The FORSBERG+two Guide to

Guide to Scaling on Shopify

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Introduction

Whether it comes out of the blue with a trending product or manifests as a slow, steady slog to the top of your game, we all hope to see the brands we pour our passion into blossom over time.

Shopify is a popular platform for brands at all stages of their journey – and many have seen significant success, starting from nothing and growing empires without ever feeling the need to migrate.

What can you do to plan for the future when it comes to short, medium and long term success of your brand on Shopify? How can you recognize the milestones that suggest it's time to bite the bullet, or shift up a gear?

In this guide, we've pulled together a few of our thoughts on how a brand can scale successfully on Shopify – avoiding growing pains, but not at the expense of opportunities that might not come calling twice.

So, if you're an ambitious brand selling (or thinking about selling) on Shopify – read on.

Timing is Everything

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One of the most important – and elusive – pieces of the puzzle when it comes to scaling a business of any kind, is knowing when to play your hand, trade up or trade in.

Have a Plan

We'd all love a crystal ball to predict how our business is set to perform over the coming weeks, months and years. In the absence of such a marvel, we can at least plan for multiple potential pathways. Having a general understanding of your store's trajectory, and mapping this against likely peaks and troughs in the annual ebb and flow of ecommerce will help you to understand your potential.

To avoid winging it, or sitting on the fence, pick a few points in time at which you'll sit down and make some concrete decisions about important investments in your business throughout the year. Make a plan – or, more accurately, make several plans.

Invest in Tech that Grows With You

When it comes to these investments, your tech stack is likely to be an important factor. Knowing when you're at the right stage to see a dependable return on your investment (and swift Time to Value) can feel difficult. If you're serious about scaling and ambitious as a brand, then look for opportunities to add affordable functionality sooner rather than later.

Seek out solutions that will scale alongside your business – robust apps with the capacity to handle an uptick in traffic and revenue without breaking a sweat (or the bank). Fail to do this and you'll find yourself scrambling to assemble your A Team as things really take off ... and your store starts creaking.

Assemble Your Team

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Behind the digital facade of an online brand stand some very important analog humans. From your star developer to your warehouse temp, every individual has a role to play.
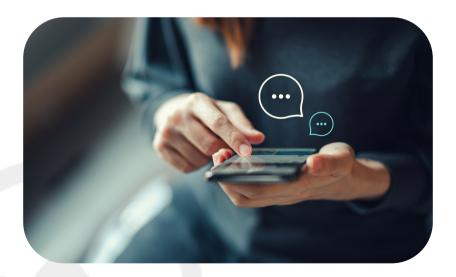
Build a Team that Stands the Test of Time

Ecommerce is nuanced, and brands that are scaling can be intricate beasts. Just as you look to acquire and retain customers, you should also be working on your team retention, arguably as a matter of top priority. Yes, fresh eyes, new ideas and wider experience are valuable. But a truly detailed knowledge of the way your brand and store operates brings benefits that are very hard to replace.

As you start to see success, check in with your team and get a realistic sense of the strain this acceleration is placing on them. Actively mitigate the adverse effects that your brand's growth will inevitably have on elements of their experience, whether through creating a sleeker order management process or actively reducing the number of support tickets they need to deal with.

Pick Dependable Third Parties

At a certain size, your brand will inevitably be outsourcing some aspect of operation to third parties – be this agencies, designers or developers. As with your stack, try to find the sweet spot in terms of timing when bringing this help onboard. Hesitating for too long will see you scrambling to find the "right fit" and more likely to have to compromise. When it comes to working with developers, support is everything. At FORSBERG+two, we have friendly humans ready and waiting to help with emerging issues around the clock. We know the difference this makes – to the ongoing relationship, but most importantly, to your business.

Nail the Finer Details Now

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It's often been said that "retail is detail." Those little touches that elevate and distinguish your brand from everyone else playing in your vertical – well, they're not so little.

