



# Experts Marketplace Partner Handbook





## Purpose

This handbook is your guide to success in the Shopify Experts Marketplace, helping you navigate everything from your internal dashboard to merchant communications. Use this resource to educate yourself and your team on the tools and tips for interacting with Shopify merchants.

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# THE SHOPIFY EXPERTS MARKETPLACE HELPS MERCHANTS FIND, HIRE, AND TRANSACT WITH TRUSTED PARTNERS TO HELP GROW THEIR BUSINESS.

## Experts Marketplace definition

### The 150ft version:

The Shopify Experts Marketplace is an integrated solution to help merchants find, hire, and transact with trusted and affordable partners to help grow their business.

Partners have the ability to grow their social and services footprint within the Shopify Experts Marketplace by providing trusted and affordable work to merchants in need. The potential for partner growth through the addition of a steady lead flow and ongoing merchant requests are just a few perks of the marketplace.

Partners are welcomed into the Shopify Experts Marketplace based on their commitment to delivering best in class client service/support to merchants of all sizes.

### Program benefits:

- Listing on Shopify Experts Marketplace and community pages
  - Exposure to tens of thousands of merchants worldwide
  - Opportunity to work with the Shopify Experts Marketplace team for future marketing
  - New business leads via direct introduction from Shopify Experts Marketplace
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## Internal tools

Before we cover the Shopify Experts Marketplace workflow and how you will access requests and data concerning your profile, let's cover some basics about the internal tools you should become familiar with.

**PRO TIP:** Bookmark these links and sort them in folders for easy access in your browser.

### TextExpander

There are a lot of links and information that you will need quick access to on a regular basis. [TextExpander](#) allows you to create text shortcuts. For example, you can set it up so that when you type “; 20” it automatically writes, “Thank you for contacting our team, and showing interest in working with us”.

**PRO TIP:** Once you have TextExpander set up on your computer, ask your colleagues for an export of theirs so you can start building out your own list. This will help you tailor custom responses to merchants based on their specific requests.

### Google Hangouts/Skype

Shopify merchants are worldwide. These two tools will be your primary means of getting in touch with them.

**PRO TIP:** We recommend using Google's [G Suite](#) for email, calendar, documents, etc. Google Calendar events have a Hangouts link built in automatically. But, if someone from outside Shopify and not on the calendar invite wants to join, you'll need to [adjust the Hangout's settings](#).

### Calendly

Internal meetings can be booked through Google Calendar. To allow merchants and external contacts to schedule meetings with you, create a [Calendly](#) (or [youcanbook.me](#)) account. We recommend including it in your email signature to ensure that merchants can always find it and book you.

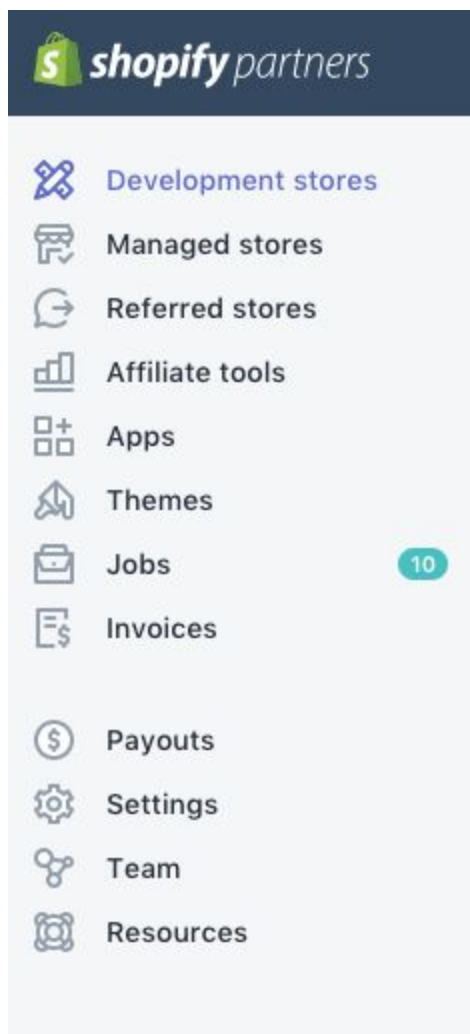
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## Internal profile access

Now that you are officially ready to tackle the Shopify Experts Marketplace, let's help you get well acquainted with your Partner Dashboard. This is where you will access your job requests, job details, find out when requests were made, request collaborator account access, create invoices, and communicate with merchants.

### Understanding your dashboard



When you log into your Partner Dashboard, you'll notice that you now have access to a new 'Jobs' section in the left-hand navigation. Here, you can view all of the merchant matches and requests that have been made for you and your team.

