

# The Scale *Playbook*

Three systems for growing an online store past the plateau:  
unit economics, retention and operations.

— FOR FOUNDERS WHO SHIP

# Before you *start*

This playbook is for founders stuck at \$10K–\$30K a month, or wherever your store has stopped growing: more effort no longer means more growth. Read it once, then work through it one system at a time.

## ABOUT MIZOSTOREFORGE

mizostoreforge is a journal for people who build and run online stores. Most chapters point to longer guides in the Journal at [mizostoreforge.com](https://mizostoreforge.com), if you want to go deeper on any system.

## READ THIS TOO

This playbook is educational. It is not financial, legal or tax advice. Every business is different: results depend on your product, market, margins and execution. We make no promise about what you will earn. Numbers in worked examples are illustrative, and rules of thumb are starting points to test, not guarantees.

## How to use it

1

### Take the self-check

Two minutes. It shows where your store is leaking.

2

### Run the 90-day plan

One month per system, in order, using the worksheets.

3

### Keep the scorecard

Five numbers, reviewed weekly, long after day 90.

First edition, October 2026. © 2026 mizostoreforge. All rights reserved. You're welcome to print the worksheets for your own business.

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## — START HERE

# Is this *you*?

Tick every statement that is true for your store today. Be honest: nobody else will see it.

- |                                                                                                                    |        |
|--------------------------------------------------------------------------------------------------------------------|--------|
| <input type="checkbox"/> Revenue has been roughly flat for three months or more, even though you've worked harder. | CH. 01 |
| <input type="checkbox"/> You've raised ad spend and watched your cost per new customer rise with it.               | CH. 02 |
| <input type="checkbox"/> You can't say, from memory, what one order of your best seller leaves you after costs.    | CH. 02 |
| <input type="checkbox"/> You judge campaigns mainly on a ROAS target, without knowing your break-even ROAS.        | CH. 02 |
| <input type="checkbox"/> You don't know what share of last quarter's customers have ordered twice.                 | CH. 03 |
| <input type="checkbox"/> Apart from order and shipping confirmations, your store sends no automated emails.        | CH. 03 |
| <input type="checkbox"/> When sales dip, a sitewide discount is the first thing you reach for.                     | CH. 03 |
| <input type="checkbox"/> You answer most customer messages yourself.                                               | CH. 04 |
| <input type="checkbox"/> If you took a week off, orders would go unshipped or questions unanswered.                | CH. 04 |
| <input type="checkbox"/> You don't review the same handful of numbers every week.                                  | CH. 04 |

## READING YOUR TICKS

Each tick points to a chapter. If you ticked something in every chapter, don't jump ahead: the 90-day plan runs in a fixed order because each system makes the next one easier. Numbers first, then retention, then systems.

## CHAPTER 01

# The *plateau*

01

Most stores don't stall because the founder stops working. They stall because the business was built to grow one way, by buying more traffic, and that lever tends to get more expensive the harder you pull it.

## Four patterns behind the ceiling

01

**Scaling ad spend, not profit**

Revenue goes up, but every new order carries a full acquisition cost. If you don't know your margin per order, you can't tell whether more spend is growth or a faster loss.

02

**One-time buyers, no retention**

If customers buy once and disappear, you pay to replace most of your revenue every month, and the bill rises with your targets.

03

**The founder runs every task**

Support, fulfilment, ads, content, finance. When everything routes through one person, that person's hours become the ceiling, and burnout isn't far behind.

04

**No systems to scale on**

Work that lives in your head can't be delegated, measured or improved. It can only be repeated, by you.

More hustle won't break the ceiling. *Better systems will.*

# The *shift*

From hustle to system: two ways to run the same store. The products can be identical. What changes is where growth comes from.

|                   | ● THE PLATEAU MODEL           | ● THE SCALE PLAYBOOK                                    |
|-------------------|-------------------------------|---------------------------------------------------------|
| GROWTH LEVER      | More ad spend                 | Profitable unit economics                               |
| CUSTOMERS         | One-time buyers               | A retention engine                                      |
| OPERATIONS        | Founder-dependent             | SOPs and a lean team                                    |
| THE MAIN QUESTION | “How do we get more traffic?” | “What is each customer worth, and how do we keep them?” |

## Fix them in this order

- **Numbers first.** They tell you how much you can afford to spend to win a customer.
- **Retention second.** It raises what each customer is worth, which changes what you can afford.
- **Systems third.** They free the time to do the first two properly, every week.

