

Pitching Shopify POS to Clients

A sales resource for Shopify Partners



Introduction

Welcome! We want to sincerely thank you for continuing your journey with us as you align your business with the Shopify Platform.

As we improve and expand into the retail world, more opportunities become available to you and your clients. To help you take advantage of these opportunities, we created this comprehensive guide outlining the Shopify Point-of-Sale (POS) system – including a basic understanding of the system, its features, and how to position it to clients.

Feel free to use the content provided in this document to enhance your sales collateral, including:

- Capabilities decks
- Quotes, proposals, and RFP/RFI responses
- Service agreements, statements of work, and contracts
- General client communication
- Your website

We hope this resource helps you develop a joint value proposition with Shopify that strengthens your pitching and sales process for any of your commerce projects.

– The Shopify Partners Team

Why POS?

The future that's emerging is one where consumers can choose to buy online, in-store, or wherever they happen to find themselves. Merchants who only sell online still find success, however, there is more room for their business to thrive when multi-channels are leveraged.

That's where you, the Shopify Partner, come in.

Merchants making the move to retail POS, or multi-channel merchants seeking a solution to connect their online and in-person channels, will seek your expertise. Offering the Shopify POS solution will help them extend their business in-person. Simultaneously, adding POS setup to your service offerings can help your business grow from an ecommerce consultancy to a full-fledged commerce consultancy.

The opportunity

The leap to retail can seem like a heavy commitment, however, it's easier than ever before to sell in-person thanks to POS technology becoming more affordable and accessible. Encourage your clients with these [five appealing retail industry trends](#):

1. CUSTOMERS BUY MORE IN-PERSON

According to Shopify's merchant surveys, multi-channel shopping is on the rise with [more than half of merchants selling in-person](#) in some capacity. This number is predicted to increase in upcoming years demonstrating how [the divide between online and in-person commerce is narrowing](#).

Shopping in-person gives customers the chance to communicate, experience the thrill of the hunt, experiment with what's in front of them, and compare real products with all their senses. Sales made in-store prove to be more valuable than online sales, with Shopify data showing Shopify POS purchases are significantly higher than online purchases on average.

2. MOBILE TOOLS ARE ENHANCING RETAIL PURCHASING

Mobile point-of-sale solutions are being used by retailers looking to mobilize the interactive, line-busting, shopping experience. Using mobile solutions, merchants can provide seamless transactions anywhere in the store — like those done online resulting in less waiting lines and happier customers.

Successful retailers such as Apple, Nordstrom, and Bonobos' guideshops all equip their staff with mobile devices on their sales floor to enhance customer experience by accepting payments on the spot.

3. CUSTOMERS DEMAND GREAT EXPERIENCES AND QUICK FULFILLMENT

What ecommerce may lack in customer experience is made up for in ease of fulfillment with the ability to deliver products wherever customers wish to receive them. On the flip side, brick and mortar stores force customers to travel to the store location, buy the product, and bring it back home.

With Shopify POS, merchants can offer a richer experience by taking orders in-store, adding shipping costs, and sending them to whichever location a customer chooses inside the Shopify Admin.

The best parts of online and in-person selling are combined to offer a great in-store experience with convenient fulfillment.

4. THE RETAIL LANDSCAPE IS EVOLVING

In the past, a retail location's main purpose was to distribute products. Now, it's a means to create experiences. Instead of sales per square foot, it's experience per square foot.

Shopify POS helps merchants thrive in this changing ecosystem by powering experiences like Buy Online with [Shopify POS](#), [in-store refunds](#), and showrooming. Leveraging these features combines the power of online and retail to present one seamless experience.

5. MEDIA IS TAKING OVER THE ROLE OF TRADITIONAL STORES

Historically, traditional brick-and-mortar stores were the best way to connect and sell to consumers. But today, digital media has brought a whole new wave of purchasing channels and options. Merchants can sell products on Facebook, Instagram, BuzzFeed, Pinterest, and more.

