Designing Your Ecommerce Pre-Order Campaign: A Worksheet

Step 1 — Determine Your Goal

What's the purpose of your pre-order campaign? Are you trying to capture sales for a temporarily out-of-stock product? Or perhaps you want to validate a new product idea?

Your answer:

Step 2 — Identify Your Product

What product(s) are you trying to promote or sell via this pre-order campaign? Why this product? Does it have any unique qualities in terms of its value proposition?

Your answer:

Step 3 — List Your Challenges

How long will it realistically take for customers to receive the product you identified in step 2? What do you still need to complete (e.g., design, testing, manufacturing)? Are there any potential hiccups that might delay fulfillment?

Your answer:

Step 4 — Select the Type of Pre-Order Campaign

Based on the goals you listed in step 1 and the challenges you jotted down for step 3, what type of pre-order makes the most sense for your brand?

- Pay Now — best for shorter lead times
- Pay Later — perfect for validating shoppers' interest in a product
- Crowdfunding — a great choice if you're strapped for cash and in the early stages of development

Your answer:

Pro Tip:
Successful pre-order campaigns do a great job of setting customer expectations from the start.

Step 5 — Plan Your Pre Order Campaign's Communication and Marketing Strategy

How can you ease customers' concerns or impatience (especially if they've paid upfront): What are the different production or fulfillment milestones that warrant a communication update? How can you best mitigate damage to your brand reputation in case a delay occurs?

Your answer:

In terms of marketing, what are some creative ways to promote your pre-order product(s)? For example, what are some word-of-mouth tactics, early-bird incentives, or FOMO-inducing messaging that can best generate buzz and a sense of urgency?

Your answer:

Step 6 — Find the Perfect Shopify Pre-Order App

What features do you need in your chosen Shopify app? Which apps fit the bill? (Check out **Pre-Order Now** or **PreProduct**.)

Your answer:

Step 7 — Create a Plan

What are all the assets that you need to create (e.g., email updates, ad banners, landing pages)? Who's in charge of what? What's your deadline? How long will the pre-order period last? Alternatively, is there a maximum number of available pre-order spots?

Your answer:

Step 8 — Design Your Pre-Order Page

What details would shoppers need before they're ready to take the plunge and hit the pre-order button? How can you properly set expectations? What information do you need from customers? What is the pre-order purchasing sequence?

Your answer:

Step 9 — Announce Pre-Orders Are Open

Which channels do your existing and target customers spend the most time on? How can you get them excited about your pre-order campaign?

Your answer: