOURCES

- Website: [Namelix](#), Business Name Generator Tool
- Website: [Thesaurus](#)
- Website: [Visuwords](#), A Modern Dictionary for A Modern World
- Website: [Launchaco](#), Search Domains, Social Media Handles & Logotypes
- PDF: [Branding Kit](#), Love & Money

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MODULE 2:

Branding & Getting Your Store Set Up

LESSON:

Brand Look & Feel (Brand Kit: Logo, Color Palette, Fonts, etc.)

A brand kit is a document that conveys where your brand is now and where you want it to be. The goal of the kit is to understand the brand through and through. You want others to read the document, fully understand your vision and iterate on it.

In this lesson we'll walk through the brand kit I made when building my company, Dropbottle.

Components of a Brand Kit

Brand Pyramid

- Target Audience
- Rational Benefits
- Values/reasons to believe
- Aphorism
- Vision
- Personality

Product

- Product Direction
- Uses
- Problem + Solution + Stat

Brand Look & Feel

- Color-ways
- Typography
- Merch
- IRL
- Packaging
- Competition
- Brandspo
- Logos
- Fontspo
- Mood Board

ACTION ITEMS

- ❑ Analyze Dropbottle's brand kit document in the Tools & Resources below.
- ❑ Make a copy of the blank Brand Kit document and fill it out for your own business.

TOOLS & RESOURCES

- Document: [Dropbottle Brand Kit](#), Foundr
- Document: [Blank Brand Kit](#), Foundr
- Blog: [40 Stunning Brand Kits to Inspire You](#), Canva
- Blog: [65+ Brand Guidelines Templates](#), Venngage
- Pinterest: [Brand Kit Examples](#)

Notes:

[illegible]

MODULE 2:

Branding & Getting Your Store Set Up

LESSON:

Store Options

In this lesson, I'll introduce you to the 3 major e-Commerce platforms at the time of filming. If anything changes, we will be sure to let you know.

It's important to know the different options available for your online store as each of them have some pros and some cons!

The 3 Major Ecommerce Platforms

- Shopify - For brands new to ecommerce
- Big Commerce - For brick-and-mortar stores selling online
- Magento - For large enterprises

ACTION ITEMS

- ❑ Visit each of the sites we covered in the lesson and decide which ecommerce store platform suits your needs

TOOLS & RESOURCES

- Website: [Shopify](#) (Free trial)
- Website: [Big Commerce](#)
- Website: [Magento](#)
- Blog: [Pros & Cons of the Top 7 Ecommerce Platforms](#), Stryde
- Blog: [The 5 Best Ecommerce Platforms](#), Shout Me Loud
- Article: [126 Ecommerce Terms Every Store Owner Should Know](#), Tyche Softwares

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MODULE 2:

Branding & Getting Your Store Set Up

LESSON:

Set Up Your Shopify Store

In this lesson, you'll learn how to set up your very own Shopify store.

We twisted Shopify's arm and got them to create a custom tailored training video for you detailing exactly how easy it is to get your store ready to look like a super professional website with ease.

Key Types of Automation Workflows

- Welcome Series
- Upsell & Recommended Products
- Abandoned Cart Series
- Conditional-Based Sequences

ACTION ITEMS

- ❑ Follow the tutorial to set up your Shopify store. If you've chosen another platform, use the links provided in the Tools & Resources to set up your store there.

TOOLS & RESOURCES

- Website: [Shopify](#) (Free trial)
- Website: [Help Center](#), Shopify
- Website: [App Store](#), Shopify
- YouTube: [Shopify](#)
- Blog: [Start an Online Store with Magento](#), Magento
- Blog: [How to Set Up Your Online Store with Big Commerce](#), EnvatoTuts+

Notes:

[illegible]

MODULE 3:

Developing & Planning Your Idea

LESSON:

Introduction to Start & Scale Manufacturing

Welcome to Module 3! In this module, you'll learn how to get your product designed, manufactured and shipped.

In this lesson, we'll analyze the pros and cons of local and global manufacturing. When thinking about manufacturing, my biggest piece of advice would be to start local, then go global. In other words, always prototype using a local manufacturer and scale through an international one.

TOOLS & RESOURCES

- Blog: [How to Find a Manufacturer + Save 65% on Product Development](#), Big Commerce
- Article: [18 Resources to Find a Manufacturer for Your Product Online](#), Small Business Trends
- Blog: [How to Find the Right Manufacturer for Your Product](#), Sourcify
- Article: [How to Find a Reliable Oversea Manufacturer to Bring Your Product Vision to Life](#), Foundr
- Article: [How to Find Chinese Manufacturers If You Don't Know Anyone In China](#), Forbes

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MODULE 3:

Developing & Planning Your Idea

LESSON:

Validation (MVP)

“Validate your idea now, save money later.”

In this lesson, I'll be teaching you the process I've always followed to validate my multiple 7-figure ecommerce brands. Validating your product, or ensuring there is a market for it, is key to lock down the future success of your brand.

Minimum Viable Product (MVP)

A product with enough features to gather feedback and potentially release

Create your MVP

1. Prepare or make a small demo version of your product for customers to see/try
2. Have a graphic designer create a 3D prototype
3. Order a small run locally

ACTION ITEMS

- ☐ Create a render or prototype of your product!
- ☐ Run your MVP by 20 people who fit your target market. Try to meet with them in person and watch them - even better, record them interacting with your product.
- ☐ Get as much live feedback from people about what they think of your product - what they like and don't like about it and what they would change if they could. Refer to the Validation Checklist below when capturing their responses.

Validation Checklist

- ☐ Ease of Use
- ☐ Ease of Storage
- ☐ Intuitiveness
- ☐ Likes
- ☐ Dislikes
- ☐ Suggestions

TOOLS & RESOURCES

- Survey: [Customer Survey Template](#), SurveyMonkey
- Website: [SurveyMonkey](#), Online Survey Builder
- Website: [Typeform](#), Online Survey Builder
- Blog: [The Ultimate List of Customer Development Questions](#), Mike Fishbein

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MODULE 3:

Developing & Planning Your Idea

LESSON:

Designing Your Prototype

In this lesson, I'll be teaching you how to find a designer to help you create your prototype.

In order to get it right, you'll need a professional designer who can help you bring your design to life. This is important because you'll need to be able to go to a manufacturer and give them a design they can work with.



Start from as little as drawing a picture of what you're thinking of creating.



Work with a designer or a local manufacturer to help you design your product.



Jump in a quick phone call with your designer, but it's gonna be better if you can meetup in person for live iteration. If you can't meet in person, this process can happen over the phone with things like screen sharing on Skype



Brief the designer about the look, feel, materials and style of your product.



Give the designer an idea around the actual size and specifications of what you want to create.

ACTION ITEM

- ☐ Browse through the freelancer marketplaces linked below and choose a freelance designer to create your prototype or 3D render.
- ☐ Reach out to them using the Designer Outreach Template in the Tools & Resources. Then, thoroughly brief them on the vision for your prototype. It could be helpful to send them your brand kit as well.

Note: Be sure to ask for the original editable files from your designer. The file format will most likely be: .eps, .psd, or .stl

TOOLS & RESOURCES

- Document: [Designer Outreach Template](#), Foundr
- Website: [Industrial Designers](#), Upwork
- Website: [Dribbble](#) (Yes, that's 3 B's!), Freelancer Marketplace
- Website: [Behance](#), Freelancer Marketplace
- Website: [99 Design](#), Freelancer Marketplace
- Website: [Fiverr](#), Freelancer Marketplace
- Website: [Upwork](#), Freelancer Marketplace
- Website: [Kin Euphorics](#), Herbal Tonic Drink
- Website: [Recess](#), Hemp-Infused Sparkling Water

Notes:

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MODULE 3:

Developing & Planning Your Idea

LESSON:

Packaging, Design, Look & Feel

"The more lead magnets we create, the more people we can get onto our email list."

In this lesson, I'm going to be teaching you about how to design the proper packaging for your product.

It's important that you get your packaging right because your product's packaging is a part of your brand's identity and the customer experience, and one of the key ways you can differentiate yourself from the rest of the competition.

However, you don't necessarily need to have a custom packaging. I started my first business using plain packaging. So go with what works for you but be aware of the experience your customer will go through when they receive and unbox your product.

Key Considerations for Designing Your Packaging

- 1. The look
- 2. The kind of packaging (Ex. Envelope, box, cylinder, etc.)
- 3. The weight of the packaging options
- 4. The size of the packaging options
- 5. Mandatory warning labels or regulations

Competitor Research: Packaging

Describe the packaging your competitors are using. Take note of the type of packaging, the design and anything else that stands out to you.

Competitor #1:

ACTION ITEMS

- ❑ Check out your three main competitors and their packaging (If you don't want to spend the money on buying products, just go on Pinterest and see what other people in your niche are doing with their packaging).
- ❑ Jot what you like about their packaging and come up with 3-5 different ideas for the design of your own.

Competitor #2:

Competitor #3:

Packaging Design Ideas:

TOOLS & RESOURCES

- Website: [Inke](#), Custom Packaging Design
- Website: [Lumi](#), Packaging for Modern Supply Chain Teams
- Website: [Noissue](#), Customized Tissues Paper
- Website: [Better Packaging](#), Sustainable Packaging



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MODULE 3:

Developing & Planning Your Idea

LESSON:

Finding a Manufacturer For Your Packaging

"You want your customers to have the best unboxing experience possible."

In this lesson, I'll teach you how to find the right manufacturer for your packaging. This is important because you don't want to end up spending too much money on your packaging and have to cut costs elsewhere.

100-300 Units
Find a packaging company



Always start simple.

Once you are ready and everything is working, you can always scale.



Get a prototype of your packaging done locally first so you can get an idea of the design and the specs.

500+ Units
Go to a manufacturer



You can easily just Google

a packaging manufacturer that's close by to where you're manufacturing your product.



You'd want to order in bulk

for packaging, but you don't want to order in very large batches until you are confident with the supplier.

TOOLS & RESOURCES

- Spreadsheet: [Shipping and Packaging Database](#), Foundr
- Website: [Product Catalog](#), Lumi
- Website: [Thinkpack](#), Bespoke Packaging Designs
- Website: [A Better Lemonade Stand](#), Online Ecommerce Incubator
- Website: [Curtis Packaging](#), Packaging Solutions
- Website: [Fantastapack](#), Full Color Custom Boxes and Labels
- Website: [Pakible](#), Custom Packaging for Your Products
- Website: [Elite Labels Group](#), Fashion Labels and Packaging
- Website: [Value Mailers](#), Bubble Mailers, Packaging Supplies and Packing Materials
- Website: [Fast-Pack](#), Wholesale Shipping Supplies
- Blog: [The Dieline](#), Bespoke Creative Platform for the Packaging Community
- Website: [Alibaba](#)
- Blog: [The Ultimate Guide to Product Packaging Design](#), 99Designs

ACTION ITEMS

- ❑ Look through the different packaging companies in the resources below and in the previous lesson. Shortlist 3 product packaging companies.
- ❑ Reach out to each shortlisted company for packaging samples.

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MODULE 3:

Developing & Planning Your Idea

LESSON:

How to Find a Local Manufacturer

In this lesson, I'll teach you how to find a local manufacturer to create your prototype.

It's very helpful to work in-person with your manufacturer when creating the first ever version of your product, whether that's just one unit or up to fifty units. This was part of my secret sauce to minimize risk when I first started my ecommerce brands,

Key Considerations for a Local Manufacturer



Location

You want them to be close to you if possible.



History

Check whether they've worked with other brands that you know and love.



Samples

You want to see samples of some of their work.

Manufacturing Tips

1. Request a basic cost for the type of product you want to produce
2. Ask the manufacturer about scaled pricing tiers
3. Ask about the lead time it will take to create your initial product
4. Ask if they have a minimum/maximum order quantity

ACTION ITEMS

- ☐ Create a list of 5 local manufacturers using the worksheet below. It may be helpful to create your own spreadsheet to further organize your list.
- ☐ Reach out to them for a basic quote on a product prototype. Then start narrowing down your prospects.