## Dashboard overview

**Job requests**

1

TOTAL	RESPONSE RATE	MERCHANT RESPONSE RATE	DECLINE RATE
1,662	86.8%	10.7%	7.5%

2

All (1,662) Pending (87) Archived (196)

3

Job	Merchant name	Store name	Request date	Status
<a href="#">Get more visitors</a>	Cameron McKean	<a href="#">BottomFeeder</a>	Jan 23, 2018	New
<a href="#">Develop a brand strategy</a>	Keno Henry	<a href="#">Golden stocks</a>	Jan 22, 2018	New
<a href="#">Make store tweaks</a>	Ryan Kris	<a href="#">Hello Sarnie</a>	Jan 22, 2018	Opened
<a href="#">Get more visitors</a>	Arlette Fleischer	<a href="#">Diamia handmade skincare</a>	Jan 22, 2018	New
<a href="#">Make store tweaks</a>	Chase Gugenheim	<a href="#">Blanquill</a>	Jan 22, 2018	New
<a href="#">Set up a basic store</a>	kupakwashe dzakandwa	<a href="#">ISHKET</a>	Jan 22, 2018	New
<a href="#">Make store tweaks</a>	Stuart Massengill	<a href="#">First Class Trend</a>	Jan 22, 2018	New
<a href="#">Make store tweaks</a>	Adam Flint	<a href="#">hempoz</a>	Jan 22, 2018	New

1. Top level stats to give you and your team a bird's eye view on your current performance in the Shopify Experts Marketplace. Within each box, you can click on the '?' to learn more about that number and what it means.

**PRO TIP:** Create goals and targets for your team, and log into your dashboard daily to monitor progress. For example, "Increase our Response Rate by X% this month."

2. This navigation area allows you to view all merchant requests (All), pending requests that are New, Opened, or Awaiting Response (Pending), and completed or declined requests (Archived).

3. The lower area is where you can see the pipeline of requests coming into your profile, with a specific tag on the right-hand side to give you a quick status check on that lead. Clicking through will give you all the information you need to know about that merchant's request.

## Merchant request

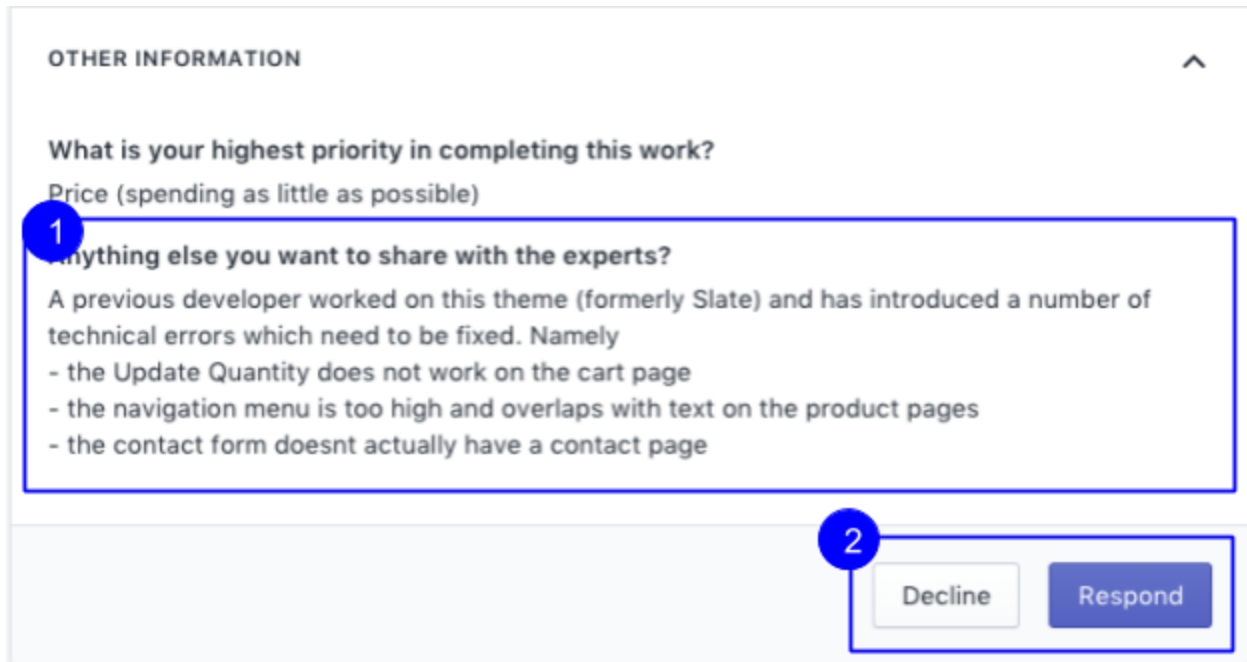
The screenshot shows a merchant request interface with four numbered callouts:

- 1**: Job #22625: Make store tweaks (Opened)
- 2**: Job Details (Created Jan 22, 2018)
  - Category: Setup and design
  - What pages/areas of your store need tweaking?
    - Pages
    - Other
    - Nav bar height
  - What type of pages do you need tweaked?
    - Cart page
  - Provide additional details about what you need tweaked.
    - Update cart function is not working
- 3**: Merchant
  - Ryan Kris
  - Hello Sarnie
  - [hello-sarnie.myshopify.com](https://hello-sarnie.myshopify.com)
  - Shopify plan: Basic
  - Customer since: Jul 10, 2017
  - Location: Australia (ACDT)
- 4**: Responding to job requests
  - Introduce yourself and let them know you're interested in the job. It's a good idea to include your name, a little about your company, questions about their job, or any instructions about how you'd like to proceed.
  - This message will be sent to the merchant's email. They can respond to you directly by simply replying to the message.

