

# How to Set Up Email Marketing on Shopify: A Practical Workflow



- Building a revenue-driving email system, step-by-step



- Course goal: configure sender domain, segments, automated flows, campaigns



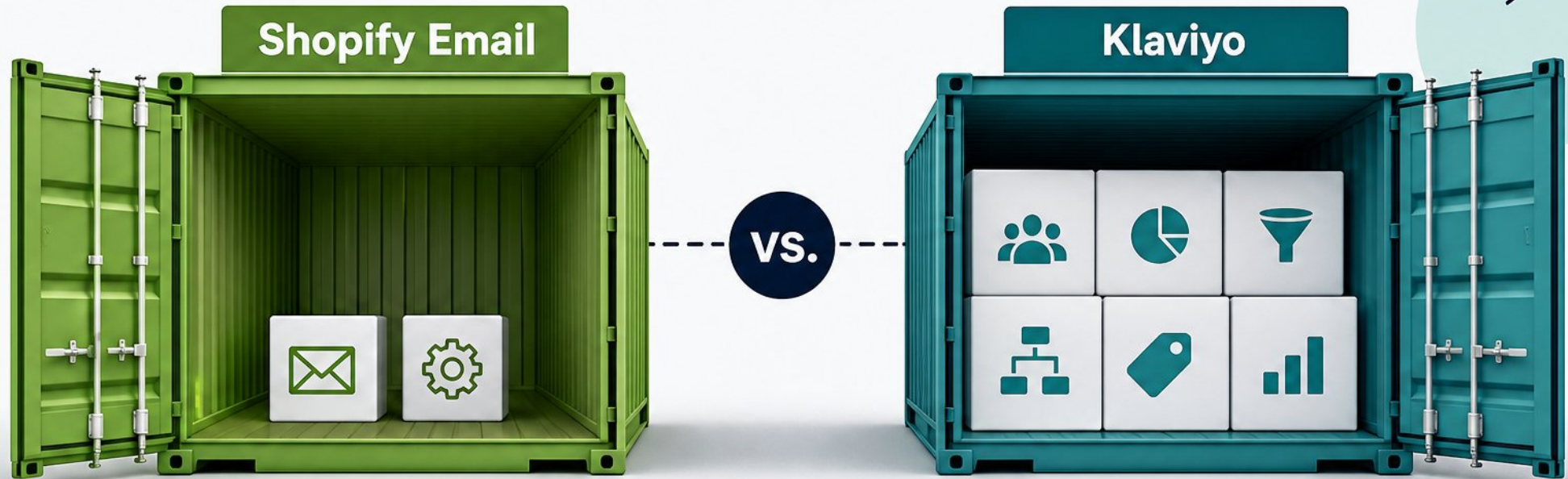
- For store owners, e-commerce operators, and lifecycle marketers



- Covers platform choice, setup, automations, campaigns, compliance, optimization



# Choosing Your Email Platform: Native vs. Third-Party ESP



-  - Shopify Email: 10K free emails/month, basic automations
-  - Klaviyo: advanced segmentation, best above \$2M revenue
-  - Omnisend: email + SMS value, ideal mid-market choice
-  - Start native under \$500K; consider third-party for growth
-  - Weigh cost, automation depth, segmentation, deliverability

# Technical Foundation: Sender Domain Authentication



- Gmail, Yahoo, Microsoft require SPF, DKIM, and DMARC



- SPF authorizes the sending server; DKIM signs the email



- DMARC policy tells receivers what to do on failure



- Shopify: CNAME records handle SPF and DKIM; add DMARC as TXT record



- Unauthenticated domain gets rewritten to store+123@shopifyemail.com



# Building Your List and Core Segments

- Capture at checkout, popups, and forms for list growth
- Core segments: new, first-time, repeat, VIP, lapsed
- Segment by purchase history, location, spending, and tags
- Never buy lists; use double opt-in for EU; suppress unengaged contacts