My Local Manufacturers

Manufacturer #1

Name: _____

Website: _____

Contact Info: _____

Manufacturer #2

Name: _____

Website: _____

Contact Info: _____

Manufacturer #3

Name: _____

Website: _____

Contact Info: _____

Manufacturer #4

Name: _____

Website: _____

Contact Info: _____

Manufacturer #5

Name: _____

Website: _____

Contact Info: _____

TOOLS & RESOURCES

- Website: [Maker's Row](#), Manufacturing Database
- Podcasts: [Best Manufacturing Podcasts](#), Player.
FM



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MODULE 3:

Developing & Planning Your Idea

LESSON:

Finding a Global Manufacturer on Alibaba

In this lesson, I'm going to show you how I find global manufacturers on Alibaba.com

Alibaba.com is currently the world's biggest online commerce company. It's an online marketplace of manufacturers, factories, merchants and suppliers that has hundreds of millions of users and hosts millions of merchants and businesses. In a nutshell, it's essentially a huge database where you can search and find manufacturers.

When it comes to finding a global supplier or manufacturer, you can do this in a number of ways, but the most common method and the one I would recommend is looking on Alibaba where you can create a free account.

How To Find a Global Manufacturer

1. Create an account and start searching
2. Type in keywords relating to your product, like "infuser drink bottle," or "fruit infusing drink bottle."
3. As your search, the listings of manufacturers will show up along with their different ratings and rankings. Go with a "Gold Supplier" who has been operating for a number of years.
4. Contact suppliers that have good feedback, are a bit less expensive, but promise higher quality.
5. Pay attention to how quickly and how well different suppliers reply to you.

ACTION ITEMS

- ☐ Create an Alibaba account.
- ☐ Shortlist 3-5 manufacturers with good reviews and a gold rating.
- ☐ Use the Supplier Enquiry Script Template provided to ask for quotes and get samples. Then narrow down your options.

My Global Manufacturers**Manufacturer #1**

Name: _____

Website: _____

Contact Info: _____

Manufacturer #2

Name: _____

Website: _____

Contact Info: _____

Manufacturer #3

Name: _____

Website: _____

Contact Info: _____

Manufacturer #4

Name: _____

Website: _____

Contact Info: _____

Manufacturer #5

Name: _____

Website: _____

Contact Info: _____

TOOLS & RESOURCES

- Document: [Supplier Enquiry Script Template](#), Foundr
- Website: [Alibaba](#)
- Website: [Shopify Print On-Demand Apps](#), Shopify (allows merchants to use their own product designs without carrying inventory)



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MODULE 3:

Developing & Planning Your Idea

LESSON:

Shipping & Tracking

“The faster you can ship a product the higher your site conversion rates will be.”

In this lesson, I will be teaching you how to ship and track your ecommerce product. This needs to be considered from the very outset because it can have a huge impact on your product pricing.

Third Party Logistics (3PL)

- An outsourced provider of distribution and fulfillment services

Important Notes

- Keep packages light and small
- Offer free, flat-rate or carrier rates
- Use a shipping calculator to figure out your rates
- Ensure you're compliant with local and international customs

Things to Keep Track Of

- Customer
- Order
- Date/Time
- Tracking Number/Receipt

ACTION ITEMS

- ☐ Choose a postal provider and make sure they integrate with your ecommerce platform.
- ☐ Check their daily cut-off times and shipping rates for standard and international shipment or contact them to get a quote.
- ☐ Decide whether or not you'll offer free shipping and how that would affect your product pricing.
- ☐ Bonus: Do some research to see if there are any shipping regulations or guidelines that you need to be aware of.

TOOLS & RESOURCES

- Calculator: [Shipping Calculator](#), USPS
- Calculator: [Shipping Calculator](#), Canada Post
- Calculator: [Shipping Calculator](#), UK Royal Mail
- Calculator: [Shipping Calculator](#), Australia Post
- Calculator: [Shipping Calculator](#), FedEx
- Calculator: [Shipping Calculator](#), UPS
- Calculator: [Shipping Calculator](#), DHL
- Calculator: [Shopify Shipping Calculator](#), Shopify
- Calculator: [Shipping Calculator](#), Parcel Monkey
- Website: [Shopify Shipping](#), Shopify
- Website: [Import/Export - Country or Territory Regulations](#), UPS

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MODULE 4:

Developing & Planning Your Idea

LESSON:

Finance 101 (Costs, Margins, Profits)

In this lesson I will be teaching you everything you need to know to successfully finance your physical product idea and ensure it has a healthy profit margin and the largest chance for success.

Gross Profit Margin

The percentage of profit retained after paying the cost of goods sold (cost of production).

Aim for your profit margin to be greater than or equal to 30%.

$$\text{Gross profit margin} = \frac{(\text{Revenue} - \text{Cost of goods sold})}{\text{Revenue}} * 100$$

If low profit margin (less than 30%), then:

- Cut production costs
- Raise prices
- Discontinue certain products

If high profit margin (over 60%), then:

- Increase marketing efforts

ACTION ITEM

- ☐ Calculate your Gross Profit Margin by filling out the spreadsheet in the Tools & Resources section.
- ☐ Aim for a Gross Profit Margin between 30 and 60%.

TOOLS & RESOURCES

- Spreadsheet: [Gross Profit Margin Calculator](#), Foundr
- Document: [Cost of Goods Sold](#), Foundr
- Calculator: [Profit Margin Calculator](#), Shopify

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MODULE 4:

Developing & Planning Your Idea

LESSON:

Product Pricing

In this lesson, I'll be teaching you how to structure your product pricing.

This is really important because product pricing influences brand perception, making it a huge psychological factor in determining whether a customer will purchase your product. So as a rule of thumb, you should price your product 2.5x more than it costs to make.



The easiest way is to **offer only a single product** on a website.



When thinking about your product pricing **keep your variations to a minimum**.



When thinking about product pricing, you need to **take margins into consideration**.

**Refer to the lesson on Finance 101*



Wholesaling can be a really great strategy for ecommerce websites.

ACTION ITEM

- ❑ Calculate your product price per unit using the Cost Per Unit Calculation Tool linked below. Then simply multiply that number by at least 2.5 (the ideal mark-up) to get your Price Per Unit.
- ❑ Identify 3 different retail price variations for your product.
- ❑ Play around with more psychological hacks (Ex. Rounding to the nearest whole number, including an offer into the product price, etc.). Use the links under Tools & Resources to help come up with potential hacks.

Price Per Unit

Cost Per Unit: _____

Price Per Unit (Cost Per Unit x Markup): _____

Retail Price Variations

Product Variation

Price

Psychological Hacks

- 1. _____
- 2. _____
- 3. _____

TOOLS & RESOURCES

- Spreadsheet: [Cost Per Unit Calculation Tool](#), The SCAN Foundation
- Website: [Dollar Shave Club](#), Shaving Supplies
- Article: [13 Psychological Pricing Tricks You Should Try](#), Insights for Professionals
- Article: [5 Psychological Hacks that Will Make Your Pricing Page Irresistible](#), Marketing Land

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MODULE 4:

Developing & Planning Your Idea

LESSON:

Planning Your First Stock Order With a Local or Global Manufacturer

"Perfection is a myth. Version one is always better than version none."

In this lesson, I'll show you how to make your first local and global order and what to watch out for. It's important to keep your initial order quantity small and always start with your manufacturer's minimum order quantity when first starting off.

Lower order quantity = Lower risk

Minimum Order Quantity (MOQ)

The minimum number of stock the manufacturer will produce to make an order

ACTION ITEM

- ☐ Research your manufacturer's MOQ.
- ☐ Congrats! You're ready to place your first order!

TOOLS & RESOURCES

- Document: [Manufacturing Cheat Sheet](#), Foundr
- Website: [LegalZoom](#), Customized Legal Services

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MODULE 4:

Developing & Planning Your Idea

LESSON:

Product Inspection

In this lesson, I'm going to be teaching you how to create and set up proper inspection procedures for your product.

It's important to get your product inspected because you need to be able to ensure product quality at every stage and that you're getting what you're paying for. Usually the larger the order, the higher the likelihood some of your products will have defects. However, aim to spend no more than a few hundred dollars to in product inspection when first starting out.

Defect Rate

The percentage of output that fails to meet the quality target. The average defect rate is about 2-5% of the total order.

Life Without Product Inspection:

- Defective Products
- Recalls
- Refunds
- Production Delays
- Unhappy Customers

ACTION ITEMS

- ☐ Decide who will inspect the product using the product inspectors linked in the Tools & Resources below.
- ☐ Incorporate the inspection process into your workflow. (You may need to alter your launch date, etc.)
- ☐ Brainstorm a list of any product defects you run the risk of having in the Potential Product Defects exercise. Consider the components and materials of your product.

Potential Product Defects

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

TOOLS & RESOURCES

- Document: [Product Inspection Cheat Sheet](#), Foundr
- Document: [Completed Product Inspection Example](#), Asian Inspection (now QIMA)
- Website: [PROQC International](#), Product Inspection
- Website: [QIMA](#), Product Inspection

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MODULE 4:

Developing & Planning Your Idea

LESSON:

Trademarks & Patents

"Just because you own a domain doesn't mean you own a trademark."

In this lesson, we'll consider the legal side of your brand, specifically thinking about trademarks and patents.

Trademark

A specific mark, design, word or phrase that differentiates your brand from others.

Patent

A license or right that protects original inventions, designs and processes.

Pro Tips

- Only trademark one thing
- Do your research
- Stay away from words used by a big competitor

Note: *What I'm about to teach you is NOT legal advice.*

ACTION ITEM

- ☐ Do your research to ensure your trademark is available. Make sure to research related trademarks as well.
- ☐ Reach out to a lawyer or go to a legal website if you need assistance.

TOOLS & RESOURCES

- Patent: [GoPro](#)
- Website: [LegalZoom](#), Customized Legal Services
- Website: [Trademarkia](#), Register Your Trademark
- Website: [Global Brand Database](#), World Intellectual Property Organization
- Website: [IP Australia](#), Intellectual Property Search Engine for Australian Brands
- Website: [Trademark Electronic Search System](#), U.S. Patent and Trademark Office
- Website: [Bite](#), Toothpaste Bits

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MODULE 4:

Developing & Planning Your Idea

LESSON:

Breaking the Mould

The phrase, “breaking the mould” refers to designing a product in a completely new and different way - basically, inventing it. This lesson will help you decide whether or not you should break the mould of an existing product (produce variations of existing products) or try something new. Generally speaking, if you’re just starting out, try not to deviate from the “mould” too much. You don’t want breaking the mould to break your bank account!

Breaking the Mould

Pros

Innovative
Sets you apart in the market

Cons

Time consuming
Relatively expensive

ACTION ITEMS

- ☐ Fill out the The 5-Question Self-Assessment exercise in the workbook to determine whether or not breaking the mould is the best option for you.

Breaking the Mould: The 5-Question Self-Assessment

1. Are you a product innovator or product refiner? If you answered “product innovator,” then “break the mold.”
2. Does your product or product idea have any competitors? If no, “break the mould.”
3. Are you or do you plan to create a revolutionary product? If yes, “break the mould.”
4. Do you have tight budget constraints? If no, “break the mould.”
5. Do you have the time to go back and forth with your manufacturer for multiple different product iterations? If yes, “break the mould.”

TOOLS & RESOURCES

- Article: [40 Greatest Product Innovations of the Modern Age](#), Men’s Health
- Blog: [29 Private Label Product Ideas to Kickstart a \\$100K+ Brand](#), ecommerceCEO
- Blog: [10 Trending Private Label Product Ideas](#), Startup Bros

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MODULE 4:

Developing & Planning Your Idea

LESSON:

Profit Margin

"The profit margin is your mistakes margin."

In this lesson, I'm going to show you how to set the price for your products, taking your profit margin into account. A profit margin refers to the percentage of revenue remaining after subtracting all costs. Having a good profit margin between 30 and 60% gives you more room for error and additional room to take calculated risks to scale your business.

Economies of Scale

Cost advantages gained by an increased level of production

Tips for Competitive Edge

1. Cut production costs
2. Bundle low margin items with high margin items
3. When in doubt, raise the price

ACTION ITEMS

- ☐ Calculate your profit margin based on your price and costs using the Profit Margin Calculator exercise.

Profit Margin Calculator

1. To calculate your Profit Margin, you must first determine the Cost.

Cost: What it costs you to manufacture your product.

Cost: _____

2. Next, determine your Selling Price.

Selling Price: Multiply your cost by 2.5 (depending on the mark-up).

Selling Price: _____

3. Then determine the **price of shipping**. Consult the shipping calculator linked in the Tools & Resources below.

Shipping Price: _____

4. Then calculate your Total Revenue.

Total Revenue = Selling Price + Shipping Price

Total Revenue: _____

5. Based on that, calculate your Gross Profit.

Gross Profit = Total Revenue - Cost

Gross Profit: _____

6. Lastly, calculate your Profit Margin.

Profit Margin = Gross Profit divided by Total Revenue

Profit Margin: _____

7. Get your percentage Profit Margin by multiplying your answer by 100.

Profit Margin (%): _____

TOOLS & RESOURCES

- Calculator: [Markup Calculator](#), Omni
- Article: [10 Outrageous Markups You'd Never Guess Your Were Paying](#), Reader's Digest
- Calculator: [Shopify Shipping Calculator](#), Shopify

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MODULE 5:

Building An Audience Before You Launch

LESSON:

Market to Product Fit

"Even if you have the best possible version of whatever it is you're selling, if no one knows about it in the first place...then you don't have a market."

In this lesson, I'm going to teach you about what I like to call, "market-product fit" and what I actually mean by that.

This is important because one of the biggest myths in ecommerce, and with any business really, is the idea that "if you build, they will come" when the reality couldn't be further from the truth.

When You Don't Have a Market...

- You end up launching a product to crickets.
- Your brand won't develop into anything sustainable.
- You won't get the sales that you want.
- You will be disappointed.
- Even if it's a great product, it's not going to sell itself.

ACTION ITEM

- ☐ Brainstorm 5-10 ideas on how to build your target audience on social media in the Audience-Building exercise below.
- ☐ Start building your audience!

Audience-Building

Idea #1:



Idea #2:

Idea #3:

Idea #4:

Idea #5:

TOOLS & RESOURCES

- Video: [0 to 1 million Instagram followers in 2 years](#), Foundr
- Blog: [The Ultimate Guide to Social Media for Ecommerce](#), Neil Patel



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MODULE 5:

Building An Audience Before You Launch

LESSON:

The 3 C's of Community

"Social media isn't just for fun anymore"

In this lesson, you'll learn about what I call, "The 3 C's of Community." These are content, collaboration and consistency.

Content

- Add value
- Build trust
- Inspire action

Collaboration

- Partner with larger accounts
- Post shoutouts

Consistency

- Post regularly
- Learn when your audience is online
- Know which content resonates most

ACTION ITEM

- ☐ Bank your favorite content and collaboration examples.
- ☐ Use them as inspiration to begin your own engagement campaign.

TOOLS & RESOURCES

- Blog: [49 Ways to Gain the Trust and Loyalty of Your Audience](#), Copyblogger
- Blog: [31 Call-to-Action Examples You Can't Help But Click](#), HubSpot
- Blog: [8 Attributes of Content That Inspire Action](#), Moz
- Blog: [30 Click-Worthy Words For More Powerful Copywriting](#), Brand.ing
- Blog: [The Perfect Blog Post](#), Social Triggers
- Spreadsheet: [Content Multiplier Framework](#), Content Machine

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MODULE 5:

Building An Audience Before You Launch

LESSON:

Content Territories

"Content territories are the topics your brand either has authority on or interest in."

- Charl Laubscher, Founder of Love + Money Agency

In this lesson, I'm going to teach you how to come up with a content creation strategy.

If you follow these tips, you will be able to quickly build a strong following online. If you don't, you might waste a lot of time and potentially damage your brand presence.

Content Territories

These are the categories and topics used to bucket your content. Shape your content territories around the customer personas you crafted. Make sure to look for 3-5 content territories that represent your brand.

Content Territory Examples

Beauty
Entertainment
Fashion
Food & Drink
Health & Fitness
Lifestyle & Travel
Model
Nature & Animals
Personality
Photography
Technology
Video
Other

ACTION ITEMS

- ☐ Choose 3-5 different content territories based on your customer personas.
- ☐ Start gathering content!

TOOLS & RESOURCES

- Article: [How to Build a Social Media Strategy for Multiple Territories](#), Social Media Today
- Blog: [How to Get More Followers on Instagram: 10,000 followers in 2 weeks](#), Foundr

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MODULE 5:

Building An Audience Before You Launch

LESSON:

Content Weighing

"Your audience should look forward to your content."

In this lesson, I'll teach you how to incorporate different types of posts into your feed so that your content adds value, builds trust, and inspires action among your audience.

ACTION ITEMS

- ☐ Identify your top performing content.
- ☐ Research the top performing content across brands in your niche.
- ☐ Weigh the content by posting more of what your audience likes.

TOOLS & RESOURCES

- Blog: [How to Curate Content for Your Audience](#), Oberlo
- Blog: [32 Ways Your Ecommerce Company Can Boost Engagement and Sales](#), Neil Patel

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MODULE 5:

Building An Audience Before You Launch

LESSON:

Content Curation

In this lesson I'll teach you how to properly curate your social media feed. Curating quality content is inexpensive and can elevate your brand perception. The goal here is to create an eye-catching Instagram experience using a mix of third-party content and your own.

Content Creation

The process of creating your own content and marketing it to your own audience.

Content Curation

The process of gathering existing content and sharing it with your audience.

Image Crediting

Save an image from the web.
Record where you found it .
Reach out to the content creator for consent to repost.
Credit it by tagging and mentioning the source.

ACTION ITEMS

- ☐ Find and begin posting content that fits your brand aesthetic.

TOOLS & RESOURCES

- Blog: [A Step-by-Step Process to Curate Viral Content for Instagram and Facebook](#), Shopify
- Blog: [How to Curate a Stunning Instagram Feed With User Generated Content](#), Later

Notes:

[illegible]

MODULE 5:

Building An Audience Before You Launch

LESSON:

Brand-Generated Content (BGC) vs. User-Generated Content (UGC) vs. Influencer-Generated Content (IGC)

"The sales page does the majority of the heavy lifting if somebody's going to buy your course."

In this lesson, I'll teach you about the three main types of content you can use to increase brand awareness. If you do this right, you'll be able to gain product visibility, consumer trust, and create a positive brand experience.

Brand-Generated Content (BGC)

Content generated in-house by your brand

User-Generated Content (UGC)

Content created by your customers

Influencer Generated Content (IGC)

Content created by influencers often in exchange for the product or money

ACTION ITEMS

- ❑ Analyze the content your favorite brands are posting on social media.
- ❑ Identify the content as BGC, IGC, or UGC. Pay attention to how often they post each type of content.

TOOLS & RESOURCES

- Instagram: [Foundr UGC \(#foundrv1\)](#), Foundr
- Instagram: [Frank Body UGC \(#thefrankeffect\)](#), Frank Body
- Instagram: [The 5th UGC \(#the5thwatches\)](#), The 5th
- Instagram: [Example UGC](#), The5th
- Instagram: [SkinnyMe Tea Results Account](#), SkinnyMe Tea
- Instagram: [Example UGC](#), SkinnyMe Tea

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MODULE 5:

Building An Audience Before You Launch

LESSON:

Building Your Content Funnel

In this lesson, I'll teach you how to increase your conversion and repurchase rates by putting yourself in your prospective customer's shoes when approaching your brand or product.

The Buyer Journey
The process a potential customer goes through before making their purchase. It starts with the simple knowledge that your brand and product exist all the way down to being sold on it.



The buyer process is illustrated by the marketing funnel above. The way you give your prospective customers information depends on the level of knowledge they have about your product or brand.

Awareness Stage	Evaluation Stage	Purchase Stage
<i>The Introduction</i> • Content-focused • Brand-focused • Blog posts • Social media • Free value	<i>Swaying Opinions</i> • Social proof • Testimonials • UGC • Good press • Reviews • Waitlist • Influencers • How-To's • Demo videos • Product benefits • Frequently Asked Questions	<i>The Hard Sell</i> • Offers • Discounts

ACTION ITEMS

- ☐ Start writing and scheduling out your launch emails

The Buyer Journey

Decide on the type of content you'll feed customers at each of the stages of the buyer journey.



TOOLS & RESOURCES

- Blog: [Why Every Shopify Store Needs a Marketing and Sales Funnel](#), Shopify
- Blog: [Secrets of the Ecommerce Conversion Funnel](#), CrazyEgg
- Blog: [How to Build an Ecommerce Sales Funnel](#), SleekNote
- Blog: [How to Build an Ecommerce Sales Funnel to Drive Growth](#), Big Commerce

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MODULE 5:

Building An Audience Before You Launch

LESSON:

Post-Purchase Stage

"It's much cheaper to retain a customer than acquire a new one."

In this lesson, I'll teach you how to turn customers into repeat buyers and brand advocates. The goal here is to drive repeat purchases, reviews, and referrals by encouraging your customer to interact with you on social media or subscribe to your email list.

There are four moments in the post-purchase stage of the buyer journey which can be used for best results. Note that the simplest way to receive and use your customer's content to drive sales is by giving them a hashtag.

ACTION ITEMS

- ☐ Create 10-15 social media assets for your course
- ☐ Schedule them out on your favorite social media management tool

The 4 Product Experience Micro-moments

Micro-moment	Goal	Method
After purchase	Capitalize on the excitement of buying the product	Website pop-up encouraging your customers to share their purchase on social media
Unboxing	Capitalize on the excitement of receiving the product	Thank you cards, text on packaging, or a post-purchase email encouraging customers to share a picture unboxing your product on social media
Product in Action	Capitalize on images of your customer using the product	UGC of customers using your product
Transformation/Results	Capitalize on your customer's results	Testimonials of your customers talking about your product

ACTION ITEM

- ☐ Create CTAs for each micro-moment in the Customer Micro-moments exercise.
- ☐ Decide on which hashtags you'd like to use for each micro-moment.

Customer Micro-moments

Decide on the specific method to capitalize on your customer’s micro-moment. Craft your CTA based on your desired outcome. Come up with one or more hashtags your customer can use to share their micro-moments.

Micro-moment	Method	CTA	Hashtag
After purchase			
Unboxing			
Product in Action			
Transformation/ Results			

[illegible]

- App: [Checkout Share](#), Shopify
- Blog: [How to Use Hashtag Marketing to Grow Your Business](#), ThriveHive
- Blog: [How to Use Instagram Hashtags to Grow Your Audience](#), Sprout Social



MODULE 5:

Building An Audience Before You Launch

LESSON:

Giveaways

"Giveaways are the most effective way to quickly grow your presence on social media."

In this lesson, I'll be teaching you how to run an effective giveaway. This is important as a giveaway is a great way to generate new leads and traffic to your website all while remaining cost-effective.

The Loop Giveaway

A contest involving multiple social media accounts.

The Tag-to-Win Giveaway

A contest in which a person has to tag a friend to be eligible to win.

Giveaway Tips

- 1.) Create a strong call-to-action
- 2.) Make it very easy to enter
- 3.) Make the price attainable
- 4.) Give away two of the product
- 5.) Limit the timespan of the giveaway
- 6.) Leverage paid shoutouts
- 7.) Get influencers to host
- 8.) Run a second chance draw

ACTION ITEMS

- ☐ Use The 5th's giveaway caption as a template to create and publish your own.
- ☐ Choose the prizes for your giveaway.
- ☐ Decide whether or not to collaborate with other accounts.

The 5th Giveaway Mad Libs

TAG TO WIN A [INSERT PRIZE HERE] FOR YOU AND YOUR FRIEND

-

HOW TO PARTICIPATE:

1) Follow [YOUR BRAND'S IG HANDLE]

2) Tag A Friend under this photo and ask them to follow [YOUR BRAND'S IG HANDLE]

-

BONUS ENTRIES: 1 comment = 1 entry and you can tag 1 friend per comment.

-

Please note you just BOTH be following [YOUR BRAND'S IG HANDLE] to win.

-

Competition Ends in 48 Hours and the winner will be announced on Instagram. [YOUR DESIGNATED HASHTAG]

-

This promotion is in no way sponsored, endorsed or administered by, or associated with, Instagram. By entering, entrants confirm the release of Instagram of responsibility and agree to Instagram's Terms of Use.