None of the three needs a bigger budget to start. They need an afternoon, a spreadsheet and the discipline to look at the numbers you’ve been avoiding.

# Five levers, *not one*

A store's profit comes from a short equation. The plateau model pulls on its first term. The Scale Playbook works on all five levers.

## PROFIT, SIMPLIFIED

Customers × orders per customer × contribution margin per order – marketing – fixed costs

### 1 · More customers PLATEAU LEVER

Traffic × conversion rate. It works, but each extra customer usually costs a little more than the last as you reach colder audiences.

### 2 · More orders per customer CH. 03

Retention. The customers you already paid for come back, without a second acquisition cost.

### 3 · More margin per order CH. 02

Price, order value, shipping, payment costs, discounts and returns. Small changes here touch every order you ever take.

### 4 · Lower cost per customer CH. 02

Better conversion, sharper creative, clearer offers, and cutting campaigns that lose money on every customer.

### 5 · More founder time CH. 04

Not in the equation, but it decides whether the other four get worked on. Systems and a lean team turn your hours from doing the work into improving it.

## Why more traffic gets more expensive

When you raise budgets, ad platforms have to find buyers beyond the people most likely to purchase. Frequency rises, creative tires, and your cost per new customer tends to climb. That's not a reason to stop advertising. It's a reason to know exactly how much a customer is worth before you buy more of them.

**RULE OF THUMB** Before you scale a campaign, check that your margins still work if your cost per customer rises by 20–40%. That range comes from our Meta ads guide. Treat it as a stress test, not a forecast.

## CHAPTER 02

## 02

# Unit economics *first*

Before you scale anything, know what one order is actually worth to you. Not the revenue: what's left after the costs that come with every order.

**CONTRIBUTION MARGIN PER ORDER**

Order value – product cost – shipping & packaging – payment fees – discounts – returns

This is the money each order contributes towards ads, salaries and profit. It is the most important number in this playbook. Calculate it per product, not just as a store-wide average.

## What goes in, what stays out

**COUNT IT: COSTS THAT COME WITH EACH ORDER**

- Product cost, including inbound freight and duties
- Packaging, and picking and packing if you pay for it
- Shipping you pay, minus any shipping the customer pays
- Payment fees, including cross-border and currency costs
- Discounts and free gifts (count gifts with discounts)
- An allowance for refunds and return shipping
- App or service fees charged per order (count them with payment fees)

**LEAVE IT OUT: FIXED COSTS**

- Salaries and regular contractors
- Software subscriptions
- Rent and equipment
- Your own time

These come out of your *total* contribution margin each month, not out of each order.

## Worked example

ILLUSTRATIVE NUMBERS. THIS EXAMPLE ASSUMES NO RETURNS. USE YOUR OWN COSTS, RATES AND RETURNS ALLOWANCE.

|                               |                |
|-------------------------------|----------------|
| Order value                   | \$60.00        |
| Product cost                  | – \$18.00      |
| Shipping & packaging          | – \$7.00       |
| Payment fees (example)        | – \$2.40       |
| Discount code used            | – \$3.00       |
| Contribution margin per order | <b>\$29.60</b> |

Now say your blended CPA last month was **\$35**. Each new customer costs **\$5.40 more** than their first order contributes. Scaling ads at that cost scales the loss, unless those customers come back.

That doesn't automatically make the spending bad. It means it only works if enough customers order again, so you need to know whether they do. Chapter 03 shows how to find out, and how to make it more likely.

### CHECK YOUR REAL PAYMENT RATE

Payment costs are often higher than the headline rate once cross-border fees, currency conversion and payout costs are added. For any month, divide the money that actually reached your bank by your total sales, leaving refunds out of both. Subtract the result from 1: that's your real payment rate. Compare it with the rate you were quoted.

### FURTHER READING IN THE JOURNAL

[Hidden Shopify Costs](#)

## What you can afford to *spend*

Three numbers turn your contribution margin into spending limits. Work out the break-even numbers per product. Blended CPA covers the whole store.

### BLENDING CPA

Total ad spend ÷  
new customers

Same period, all channels.  
What you really pay to win  
one new customer.

### BREAK-EVEN CPA

= contribution  
margin per first  
order

The most you can pay for  
a customer without losing  
money on their first order.

### BREAK-EVEN ROAS

Order value ÷  
contribution margin

The return on ad spend  
below which a campaign  
loses money on first  
orders.