# Welcome Series: Your Highest-Value Automation



- 50–83.6% open rates; up to 320% more revenue per email



- Trigger on signup; 10–60 minute delay feels less aggressive



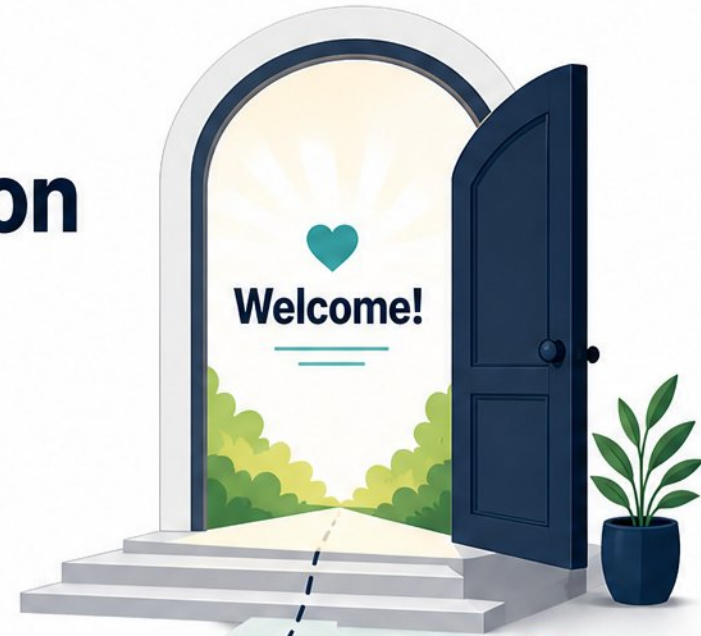
- Day 1: Incentive and intro | Day 2: Brand story