Media is taking over the role of traditional stores by owning the customer journey, starting from discoverability and familiarity of products to sales. It's effectively replacing the traditional store, with the modern-age store finding its true value in customer experience.

These trends are compelling and encouraging reasons why your clients should consider making their products available in-person.

What is Shopify's Point-of-sale system?

The Shopify Point-of-sale system consists of the Shopify POS app, available from the Apple App Store and Google Play Store, POS hardware, and the Shopify platform that merchants are already familiar with to sell online.

The [Shopify POS app](#) is a powerful solution that can be used to sell almost anywhere, including brick and mortar stores, fairs, and pop-up shops. The [POS hardware](#) can include iPads, card readers, receipt printers, barcode scanners, and cash drawers. These are all available from the [Shopify Hardware Store](#) in certain regions around the world.

Shopify POS syncs with Shopify to track orders, inventory, and customers across retail locations, online stores, and other active sales channels. It surveys inventory and automatically updates what's in stock so your clients never oversell. Additionally, the operating system connects everything from customer data, social media, and business KPIs.

We broke down the system's features into the following categories and fleshed out how each one benefits your clients.

Payments

- Credit cards — Accept Visa, Mastercard, American Express, and Discover, with no hidden fees.
- Store credit — Offer customers store credit for future purchases.
- Custom payments — Create payment options such as cheques, IOUs, or gold coins.

Discover all payment features including [personal credit or debit terminals](#), [split tenders](#), [partial payments](#), and [gift cards](#).

Checkout

- Discounts — Offer a percentage or dollar amount off a single product or a full order.
- Custom sale — Creating custom line items and setting the price to anything you want.
- Shipping — Record a customer's shipping address and contact details for an order, so they can be shipped at a later date.

- Taxes — Set your location prior to selling and you can rely on Shopify to assist with applying the appropriate taxes for your locale in supported markets including USA, Puerto Rico, Canada, UK, and Ireland.

Discover all checkout features including [order notes, mobile checkout, custom emails, or printed receipts](#).

Store management

- Refunds — Send refunds to the original payment method or make exchanges with Store Credit.
- Accounting integration — Save time and money on bookkeeping by integrating Shopify with QuickBooks, Xero, and more.
- Order history — View all past orders made in-store and online, searching by customer product, or date.

Discover all store management features including [cash floats, timeline, daily totals, and staff PINs](#).

Customer Management

- Customer profiles — Receive automatic profiles about customer's shopping habits, contact information, and order history.
- Synchronization of online and offline — Sync customer information, no matter where the order is placed.
- Email marketing — Collect email addresses at checkout.

Discover the full benefits of Shopify POS's [customer management features](#).

Products

- Product organization — Organize products by category, type, season, sale, and more.
- Inventory Management — Take care of entire inventory and tracking stock counts, and automatically stop the sale of products when inventory runs out.
- Barcode support — Assign existing barcodes to products or create new ones.

Discover all product features including [Shopify POS apps and product variations](#).

Hardware

- Smartphone or tablet pairing — Run on iPhone, iPad, or Android devices.
- Free hardware shipping and returns — Guarantee free shipping and 30-day returns.
- Free credit card reader — Each merchant is granted a free Shopify card reader that pairs with smartphones or tablets.

Discover all hardware features including [point of sale hardware, receipt printers, barcode scanners, and printers](#).

Analytics

- Dashboard — See actionable data on sales, orders, and traffic.
- Retail analytics — View, analyze, and export sales by staff members, location, time period, or customers.
- Product reports — Analyze and gain insight into any store's growth.

Discover the full benefits of Shopify POS's [analytics features](#).

Shopify on mobile

- Mobile dashboard — Access items that need immediate attention and track trends.
- Manage inventory — Add products, take a product photo, change a price, or add inventory, all from the mobile app.
- Email or call customers — Look up customer profiles and instantly reach out through email or phone.

Discover all Shopify mobile features including [data syncing](#).

24/7 support

- Dedicated support team — Access Shopify's support team, available 24 hours a day, 7 days a week, by email, live chat, and phone.
- Shopify Help Center — Find FAQs, user guides, and tutorials in the [Shopify Help Center](#).
- Ecommerce University — [Teaching resources](#) about selling in a physical retail space and online.