## In the worked example

| NUMBER                                  | CALCULATION                          | RESULT         |
|-----------------------------------------|--------------------------------------|----------------|
| Break-even CPA                          | Contribution margin per order        | <b>\$29.60</b> |
| Break-even ROAS                         | \$60.00 ÷ \$29.60                    | <b>2.03</b>    |
| Target CPA, keeping \$8 per first order | \$29.60 – \$8.00                     | <b>\$21.60</b> |
| Last month's blended CPA                | From your ad accounts and store data | <b>\$35.00</b> |

## Trust your own numbers

Ad platforms report the revenue they attribute to themselves, which can include customers who would have bought anyway and returning customers you already paid for. Blended CPA uses your store's own records. When the two disagree, make decisions on your own numbers and use platform figures to compare campaigns with each other.

## Six ways to raise margin per *order*

Each one lifts the contribution of every future order, including the ones you never paid to acquire.

**01****Raise order value**

Bundles, kits and relevant add-ons at checkout. If you offer free shipping, set the threshold a little above your average order value so it nudges people to add one more item.

**02****Price on value, not hope**

Before raising a price, add something real: better materials, a kit, a proper warranty, faster support. Then test the new price on a product, not the whole store.

**03****Ship smarter**

Weigh and measure the real packed parcel before setting rates. Carriers may charge by size as well as weight, and packaging is a cost too.

**04****Stop payment leakage**

Set rounded local prices per market, avoid converting currency twice, and keep disputes low. Each leak quietly takes a slice of every order.

**05****Discount with a purpose**

Every code comes straight out of contribution margin. Swap sitewide sales for targeted offers: a first-order incentive, a win-back offer, a thank-you for loyal customers.

**06****Return less**

Many return reasons can be fixed upstream: clearer size charts, honest photos, accurate descriptions. Ask every customer who asks for a refund what went wrong, and fix the cause.

**RULE OF THUMB** Our shipping guide suggests setting a free-shipping threshold 15–20% above your average order value. Check your average order value in your store's reports, then test.

**FURTHER READING IN THE JOURNAL**

[High-Ticket vs. Low-Ticket Stores](#) · [Shipping Guide](#)

## Chapter 02: this *month*

Use Worksheet 1 (page 25) for the calculations.

- ☐ Calculate contribution margin for your five best-selling products.
- ☐ Work out your real payment rate:  $1 - (\text{money received} \div \text{total sales})$ .
- ☐ Calculate blended CPA for the last 30 days, across all channels.
- ☐ Work out break-even CPA and break-even ROAS for each of the five products.
- ☐ List every campaign whose CPA is above break-even CPA. For each one: fix it, pause it, or justify it with real repeat-purchase data from Chapter 03.
- ☐ Pick one margin lever from the previous page and test it for the rest of the month.
- ☐ Cancel the apps and subscriptions you no longer use.

### BEFORE YOU SCALE ANY CAMPAIGN

Ask three questions. What does an order of this product contribute? What does a customer from this campaign really cost? And if cost per customer rises by 20–40%, does it still work? If you can't answer all three, you're not ready to scale it yet.

### FURTHER READING IN THE JOURNAL

[Meta Ads Scaling Playbook](#) · [Hidden Shopify Costs](#) · [High-Ticket vs. Low-Ticket Stores](#)

### NOTES

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## CHAPTER 03

## 03

# The retention *engine*

A customer who buys twice does more for your profit than two customers who buy once, because you only paid to acquire one of them.

## Retention *compounds*

## WHAT THE RESEARCH SAYS

**5–25×**

Acquiring a new customer can cost 5 to 25 times more than keeping an existing one.

HARVARD BUSINESS REVIEW, 2014

**+25–95%**

A 5% increase in customer retention can lift profits by 25% to 95%.

BAIN & COMPANY RESEARCH, CITED BY HBR, 2014

These figures come from broad research across industries, much of it outside e-commerce. Treat them as direction, not a forecast for your store. Full sources on page 30.

## The one number to watch

## REPEAT PURCHASE RATE

Customers with 2+ orders ÷ all customers

Same period. Track it monthly. It's the clearest sign the engine is working.