TOOLS & RESOURCES

- Document: [Tag-to-Win Giveaway Script](#), Foundr
- Instagram: [Giveaway Post Example 1](#), Bambi Boutique
- Instagram: [Giveaway Post Example 2](#), Bambi Boutique
- Instagram: [Giveaway Post Example 3](#), Bambi Boutique
- Instagram: [Giveaway Post Example 4](#), Bambi Boutique
- Facebook: [Giveaway Post Example \(Facebook\)](#), The 5th
- Instagram: [Tag-to-win Giveaway Example](#), The 5th
- Instagram: [Giveaway Followup Post](#), The 5th
- Blog: [How To Hold a Tag-to-Win Giveaway on Instagram](#), Hey Influencer
- Blog: [How to Grow Your Ecommerce Business with Viral Giveaways](#), Sumo
- Blog: [The Simple Strategy We Used to Get 13,603 New Email Sign-Ups in 10 Days](#), Foundr

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MODULE 5:

Building An Audience Before You Launch

LESSON:

Marketing Psychology

"You can take the person out of the stone age but you can't take the stone age out of the person."

In this lesson, I'll talk about the importance of utilizing the psychology of marketing and the role it plays while you are building an audience for your product and online store. I'll teach you the seven psychological principles of persuasion and we'll hone in on the 3 that are most applicable to your business.

The 7 Psychological Principles of Persuasion

1. Reciprocity
2. Commitment and Consistency
3. Liking
4. Authority
5. Social Proof
6. Scarcity
7. Unity

ACTION ITEM

- ☐ Brainstorm how you can apply the three main psychological triggers to your brand.

Trigger	Example	Applications
Reciprocity	Free content	_____
	Free gift with purchase	_____
Social Proof	Customer reviews or testimonials	_____
	Showcase good press	_____
	Waitlist	_____
	Influencers you've worked with	_____
	Show people are following your brand and viewing your content	_____
Scarcity	"Only x number of products left"	_____
	Limited edition	_____
	Countdown timer	_____

TOOLS & RESOURCES

- Website: [JustUno](#), Visitor Conversion Optimization Platform
- Plug-In: [Social Proof](#), Shopify
- Plug-In: [Nudgify](#) (Social Proof), Shopify
- Plug-In: [Fomo Social Proof](#), Shopify
- Plug-In: [Urgency, Social Proof & Timers](#), Shopify
- Blog: [Top 3 Social Proof Apps in the Shopify App Store 2019](#), Convertize
- Blog: [11 Mind Tricks Ecommerce Marketers Use to Make You Buy](#), CrazyEgg
- Book: [Influence: The Psychology of Persuasion](#), Amazon
- Blog: [20 Examples of Social Proof in Action](#), HubSpot
- Blog: [26 Examples of Social Proof Used in Marketing](#), Referral Candy
- Video: [The 6 Principles of Influence](#), YouTube

Notes:

[illegible]

MODULE 5:

Building An Audience Before You Launch

LESSON:

Your Waitlist (Landing Page)

In this lesson, I'm going to teach you how to create a waitlist of people who are waiting for you to open your store. Your waitlist will become a powerful asset so that you get sales on day one. But in order to get hundreds if not thousands of people signed up to your waitlist you have to get their email. Enter the landing page.

Landing Page

A webpage where people can put in their information and anything else you'd like to capture. Create a call-to-action on your other platforms to direct your customer to the landing page.

The 7 Components for a Waitlist Landing Page

1. Headline
2. Subhead
3. Hero Image
4. Clear Copy
5. Clickable CTA
6. Scarcity Mechanism

ACTION ITEMS

- ❑ Create a landing page using one of the sites linked in the Tools & Resources below.
- ❑ Promote that page everywhere you can!

TOOLS & RESOURCES

- App: [Lander](#), Landing Page Creation
- Website: [Unbounce](#), Landing Page Creation
- Website: [LeadPages](#), Landing Page Creation
- Website: [ClickFunnels](#), Marketing Funnels and Landing Pages
- Website: [LaunchRock](#), Landing Page Creation
- Plug-In: [Coming Soon](#), Shopify
- Blog: [The Best Ecommerce Landing Pages to Boost Your Conversion](#), CrazyEgg
- Blog: [30 Ecommerce Landing Page Examples to Influence Your Next Page Design](#), InstaPage
- Blog: [4 Best Landing Page Creation Tools That Save You Hours](#), Neil Patel
- Blog: [25 Best Coming Soon Landing Page Examples You'll Want to Copy](#), Wishpond

Notes:

[illegible]

MODULE 6:

Million Dollar Influencer Marketing Blueprint

LESSON:

Getting Started with Influencer Marketing (Part A)

This module is all about leveraging social media influencers to gain brand traction, scale up your audience, and ultimately sell your products!

According to the Digital Marketing Institute, 49% of consumers depend on influencer recommendations. In the next two video lessons, I'm going to help you get started with the very first step of creating a successful influencer marketing campaign — goal-setting.

There are 4 different campaign goals that I commonly use with influencer marketing campaigns:

- Increasing Brand Awareness
- Generating Content
- Growing your Social Following
- Driving Sales

Tips on working out what to give away to build reciprocity:

- Focus on what's going to add value for your target audience.
- Pinterest: A repin rate gives a good indication of the demand for that content.
- You can create a downloadable of something that's been repinned a lot of times.
- Find out your audience's interest groups.
- Find out what's trending on social media.
- Personalization is a big trend. E.g: You can offer personalized products to your first 100 customers.

TOOLS & RESOURCES

[Download Transcript](#)

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MODULE 6:

Million Dollar Influencer Marketing Blueprint

LESSON:

Getting Started with Influencer Marketing (Part B)

It's time to learn about the last two influencer marketing goals I like to keep in mind when implementing my campaigns. At the end of this lesson, you should have an idea of which goal is most important to you and your online store.

ACTION STEPS

- ☐ Select 1 campaign goal out of the 4 we talked about
- ☐ Choose 1 type of influencer collaboration to achieve this goal
- ☐ Use the S.M.A.R.T. Goal-Setting Framework to refine your influencer marketing campaign goals.

Use the SMART Goal-Setting Framework below to guide you through the process of refining your influencer marketing campaign goals. For more information on SMART Goal-Setting enroll in Triple Your Business, a scaling course by Foundr, which includes a great lesson on SMART Goals.

S = Specific
M = Measurable
A = Achievable
R = Relevant
T = Time-bound

Campaign Goals:

- ☐ Increasing brand awareness
- ☐ Growing social following
- ☐ Generating content
- ☐ Driving sales

Influencer Collaboration Type:

- ☐ Product-for-post campaign
- ☐ Product-for-content campaign
- ☐ Influencer giveaways
- ☐ Personalized discount codes

Now, how will you make your goal S.M.A.R.T.?

For example, if you selected "Generating content," your S.M.A.R.T. goal could be something like, "Generate 30 pieces of original influencer content by the end of this quarter."

Specific:

Measurable:

Achievable:

Relevant:

Time-bound:

TOOLS & RESOURCES

[Download Transcript](#)

[Google UTM Campaign Link Builder](#)

[Influencer Marketing - 6 Steps for Building an Effective Strategy \(SocialBakers\)](#)



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MODULE 6:

Million Dollar Influencer Marketing Blueprint

LESSON:

Identifying the Right Influencers

The most important consideration when starting a successful influencer marketing campaign is selecting the 'right' influencers. But what exactly constitutes the right influencer for your brand? And is having a large following enough?

Seven Factors for the Perfect Influencer

- Reach & Relationship
- Credibility
- Expertise
- Content
- Portfolio
- Persuasion
- Audience Relationship

The 3 R's Formula for Influence

Reach x Relevancy x Relationship = Influence

ACTION STEPS

- ☐ Start researching influencers. Who is creating great content in your space? Who are your ideal customers are following?
- ☐ Identify a list of 10-20 influencers that fit your brand and write them in the Influencer Prospects list below or in the Google
- ☐ Spreadsheet link under Resources & Links. If you're using the spreadsheet, be sure to make a duplicate to work off of.
- ☐ Evaluate your influencer list using the Brand-Influencer Fit questionnaire.
- ☐ Look at who your competitors are working with. Jot them down below or in the Competitor Partners tab in the spreadsheet.

Influencer/ Username	Platform	Followers/ Subscribers	Persona/Description



Do they have a large, engaged social media following?

- ☐ Yes
- ☐ No

Notes: _____

Do they have credibility or an expert status in a specific subject area?

- ☐ Yes
- ☐ No

Notes: _____

Have they built a brand around their personality, interests, hobbies or skills?

- ☐ Yes
- ☐ No

Notes: _____

Is their content on brand for you? In other words, does it share a similar aesthetic with your brand?

- ☐ Yes
- ☐ No

Notes: _____

Are their followers actively engaged in their content?

- ☐ Yes
- ☐ No

Notes: _____

Do they feature brands in their content?

- ☐ Yes
- ☐ No

Notes: _____

Have their sponsored post received as much engagement as their regular posts?

- ☐ Yes
- ☐ No

Notes: _____

Do they have a strong relationship with their audience?

- ☐ Yes
- ☐ No

Notes: _____

Are they able to speak to them in a language they trust and understand?

- ☐ Yes
- ☐ No

Notes: _____

Do they have a YouTube following or have they been on TV

- ☐ Yes
- ☐ No

Notes: _____



Competitor Partners

Influencer/ Username	Platform	Followers/ Subscribers	Persona/Description

TOOLS & RESOURCES

- [Download Transcript](#)
- [Example of an ideal influencer: Sarah’s Day](#)
- [How to Find Influencers & Launch a Killer Influencer Marketing Campaign \(Neil Patel\)](#)
- [Upfluence, Influencer Search Engine](#)
- [HypeAuditor, Instagram Account Analysis](#)
- [Google Spreadsheet: Influencer Prospects, Competitor Partners](#)

Notes:

[illegible]

MODULE 6:

**Million Dollar Influencer
Marketing Blueprint**

LESSON:

Audience Analysis

Who is your prospective influencer's audience? While it's difficult to know without explicit demographic information, it's not impossible. In this lesson, you will learn key tactics on gaging an influencer's audience. This will help you determine whether they're a good fit with your own target audience.

Basic Demographics

- Gender
- Age
- Location

ACTION ITEMS

- ☐ Perform a sample audience analysis of a prospective influencer partner
- ☐ Go through the last 20+ people who have liked or commented on their posts
- ☐ Analyze those followers' profiles and record demographic info (Gender, Age, Location) below.



[illegible]

Influencer Audience Analysis

Pick a prospective influencer partner and go to the comments section on a few of their posts. Click on a random sample of commenter profiles and write down their perceived demographic information. The more samples you take, the more accurate your audience analysis will become.

Influencer: _____



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MODULE 6:

Million Dollar Influencer Marketing Blueprint

LESSON:

Macro vs. Micro Influencers

Working with macro and micro influencers shouldn't be an either/or scenario. There are pros and cons to both. And the best influencer strategy includes a mix of both. In this lesson, you'll learn the pros and cons of each from cost and engagement to ROI and authenticity.

Macro Influencers

- Cost more
- Never do unpaid collaborations
- ROI is easier to define
- Longer, more established audience relationship
- Could lead to more micro influencer marketing requests

Micro Influencers

- Cost less
- Require more to achieve the same result
- Outreach is time-consuming
- More likely to do gifting/barter
- Perfect for "product-for-post" or "product-for-content" campaigns
- Higher engagement rate
- More authentic

ACTION ITEMS

- ☐ Make a list of 10 macro influencers and 20 micro influencers on the social platform of your choice. Feel free to use the Google Spreadsheet link under Resources & Links to label the micro/macro-influencers in your Influencer Prospects list.



