



Lead Generation Playbook

2024



For Shopify Partner use only:

The goal of this playbook is to enable Shopify partners to plan and build demand generation campaigns.

This playbook and the information in it are provided in confidence for the sole purpose of enabling Shopify partners. Please do not share with Shopify prospects, merchants, or other third parties.



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01

Lead Generation Overview



Getting started

Lead generation encompasses a variety tactics, campaigns, and strategies depending on the platform you use to capture leads. When building your lead generation campaign, there are 4 key areas of focus to maximize impact:

- 01** Delivering the Right Content
- 02** Choosing the Right Audience
- 03** Choosing the Right Time
- 04** Selecting the Right Channels



02

Delivering the Right Content

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Planning your campaign

Building the Right Content

Content is often the go-to method businesses use to generate leads and a great way to guide users to a landing page. When building your content for your demand generation campaign, the goal should be to provide your prospect with useful information aligned to their needs and stage in the funnel.

**When building your content for your lead generation campaign, focus two important areas:
Creative and Landing Page**

[For logos and co-branding guidelines, view Partner Toolkit: Marketing Guidelines](#)



Delivering the Right Content

Building your Creative

When building the creative for paid ads, use proof-based messaging to validate. Great proof-based messaging includes:

- Customer testimonials
- Data backing up your claim
- Well-known brand logos
- Success stories

Tip: Make sure you get your client's approval before using their quote or logo in your marketing materials.

Building your Landing Page

Your landing page should have one main objective: Lead capture.

Make sure your landing page has a clear call to action and is distraction free to drive your viewer to complete the action. Minimize call to actions and write actionable copy to complete the form.

When asking for lead data in the landing page form, keep the information you're requesting at a minimum. We recommend: Name, Company, Email, Phone, and Country



How-tos

Adding required opt-in language

For future marketing, make sure to obtain required consents, authorizations and approvals from registrants. If you are leveraging Shopify Marketing Funds for your lead generation activity, make sure to include the following language below to share such Registrant Data with Shopify.

AMER and APAC

Include a checkbox which may be pre-ticked and the following statement on your RSVP landing page:

“You agree to be contacted by [include name of Partner] and/or Shopify about their respective services. Your personal information will be processed in accordance with Shopify’s [Privacy Policy](#) and the privacy policy of [include name of Partner], respectively.”

European Economic area, UK, and Switzerland

Include checkboxes which may not be pre-ticked and each of the following statements on your RSVP landing page:

“By checking this box, you agree to be contacted by Shopify about its services. Your information will be processed in accordance with Shopify’s [Privacy Policy](#).”

AND

“By checking this box, you agree to be contacted by [include name of Partner] about its services. Your information will be processed in accordance with [the Partner’s] Privacy Policy.”



03

Selecting your Audience



Planning your campaign

Selecting your Audiences

When selecting your audience for your marketing campaigns, make use of all 1st- and 3rd-party data signals available. Leverage this data to segment and refine your audiences to improve your campaigns. Below are 3 key data sources to leverage when building your campaign.

Website data

Leverage data from your website such as site sessions and specific site actions.

Lead and prospect data

Collect and leverage data when building your target list such as email, phone, company, timeline, budget, and current platform.

Customer data

Create lookalike audiences, remarketing audiences and similar audiences with your customer data. By feeding the audiences with customer data you're able to better target the most relevant audience and refine

- How to create a lookalike audience in Meta Ads Manager ([link](#))
- How to use Predictive Audiences in LinkedIn ([link](#))
- How to use Audience Expansion in LinkedIn ([link](#))
- How to use lookalike audiences in GoogleAds ([link](#))



Planning your campaign

Target audience criteria

When building campaign lists, below are some recommended criteria for revenue, titles and industries. Choose geographies and industries that best represent your capabilities.

Revenue

- Mid-Market: \$2M-\$25M
- Large Accounts: \$25M-125M
- Enterprise: \$125M+

Technology:

- Installs/ users of other ecommerce platforms
- Adobe Commerce/Magento
- Salesforce Commerce Cloud
- BigCommerce
- WooCommerce

Titles:

- Chief Executive Officer (CEO), Chief Marketing Officer (CMO)
- Chief Digital Officer (CDO)
- Chief Technology Officer (CTO)
- Chief Information Officer (CIO)
- Chief Operating Officer (COO)
- Chief Financial Officer (CFO)
- Vice President of eCommerce
- VP of Marketing
- Director of Marketing
- Director of eCommerce Marketing

Industries:

- Automotive
- Consumer electronics
- Fashion and apparel
- Fitness and nutrition
- Food and beverage
- Health, beauty, and cosmetics
- Home furnishing
- Media and entertainment
- Outdoor living
- Pet supplies
- Services
- Sports and Recreation
- Tools and hardware
- Toys and games



04

Selecting your Channels



Selecting your channels

A Funnel-based Approach to Campaign Management

When building your campaign, you should employ a funnel-based approach to progress prospects through the funnel. Consider the following stages when building your campaign:

- **Awareness** - In this top of funnel phase, you should answer two questions: who are you and why should I trust you? Brand campaigns, events and customer stories are great ways to engage prospects in this stage.
- **Consideration** - As prospects move into the consideration stage, offer valuable information through gated content like eBooks, white papers or webinars. The goal of this phase should be to capture demand through a lead form and start a conversation.
- **Conversion** - Prospects that are warm and have reached the bottom of the funnel should be engaged with targeted campaigns such as a small sized event, joint demos, and promos.
- **Customer** - Drive loyalty and increase customer value through cross-sell and upsell services

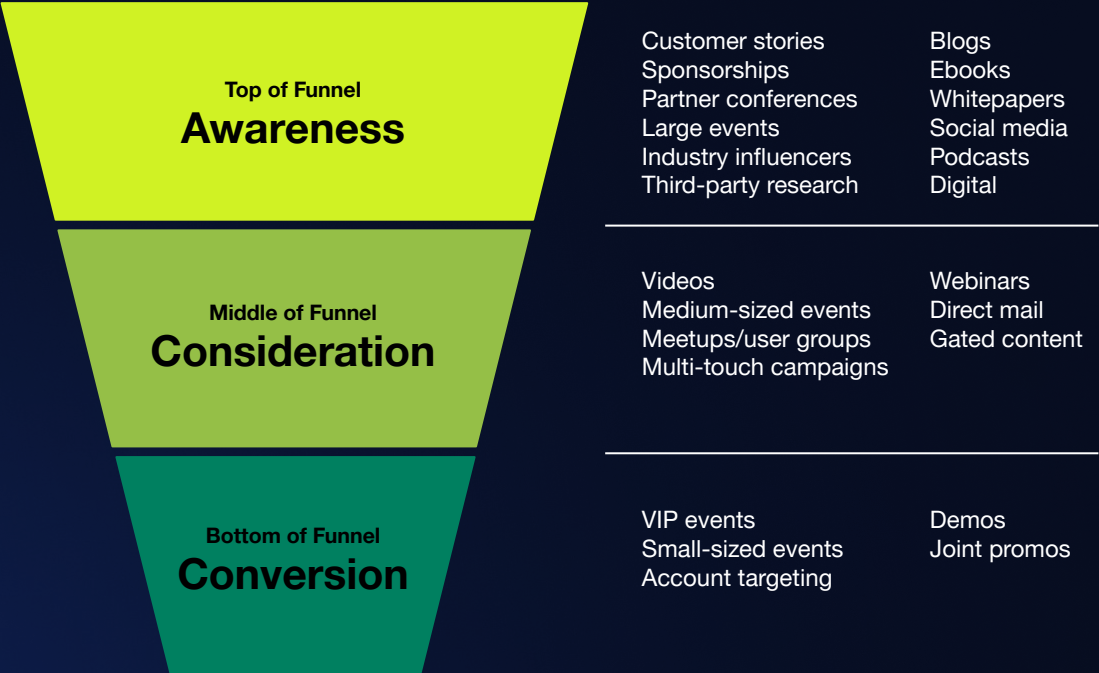


Selecting your channels

Common Funnel Tactics to Leverage

When building your funnel-based approach, consider the ideal tactics for each stage.

Deploy multi-touch campaigns that leverage the full-funnel to progress leads from Awareness to Conversion. Consider starting with a thought-leadership whitepaper to capture demand, re-engage prospects with a webinar and convert through a demo or site audit. [View the Campaign Sample to see more multi-touch campaigns in action.](#)





Selecting your channels

Paid Social

Social media is a popular lead generation channel for running paid advertising. Below are some considerations when using Facebook, Instagram, and LinkedIn for paid ads.

Facebook and Instagram

These channels typically provide higher volume leads with lower cost. The leads are generally lower quality and require some fine-tuning of your target audience to improve over time.

- Targeting Options: Demographic, General Interests, Location, et
- Ad types: Static, Video, Carousel
- Recommendation: Launch full-funnel campaign strategy targeting all stages with the right content

LinkedIn

Compared to Facebook and Instagram, LinkedIn generally provides a lower volume of leads at a higher cost. However, the quality of lead trends higher due to the business specific targeting capabilities.

- Targeting Options: Demographic, Firmographic, Job Title, Company Size, Education, Industry, Employer
- Ad types: Static, Video, Carousel
- Recommendation: Launch full-funnel campaign with thought leadership content targeting all stages, promote an event, or highlight a new product



Selecting your channels

Google Ads

Google Ads is a pay-per-click (PPC) advertising platform where advertisers pay per click (or impression) on an ad. This can be an effective way to drive qualified traffic to your business because they're searching for products and services like yours. Google ads generally have a higher cost per lead but the intent-based nature of the channel also leads to higher quality leads.

- Targeting - based on keyword (demographic, location, etc)
- Recommendation: Use this channel for acquisition-focused campaigns that capture demand
- Ad types: Text-based creative



Selecting your channels

Google Ads Best Practices

- Focus on being niche when selecting themes and topics
- Use social proof or references to build credibility and trust such as merchant testimonials, quotes, and reviews
- Highlight benefits, facts, stats in your messaging - not just features
- Dig into your website's Google Analytics to find out what people are searching for. Use this as a key to find out words and phrases they are really searching for
- Focus your keywords on your audience's search intent
- Add broad match keywords to your Search campaign.
- Focus on keywords with commercial and transactional intent for PPC campaigns because they target users who are ready to purchase.
- Include local keywords if they make sense (i.e city, neighborhood names) to attract local or more niche customers if you are targeting a specific geography.
- Do A/B testing always, so we can see what Ads are working best and stop investing on the once performing low.



Selecting your channels

Email Nurture Campaigns

Email nurture campaigns are an important tool for guiding prospects through the funnel and building a relationship with them. This cost-effective tool is an enhancement to other channel methods and should provide prospects with more valuable content, information and gentle nudges to start a conversation.

When building email nurture campaigns,

- Keep the emails short, focusing on one relevant topic per email
- Add personalization to drive engagement and build connection
- Carefully craft the email sequence to pull leads through the funnel – starting with education before offering promo or demo content
- Test your emails and track key metrics

[View email campaigns in the Shopify Partner Portal](#)



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Measuring Success



Campaign Measurement

The campaign metrics that you measure will vary depending on the prospect stage and channel you are using. Top metrics to pay attention to at each stage of the funnel are:

- **Awareness:**
 - Track page views and sessions in a tool such as Google Analytics for your landing pages
 - Track booth visitors or event attendees from conferences
 - Track your email opens and click rates in your email marketing software. ([View email marketing benchmarks for ecommerce from Shopify Partner, Klaviyo](#))
- **Consideration:**
 - Track the number of leads generated from form fills on your landing page
 - Track webinar registration and attendance in your webinar hosting platform
 - Track lead quality from your CRM or through manually tracking with sales.
 - Track event registrations and attendees
- **Conversion:**
 - Track event attendance from those that attend your VIP events
 - Track the number of demos scheduled with your sales
 - Track lead to opportunity conversion rate through your CRM or manually with sales



How-tos

Defining and submitting leads and referrals

Definitions

Lead: A potential sales contact, individual, or organization who engaged with your marketing campaign thus expressing interest.

Referral: Referrals are leads that have been pre-qualified to be a strong fit for a Shopify product (i.e., Plus, POS, MarketsPro) by a Shopify partner and submitted through the referral form in the Shopify Partner Portal. Referrals are highly-qualified leads that have a strong likelihood of converting to an opportunity.

How to submit

Lead:

1. If leveraging marketing funding for your campaign, you can submit your leads directly to your Shopify contact or through the Shopify Partner Portal using the template provided.

Referral:

1. Submit your qualified referrals in the Shopify Partner Portal. This is required to receive revenue share for your closed deals.



How-tos

How to Qualify a Referral for Shopify

Some good indicators that they might be a fit for Shopify Plus are:

- They have a global or localised presence in different countries
- Are currently selling online
- Are focusing on high growth, scale & expansion
- Are currently using an e-commerce platform
- OR are part of much large organisation looking to go DTC for the first time
- Looking for a partner not just a platform, with services offered during and post migration
- Omni - channel merchant, looking to diversify through many channels
- Have a business need to move e-commerce platforms in the next 12 months
- Is primarily a B2C focused business that may have a secondary B2B arm to the business
- Have an individual or team who are responsible for owning & making this decision
- Have a budget that supports a minimum subscription of \$2K USD per month, as well as re-platforming costs.



06

Campaign Examples



Campaign samples

6-month Multi-touch Campaign

Step 1: Choose your objective

- Drive demand to acquire new merchants

Step 2: Choose your audience

- Prospective mid-market and large account merchants (\$2M-125M in revenue)

Step 3: Select your assets and channels

Month 1-3:

- *Landing page of case study with form to capture leads/contact information*
- *Google Ads to drive traffic to the landing page*
- *Email to prospect database to drive traffic to the landing page*

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Month 4-6

- Paid Ads on social media (LinkedIn, Instagram, Facebook, etc) to drive traffic to landing page
- Event/VIP Dinner to high intent prospects as guest speaker
- Emails to drive attendance

Step 5: Measure your performance

- Blog views
- Webinar registration/attendance
- Email opens/clicks
- Meetings booked



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Resources



Campaigns Resources for Partners

- Ready-to-Launch Campaigns in the Marketing Center
 - Email
 - Social Media
 - Landing Pages

[View Campaign Kits in the Shopify Partner Portal](#)



Additional Resources

- How to Create Your First Campaign with LinkedIn's Campaign Manager ([external link](#))
- Case studies of successful LinkedIn campaigns ([external link](#))
- Shopify Blog: Marketing Attribution: Definition and Different Models ([Link](#))
- Google Ads Best Practices ([external link](#))
- How to create a lead ad using Meta Ads Manager ([external link](#))



Thank you