## What retention does to the *maths*

Back to the worked example: \$29.60 contribution margin per order and a \$35 blended CPA. What changes is the share of customers who come back for one more order.

| CUSTOMERS WHO ORDER A SECOND TIME | ORDERS PER CUSTOMER | CONTRIBUTION PER CUSTOMER | AFTER \$35 CPA |
|-----------------------------------|---------------------|---------------------------|----------------|
| 0%                                | 1.0                 | \$29.60                   | -\$5.40        |
| 20%                               | 1.2                 | \$35.52                   | +\$0.52        |
| 30%                               | 1.3                 | \$38.48                   | +\$3.48        |
| 40%                               | 1.4                 | \$41.44                   | +\$6.44        |

Illustrative. Assumes each returning customer places exactly one more order with the same contribution margin, and ignores the small cost of the emails that bring them back.

At 30%, the average customer contributes  $\$29.60 \times 1.3 = \$38.48$ , which covers the \$35 CPA. Same ads, same product. The only change is that people came back.

## Two more numbers

### LIFETIME CONTRIBUTION

Contribution per order  $\times$  orders per customer

Measure it over a fixed window, such as 12 months, so it stays honest.

### REPEAT WINDOW

Median days from first to second order

It tells you when to send reminders and win-back emails.

### MIND THE CASH GAP

If lifetime contribution covers your CPA but the first order doesn't, you are paying for growth up front and earning it back later. That can be a good business, but only if you know how long the payback takes and have the cash to wait.

## Four flows to build *first*

Automated emails that run in the background. Build them once, then improve them one at a time.

| FLOW               | TRIGGER                            | STARTING SCHEDULE                                                | JOB                                                                                                                  |
|--------------------|------------------------------------|------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|
| Welcome            | Someone joins your list            | 3 emails: immediately, after 1 day, after 2 days                 | Deliver what you promised, tell your story, show best sellers with real reviews.                                     |
| Abandoned checkout | Checkout started, not completed    | 3 emails: after 1–2 hours, 1 day, 2 days                         | Remind, then answer the doubt that stopped them: shipping, returns, trust. Incentive only as a last step, if at all. |
| Post-purchase      | An order is placed                 | 3 emails: immediately, around delivery, 7–21 days after delivery | Honest delivery window, then help using the product, then ask for an honest review.                                  |
| Win-back           | No order within your repeat window | 2 emails, timed to your repeat window                            | New arrivals or improvements first. A time-limited thank-you offer second.                                           |

**RULE OF THUMB** These schedules follow our email flows guide. Adjust them to your delivery times and your repeat window, then compare open and order rates after a month.

## Before you switch them on

- ☐ Send a real test order and a real abandoned checkout to check timing and links.
- ☐ Set exit rules, so people who buy leave the abandoned-checkout flow.
- ☐ Authenticate your sending domain (SPF, DKIM and DMARC) so more of your emails reach the inbox.
- ☐ Read every email on a phone first.

### STAY ON THE RIGHT SIDE OF THE RULES

Only send marketing emails to people who agreed to receive them. In the US, the CAN-SPAM Act requires, among other things, honest sender details and subject lines, a valid postal address, and a clear way to opt out that you honour within 10 business days. The EU, UK and other markets have their own consent rules, which are often stricter. Check the rules where your customers live.

## Beyond the *inbox*

Retention starts the moment someone pays. These touches cost little and make the second order more likely.

### The thank-you page

Confirm the delivery window in plain words.  
Offer one relevant add-on, not a catalogue.

### The parcel

A short care or setup card and a thank-you note. Packaging people want to photograph.

### Delays

Tell customers about a delay before they notice it. A proactive email can prevent a support ticket, and sometimes a dispute.

### Refunds

Make exchanges and store credit easy to choose, without blocking refunds customers are entitled to. Ask what went wrong.

## Reviews that build *trust*

- **Ask after use, not after purchase.** Our social proof guide suggests 7–10 days after delivery for fast domestic shipping, and 14–21 days for longer or international delivery. One reminder at most.
- **Show them where decisions happen.** A star summary under the product title, photo reviews near the add-to-cart button, short testimonials in the cart about shipping and quality.
- **Welcome the honest ones.** Specific, mixed reviews are more believable than a wall of five stars.

### REVIEW RULES (US)

The FTC's rule on consumer reviews, in force since 21 October 2024, bans fake reviews and testimonials. You may offer an incentive for an *honest* review, but not one that requires or implies a positive one. Don't suppress negative reviews, and reviews from employees or relatives must clearly disclose the relationship. Disclose any incentive with the review itself. Other markets have similar rules.