My Macro Influencers

Influencer/ Username	Platform	Followers/ Subscribers	Persona/Description



My Micro Influencers

Influencer/ Username	Platform	Followers/ Subscribers	Persona/Description

TOOLS & RESOURCES

[Download Transcript](#)

[Influencer Rate Card \(for ballpark costs per post\)](#)

[Micro-Influencers: Marketing's Next Big Thing is Pure Gold for New Startups \(Foundr\)](#)

[How Much Should You Pay Social Media Influencers? \(Sprout Social\)](#)

[How Instagram Influencers Set Their Prices \(Influencer Marketing Made Easy\)](#)

[How Much Do Influencers Charge? | Paying Influencers 2019 Guide \(CPC Strategy\)](#)

[How Much Does Social Media Influencer Marketing Cost? \(Buffer Blog\)](#)

[What Influencer Marketing Really Costs \(DigiDay\)](#)

[Google Spreadsheet: Influencer Prospects \("Macro OR Micro" column\)](#)

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MODULE 6:

Million Dollar Influencer Marketing Blueprint

LESSON:

How to Find Influencers

So far in this module, we've cast a wide net to determine the types of influencers we might want to collaborate with. Now it's time to find them! Finding the perfect influencers for your campaign takes extreme vetting. Here are four main strategies I've used to find over 5,000 influencers for my brands:

- Using your ideal influencer as your starting point
- Working back from your ideal customer or target audience
- Modeling after what other companies are doing
- Using the social platform itself

ACTION ITEMS

- ☐ Try each strategy I've given you to find the right influencers for your campaign
- ☐ Choose which technique(s) you prefer
- ☐ Keep working on your list of influencers you started in the previous lessons
- ☐ Remember to create a blank account to gather influencers

TOOLS & RESOURCES

[Download Transcript](#)

Strategy #1: The Ideal Influencer As The Starting Point

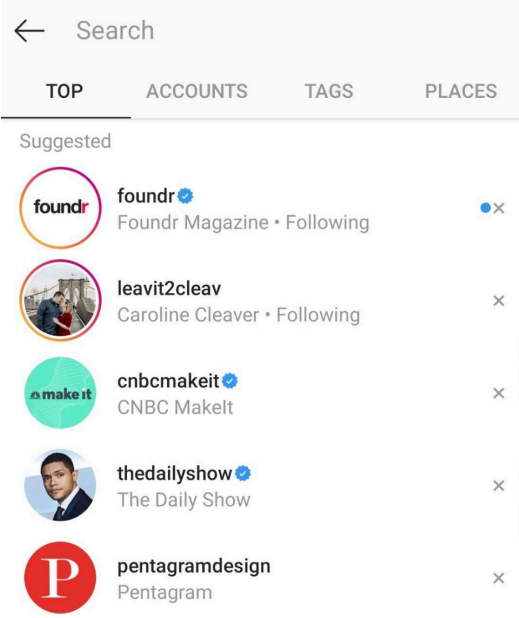
Go to the “Suggestions for you” drop-down arrow on your ideal influencer’s page. Jot down the names of the top three influencer recommendations you see. Include any other influencers your ideal influencer might be following.

Influencer/ Username	Followers	Persona/Description

Strategy #2: Back-Tracking From The Ideal Customer

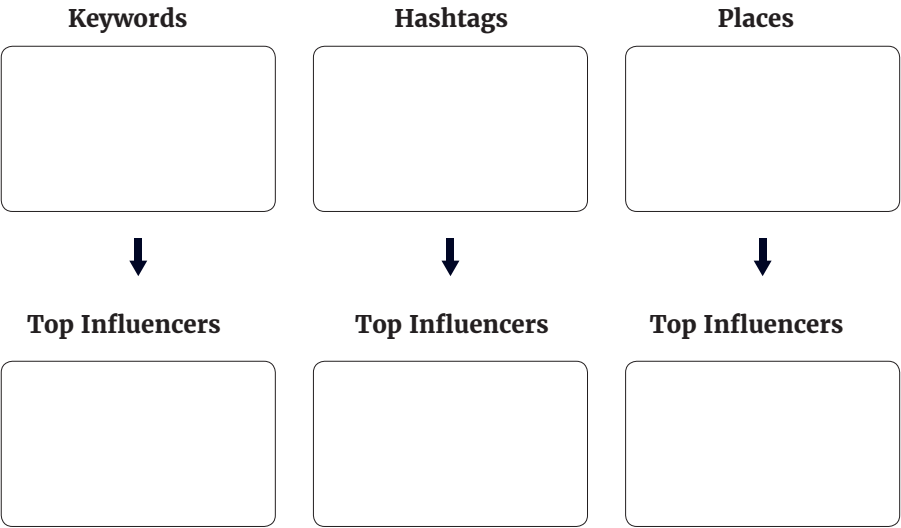
Take a look at your followers. Identify a few who fit your ideal customer persona. Who are they following? If you have the data available, feel free to look up real customers who’ve bought from your store and see who they’re following.

Influencer/ Username	Followers	Persona/Description



Strategy #4: Using Instagram For Your Influencer Search

Let's put keywords, hashtags, and location information to good use!
First type your related keywords in the search bar one by one. Whose posts are in your top results? Then, conduct a related hashtag search. Influencer posts will appear in the "top posts" section. Lastly, search whichever city you'd like and have a look at its top posts. See if there are any posts from an influencer in your niche.



Notes:

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MODULE 6:

Million Dollar Influencer Marketing Blueprint

LESSON:

Outreach to Influencers

In this lesson, I'll cover how to reach out to influencers on behalf of your brand, and I'll give you my exact email script template that you can start using right away. When working with influencers, your outreach may be their first interaction with your brand. So you'll want to make sure to give the best first impression.

Outreach Best Practices

- Keep it brief and to the point
- Spark their interest right away
- Personalize your message
- Give them a “why”
- Introduce your brand and how you're different
- Provide interesting campaign details
- Include next steps

ACTION ITEMS

- ☐ Draft an influencer outreach email
- ☐ Select one of the macro or micro influencers on your wish list and structure the outreach around them
- ☐ Feel free to use my Skintox email template as a guide

Woodpecker Cold Emails & Follow-Ups

MODULE 6:

Million Dollar Influencer Marketing Blueprint

LESSON:

Negotiating with Influencers

So an influencer is interested in collaborating, now what? The nuances of this stage will vary from partnership to partnership, but here are some tips to guide you as you work through the negotiation stage:

Set clear expectations: lay out deliverables and compensation

Meet in person for larger partnership deals

Send a briefing document & agreement

Be as exact as possible

Remain informative & clear at all times

It's important to keep in mind that the influencer will not give you a quote until it is clear exactly what will be expected of them.

ACTION ITEMS

- ☐ Brainstorm your influencer briefing with the checklist below. When you're ready to craft your contract, click on the sample contract templates in the resources section for inspiration.

CAMPAIGN OVERVIEW

- ☐ Name (Parties Involved)
- ☐ Date
- ☐ Campaign Objective
- ☐ Brand Contact Information

CREATIVE BRIEFING

- ☐ Brand Style (Tone, Messaging, etc.)
- ☐ Timeframe / Length of Campaign

DELIVERABLES

- ☐ Number of Social Posts
- ☐ Time Social Posts Active
- ☐ Social Posts Per Platform
- ☐ Frequency of Deliverables
- ☐ Influencer Content Promotion?
- ☐ Hashtags
- ☐ Links
- ☐ Description Copy Rules
- ☐ Publication Date/s

PAYMENT

- ☐ Fee
- ☐ Payment Type

OTHER

- ☐ Post Approval Procedures
- ☐ Content Ownership
- ☐ Non-Compete Clause
- ☐ Cancellation Clause

TOOLS & RESOURCES

[Download Transcript](#)

[Macro vs. Micro Influencer Deals and How to Negotiate Them \(Shopify Blog\)](#)

[The Art of Negotiating Influencer Costs in Influencer Marketing! \(PMYB\)](#)

[The Art of Negotiating With Influencers \(Tagger Media\)](#)

[Four Steps to Successfully Negotiate Rates with Influencers \(Grapevine Blog\)](#)

[Sample Influencer Contract Template \(Hire Influence\)](#)

[Influencer Contract Template article \(Influencer Marketing Hub\)](#)

Notes:

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MODULE 6:

Million Dollar Influencer Marketing Blueprint

LESSON:

Leveraging Assets to Maximize Results

The word “assets” here refer to the pieces of influencer-generated content you received as a part of the collaboration. In this lesson, I’ll give you a litany of tactics for leveraging your influencer assets to get even bigger results from your campaign.

ACTION ITEMS

- ☐ Download the Leveraging Assets Cheat Sheet
- ☐ Use the Cheat Sheet to brainstorm creative ways to leverage your assets

TOOLS & RESOURCES

[Download the Leveraging Assets Cheat Sheet](#)

[Download Transcript](#)

[Outbrain](#)

[Taboola](#)

[Quuu Promote](#)

Notes:

[illegible]

MODULE 6:

Million Dollar Influencer Marketing Blueprint

LESSON:

Measuring ROI of Your Campaign

ROI or Return-On-Investment measures the amount of return on an investment relative to the investment's cost. This metric ultimately determines the success of your influencer marketing campaign. Use the equation below to calculate your ROI:

ROI

(Gain from investments – Cost of investments)

Cost of investments

ACTION ITEMS

- ❑ Create a report with the key metrics, results and learnings from your influencer campaign. You can also input your data in the Influencer Campaign Report tab on the Google Spreadsheet provided under Resources & Links.

Influencer Campaign Report

Key Metrics	Pre-Campaign Data	Post-Campaign Data
New Users		
Unique Users		
Total Sessions		
Total Page Views		
Time Spent on Site		
Referral Traffic		

On a scale of 1-10, how well did the influencer marketing campaign perform?

What went well?

What did not go well?

What should I STOP doing?

What should I START doing?

TOOLS & RESOURCES

[Download Transcript](#)

[Google Spreadsheet: Influencer Campaign Report](#)



Notes:

[illegible]

MODULE 7:

Launch & Operations

LESSON:

Launch Checklist

"No launch is perfect. The main thing you want to do is actually launch."

In this lesson, I'll teach you how to launch your product and provide you with a product launch checklist.

A well-executed launch can increase your sales from day one, help you gain more customers, and really separate yourself from the rest of the competition. It helps to get that momentum from the very start and makes it a lot easier to scale from there.

The 3 Launch Phases

1. Planning for Your Launch
2. Pre-Launch
3. Launch

ACTION ITEMS

- ☐ Create your launch strategy using the resources and the workbook.

Launch Checklist

1) Planning Your Launch

- ❑ **Launch Date.** The first thing that you need to be clear on is your launch date. Make sure that you pick a date where you know you will have your product in stock. You can start on a Monday as website traffic and email open rates overall are higher that day than any other day of the week.
- ❑ **Timing.** Be very specific and assign dates to everything. This will help you create a basic launch schedule.
- ❑ **Risk Management.** Taking some time now to figure out what you're going to do and what can go wrong is going to save you so much stress later on. Do a big brainstorm of everything you'll be doing during launch and what might go wrong at each stage. This way you can solve the problems ahead of time proactively, rather than having to respond reactively in the moment.
- ❑ **Scarcity/Special Offer.** A large part of a successful launch will be driving sales through scarcity or a special offer during the launch period. The scarcity could be around the amount of stock that you are releasing for sale. You could also offer a special discount that is only available during launch week, or a limited offer or bonus that is only on for the launch.
- ❑ **Newness.** People love to get different, unique and new products that no one else has yet - so a "be the first" marketing message will work well here.

2) Planning Your Marketing

- ❑ **Influencer Marketing.** Influencers will be a key part of any marketing strategy. Figure out which influencers you're going to get in touch with by referring to the list that we made earlier, how you're going to get in touch with them, and how you're going to get people interested in your product launch and onto your waiting list.
 - What is the launch date to your email list?
 - When will you contact influencers?
 - When would you like them to promote your product?
 - What date will you let people know that you're launching?
 - When will you start promoting and sending out your coming soon messages?
- ❑ **Contacting Influencers.** It can take some time to get in touch with and line-up influencers, so ensure you have plenty of time to start contacting them. Ideally you will be offering them an incentive for them to post on or during your launch.

3) Pre-Launch

Your pre-launch generally lasts anywhere from two weeks to a couple months depending on how long it takes you to get everything ready. Generally you want to build an audience and then spend about 8 weeks leading into the launch. This marketing phase will be run online through social media, starting with the social channel where your target audience is the most active.