Discover all support features including [discussion forums and Shopify Experts](#).

Benefiting from an all-in-one solution

Shopify POS is an all-in-one solution, combining and connecting ecommerce and retail shopping to offer an integrated experience. While in-store, merchants can start a draft order for customers while they browse. This draft shopping cart order can be emailed to customers once they leave the store, so they can complete their transaction when and where they want.

Previous to this [Buy Online for Shopify POS](#) feature, there was no solution for retail businesses losing sales to online marketplaces because of the convenience they offer: no waiting in line, quick delivery, and cheaper prices.

POS brings the best of both worlds and simplifies the management of online and retail channels by systemizing them into a single platform, the Shopify admin. As merchants sell, the POS system analyzes the success of day-to-day sales, tracks and measures important metrics, and counts inventory.

Accessible data informs merchants which products are performing best in-store and online, which they can then use to scale their business. See the [dedicated Shopify POS manual](#) for more information on features, how to get started, and guides.

Selling the Shopify POS system

Now that you understand what it is, you're ready to starting selling. First and foremost, you must invest time in learning about your prospective or existing clients' businesses. The more you learn, the more you can tailor your solution to their day-to-day activities. We advise that you steer away from a one-size-fits-all pitch.

Approaching prospective or existing clients

To find valuable solutions for your clients, invest time and effort in these three steps:

1. **EDUCATE YOURSELF**

Start by building a relationship with your new or existing clients. Focus on learning about their business, uncovering pain points, and adding value. This way, you can ensure that Shopify POS is the best choice for their business, and be able to communicate exactly how it will help them.

2. **EDUCATE YOUR CLIENTS**

When educating clients about the importance of having an online strategy, refer back to the opportunities we laid out earlier. Clearly lay out all the benefits and features of Shopify POS and let your client know they deserve a quick-to-learn system that's cost effective and includes enterprise-level features.

3. **PITCH**

Once you've laid out all of Shopify's features, values, and comparisons to other options, and it's clear to the client that POS offers tremendous value difficult to replicate with other systems, then it's time to pitch. Demos are a great way to help educate clients, showing off the hardware (including the free Chip & Swipe Reader - which comes with a charging and travel base).

Knowing who to sell to

Next, you want to pinpoint prospective clients. To narrow down your search, we'll outline five merchants personas for you to consider:

1. **ONLINE RETAILERS**

Existing Shopify merchants can be introduced to Shopify POS as a great way to get their feet wet with in-person selling. When pitching, help them imagine what it would be like to run a brick-and-mortar store by picturing customer reactions to their products.

2. **POP-UP SHOP MASTERS**

Brands with a strong online presence that already experiment with low-risk events but may not necessarily be using Shopify yet are great prospects. Educate them on the opportunity to easily connect their online system to their retail operations using Shopify paired with Shopify POS. Social proof could entice them — you can use examples of big brands like [Kylie Cosmetics](#) taking advantage of a [pop-up strategy](#).

3. **BOUTIQUE OWNERS**

Merchants crafting their own products and goods typically operate a single brick-and-mortar location with a small number of staff. Many already understand the potential of ecommerce and want to extend their retail brand strategy, and others already sell online and want an all-in-one solution to streamline their process.

4. **CASUAL SELLERS**

This includes individuals selling their products on the weekend or seasonally at markets, fairs, or special events. They might be looking for a cost-effective solution to get their products out to market. Offer them Shopify POS as a simple solution that can support them and scale with the growth of their business.

5. **OLD SCHOOL RETAILERS**

Legacy retailers or large brick-and-mortar shops typically have multiple locations, employ a large number of staff, and are looking to expand their business in fresh ways. They might not have a solid online strategy and need help taking their business to the next phase: multi-channel. They might be keen to try POS for an experiment pop-up shop or to test out combining multiple locations under one point-of-sale solution to be more agile and mobile.