### FURTHER READING IN THE JOURNAL

[Post-Purchase Magic](#) · [Social Proof That Converts](#)

## Chapter 03: this *month*

Use Worksheet 2 (page 26) to record your starting point.

- ☐ Record your repeat purchase rate for the last 12 months. This is your baseline.
- ☐ Find your repeat window: the median days between first and second orders.
- ☐ Switch on the welcome and abandoned-checkout flows.
- ☐ Switch on the post-purchase flow, with the review request timed to delivery.
- ☐ Switch on the win-back flow, timed to your repeat window.
- ☐ Add a care card or thank-you note to every parcel.
- ☐ Start a refund log: one line per refund, with the reason in the customer's words.

### THE MAIN QUESTION

“What is each customer worth, and how do we *keep them?*”

Ask it every time you look at a campaign, a discount or a support policy.

### FURTHER READING IN THE JOURNAL

[Shopify Email Marketing 101](#) · [Post-Purchase Magic](#) · [Social Proof That Converts](#)

### NOTES

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## CHAPTER 04

## 04

# Systems and a lean *team*

If a task happens more than twice, it deserves a written process.  
Once it has one, someone else can do it.

## Start with one honest week

For one normal week, write down every task you do and roughly how long it takes. Then give each one a type:

**Repeat**

Same steps every time, little judgement. Write it down first.

**Skilled**

Needs a craft, but a clear brief can direct it.

**Decide**

Shapes whether the business works. Keep these.

| TASK (EXAMPLE WEEK)                     | HOURS | TYPE    | NEXT STEP          |
|-----------------------------------------|-------|---------|--------------------|
| Answering “where is my order?” messages | 3.5   | Repeat  | SOP + saved reply  |
| Uploading new products                  | 2     | Repeat  | SOP, then hand off |
| Briefing next month’s ad creative       | 1.5   | Skilled | Brief a freelancer |
| Reviewing margins and pricing           | 1     | Decide  | Keep               |

Illustrative. Use the task audit on Worksheet 4 (page 28).

## One page per *process*

A standard operating procedure (SOP) doesn't need to be long. It needs five parts. Here is an example of the format.

| Daily order exceptions check |                                                                                                                                                                                                                                                             | SOP · EXAMPLE |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| PURPOSE                      | Catch problem orders before customers notice them.                                                                                                                                                                                                          |               |
| TRIGGER                      | Every weekday at 10:00.                                                                                                                                                                                                                                     |               |
| STEPS                        | <ol style="list-style-type: none"><li>1. Filter orders unfulfilled for 48+ hours.</li><li>2. Check payment flags and address errors.</li><li>3. Message affected customers using saved replies.</li><li>4. Log every issue in the shared tracker.</li></ol> |               |
| OWNER                        | Support assistant                                                                                                                                                                                                                                           |               |
| DONE WHEN                    | No order older than 48 hours is unexplained.                                                                                                                                                                                                                |               |

## Write it from a *recording*

- 1 Record yourself doing the task once, talking through each step and why you do it.
- 2 Turn the recording into the five parts above. Link the recording at the top of the page.
- 3 Watch someone else follow it, without helping. Wherever they get stuck, the SOP is unclear.
- 4 Let them fix it. The person doing the task owns the page from now on.

## Delegate in this *order*

### HAND OFF FIRST

Repeatable, low-judgement work: support with saved replies, order exceptions, product uploads.

### HAND OFF NEXT

Skilled execution with a clear brief: ad creative, email design, photography.

### KEEP

The offer, pricing, unit economics and hiring. These decide whether the business works.

## Your first *hire*

Your first help doesn't need to be full-time. Start with the biggest block of *Repeat* work from your audit, and the SOPs you've already written for it.

- **Start with a paid trial task.** Give a real task, the SOP and a deadline. How someone follows a written process tells you more than an interview.
- **Give access, not passwords.** Use staff accounts with only the permissions the role needs, so access can be removed in one click.
- **Agree what “done” means.** Every SOP ends with a “done when” line. That's the standard you review against.
- **Review weekly for a month, then monthly.** Fix the process, not just the mistake.

### THE GOAL

Not to work less. To spend your hours on the decisions only you can make: what to sell, at what price, to whom, and what each customer is worth.

## Support is a system *too*

Customer support is usually the first job worth systemising. It is repetitive, it affects retention, and it protects you from disputes.