1. Job number and status on whether you have opened the request or not. This will give you a new tag on the main dashboard page, allowing you to itemize your requests based on their status.
2. Merchants' detailed description of the work they are requesting. Merchants are also required to provide business information, allowing you to get a high-level view of the type of business they are operating.
3. This block of information will give you details on the type of merchant plan they have, where they are located, and of course their Shopify storefront link.
4. This section is a permanent 'Pro Tip' area that will give you advice on how to respond to jobs, and explain the flow of responding to merchants within the dashboard.



## Responding to requests



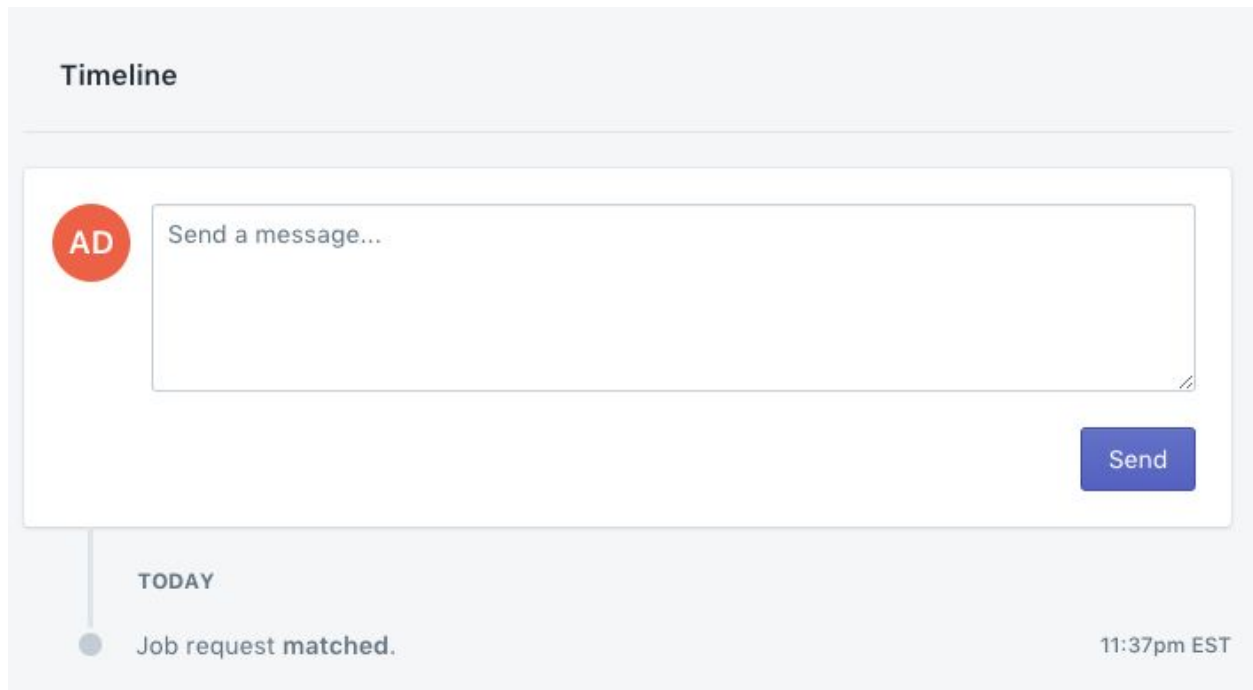
The screenshot shows a form titled "OTHER INFORMATION" with a collapse icon (^) in the top right corner. Below the title is the question "What is your highest priority in completing this work?" followed by the text "Price (spending as little as possible)". A blue box with a "1" in a circle highlights the section "Anything else you want to share with the experts?". This section contains the text: "A previous developer worked on this theme (formerly Slate) and has introduced a number of technical errors which need to be fixed. Namely" followed by a bulleted list: "- the Update Quantity does not work on the cart page", "- the navigation menu is too high and overlaps with text on the product pages", and "- the contact form doesnt actually have a contact page". At the bottom right of the form, a blue box with a "2" in a circle highlights two buttons: "Decline" and "Respond".

1 - Below the fold on each request page, we make sure to gather additional information that puts the request into context, and gives you a leg up on your response.

2. The Shopify Experts Marketplace gives you the opportunity to accept or decline the request based on your bandwidth and the breadth of work being requested.

If you decide to accept the request, clicking the 'Respond' box allows you to send your message directly to the merchant. This is the area where you will start communicating with the merchant. All subsequent replies and messaging will show up in your email inbox.





## Invoicing

We have created a new invoice generator for any job request to provide simple, yet flexible, Shopify-branded invoices to charge merchants for your services. Once you and the merchant agree to work together, click 'Create invoice', and add line items and taxes. You can modify the invoice number to keep it in sync with other accounting software that your team uses. Invoices can be saved to send later or sent right away. Merchants will receive an email with the invoice attached. The simplicity of invoicing through your Shopify admin will keep all workflows in one unified area, allowing you to keep track of all work and billing-related items.