Finding Shopify POS prospects

Now that you know who they are, how do you find prospective clients? Here are three ways to advertise your business:

1. SPREAD WORD OF MOUTH

Retail store owners form close communities. One of the most effective ways of finding new clients is through merchants you've worked with in the past since they're always talking shop among each other. To be known as a trusted source goes a long way within their communities.

Being present also helps get your name out there. Meet potential clients at local events, like farmer's markets, local business meet ups, and pop-up shop events in your city.

2. BE A THOUGHT LEADER

Potential prospects will already be searching for POS solutions, so you want to make sure your website pops up in their search results. The easiest way to do that is through content marketing. Not only are people able to find you, but if they're already consuming your valuable resources, they've already begun to build trust in you.

Examples of content include commerce comparison pages that review different solutions, company blog posts, comprehensive FAQs describing your company's Shopify experience, and customer support calls transcribed into help documentation.

3. FORM STRATEGIC PARTNERSHIPS

Work smarter by building strategic partnerships with companies or sales organizations that already have a base of small business clients, but don't offer web and POS services. Focusing on each other's strengths and complimenting each other will help you offer a more complete and polished experience to your clients.

Once you find clients, make sure their businesses are suitable for a POS system. Knowing who to avoid is just as important as understanding the type of clients you want to work with.

Qualifying leads

Shopify POS is a product that compliments ecommerce skills. Target brands who want more agility, are already online, and have a desire to get closer to their audience from wherever they are. They'll be much more grateful than clients who have no desire to move online.

The main things to consider when qualifying leads are:

- **Budget** — Does the solution make sense for the merchant and yourself?
- **Current system** — What are they currently using to record in-store sales?
- **Potential needs** — What other systems could they benefit from integrating with the new POS system (i.e. accounting systems, CRM tools, email marketing platforms, social media tools, etc.)?

You'll have more success with merchants who have an interest in selling online at some point in their entrepreneurial journey.

How to get your clients up and running with Shopify POS

Getting the POS system set-up is a relatively simple process. We've outlined each step to help you get your clients up and running with in-person selling.

1. REVIEW YOUR CLIENT'S POS HARDWARE REQUIREMENTS

Identify the hardware requirements before doing anything else on this list. Depending on how they wish to sell with POS, they will need specific hardware to facilitate their retail sales.

We recommend reviewing our [hardware documentation](#) and our [Shopify POS retail package breakdown](#) to help guide this discussion with your clients. Once you have a better sense of their intended direction, you can purchase your client's POS hardware from the Shopify Hardware Store, [depending on the availability in your client's country of residence](#).

2. SELECT THEIR PLAN AND CONFIGURE THEIR ADMIN SETTINGS

Even though all Shopify plans include access to the Shopify POS app on both iOS and Android, some offer greater selling capabilities than others. If your client is looking to use POS's advanced features, like additional hardware integration or staff management, you'll need to add [the Retail Package](#) to their plan.

Once you have a sense of the in-person selling functionality that your client needs, you can go ahead and select the appropriate plan for their store. From there, you'll need to configure their basic administrative settings, including store address, email address, staff accounts, and billing information.

Note: *You can skip this step if your client already has an online store.*

3. INSTALL THE POS APP

[Download the Shopify POS app](#) to your client's iPad, iPhone, or Android device.

We've created a handy [device comparison chart](#) that you can check to ensure your POS setup will work with your client's preferred device.

4. **HELP YOUR CLIENT ADD AND ORGANIZE THEIR PRODUCTS**

Clients who already have an online store set up will already have their products available in their POS system upon login through the app. If your client doesn't have an existing Shopify store, you'll need to add products to their catalog through either the Shopify Admin via a desktop browser, the Shopify mobile app, or directly through the Shopify POS app. Once products are listed in their Shopify Admin, you can then select which ones they'd like to make available in-store via [the visibility settings](#).

5. **ADD RETAIL LOCATIONS TO THE ADMIN AND ASSIGN LOCATIONS TO POS DEVICES**

From their Shopify Admin, you simply need to navigate to Point of Sale, and then click Locations. From there, select Add location and enter the details of your client's retail location in the dialog. You can also [select a primary retail location](#) at this point, if your client intends to sell from multiple storefronts, cities, or regions.