### Policies people can find

Processing time, delivery windows by region, and return terms (who pays, how many days, what condition) on the product page, in the cart, in the footer and in confirmation emails.

### Order status on autopilot

A shipping email built around one clear tracking button, and an instant reply that points “where is my order?” messages to the tracking page.

### Saved replies

Write answers to your ten most common questions once. Review them monthly, and update the SOP when a policy changes.

### Disputes checked daily

Card disputes have response deadlines, and a missed deadline usually means an automatic loss. Check for them as routinely as you check orders.

## Your chargeback evidence pack

- ☐ Order confirmation and the customer’s details
- ☐ Tracking showing delivery to the customer’s address
- ☐ Every message exchanged with the customer
- ☐ A screenshot of the refund policy as shown at checkout
- ☐ Address and security-code check results from your payment provider

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**RULE OF THUMB** Our support guide aims for fewer than one support ticket per ten orders, and treats a dispute rate above 0.5% as a warning sign. Card networks and payment providers set their own thresholds, so check yours.

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### FURTHER READING IN THE JOURNAL

[Customer Support & Refund Playbook](#)

## The weekly *scorecard*

Five numbers, one page, 30 minutes every week. If a number moves the wrong way two weeks in a row, that's your next project.

|   | NUMBER                      | HOW TO CALCULATE IT                                          | TELLS YOU                          |
|---|-----------------------------|--------------------------------------------------------------|------------------------------------|
| 1 | Revenue                     | Net sales for the week                                       | Whether the store is growing       |
| 2 | Total contribution margin   | Orders × contribution per order                              | Whether that growth is profitable  |
| 3 | Blended CPA                 | Ad spend ÷ new customers                                     | What growth costs                  |
| 4 | Repeat purchase rate        | Customers with 2+ orders ÷ all customers (rolling 12 months) | Whether the retention engine works |
| 5 | Support first-response time | Average time to first reply                                  | Whether operations keep up         |

## The 30-minute weekly review

- 1 **Numbers (10 minutes).** Fill in the scorecard. No discussion yet.
- 2 **What moved (10 minutes).** For each number that moved the wrong way, ask why. Look for causes, not culprits.
- 3 **One decision (5 minutes).** Choose the single change you'll make this week.
- 4 **One owner (5 minutes).** Give it a name and a date. Next week's review starts by checking it.

Use the 13-week scorecard on Worksheet 3 (page 27).

## CHAPTER 05

## 05

# The 90-day *plan*

One system per month. Don't start the next month until the last one is running.

## Month 1 *Numbers*

CHAPTER 02 · WORKSHEET 1

**WEEK 1**

Contribution margin for your five best sellers.  
Your real payment rate.

**WEEK 2**

Blended CPA for the last 30 days. Break-even  
CPA and ROAS per product.

**WEEK 3**

Every campaign losing money on first orders:  
fixed, paused or justified.

**WEEK 4**

Test one margin lever. Start the weekly  
scorecard and review.

## Month 2 *Retention*

CHAPTER 03 · WORKSHEET 2

**WEEK 5**

Baseline repeat purchase rate and repeat  
window recorded.

**WEEK 6**

Welcome and abandoned-checkout flows live  
and tested.

**WEEK 7**

Post-purchase flow live, with the review  
request timed to delivery.

**WEEK 8**

Win-back flow live. Parcel card added. Refund  
log started.

## Month 3 *Systems*

CHAPTER 04 · WORKSHEET 4

### WEEK 9

One honest week: every task logged and typed as Repeat, Skilled or Decide.

### WEEK 10

SOPs written for your five most repeated tasks, from recordings.

### WEEK 11

Policies placed where customers look. Saved replies for the top ten questions.

### WEEK 12

One function handed off, starting with a paid trial task.

### WEEK 13 · REVIEW

Compare your first scorecard week with this one. Which number improved most? Which improved least, or got worse? That one is where the next quarter starts.

## After day 90

Keep the scorecard and the weekly review running. They are the system that keeps the other systems honest. Then run the plan again each quarter, starting with whichever number improved least, and go one level deeper: more products costed, more flows tested, more of your week handed off.