## Creating Invoices

Development stores  
Managed stores  
Referrals  
Apps  
Themes  
Jobs  
Invoices  
Payouts  
Settings  
Team  
Resources

< Job 5055: Turn visitors into customers

### Create invoice

**Invoice from**  
Titan Plus Extreme  
1-21 Capp Street  
Toronto, ON M5V1E6  
Canada

**Invoice to**  
Gentleman Rebellion  
Thomas Wenger Sr

**Shopify Experts Job**  
Job 5055: Turn visitors into customers

**Invoice number** ⓘ  
0045

**Tax number**

**Business number (optional)**

**Invoice date**  
YYYY-MM-DD

**Payment due**  
Within 30 days ⓘ

DESCRIPTION	QUANTITY	RATE	TOTAL
<input type="text" value="Email marketing setup"/>	4 ⓘ	\$70.00 per hour ⓘ	\$280.00 ×

[Add line item](#)

Subtotal \$280.00  
Tax (HST 13%) \$36.40  
**TOTAL \$316.40**

1. When you create an invoice from an existing 'Job' in the system, the generator will automatically propagate the 'Invoice To' section from the original job and link it to the request.
2. The invoice generator will allow you to import all your relevant tax information, business number, and numbering systems that you may currently have in place for invoicing. Date and payment deadlines can all be set within this section.
3. Line items for all services provided can be set and explained in this section, with custom details related to rates and total amounts owing. You have the ability to add or remove multiple line items to reflect all services provided.

## Tracking invoices

**Invoices**

1

All Past due

Start typing to search...

Invoice no.	Merchant name	Store name	Payment due	Amount	Invoice status
I-0045	Thomas Wenger Sr	Gentlemen Rebellion	Nov 22, 2017	\$316.40	Sent
I-0044	Thomas Wenger Sr	Gentlemen Rebellion	Nov 18, 2017	\$1,556.00	Viewed
I-0043	christopher farquharson	The Pet Salon Shoppe	Nov 7, 2017	\$1,810.43	Past due
I-0042	Andres Chica	Fun Fun Fun	Oct 31, 2017	\$668.70	Paid

2

1. The top-level navigation will allow you to sort through all invoices, including those that are past due.
2. The invoice generator has a series of tags based on the status and outcome of each invoice. This area can be used to get a bird's eye view of each invoice's status.

shopify partners Search TPE Tital Plus Extreme Helen Brown

Development stores  
Managed stores  
Referrals  
Apps  
Themes  
Jobs  
Invoices  
Payouts  
Settings  
Team  
Resources

< Jobs >

**Job 5055: Turn visitors into customers** Responded

Create invoice Archive

**Job details**

**Job category**  
Turn visitors into customers

**What marketing approaches would you like to try?**  
Email marketing

**What have you already tried?**  
facebook, and gonna try instagram

BUSINESS INFORMATION

CUSTOMER INFORMATION

PREFERENCES

**Timeline**

TPE Send a message to the merchant...

Send

**Merchant information**

**Thomas Wenger Sr**  
Gentlemen Rebellionz  
Chicago, Illinois, USA  
[gentlemenrebellionz.myshopify.com](mailto:gentlemenrebellionz.myshopify.com)

Shopify plan: Basic  
Customer since: Nov 12, 2017

Login

**Converting a lead**

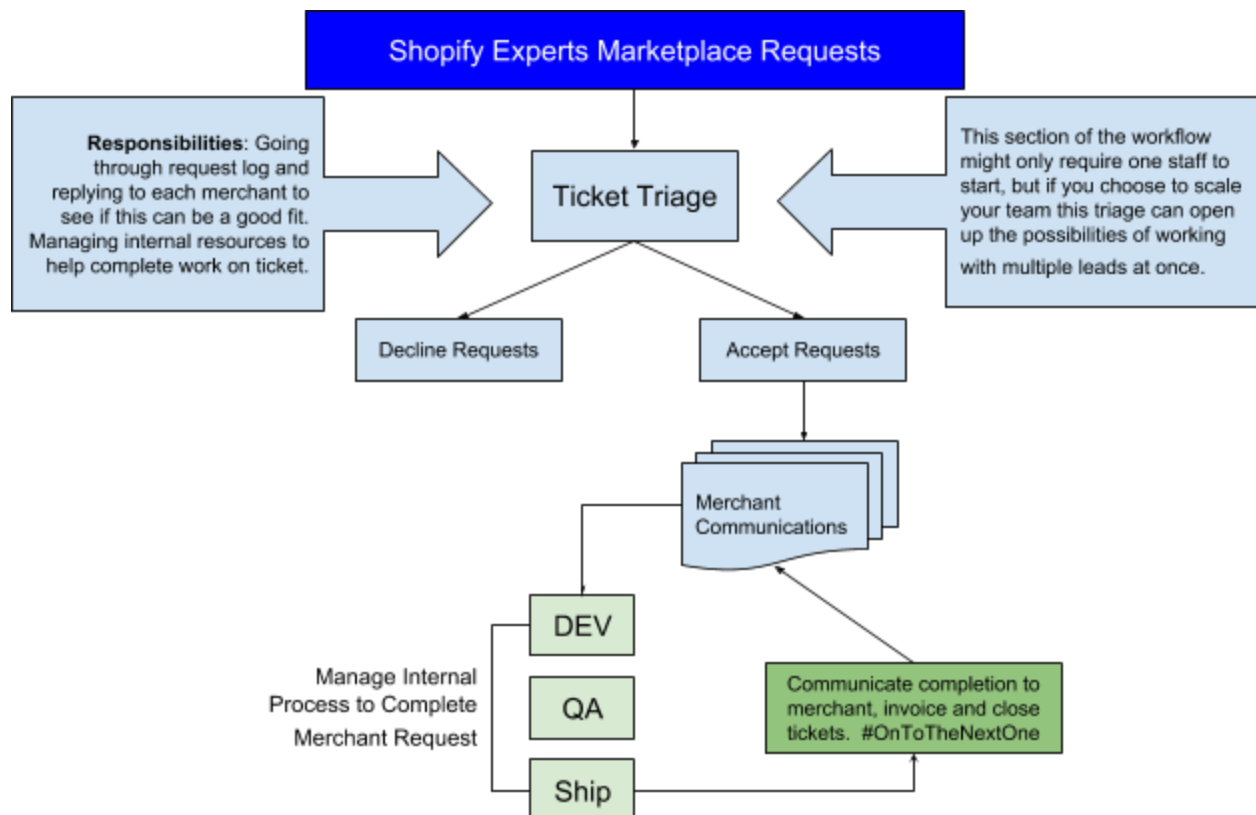
- Some helpful tip about converting a lead. Or a link to a blog post.
- Once you come to an agreement, create a collaborator account.
- And then get paid!