- Day 3: Best sellers | Day 5: Social proof | Day 7: Last chance

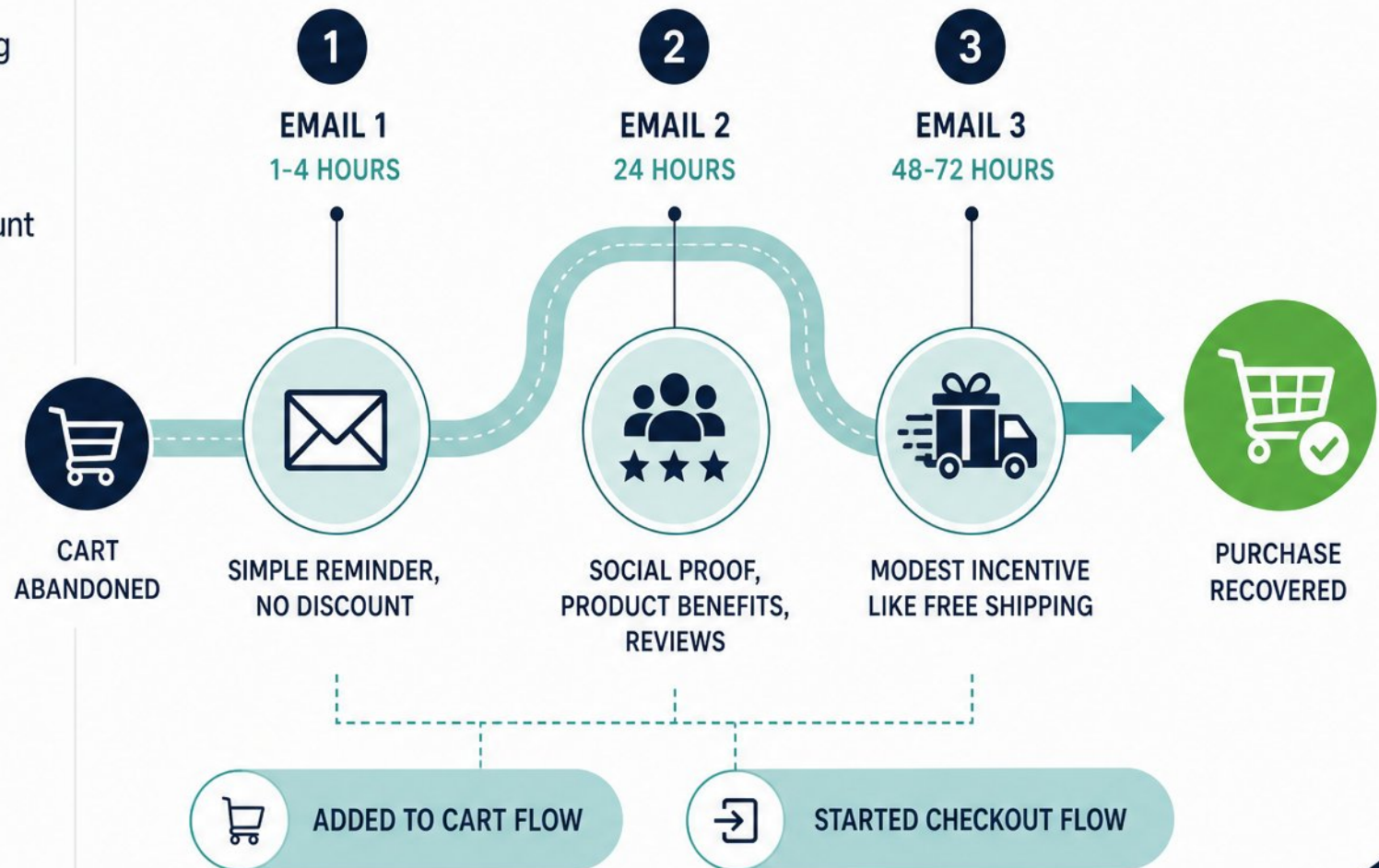


- Goal: Convert 8–15% of subscribers to first-time buyers



# Abandoned Cart Recovery: Timing and Sequence

- ~70% average cart abandonment rate; strong flows recover 10-25%
- Email 1 at 1-4 hours: simple reminder, no discount
- Email 2 at 24 hours: social proof, product benefits, reviews
- Email 3 at 48-72 hours: modest incentive like free shipping
- Separate Added to Cart and Started Checkout flows with suppression rules



# Post-Purchase and Win-Back Flows



# Designing On-Brand Emails That Convert



- Start with pre-built branded templates; customize via drag-and-drop editor



- Mobile-first design: 60%+ opens on mobile, one clear CTA, large buttons



- Use dynamic product blocks; auto-populate images, prices, and links



- Personalize with customer first name and store branding elements



- Critical elements: product image, title, checkout link, CTA, unsubscribe



# Creating and Scheduling Campaigns



- **Campaign types:** product launches, flash sales, newsletters, best-seller roundups



- **Workflow:** Messaging > Create campaign > template > segment > schedule



- **Personalize:** subject line tokens, preview text, dynamic product blocks, UTM parameters



- **Best send time:** Mon-Thu 10am-2pm audience timezone; use Sidekick recommendations

|                                                                                                          | MONDAY                                                                                                                                                                                       | TUESDAY                                                                                                                                                                                      | WEDNESDAY                                                                                                                                                                                | THURSDAY                                                                                                                                                                                              | FRIDAY | SATURDAY | SUNDAY |
|----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|----------|--------|
| <br>MORNING<br>10AM-2PM | <br>PRODUCT<br>LAUNCH<br> | <br>FLASH<br>SALES<br> | <br>NEWSLETTER<br> | <br>BEST-SELLER<br>ROUNDUPS<br> |        |          |        |

# Deliverability and Compliance Requirements



- **CAN-SPAM (US):** truthful headers and subject lines, physical address, functional unsubscribe honored within 10 business days



- **GDPR (EU):** explicit, informed consent; never pre-checked boxes; honor erasure requests within one month



- **CASL (Canada):** express or implied consent; implied consent expires in 2 years; sender identification required



- **Technical:** SPF, DKIM, DMARC plus one-click unsubscribe header and suppression lists



# Measuring Performance and Setting Targets



- Revenue per recipient (RPR) is the key metric, averaging \$0.10 per campaign send