More hustle won't break the ceiling. *Better systems will.*

## WORKSHEET 1

# Unit *economics*

CHAPTER 02 · MONTH 1

One row per product. Use real costs from your last 30 days of orders. Contribution margin = price minus the four cost columns. Break-even CPA = contribution margin. Break-even ROAS = price ÷ contribution margin.

| PRODUCT | PRICE | PRODUCT COST | SHIPPING & PACKAGING | PAYMENT & PER-ORDER FEES | DISCOUNTS & RETURNS | CONTRIBUTION MARGIN | BREAK-EVEN CPA | BREAK-EVEN ROAS |
|---------|-------|--------------|----------------------|--------------------------|---------------------|---------------------|----------------|-----------------|
|         |       |              |                      |                          |                     |                     |                |                 |
|         |       |              |                      |                          |                     |                     |                |                 |
|         |       |              |                      |                          |                     |                     |                |                 |
|         |       |              |                      |                          |                     |                     |                |                 |
|         |       |              |                      |                          |                     |                     |                |                 |
|         |       |              |                      |                          |                     |                     |                |                 |

**TOTAL AD SPEND · LAST 30 DAYS**

All channels

**NEW CUSTOMERS · LAST 30 DAYS**

First-time buyers only

**BLENDED CPA**

Ad spend ÷ new customers

**REAL PAYMENT RATE**

1 – (money received ÷ total sales), refunds left out

## Campaigns losing money on first orders

| CAMPAIGN | CPA | BREAK-EVEN CPA | DECISION: FIX, PAUSE OR JUSTIFY |
|----------|-----|----------------|---------------------------------|
|          |     |                |                                 |
|          |     |                |                                 |
|          |     |                |                                 |
|          |     |                |                                 |

## WORKSHEET 2

# Retention *baseline*

CHAPTER 03 · MONTH 2

### REPEAT PURCHASE RATE

2+ orders ÷ all customers, last 12 months

### REPEAT WINDOW

Median days, first to second order

### ORDERS PER CUSTOMER

Orders ÷ customers, last 12 months

## Flows

| FLOW               | LIVE? (DATE) | EMAILS | TIMING | WHAT TO TEST NEXT |
|--------------------|--------------|--------|--------|-------------------|
| Welcome            |              |        |        |                   |
| Abandoned checkout |              |        |        |                   |
| Post-purchase      |              |        |        |                   |
| Win-back           |              |        |        |                   |

## Refund log

| DATE | PRODUCT | REASON, IN THE CUSTOMER'S WORDS | FIX |
|------|---------|---------------------------------|-----|
|      |         |                                 |     |
|      |         |                                 |     |
|      |         |                                 |     |
|      |         |                                 |     |
|      |         |                                 |     |
|      |         |                                 |     |
|      |         |                                 |     |
|      |         |                                 |     |
|      |         |                                 |     |
|      |         |                                 |     |

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 WORKSHEET 3

# The 13-week *scorecard*

CHAPTER 04 · EVERY WEEK

Fill in one column every week during the 30-minute review. Mark any number that moved the wrong way two weeks in a row.

| WEEK                      | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 |
|---------------------------|---|---|---|---|---|---|---|---|---|----|----|----|----|
| Revenue                   |   |   |   |   |   |   |   |   |   |    |    |    |    |
| Total contribution margin |   |   |   |   |   |   |   |   |   |    |    |    |    |
| Blended CPA               |   |   |   |   |   |   |   |   |   |    |    |    |    |
| Repeat purchase rate      |   |   |   |   |   |   |   |   |   |    |    |    |    |
| First-response time       |   |   |   |   |   |   |   |   |   |    |    |    |    |

## Decisions

| WEEK | THE ONE DECISION | OWNER | BY | DONE |
|------|------------------|-------|----|------|
|      |                  |       |    |      |
|      |                  |       |    |      |
|      |                  |       |    |      |
|      |                  |       |    |      |
|      |                  |       |    |      |
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|      |                  |       |    |      |
|      |                  |       |    |      |

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 WORKSHEET 4

# Task audit and *SOP*

CHAPTER 04 · MONTH 3

| TASK | HOURS / WEEK | REPEAT · SKILLED · DECIDE | NEXT STEP |
|------|--------------|---------------------------|-----------|
|      |              |                           |           |
|      |              |                           |           |
|      |              |                           |           |
|      |              |                           |           |
|      |              |                           |           |
|      |              |                           |           |
|      |              |                           |           |

## Your first SOP

Pick the task you did most often last week. Fill this in, then hand it to someone else and watch them follow it.

|           |
|-----------|
| TASK      |
| RECORDING |
| PURPOSE   |
| TRIGGER   |
| STEPS     |
| OWNER     |
| DONE WHEN |