## Building a team

Now that you are part of the Shopify Experts Marketplace, it will be important to strategize and scale for future growth.. It's always recommended to start small and test the waters of the Shopify Experts Marketplace to familiarize yourself with the breadth of work required.

Planning your approach to handle requests can be tricky when you aren't quite sure how quickly requests will come in, or the turnaround time for individual contracts. We've taken the time to create a potential workflow chart to help you set realistic goals as you enter the marketplace.

## Building an organization



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This workflow is only a recommendation, but it's something that can easily vary based on how vested you are or will become in the Experts Marketplace. We created this to give you an understanding of what it takes to succeed directly out of the gate, and plan for the long term when it comes to handling multiple requests and ongoing projects.

Never overlook the allocation of internal resources on ticketed requests. As Experts Marketplace requests come in, make sure to allocate your time accordingly to stay on target for all completion times. Staying on budget and on time is another key indicator to merchants that you are the top candidate for their request, or even repeat business. We have witnessed many small requests turn into long-standing merchant/partner relationships that have proved to be very beneficial for both parties. This is one of the main reasons why it's always important to treat each request with the highest level of service.

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## Going after your first brief

When you get that first request, the balloons and fireworks will be going off in your head — but now is the time to step up and show this merchant why you are the best candidate for the job.

### Steps for success

You may receive multiple merchant requests at once. You need to prioritize them based on how and when you will approach them. There is a simple way to break this down, which will allow you to focus on internal resource allocation and delivery timelines.

<b>Job Details</b>	Created Feb 07, 2018
<b>Category</b> Setup and design	
<b>What do you want to include in the design and build of your online store?</b>	
<ul style="list-style-type: none"> <li>• Visuals</li> <li>• Structure</li> <li>• Copywriting</li> <li>• Product photography</li> <li>• Ongoing work</li> </ul>	
<b>BUSINESS INFORMATION</b>	▼
<b>OTHER INFORMATION</b>	▲
<b>What is your highest priority in completing this work?</b> Price (spending as little as possible)	

**PRO TIP:** Try to dive in and ask questions around what the merchant is are trying to accomplish. It will always help you position your service offering. **DON'T** reply with a list of services you offer. Speak to their needs first if you want to create a positive response and a strong first impression.

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1. **Identify the merchant's request/goal:** Anchor your strategic plan to the priorities that merchants identify as critical to their specific request. Identify the key areas in the request that will equal success for the merchant, and position your response accordingly. You only get one chance to make that first impression, so put yourself in their shoes and answer each request clearly and effectively. This will allow them to feel confident about your proposition.
  2. **Deconstruct the request into priorities:** Break down the merchant's requests into priorities that you can manage and facilitate with internal resources, if needed. For each priority, assess whether there is a communication breakdown preventing merchants from taking the desired action or following your advice/guidance. This is the perfect opportunity to follow up with a second email to keep your merchants up to speed on some of your internal thought processes and what kind of outcomes they can expect. This is also a great way to continue the conversation with them. The longer your plan is, the more overwhelming it will seem to the merchant. Create a short, personal brief to scope the problem, solution, and success metrics and to align yourself with their goals.
  3. **Keep communicating during the request lifetime:** Creating triggers is a great way to keep the communication open with the merchant. Have a few time-sensitive triggers that you can use as milestones to re-engage with the merchant throughout the relationship..

Use your best judgement when deciding when and how to respond to a request — this will often be based on your bandwidth and the skillset required for the request. When you do respond to a merchant request, remember that it's not an inconvenience for them. They are reaching out for assistance, and your response is adding value to move their business further. This is why it's always important to tailor your message to their exact request, and stay away from canned messages that are lengthy and salesy.