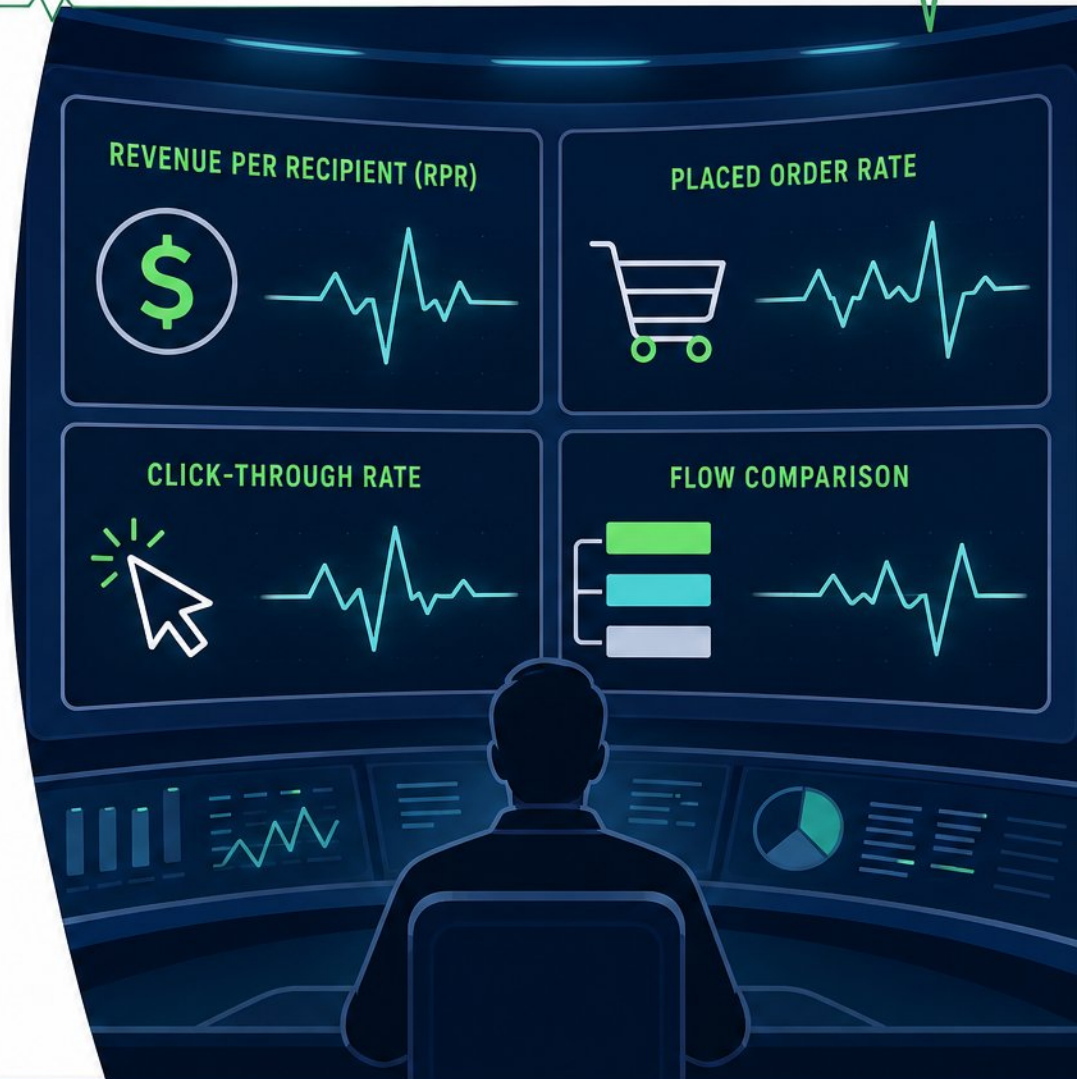
- Apple MPP inflates open rates 8–12%; prioritize CTR, RPR, and conversion rate



- Automated flows drive 41% of email revenue from just 5.3% of sends



- Flow targets: abandoned cart \$3.07 RPR; welcome \$0.25–\$0.65; post-purchase \$0.18–\$0.42