To start getting people hyped up for your launch, you'll want to get started on the marketing strategies you were working on earlier like:

Ensure influencers are posting coming soon and sneak peeks of your product.
 Feature posts about your product "coming soon" or "sneak peeks" on your brand's social media.
 Run a competition or referral campaign to build some hype around your launch.
 You might also want to consider creating some lead magnets or content upgrades to give away free for getting people onto your email list.

4) Launch

This is when all your hard work is going to pay off and you want to make sure that everyone on your team is briefed and ready. This is likely going to be when you're going to get the most sales, so you want to make sure everything runs perfectly.

- ❑ **Test everything is working on your online store.** Have some friends do dummy purchases to ensure that everything is working correctly. Be sure to test it on a couple of different web browsers and phones. Make sure that it works from a mobile phone because a large number of people will go straight from social media to the store on their mobile device.
 - Is the order button working?
 - Is the purchase receipt being sent through?
 - Are any pop-ups or offers working correctly on the site?

- ❑ Email your waitlist and announce it on social media. Keep it exciting, remind them of the offer and have just ONE very clear call-to-action. Send them to the one page where they can buy. You can schedule the email up in advance, as well as pre-prepare the social media posts and captions.
- ❑ Maintain your social media posting, keep talking about the launch, but also watch for comments, questions and feedback that could be stopping people from buying.
- ❑ The momentum of your launch usually dies off after a week but you want to keep the momentum going and still keep promoting your launch for at least a few days after you officially start.
- ❑ Keep an eye on all of your tools and the influencers you're working with and making sure everything is working in sync with each other.
- ❑ Make sure to deal with customer support as well because you'll have loads of people email you.

Remember: No launch is perfect. The main thing is to make sure you do launch. You need to get your product out there, selling and getting customer feedback ASAP.

TOOLS & RESOURCES

- Document: [Launch Checklist](#), Foundr
- Document: [Proven-to-Convert Pre-Launch Email Templates](#), Foundr
- Website: [The Essential Shopify Store Launch Checklist](#), Shopify
- Blog: [5 Things You May Forget Before Launching Your Shopify Theme](#), Out of the Sandbox

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This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

MODULE 7:

Launch & Operations

LESSON:

Free Shipping

"People would pay more for a product with free shipping rather than less for a product with shipping."

In this lesson, I'm going to take you through why you should offer some level of free shipping.

Shipping Tips

- **Factor your shipping and handling price into your product price.** Rather than selling a book that costs \$20 with \$20 shipping just sell the book for \$40 with free shipping.
- **When a product is more expensive sometimes it implies that it might be of higher quality or higher value.** The only time there is perceived value in shipping is when it is going to be faster or safer for your product to be shipped
- **There is no perceived value in standard shipping** especially if it's going to take a while and it's untracked. These days, it's a basic expectation from a customer buying online that their product will get to them in a cost-effective way — if not free of charge.
- **Have a free standard shipping option** (At least for all domestic orders. So if you ship from the U.S. say, "free standard shipping U.S. wide") and then an international option and a more costly tracked, express option.

ACTION ITEMS

- ☐ Research how much it'll cost to offer domestic, international and express shipping using shipping calculator of choice in the Tools & Resources.
- ☐ Rework your product pricing strategy to offer free shipping on domestic orders, a flat international fee and tracked, express options for both domestic and international orders.
- ☐ Include the costs in your profit margin spreadsheet.

TOOLS & RESOURCES

- Spreadsheet: [Gross Profit Margin Calculator](#), Foundr
- Website: [Free Shipping](#), Shopify
- Blog: [How to Determine Your Shipping Costs Without Ripping Off Your Customer](#), SKU Vault
- Calculator: [Shipping Calculator](#), USPS
- Calculator: [Shipping Calculator](#), Canada Post
- Calculator: [Shipping Calculator](#), UK Royal Mail
- Calculator: [Shipping Calculator](#), Australia Post
- Calculator: [Shipping Calculator](#), FedEx
- Calculator: [Shipping Calculator](#), UPS
- Calculator: [Shipping Calculator](#), DHL
- Calculator: [Shopify Shipping Calculator](#), Shopify
- Calculator: [Shipping Calculator](#), Parcel Monkey
- Website: [Shopify Shipping](#), Shopify

Notes:

[illegible]

MODULE 7:

Launch & Operations

LESSON:

Afterpay & Zip Pay

In this lesson, my friend and CEO and Publisher of Foundr Magazine, Nathan Chan will show you how to use various checkout methods to raise your sales conversions.

Aside from running Foundr, Nathan is the co-founder of a successful ecommerce business called Healthish specializing in a time-marked water bottle. He's experienced the impact of using various checkout methods first-hand and will share his learnings in this lesson.

Note: Choose either Afterpay or Zip Pay to avoid being penalized by the other as both are offering the same type of service.

ACTION ITEMS

- ☐ Spend five minutes exploring the Afterpay and Zip Pay sites.
- ☐ Choose one for your store and make sure you're accepting PayPal as well.

TOOLS & RESOURCES

- Website: [Afterpay](#), Ecommerce Payment Method
- Website: [Zip Pay](#), Ecommerce Payment Method
- Blog: [Afterpay vs. Zip Pay: Which Is Better For Your Ecommerce Store](#), Medium

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MODULE 7:

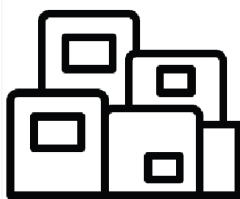
Launch & Operations

LESSON:

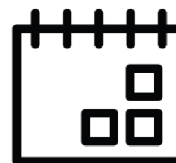
Logistics - Holding Stock

In this lesson, I'll teach you how to manage your stock flow. Too much stock on hand is expensive to order, maintain, and store. Too little and you miss out on sales.

Luckily, most online store providers will have apps that can help manage your stock quantity. Whether you do it with an app or a simple spreadsheet, you need to know the following numbers:



Your
stock on hand
at all times.



Your
Average Sales:
Daily/Weekly/Monthly



Your **Lead Time**
around ordering and
receiving your stock, which
is usually between 1 and 3
months.

Stock Holding Tips

- **Do a stocktake every Monday** so you can place an order during the week.
- With most ecommerce providers, you can **set triggers that remind you when you need to order more stock** based on lead time and stock levels.
- **Keep your numbers up to date** at all times.
- **Know your lead times** for ordering and receiving new stock,
- Before you start to scale, you can **manage your stock from your own home, office, or garage**. At an early stage, it is generally too soon to start organizing third party logistics (3PL) or other warehouses.

ACTION ITEM

- ☐ Complete the worksheet below to get to know your numbers.
- ☐ Decide which methods to use to keep track of your inventory.

Stock Flow Management

$$\frac{\text{Number of items ordered per week}}{\frac{\text{Number of days until your product runs out}}{\text{Average number of products sold per day}}} =$$

[Note: The timeframe may vary. Also don't forget to factor in your lead time as well as your shipping time. This means, do this simple equation weeks in advance according to the numbers your business is averaging or forecasting.]

For example: Amy ordered 150 razors for the week on Monday. And she's been selling an average of 30 razors a day.

$150/30 =$ She'll sell out in 5 days.

So she'll need to re-order stock in 5 days and adjust her order.

Now try it yourself.

Figure A: Number of items ordered per week: _____

Figure B: Average number of products sold per day: _____

$$\frac{\text{(Figure A)}}{\text{(Figure B)}} =$$

Number of days until your product runs out: _____

TOOLS & RESOURCES

- Blog: [The Beginner's Guide to Ecommerce Shipping and Fulfillment](#), Shopify
- Website: [Free Inventory Management Plug-Ins](#), Shopify

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MODULE 7:

Launch & Operations

LESSON:

Customer Support

"Hire when it hurts."

Customer support is the direct intersection between your product and your market. If you don't focus on it, you can damage your brand, lose sales, and easily upset existing customers. In this lesson, I'll teach you how to run customer support and when to get extra help!

Customer Support Tips

- **The founder should do the initial customer support** for the first 3-5 days to 6 months after launching. Commit to working on customer support for at least 1 hour per day.
- This is your chance to talk to your customers, hear their problems, complaints and issues so that you can resolve them, **learn from them and even keep improving your product based on their feedback.**
- **Your answers to customers will be in your company's tone of voice** and in your personal tone of voice so that later on, other staff will know what to expect and how to communicate on your behalf.
- It's important not to take things personally, **aim to be friendly and professional with everyone**, even if they are behaving badly. Remember that your goal is to provide an amazing customer experience and scale your company - not fight with rude people on email.
- **Start using customer support software** once your brand starts doing over \$10,000 a month.

Getting Started

1. **Have a dedicated email** where customers can contact you for help. support@yourcompany.com.
2. **Have a basic standard of how quickly you will respond.** Most people expect some sort of reply within 24-48 hours. It's even a good idea to setup an auto-responder that says "thanks for your email, we will get back to you within - and then set a reasonable expectation for how quickly you will be replying to emails".

3. You will find yourself answering the same kinds of questions again and again. **Start an FAQ document and save the answers to questions** people ask all the time. You can then start to copy and paste them into answers for new emails or even set up some keyboard shortcuts.
4. As your company begins to grow and scale it is best to **get a dedicated customer support software or help desk.** Basically these kinds of software allow you to take ticketed questions, assign support tickets to team members and have your staff reply with pre-saved responses or templates which will save a lot of time.
5. As you launch, **set aside at least one hour per day to handle these customer support emails**, ideally some time in the morning, and some in the evening to cover as many time zones as possible.

ACTION ITEMS

- ☐ Create a customer support email address for your company.
- ☐ Create a document where you can keep track of FAQs.

The image shows a full-page view of a document template. The top half consists of ten horizontal grey lines on a white background, providing space for notes or a title. The bottom half features a light blue sidebar on the right side. This sidebar contains the heading "TOOLS & RESOURCES" in a bold, dark blue font. Below the heading is a bulleted list of seven items, each starting with a dark blue dot. The list includes website recommendations like Zendesk, HelpScout, Intercom, Upwork, and Freelancer, as well as blog and article references regarding outsourcing customer service. The main body of the page below the ruled lines is currently blank.

TOOLS & RESOURCES

- Website: [Zendesk](#), Customer Support Ticket System and Support Platform
- Website: [HelpScout](#), Customer Service Software and Education
- Website: [Intercom](#), Customer Messaging Platform
- Website: [Upwork](#), Freelancer Marketplace
- Website: [Freelancer](#), Freelancer Marketplace
- Blog: [Pros and Cons of Outsourcing Customer Service](#), Simplr
- Article: [A Fresh Perspective on Customer Service Outsourcing](#), Forbes

- Website: [Zendesk](#), Customer Support Ticket System and Support Platform
- Website: [HelpScout](#), Customer Service Software and Education
- Website: [Intercom](#), Customer Messaging Platform
- Website: [Upwork](#), Freelancer Marketplace
- Website: [Freelancer](#), Freelancer Marketplace
- Blog: [Pros and Cons of Outsourcing Customer Service](#), Simplr
- Article: [A Fresh Perspective on Customer Service Outsourcing](#), Forbes

MODULE 7:

Launch & Operations

LESSON:

Gretta's Marketing Stack

In this lesson, I'll walk you through my personal Shopify Stack— the exact apps and plugins I use to run my online store.

Marketing

[Hey Influencers](#)

Pre-Launch & Coming Soon

[Coming Soon Page - Shopify](#)

[Lander App](#)

[Instapage](#)

Email Marketing

[Campaign Monitor](#)

[MailChimp](#)

[E-Mail Octopus](#)

Graphics

[Canva](#)

[99Designs](#)

Payments

[ZipPay](#)

[AfterPay](#)

[Smile.io](#)

One-Click Upsells

[Upsell Hero](#)

[Product Upsell](#)

Social Proof

[Shoppable IG Feed](#)

[JustUno](#)

[Fomo](#)

[Zendesk](#)

Competitions

[Gleam.io](#)

[Vyper](#)

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MODULE 7:

Launch & Operations

LESSON:

Reiterate/Optimize Your Product

"Never stop trying to make your product better."

In this lesson, I'm going to be teaching you how to reiterate and optimize your product. This is important because even after your initial validation there's always going to be other things you can do to improve your product once you start getting more feedback from the market.