**PRO TIP:** Always write a unique response to each merchant request that speaks directly to their needs, and stay away from canned messages as it results in low conversion rates. Keep it fresh and direct, and reference the details of what they are trying to accomplish. Email signatures and long messages can turn off merchants.

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## Partner replies

12:43pm EST

Hi Quentin,

Nice to meet you! My name is Mark — Founder of Coldsmoke Creative. We are part of the Shopify Experts program, focusing on custom design and development of Shopify Stores and applications.

I'd love to learn more about your business and the full scope of your project. Do you have a timeline and/or budget in mind?

Do you have any time to hop on the phone and chat tomorrow? If so, let me know the best number to reach you on and we'll make it happen.

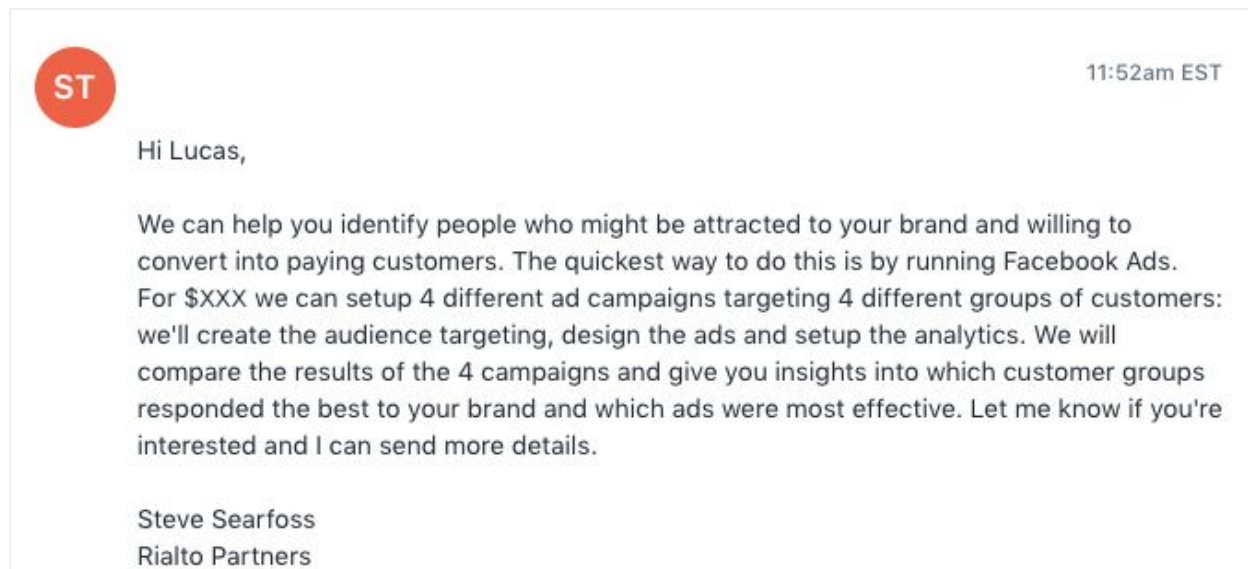
Talk soon,

In this reply, the Shopify Partner did a fantastic job explaining their core competencies right out of the gate, and clearly explained what they can do to help. Secondly, they didn't dance around hard hitting questions like SOW and budget. When you can surface these questions up front, it helps the merchant think a bit more deeply about what they really want to accomplish.

Lastly, this partner was able to quickly reach out and ask the merchant if they were available for a brief phone call to discuss further. In some cases, email is the preferred medium for communication, but we are seeing much higher conversion rates on completed work when phone calls take place.

The above example is a well-rounded response that was brief and effective. This partner put all their cards on the table, and it won them a phone call that resulted in a new customer.

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In this response, the merchant was requesting to get some help around creating social media ad campaigns and looking to see what might be the most positive stream. Rialto Partners came in with a very informative and educational response that spoke to budget, execution, and how they are going to prove which campaign is the most effective.

They kept their response concise, leaving it up to the merchant to decide if they wanted to pursue this request further.

The outcome was a definite yes from the merchant, followed by a quick call to get things started and ultimately launch for testing. Replies that directly speak to the merchant's request have yielded the highest conversion rates, and normally receive the best response rate from merchants. Long-winded company mantras and service-focused emails don't sit well with merchants and lead to the lowest reply rates.

## Partner etiquette

In the Shopify Experts Marketplace, we want our partners to feel confident and encouraged by the strong caliber of requests and high level of merchant engagement. As the Shopify team has been busy working to set the quality bar as high as possible, we want to make sure that our partner community reciprocates the same level of engagement, professionalism, and dedication

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when it comes to our merchants and their requests. We must never forget that one of the hardest things to do is ask another person for help, and that is exactly what our merchants are doing in the marketplace day in and day out. They are reaching out to you for help and assistance with their business and, in many cases, this business is their lifeline for putting food on the table.

When we think about the broader partner community, it's easy to identify common ideologies when dealing with teams, development, and overall merchant assistance. However, we wanted to help you understand what many of our merchants shared with us when we asked them how they wanted to be treated and what they were looking for in a partner to work with, for both short and long-term relationships.