## REFERENCE

# Glossary

|                           |                                                                                                                                                  |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| Average order value (AOV) | Revenue ÷ number of orders, for the same period.                                                                                                 |
| Blended CPA               | Total ad spend across all channels ÷ new customers, for the same period. What one new customer really costs.                                     |
| Break-even CPA            | The most you can pay to acquire a customer without losing money on their first order. Equal to contribution margin per order.                    |
| Break-even ROAS           | Order value ÷ contribution margin per order. Below this return on ad spend, a campaign loses money on first orders.                              |
| Chargeback                | A card payment reversed by the customer's bank after a dispute. It usually comes with a fee, and too many can put your payment account at risk.  |
| Contribution margin       | Order value minus the costs that come with each order: product, shipping and packaging, payment and other per-order fees, discounts and returns. |
| CPA                       | Cost per acquisition: what you spend on marketing to win one new customer.                                                                       |
| Fixed costs               | Costs that don't change with each order, such as salaries, software subscriptions and rent.                                                      |
| Lifetime contribution     | Contribution margin per order × orders per customer, measured over a fixed window such as 12 months.                                             |
| Real payment rate         | 1 – (money received ÷ total sales), with refunds left out. What payments really cost you, including fees and conversion.                         |
| Repeat purchase rate      | Customers with two or more orders ÷ all customers, for the same period.                                                                          |
| Repeat window             | The median number of days between a customer's first and second order.                                                                           |
| ROAS                      | Return on ad spend: revenue attributed to ads ÷ ad spend.                                                                                        |
| SOP                       | Standard operating procedure: a one-page, written process that someone else can follow.                                                          |
| Target CPA                | Break-even CPA minus the profit you want to keep from each first order.                                                                          |
| Win-back flow             | Automated emails sent to customers who haven't ordered within your repeat window.                                                                |

## GO DEEPER

# Further *reading*

## From the mizostoreforge Journal

- [Hidden Shopify Costs: Currency Conversion, Payout Fees, and Cross-Border Margins](#)
- [High-Ticket vs. Low-Ticket Shopify Stores in 2026: Math, Margins, and Ad Fatigue](#)
- [Meta Ads Scaling Playbook for 2026: How to Scale Budgets Without Killing ROAS](#)
- [Post-Purchase Magic: How to Turn One-Time Buyers into Repeat Customers Without Discount Overkill](#)
- [Shopify Email Marketing 101: 4 Automated Flows Every Store Needs](#)
- [Social Proof That Converts: How to Collect & Showcase Reviews That Sell](#)
- [Shopify Customer Support & Refund Playbook: How to Prevent Chargebacks and Build Retention in 2026](#)
- [Shipping Guide: Zones, Prices, and Strategies \(Shipping & Fulfillment\)](#)

## Sources

- Amy Gallo, “The Value of Keeping the Right Customers,” *Harvard Business Review*, 29 October 2014. [hbr.org/2014/10/the-value-of-keeping-the-right-customers](https://hbr.org/2014/10/the-value-of-keeping-the-right-customers)
- Bain & Company, “Retaining customers is the real challenge,” 2006. [bain.com/insights/retaining-customers-is-the-real-challenge](https://bain.com/insights/retaining-customers-is-the-real-challenge)
- Fred Reichheld, “Prescription for cutting costs: Loyal relationships,” Bain & Company. [media.bain.com/Images/BB\\_Prescription\\_cutting\\_costs.pdf](https://media.bain.com/Images/BB_Prescription_cutting_costs.pdf)
- Federal Trade Commission, “CAN-SPAM Act: A Compliance Guide for Business.” [ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business](https://ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business)
- Federal Trade Commission, “The Consumer Reviews and Testimonials Rule: Questions and Answers.” [ftc.gov/business-guidance/resources/consumer-reviews-testimonials-rule-questions-answers](https://ftc.gov/business-guidance/resources/consumer-reviews-testimonials-rule-questions-answers)

The 25–95% range is as reported by HBR, citing Reichheld’s research at Bain; Bain’s own pages give the upper figure and, for financial services, a lift of more than 25%. Where this playbook refers to “our guide”, the figure is an editorial rule of thumb from the Journal articles above, not a research finding. Test it against your own data.

## KEEP GOING

New guides on pricing, retention and operations are published in the mizostoreforge Journal. Read them, and get in touch with questions about this playbook, at [mizostoreforge.com](https://mizostoreforge.com).



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