



## Buyer Experience Award

An organization or team who has developed a best-practice operational approach to enable a world-class buyer experience with successful business outcomes of improved conversion or revenue.

### The Winner



#### The Challenge

Shopify is one of the most popular online store builders and best-known ecommerce solutions on the market. To achieve additional revenue growth, the Shopify team looked to improve their buyer experience - focusing on customers wanting to upgrade to a higher platform subscription plan. Their existing sales cycle contained multiple touch points with several teams which lengthened the process. This meant customers had longer wait times, sometimes for urgently needed upgrades and services. Internally, valuable time was being spent on manual tasks that could easily be automated, freeing teams for other revenue generating activities.

#### The Operational Approach

Shopify's solutions centered heavily in automation. One of the first improvements made was the creation of a localized landing page where customers could initiate a plan upgrade simply from signing into their store. Upon selecting an upgrade, another automation would then determine if the shop was eligible and present customized pricing. These automated processes triggered a lead to be created in Salesforce and routed through LeanData.

With specific rules and criteria setup in LeanData, leads could be auto-upgraded to contacts and create opportunities. These parameters also helped determine which opportunities were eligible for sales commission. There are now automations in place to mark the opportunity as closed won, create contracts, establish billing, and change the shop's subscription plan. In addition, LeanData teams created a custom action node for Shopify that helped associate product records in the auto-upgrade opportunities.

#### Operational Results

As a result of Shopify's new automations, thousands of new customers have upgraded their platform subscription using this "self serve" funnel since launch. Other benefits include:

- The business saves 5.8 hours of manual process work per upgrade
- Customer time to value increased by 360x, enabling them to onboard to the platform quicker
- Reduced errors because of less human intervention and elimination of complex manual processes
- Each plan upgrade led to 7x-68x more incremental ARR

By implementing an automated solution to the platform upgrade process, Shopify has seen improvements in customer retention, reduced errors from human intervention, and the elimination of complex manual processes.

**"This automation helped us resolve some of our business and operational problems. Being a no code platform, LeanData made it easy for us to make changes to our rules and flows and make improvements. The custom node was a useful addition and proved how flexible the platform was and a great automation tool from the long-term perspective."**

**– Sabrina Lobo, Marketing Technology Specialist**