Once your client's locations are added in their admin, you can quickly assign these locations to their respective POS devices [via the POS app Settings screen](#). This will ensure your client's devices are associated to the appropriate retail locations, the right taxes are applied to the in-person orders, and that order tracking is enabled.

6. **CONFIGURE TAX SETTINGS**

Regardless of whether your client chooses to sell in one or multiple physical locations, you'll need to ensure your client's sales tax rates are set up to adhere to the rules and regulations of the region of the world they're selling in. From there you can assign the selling location to their POS device to enable local tax rates.

Take the time to review [this documentation](#) if you've never set up taxes with Shopify POS.

7. **SELECT A PAYMENT PROVIDER AND CUSTOMER PAYMENT METHODS**

[You can enable a payment provider](#) via the Shopify Admin just as you would for any online store. Once that's done, we recommend [customizing your client's preferred payment methods for POS purchases](#) via the Select payment screen within the POS app.

For clients operating in [Shopify Payment Card Present supported regions](#), they will be automatically set up with Shopify Payments as their card processor for in-person payments. This allows them to take credit card payments manually,

in-person, or order a card reader to tap or swipe credit cards. If they're already selling online with Shopify Payments, clients will benefit from using one card processor selling both in-person and online. For clients in unsupported Shopify Payment regions, they can use an external terminal to accept credit card payments.

8. **SET UP THE SHOPIFY POS HARDWARE**

Once you've completed all the steps above, it's finally time to set up your client's POS hardware. This step is pretty simple — you just need to get a card reader to begin accepting in-person payments straight from your client's mobile device. Depending on the reader, you'll be able to easily pair it using Bluetooth or via the mobile device's audio jack. With the new [Shopify Chip & Swipe Reader](#), it's easy to pair the portable hardware within the app using the tutorial.

With the [Shopify Retail Package](#), your clients can connect their receipt printer, cash drawer, and barcode scanner through Bluetooth for a cohesive in-person selling experience.

9. **TEST OUT YOUR SETUP TO ENSURE THINGS ARE RUNNING SMOOTHLY**

It's important that you process some test orders through your client's POS after you've completed the basic setup process. This is a great opportunity to have your client get their hands on Shopify POS, so that they're familiar with the transaction process, while also giving you a chance to verify that everything is working properly.

We recommend testing a few different types of transactions at this point, which could include [partial payment](#), [refunds](#), or [order updates](#).

Once you've confirmed that orders are being processed appropriately, your client is ready to start selling in-person with their newly set up Shopify POS system.

Conclusion

Shopify POS is a segment of Shopify's merchant community that's not only seeing tremendous growth, but holds vast potential for the expansion of your business. Regardless of whether you're an ecommerce consultant, web designer, or developer, it's critical to consider adding Shopify POS to your service offering.

Hopefully, after reading this resource you can speak persuasively to current trends in retail, the power of Shopify POS, and show your clients the potential and opportunities existing in adding an offline component to their business.

Additional resources for client education

We've curated some of our favorite articles, ebooks, and videos about optimizing your sales process. Take a read or share with your team and clients to find new ways to leverage the retail landscape.

Shopify Partner Articles

- [How to Get Your Clients Up and Running With Shopify POS](#)
- [Why You Should Add Shopify POS to Your Service Offering](#)
- [5 Retail Industry Trends to Get your Clients Excited about Shopify POS and Offline Selling](#)

Shopify Resources

- [Shopify POS as a way to sell](#)
- [Shopify POS for retail](#)
- [Everything you need to know about selling in person for Shopify POS](#)

Articles for your clients and prospective clients

- [Turn Showrooming Into Sales — Introducing Buy Online for Shopify POS](#)
- [Why Digital Brands Need Physical Retail: An Evening with Bulletin's Co-founder and COO](#)
- [How to Write a Basic Business Plan for Your New Retail Startup](#)