**PRO TIP:** Never forget that a first impression with a merchant will ALWAYS set the working tone of that relationship, and in many cases will lead to more work and a long-lasting working relationship.

### **Be Authentic - Identify Shared Goals - Develop Mutual Respect - Get Personal**

These were the main talking points that merchants were looking for when asked what they were looking for in a partner. The themes are all very straightforward, and are things that we would expect our partners to already incorporate into their daily practices when dealing with merchants. These four ideologies are clear identifiers for merchants to feel that they are working with a strong and trustworthy partner, something that we are excited to witness and report on with confidence when looking at the data of closed jobs in each of our partner's profiles.

Use these guiding steps to help Shopify merchants in the Experts Marketplace, grow your standing and brand with clients, and create long-lasting relationships.

## **Partner resources**

- Read through our [Shopify Design and Development Blog](#) case studies to get to know some of our partner's stories.
  - Find out more about [Shopify Unite](#) and the impact it has had on our partners — read through our 2017 [debrief](#).
  - Check out the [forums](#) — Shopify Partners have private access to our forums and get Shopify Partner and Shopify Expert badges when they post.
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# Shopify Experts Marketplace 101

## Rules of Engagement for Success

### Intro/Responsibilities

Now that we've covered the basics on the tools, dashboards, and etiquette that will help you succeed in the Shopify Experts Marketplace, we can focus on the merchant relationship and the responsibilities you will have when interacting with daily job requests.

As a partner in the Shopify Experts Marketplace, you have the unique opportunity to work exclusively with Shopify leads directly from the merchants themselves, with no third-party platforms to connect the dots. You will be dealing with our merchants exclusively and directly about everything related to their online business and Shopify storefront.

Your responsibilities include:

- Replying in a timely manner to job requests, whether it's an 'accept' or 'decline.' Declining leads doesn't hurt your chances of new leads, it only helps us better align future leads to your needs.
- Answering emails and providing honest and authentic suggestions and recommendations.
- Helping merchants to the best of your team's capabilities.
- Knowing when to say no if you don't have the bandwidth or skillset to complete a merchant's request.

These duties may seem straightforward, but they take a lot of consideration, adaptability, and tenacity. Each merchant request is different and some may have different challenges, motivational triggers, or definitions of success. This means that each of these responsibilities will be different for each merchant. It's important to cater your efforts to their work styles as much as possible, to ensure that you work together in a mutually beneficial manner.

That said, this is a partnership, so don't be afraid to hold your merchants accountable and challenge them. Your merchant partnership should be mutually satisfying and enriching.

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The following sections will guide you as you begin to forge relationships and work more closely with Shopify merchants from the Experts Marketplace. Consider each section a goal that should be attained in the first three months of your involvement with the Experts Marketplace.

## Relationships

### **How to create them, and why they are so important**

The overarching goal of your relationships with merchants is to have you, the partner, act as an extension of their team and assist with technical roadblocks and future scaling. This is accomplished by working with authenticity and confidence from the very first request. Use your strengths and knowledge to prove that working with you was the best decision this merchant ever made! Be consistent, deliver on time and within budget, and always make sure to be available and present in each conversation or email.

In order to successfully achieve this goal, it's important to harness your unique position by being the first one through the door to directly answer their specific request. This will serve to create a tightly-knit relationship with the main stakeholders involved in the merchant request.

As a partner in the Experts Marketplace, it's important to note that real success, the kind that exists on multiple levels, is impossible without building great relationships and strong first impressions. Real success is impossible unless you treat merchants with kindness, regard, and respect. There are a few important aspects that should be considered when building this type of relationship with merchants.

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## 1: Give consistently, receive occasionally

The person who builds great relationships doesn't think about what they want; they start by thinking about what they can give and how they can help. They see giving as the best way to establish a real connection and a lasting relationship. They approach each request as if it's all about the merchant and not about them, and in the process they end up building relationships with merchants who follow the same approach. This is all about building for the long-term and making real connections that turn into mutually beneficial business relationships.

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**PRO TIP:** Trying to learn about a merchant's long-term plan can help you understand how to take a wider lens approach to their request.

## 2: The unasked question

Often you'll notice that merchants will ask a different question than the one they really want answered during your email thread or conversation.

A merchant might reference how you felt about the idea they presented during their original request, when what they really want is to talk about their diminished stakehold with their customers that they are currently dealing with and how to remedy that relationship.

Behind many simple questions are often larger questions that go unasked. Partners who build great relationships think about what lies underneath so they can answer that question too, and start to truly become a part of a merchant's support arsenal.

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**PRO TIP:** Don't be afraid to provide honest, genuine, and thoughtful advice to merchants. They will appreciate the advice and support. This kind of behaviour is also very important because it shows they trust your opinion. In not answering the question or not asking additional questions to get to the root of their concerns, you are taking their respectful perception of you for granted.

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### 3: Know when to dial it back

Providing great feedback, suggestions and introductions to your full suite of services can be helpful.... until it isn't. In many cases, merchants will have a straightforward request and might be looking for a quick fix and to be on their way. If you can identify this right away, it's always a good decision to read and recognize the merchant's position and stick to the plan of the request.