Build a Cohesive Brand

As your scaling journey starts to pick up pace, a brand can feel like a runaway train. Success (especially significant success over a short period of time) can be intoxicating – and completely overwhelming. When it comes to finding time to fix the finer details of your brand, you shouldn't feel like you're chasing your tail. So, while you still have time to take a breath, focus on creating something that feels truly cohesive. Define your tone of voice. Customize those Shopify notification emails. Apply your branding to all customer-facing paperwork. For more ideas of how to polish up your brand's act before you find you have no time to, head here.

Solid foundations in this aspect of your business will also help you feel confident to delegate aspects of your operation to others. When you need to bring in external help and are able to hand over a polished brand playbook, they'll be able to hit the ground running.

Create a Polished Customer Journey

The way you treat your customers will make or break your brand. If you can't treat them well before you scale, you have little hope of improving matters as the orders arrive in greater numbers. Take time to access each touchpoint and think of tangible ways you can improve their experience. From including beautifully customized returns forms in each packed order, to providing an invoice before they have to ask, or a seamless download experience for the sale of digital products, there are endless ways you can enhance your customer journey. And over time, they'll all combine to something that's far greater than the sum of their parts.

Get Real
About Returns

04

More sales = more returns. This is an important part of the puzzle – and one you'll want to get your head around, before it starts multiplying in line with your success.

Create a Clear, Sustainable Policy

Returns are an unfortunate inevitably when it comes to ecommerce – and they're generally a frustrating experience for everyone involved (a disappointed customer, and a business taking an additional revenue hit). As they'll never be completely eradicated, make sure you have a fair policy, that's clearly communicated and – above all – sustainable as you scale. Free returns are so commonplace these days that many customers will automatically expect them. If this isn't something you're going to be able to offer, make sure your customers are aware before they make a purchase.

Have a Strategy in Place for Return Reduction

As well as transparency when it comes to your policy, there are also many ways to start chipping away at your return rate – and these can be put into practice at any stage of your business's growth. One solid example starts in your warehouse. By getting a better picking and packing process in place, you can drastically cut down on errors in orders sent. Picking lists (efficiently generated by Orderly Print) can help achieve this – and the time they save your team will help to reduced rushed packing and damaged goods on arrival.

Oil the
Machine

05

The nuts and bolts of ecommerce are constantly evolving. If a process feels clunky or time consuming now, it's only set to magnify as you scale. Even if you're coping at this point in your journey, it's easier to fix a leaky roof in light rain than during a deluge…

Automate, Automate, Automate

Many scaling brands fear losing the "human touch" as they grow and start to see significant success. If the thought of automating many of your processes raises these concerns, consider the amount of time you could reinvest into true customer-facing activities and interactions, if certain back office procedures were taken care of automatically. By letting automation take the strain when it comes to the "drudgery" of your business, you have time to focus on the things that truly matter. Automation doesn't have to mean clunky interactions with chatbots and frustrating canned support responses – you could start by automating time consuming manual tasks such as sending out invoices. By auto-delivering invoices, you'll save yourself and your customer's time – as they'll never need to request one.

Practical Magic

Finally, Shopify offers so many opportunities to streamline your workflows – both natively and via third party apps. If you're already a Plus merchant, you might be familiar with leveraging Shopify Flow to create smart automated shortcuts, but there are plenty of ways that brands of any size can start to whittle down their workflows to enhance productivity and keep the gears spinning smoothly.

Working with Orderly Print, to give just one example, transforms your order management, allowing you to work efficiently at scale with bulk processing, tagging and filtering of your orders to quickly and effectively move them through and out to waiting customers.

"OrderlyPrint solved our order management and fulfillment issues and saves us HOURS each day and we recommend it to anyone looking to simplify the way they process and ship orders"

Owen and Kevin Alto
- Alto Collective

Scale with Ease with FORSBERG+two

More than 100,000 Shopify merchants trust our apps to streamline their operations and boost their brand. Wherever you're at in your ecommerce journey, we'd love to take the next step with you.

From beautifully branded Shopify notification emails to completely custom invoices, automatically delivered, we're here to help elevate your ecommerce essentials in a way that scales seamlessly, helping your business grow through increased efficiencies and meticulous attention to detail.

Build solid foundations for the future – take your first step towards automation with OrderlyPrint today.

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