Tips for Product Optimization

- Even after your initial validation, **there's always going to be other things you can do to improve your product** once you start getting more feedback from the market.
- **Do not reiterate or update your product until you have had some real customer feedback.** Focus on their pain points and do not get obsessed with what you think they want or would like.
- **Getting feedback from your actual customers** can give you inspiration for other products you can make in the future.
- **Keep track of any common customer complaints, returns, or frequent issues** that your customers tell you about.
- **It's important that you also seek user feedback.** A lot of people won't tell you if they are having problems, but they may tell their friends, complain on social media or simply never buy from you again.
- **Send satisfaction surveys to find out about their experience.** Keep it short and easy, otherwise people may start and not finish. Get some basic demographic information about them. and also how many times they have purchased from you.

ACTION ITEM

- ❑ Create and send out a survey for customer feedback.

TOOLS & RESOURCES

- Document: [Product Optimization Survey](#), Foundr
- Website: [Typeform](#), Create Online Surveys
- Website: [Survey Monkey](#), Create Online Surveys
- Article: [Frank Body's New Glittery "Unicorn" Scrub Has a 50,000 Person Waitlist](#), Fashionista

Notes:

[illegible]

MODULE 8:

Scaling Your Store

LESSON:

Cart Abandonment

"A cart abandonment initiative can help you recover 20% of lost sales."

In this lesson, I'll teach you about using cart abandonment tools to capture more sales.

This is important to ensure that you maximize all your marketing efforts by following up with potential customers who start the checkout process but do not complete it.

Why Do Customers Abandon Their Shopping Cart?

Sometimes people get distracted, don't have their credit card with them, the website crashes or something else. So it doesn't necessarily mean they want to cancel their order

Why Do You Need A Cart Abandonment Tool?

It's a great way of recovering customers that could have potentially been lost. A good cart abandonment sequence can recover about 20% of your lost sales.

How Does A Cart Abandonment Tool Work?

It integrates with your shopping cart. When someone starts to buy from your online store but leaves without completing the purchase, it triggers an email to them. It will be a recovery email aimed at getting them to complete the purchase.

The message will say something like, "you have forgotten this item in your cart" and then gives them another chance to buy. If it detects that they still haven't completed the purchase one or two days later, it automatically sends out a reminder email with a coupon code and further incentive to buy - such as 10% off your purchase.

What Cart Abandonment Tools Can I Use?

1. SmartCart Recovery
2. Abandon App
3. Jilt
4. Cart Rescuer
5. Abandon Aid

ACTION ITEM

- ❑ Choose a cart abandonment tool that integrates with your ecommerce platform.

EXAMPLES

[Fifty Three Cart Abandonment](#)

[Ashley Bridget Cart Abandonment](#)

[Black Milk Clothing Cart Abandonment](#)

[Skinny Me Tea Cart Abandonment](#)

[Chubbies Shorts Cart Abandonment](#)

[Doggy Loot Cart Abandonment](#)

[Fab Beds Cart Abandonment](#)

[Hello Merch Cart Abandonment](#)

[Holstee Cart Abandonment](#)

[NOMAD Cart Abandonment](#)

TOOLS & RESOURCES

- Document: [Email Templates](#), Foundr
- Board: [Abandoned Cart Emails](#), Pinterest
- Website: [Jilt](#), Ecommerce Email Marketing
- App: [Abandon App](#), Checkout Recovery Tool
- App: [Smart Cart Recovery](#), Recover Abandoned Orders
- Website: [Cart Rocket](#), Cart Abandonment Solution
- Website: [Abandon Aid](#), Revenue Discovery and Recovery
- Website: [Shop Message Me](#), Messenger Marketing Platform
- Blog: [Abandoned Cart Emails](#), Shopify

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MODULE 8:

Scaling Your Store

LESSON:

Thank You Cards In Order

"A little bit of personalization can be the difference between having a one-time customer and a customer for life."

In this lesson, I'm going to teach you about the power of using thank you cards. These are just printed cards that your customers can receive with their purchase. This is important as Thank You cards are an easy way to increase a customer's loyalty and improve their experience.

The Importance Of A Thank You Card

Thank you cards are a really easy way to **increase your customer's loyalty** and also **improve their experience**. It's a very simple thing that just makes people feel more special and **spices up that unboxing experience** when they receive their package.

It's a great opportunity for you to **continue marketing with a call-to-action** such as asking people to leave reviews or create some other kind of user generated content. You may even want to offer a coupon code for a discount on their next purchase.

It's a really easy method to **strengthen the relationship** you have between your brand and your customer. This little bit of personalisation can be the difference between having a one-off customer, or a customer for life.

It's a simple, pretty affordable step that goes a long way.

ACTION ITEM

- ☐ Do your thank you card competitor research.
- ☐ Decide what you'd like your thank you cards to achieve or accomplish in the exercise below.
- ☐ Get your cards designed and made!

Thank You Card Goals

What do you want your "thank you" card to achieve?

- ☐ Increase Customer Satisfaction
- ☐ To Create UGC (User Generated Content)
- ☐ Retention (Offer Discount/Coupon Code)
- ☐ To Get Customer Reviews
- ☐ Other: _____

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TOOLS & RESOURCES

- Board: [Thank You For Your Order Cards](#), Pinterest
- Blog: [How To Write Thank You For Your Purchase Notes](#), Shoplo
- Blog: [How To Write A Thank You For Your Purchase Note \[Templates\]](#), PackHelp
- Website: [Vistaprint](#), Customizable Marketing Materials
- Website: [Postable](#), Customizable Cards

- Board: [Thank You For Your Order Cards](#), Pinterest
- Blog: [How To Write Thank You For Your Purchase Notes](#), Shoplo
- Blog: [How To Write A Thank You For Your Purchase Note \[Templates\]](#), PackHelp
- Website: [Vistaprint](#), Customizable Marketing Materials
- Website: [Postable](#), Customizable Cards

MODULE 8:

Scaling Your Store

LESSON:

Raising Your AOV

"The more money you can afford to profitably acquire a customer, the easier your growth is going to be."

In this lesson, I'll teach you about raising the Average Order Value (AOV). This is important because your AOV could help you both significantly build on your revenue while also improving your customer experience by offering a complete product solution.

ACTION ITEM

- ☐ Decide on a tactic to increase your Average Order Value (AOV).
- ☐ Jot down ideas for how it could work for your brand.

Maximizing AOV

How do you want to increase the Average Order Value for your store?

- ☐ Bulk Discounts
- ☐ Themed Kits, Packs, Bundles
- ☐ Upsells
- ☐ Conditional Free Shipping

Ideas

Notes:

- App: [ReConvert](#), Post-Purchase Upsell
- App: [Bold Upsell](#), Upsell Smarter
- App: [Candy Rack](#), One Click Upsell
- Website: [Zipify](#), One Click Upsell
- Blog: [How To Add One Click Upsell To Your Shopify Store](#), Bold Commerce
- Blog: [Upsell After Checkout - The Highest Converting Click In Ecommerce](#), Bold Commerce

MODULE 8:

Scaling Your Store

LESSON:

Upsells/Cross Sells

In this lesson, I'll teach you about how to upsell your products. Upsells are important because they increase your average purchase price and make money from your existing traffic to your online store.

The probability of selling to a new prospect is 5-20%, while the probability of selling to an existing customer is way higher at 60-70%. This creates a huge opportunity for your store to make more sales.

The Two Main Types of Upsells

1. Price-Tiered Upsell

This type of upsell means that you are simply **offering them more of your product but at a discount.**

For example, "buy two and get the third free." Or, "save 50% when you order two or more." It's encouraging them to spend more and move up a pricing tier. This works well when you offer to move them up just one level at a time. Using McDonald's as an example, this upsell happens when they offer to supersize a meal.

2. Value-Add Upsell

This type of upsell means that you are **offering another product that is complementary to your customer's order.** You need to have a good reason or value proposition for any value-add upsell.

Your upsell needs to be as relevant to the purchase as possible. Using SkinnyMeTea as an example, they offer a tea strainer as an upsell whenever a loose leaf tea is added to cart. They explain that using a good tea strainer will help them get more serves out of the loose leaf tea they have just ordered.

EXAMPLES

[Upsell via Desktop on Shopping Cart](#)

[Upsell via Mobile on Shopping Cart](#)

ACTION ITEM

- ☐ Create one upsell based on either value or price.
- ☐ Install your upsell app or widget.

TOOLS & RESOURCES

- Document: [5 Ways to Get More Sales On My Store \(For Free\)](#), Foundr
- Blog: [The 20 Best Upsell and Cross Sell Apps On Shopify](#), Scepter Marketing
- Website: [Sales and Conversion Optimization](#), Shopify
- Website: [Zipify](#), One Click Upsell

Notes:

[illegible]

MODULE 8:

Scaling Your Store

LESSON:

Growing Your Email Database With Pop-Ups

"Your email list is an asset that you own and can market to in a cost effective way at any time."

In this lesson, I'll teach you how to grow your email database with incentivized pop-ups. This step is really important as email marketing is still one of the most effective ways of connecting with your customers and increasing sales.

Pop-Up Conversion Rate

The number of times the pop-up is viewed versus the number of emails collected

Tips on Growing Your Email Database

- Your pop-up will need to **offer visitors an incentive** for them to sign-up to your email list.
- These incentives might include a discount or coupon code, a content upgrade (for example a free guide or eBook), free shipping, store loyalty points, a free gift with purchase, product personalisation, a 2-for-1 offer, access to a special event or limited edition product, and more!
- You may entice your store visitors to **enter their email through a content upgrade**.
- A content upgrade is simply additional content that your store visitors can only unlock in exchange for giving you their email address. It should be something complimentary to your product and with a perceived value (i.e. Something that your customer wants).
- The strategy is to **continually send traffic from your social media channels, to your online store**, so that when visitors land on your store and the pop-up displays, a number of people will sign-up to your list.
- If you want to have more qualified leads, you could **have the pop-up appear only after 15 or 20 seconds of visiting your site**, which also helps avoid increasing your bounce rate.

ACTION ITEM

- ☐ Create a compelling pop-up on your store's homepage.
- ☐ Start by deciding on the incentive or discount you want to use.

Pop-Up Incentives

Which incentive/s do you want on your site pop-ups?

- ☐ Bulk Discounts
- ☐ Themed Kits, Packs, Bundles
- ☐ Upsells
- ☐ Conditional Free Shipping
- ☐ Other: _____

TOOLS & RESOURCES

- App: [Wheelio](#), Gamified Pop-Up
- App: [Privy](#), Exit Pop Ups & Email
- Website: [Justuno](#), AI Visitor Conversion Platform

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MODULE 8:

Scaling Your Store

LESSON:

Email Marketing

"40% of all of my brand's sales come from email marketing."

In this lesson, I'll teach you the best email marketing practices for your online store. This is important because you want to continually hype up your brand or your products to keep top-of-mind positioning.

The 3 Most Important Things About Email Marketing**1. Don't miss out on the chance to send a welcome email.**

One of the highest converting and highest opened emails is your "welcome" email. About 50% of people open this email as compared to 20% for the emails thereafter.

It's important to make sure that this is one of your best emails and include a compelling call-to-action. You may want to offer them a coupon code for an immediate purchase. Or if your aim is to nurture them, simply direct them to some of your best content on your blog or website.

2. Frequency.

You need to email your list at least weekly to stay top-of-mind and engage with your audience. Emailing more than twice a week is too much for most stores. It will damage your open rates, cause spam complaints and unsubscribes.

In certain instances, it's relevant that you email them more often, especially if they have opted in for specific emails or alerts about a particular product. This could include letting them know that an item is "back in stock" or about a special event or sale.

It is recommended to structure a weekly newsletter that goes out on the same day every

week, or if you are short on content, simply have a day of the week that you giveaway something or do something special. For example, "Freebie Friday." You can also include customer reviews in each email to demonstrate social proof and encourage people to buy.

3. Seasonal Marketing Campaigns.

The most successful email marketing is relevant to your customer and what is happening in their lives.

Two major things that will impact your customers are seasons and holidays. For SkinnyMe Tea for example, it is a very seasonal product, so they always have a "start of the summer" sale, a "bikini body" sale, then they have a winter sale. The value offering they're promoting changes relative to the season.