# | A/B Testing and Optimization



- Test one variable at a time: first email timing, then spacing, then copy



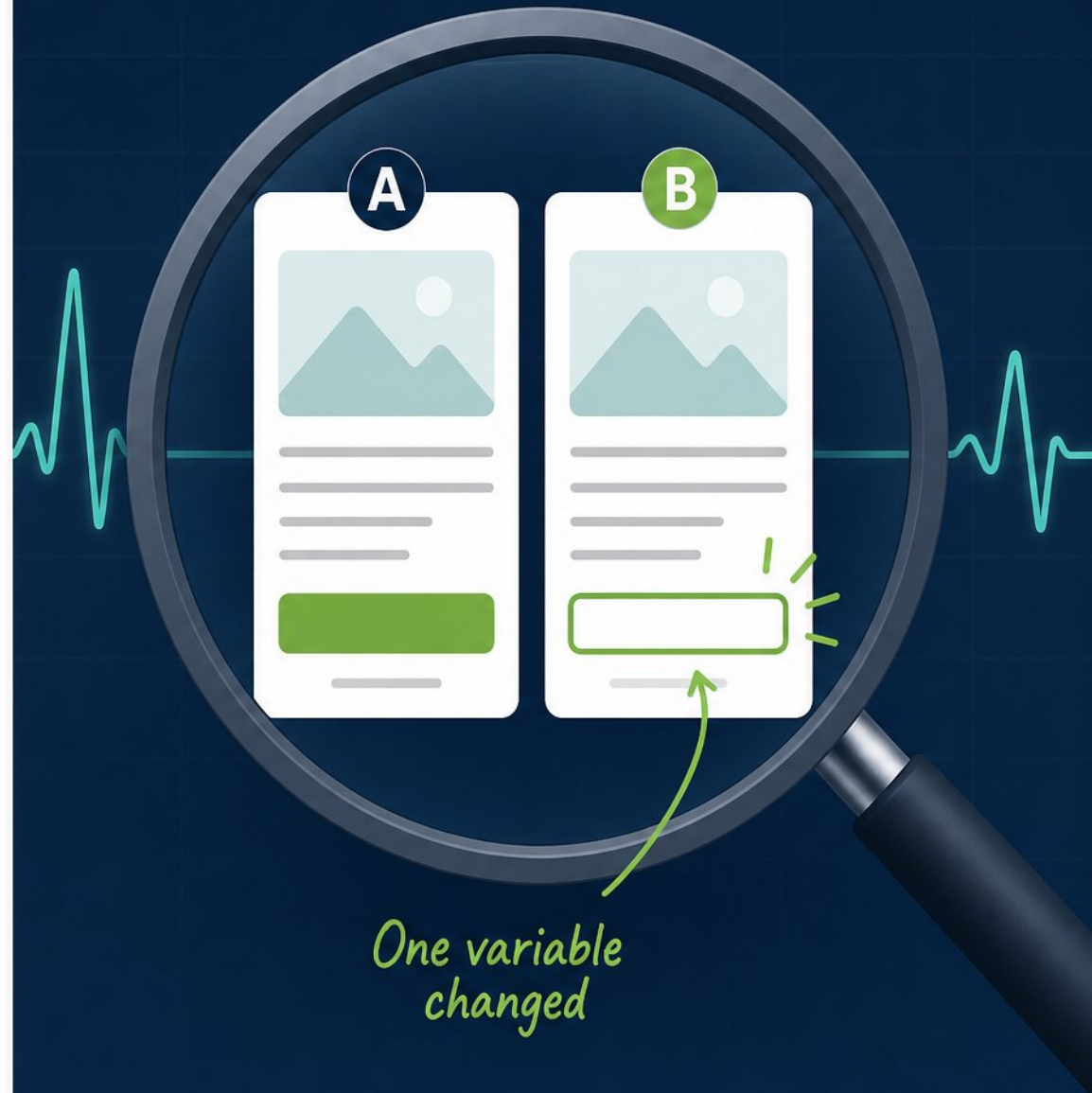
- Split traffic 50/50 with 200+ sends per variation for valid results



- Start with abandoned cart timing—it has the biggest recovery impact



- Weekly audit: unsubscribe under 0.3%, hard bounce under 0.5%, list growth 2.5%+



# Common Mistakes and How to Avoid Them



- Early discounts train customers to abandon carts for coupons



- Missing purchase suppression sends emails after sale



- Avoid noreply@ senders—hurts engagement and deliverability



- Always test welcome and abandoned cart flows in private browser



# Your 30-Day Email Setup Action Plan



# PersonWise.

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