International holidays and festivals are also important. Make sure you plan your email marketing around holidays and events.

ACTION ITEM

- ☐ Create your first welcome email.
- ☐ Choose three other types of emails and create those for your brand using The 10 Must-Have Emails checklist.
- ☐ Decide on your marketing holidays and schedule emails for them.

The 10 Must-Have Emails

- ☐ The Welcome Email
- ☐ The Curation Email
- ☐ The Engagement Email
- ☐ The Referral Email
- ☐ The Discount Email
- ☐ The Cart Abandonment Email
- ☐ The Order Confirmation Email
- ☐ The Upsell or Cross Sell Email
- ☐ The Re-Engagement/Win-Back Email
- ☐ The Customer Appreciation/Thank You Email

Marketing Holidays

Take note of any seasonal events or holidays that you want to run a special campaign for and start scheduling those emails into your marketing calendar.

Do any of the following events impact sales of your product (please check):

- ☐ Seasonal Sales Opportunities (Summer, Autumn, Winter, Spring, Rainy, Hot)
- ☐ Beginning of the Year Clearance Sales (NYE, Boxing Day)
- ☐ Back-to School-Sales
- ☐ Holiday Sales (Festivals, Public Holidays, Black Friday etc.)
- ☐ Other: _____
- ☐ Other: _____
- ☐ Other: _____
- ☐ Other: _____

TOOLS & RESOURCES

- Document: [SkinnyMe Tea Email Marketing Template](#), Foundr
- Document: [Pre-Launch Email Template](#), Foundr
- Website: [Infusionsoft](#), Email Marketing Automation
- Website: [Active Campaign](#), Email Marketing
- Website: [Campaign Monitor](#), Email Marketing & Automation
- Article: [Lessons From 21 of the Best Welcome Emails In The Ecommerce Business](#), Gorilla 360
- Article: [Great Welcome Email Ideas](#), Klaviyo
- Article: [Welcome Emails Every Store Needs to Send](#), Smartr Mail

Your Ecommerce Marketing Calendar

January	February	March	April
• New Year • Chinese New Year • Health and Fitness	• Superbowl Sunday • Valentine's Day • President's Day	• St Patricks Day • Spring Fashion	• Easter • April Fools • Earth Day
May	June	July	August
• Summer Clothing • Outdoor Activities • Cinco de Mayo • Mothers Day • Victoria Day	• President's Day • Father's Day • Aboriginal Day • St. Jean Baptiste Day	• Canada Day • Independence Day • Summer Holidays	• August Long Weekend • Back to School • Fall Fashion
September	October	November	December
• Independence Day • Labour Day • First Day of Fall	• Halloween • Canadian Thanksgiving • Winter Fashion	• Black Friday • Cyber Monday • American Thanksgiving • Winter Sports and Activities	• Christmas • Boxing Day • New Years Eve

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MODULE 8:

Scaling Your Store

LESSON:

Offers & Coupon Codes

In this lesson, we'll talk about how to use coupon codes with your online store. This simple method is a very cost-effective way to increase your sales and incentivize your new and/or existing customers to purchase from you.

Coupon codes are a great strategy for those who are just starting out, because they create demand and some time pressure around what you're offering. It doesn't always have to be a discount, though, you can offer other things such as a free additional product with a "buy one get one free" offer.

Coupon Code

A promotion that can be applied to a specific product or product category.

Prime Real Estate For Coupon Codes

- Site Pop-Ups
- Thank You Cards
- Emails
- Brand Social Media Accounts
- Influencer Social Media Accounts
- Checkout Cart

Things to Consider

- The best places to use coupon codes are:
 - **As a pop-up on your site.** You can offer different coupon codes for different actions. For example, when they first arrive on your page they could see a "buy today and save 10% on your next order." Or when they view a specific product you could trigger a pop-up offering a "buy one get one free" offer or coupon code.
 - **In a physical thank you card** your customer receives with their order.
 - **Over email.**
 - **From your social media accounts.**

- Be sure that they are time-sensitive so that people are encouraged to take action.
- It's good to name your coupon code after one of the benefits of the product so it's really memorable. Like for example an "energy boost" coupon code, if that's the main benefit of the tea you're selling. So it can be "ENERGYBOOST10" or something like that.
- Be creative with your coupon codes. They could be something playful and cheeky and really align with your brand identity.
- Coupon codes are very popular during events, holidays and seasonal activities. Holidays like Easter, Thanksgiving, Black Friday, Christmas and New Year's work very well.
- Make sure the discount is compelling. If it's only a very small discount or if it has no expiry date, then people aren't going to be motivated to buy. And sometimes very small discounts can work in reverse and make you look cheap.
- Do not train your customers to only purchase with codes or to always expect large discounts.

ACTION ITEM

- ☐ Create your first coupon code.
- ☐ Try working with influencers or offering condition-based coupon codes.

TOOLS & RESOURCES

- Video: [How To Create Discount Codes In Shopify](#), YouTube
- App: [Bulk Discounts](#), Shopify
- Blog: [Offering Discounts and Setting Sale Prices](#), Shopify

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MODULE 8:

Scaling Your Store

LESSON:

Customer Reviews & Social Proof

In this lesson, we'll go through how to create more demand for more product through the power of customer reviews and testimonials. This is important as customer reviews are one of the most important and effective selling tools for your product. However, customers won't leave a product review unless they're told.

Where to Find Social Proof

- Social Media
- Home Page
- Product Pages

Tips On Using Social Proof

- **Put your social proof right where people are interacting with your brand the most.** This means on your social media account, on your homepage, and on your product pages.
- **The main areas you want to focus on are customer reviews and user-generated content.** Ideally the type of user-generated content you'd want to show off would be pictures of your target audience.
- **It's a good idea to create a custom hashtag for your brand** so people can just check it out and see all these pictures of your customers. You can just use the hashtag of your brand name or you can create a few depending on what specific thing you want to talk about and encourage your users and followers to use them.
- **You can encourage people to create user-generated content through competitions and other incentives,** just be sure that you tell them what hashtag to use.
- **You can install an app called Social Photos if you are using Shopify.** It allows you to pull photos

from your users and followers directly from social media, and show them on your product page.

- **Product Reviews are another important factor.** Make sure you show off your best ratings and feedback in a visible place to encourage people to buy and trust in your product.

EXAMPLES

- [ZeroUV's Example Of Using Customer Reviews As Social Proof](#)
- [Geoffrey Scott's Example Of Using Customer Reviews As Social Proof](#)

ACTION ITEM

- ☐ Make sure good UGC is displayed in your online store.
- ☐ Create an email with the goal of getting customer reviews.

TOOLS & RESOURCES

- Website: [Yotpo](#), Ecommerce Marketing Platform
- Website: [Proof](#), Boost Your Website Conversions
- Website: [Loox](#), Website for Social Proof (Nathan's Favorite)
- App: [Socialphotos](#), Capitalize on Social Media Marketing
- App: [#Paid](#), Creator Media Marketing Platform
- Article: [11 Ways to Use Social Proof to Increase Your Conversions](#), Optin Monster

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MODULE 8:

Scaling Your Store

LESSON:

3PL - Third Party Logistics (Consumer to Customer)

In this lesson, I'm going to talk about 3PL— 3rd Party Logistics. It's about assigning other companies to take care of the shipping of your products for you. 3PL is important because it's time-consuming to run your own logistics and it's not the most cost-effective way to operate either. As a rule, start looking into 3PL once you start moving 300-500 units per month.

3PL Pricing Considerations

- **Warehousing Price** - The cost they charge you per unit to store your product.
- **Picking and Packing Price** - How much it costs to physically pick up your product and put it into your packaging. This is usually around \$1.00 USD per unit.
- **Shipping Price** - The cost they charge you for local and international shipping from their facility.

ACTION ITEM

- ☐ Research 3PL companies that are located near your manufacturer.
- ☐ Contact the companies for a personalized quote.

TOOLS & RESOURCES

- Website: [Send From China](#), Shipping & Fulfillment Solution
- Website: [Shippit](#), Shipping & Order Fulfillment
- Website: [Shipware](#), Freight & Parcel Shipping
- Website: [Fulfillment Express](#), Fulfillment Center
- Website: [Fullfillio](#), Ecommerce Order Fulfillment

Notes:

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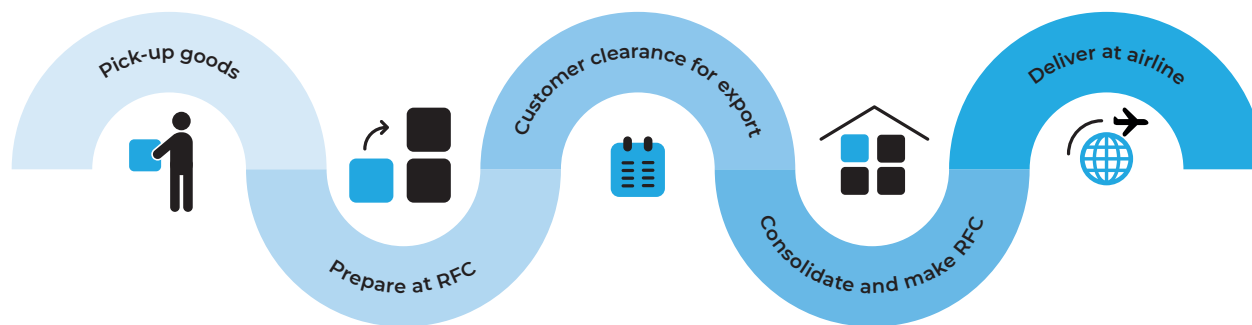
MODULE 8:

Scaling Your Store

LESSON:

Freight Forwarding - Moving Product from Manufacturer to 3PL

In this lesson, I'll teach you how to get your stock from your manufacturer to your 3PL warehouse to your home using a freight forwarder. Freight forwarders deal with all the third parties required to ship your stock internationally. They also deal with all the compliance, documentation and taxes associated with each country you ship to.

**ACTION ITEM**

- ☐ Find a freight forwarder in your country.

TOOLS & RESOURCES

- Website: [Flexport](#), International Freight Forwarder
- Website: [BGI Worldwide](#), International Freight Forwarder
- Website: [FedEx](#), International Freight Forwarding
- Blog: [13 Things You Need to Know About Freight Forwarding](#), Universal Cargo

Notes:

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MODULE 8:

Scaling Your Store

LESSON:

When to Create Your Next SKU

In this lesson, you'll learn how to identify the time to create more products or Stock Keeping Units (SKUs). By adding additional products to your line, you can both increase your Average Order Value (AOV) and also improve your customer experience.

Stock Keeping Unit (SKU)

A number assigned to a product by a retail store to identify the price, product options and manufacturer of the merchandise.

SKU Tips

- Make it relevant.
- Don't alter your brand positioning.
- Avoid analysis paralysis with no more than 4-6 options.
- Try upselling when possible.

ACTION ITEM

- ☐ Come up with at least four ideas for add-on items that can compliment your customer's experience.
- ☐ Survey your existing customers to determine the products they need the most.

Additional SKUs

Idea #1:

Idea #2:

Idea #3:

Idea #4:



The image shows a page with horizontal lines for writing. On the right side, there is a sidebar with a light blue background. The sidebar has a title 'TOOLS & RESOURCES' in bold black text. Below the title, there is a list of four blog links, each preceded by a bullet point. The links are: 'Blog: [What Is a SKU Number and How Retailers Can Use Them To Boost Their Business](#), Shopify', 'Blog: [When You Should Use SKUs in Your Store](#), Woo Commerce', 'Blog: [The 5 Biggest Problems With Managing an Ecommerce Site with Lots of SKUs](#), Blue Stout', and 'Blog: [SKU Numbers: What Are They and How To Set Them Up](#), FitSmallBusiness'.

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MODULE 8:

Scaling Your Store

LESSON:

A Story About Getting Started

CONGRATULATIONS!

You've completed the course. It's time to just start! Here we're going to talk about how to move past the fear and really get started with your ecommerce store.

If you feel stuck and need some support, head to the Foundr Facebook Group and ask a question to get help.



TOOLS & RESOURCES

- Facebook Group: [Start and Scale Your Online Store by Foundr Magazine](#), Facebook

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