Partners who provide top-rated service know when to help merchants with their requests, and when to extend their service offering and go above and beyond; and when to take charge and when to follow. Great relationships are multifaceted and therefore require multifaceted partners willing to adapt to the situation — and to the individual merchant in that situation. Adaptability is key!

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**PRO TIP:** When you reply to a merchant request, try to follow up after the initial response and get an understanding of how this request impacts their business. Use that information to position your services. Stick to the script or expand on their request and help them beyond the initial brief. This will show consideration and ensure your interactions are pointed and mutually beneficial.

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## Communication

### What we should communicate when working with merchants

When the Shopify Experts Marketplace Operations Manager Alok Ahuja attended business school, one of the most important quotes he heard was, "It's not what you say, but how you say it." The core idea of this quote was the importance of effective communication, which is something that is imperative to partners in the Experts Marketplace. Effective communication skills are the key to good partner leadership, and what separates a poor partner from an exceptional one.

When you communicate well with merchants, it reduces friction by eliminating potential misunderstandings and encouraging a healthy and trusting relationship.

Efficient communication will also let you get requests done quickly and consistently, helping you manage the merchant's ongoing expectations. The moment you open the lines of communication with merchants, the process of carrying out tasks becomes smoother and projects will most likely go by with ease. Plus, you will be surprised how meeting targets will become a whole lot easier!

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The success of each merchant relationship will be based around how tightly connected you are with their team and overall request guidelines, and this will come down to frequency of communication. Always make sure that you take their calendar into consideration before your own when booking calls or meetings.

In order to accomplish this, you can follow a number of communication options:

### **1. Keep them informed**

When dealing with merchants, email remains a potent solution and will be your main tool for communication in the Experts Marketplace. It will enable you to send messages to all members of their team without pulling too much time out of their day. This is a great way to keep a constant, open line of communication with merchants without becoming overly invasive.

A lack of communication is usually at the root of most problems associated with merchants. Any good partner relationship will be able to weather setbacks if you are proactive in communicating both good and bad news. When communication is direct and transparent, trust forms more easily and this will help you create a foundation for long-lasting relationships.

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**PRO TIP:** It's easy to forget that merchants are not as submersed in the inner workings of Shopify. Always make sure to keep this front of mind when working on their respective requests.

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### **2: Listen and read to understand needs**

Listening is one of the most underutilized tools when managing merchant expectations. In many cases, merchants are unsure of what they are trying to accomplish or are just not very good at articulating those thoughts. As such, you must have excellent intuition and recognition skills in order to identify the key messages a merchant is trying to communicate. One of the best ways to compensate for a merchant who communicates poorly is to repeat what you have read or heard and ask them to confirm the accuracy of those key takeaways, which will ultimately impact expectations.

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**PRO TIP:** When a merchant is writing a situation/question/request/problem, always sympathize with them by asking questions about how it may be affecting them/their business/their clients. Ask them what their ideal scenario or solution may be and why. Ask them how the problem/situation occurred and how you, as a Shopify Partner, can prevent it from happening again. Big or small, listen to and understand the needs and concerns of every merchant you work with.

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## Meeting and managing expectations

### Setting the standard with merchants — and sticking to them

In order to maintain a successful merchant-partner relationship, you'll be required to demonstrate the key components of a relationship and communicate regularly. To fulfill all of those steps and meet merchant expectations, partners will be operating at Level 5 (a reference to Jim Collins' novel *Good to Great*) day in and day out.

Meeting and managing expectations is something that can easily be accomplished by having positive relationships with merchants. This also leads to partners having calmer days and a higher level of daily productivity. In addition to the guiding tips above, partners can manage all merchant expectations by following a few simple steps.

### Be honest from the beginning

Though it may sound counterintuitive from the tips above, it's important to tell merchants in the initial conversation that there are no guarantees. Although it may feel uncomfortable, saying this clearly and in no uncertain terms encourages the merchant to take a leap of faith in your work, and helps them understand the process behind your work and coaching. Also note that this may not be applicable for all requests, but perhaps those that are more heavy in custom development work.

Always make sure to set precise and complete expectations when starting a project scope. It will work in your favour to be clear that additional work or tasks may cost additional money. No

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surprises for the merchant will equal full trust in your team, and a long standing business relationship that will equal more work.

### **Constant communication**

Partners are in a position and industry in which the goal is to do one thing: serve. That means being consistent, dependable, and (almost) always available. While of course it's important to set boundaries so that you can maintain a rewarding work life balance, it's critical that merchants know they can gain access to you as needed. Hopefully just knowing you're available and ready to jump on a request or project as needed will be enough to ensure that merchants don't abuse your generosity with time.

At the end of the day, your ability to manage merchant expectations is going to hinge on how well you choose to communicate. If you leave things up to chance, chances are you and the merchant will both be disappointed. However, if you take the time to listen, be proactive about communicating openly, and address any issues head-on, you will keep ALL merchant requests in check and be in a good position to grow your relationship over time as a top leading Experts Marketplace partner.

## **Conclusion**

As you can see, being a partner in the Shopify Experts Marketplace is a very unique and rewarding position to hold. You will be making big impacts on the lives and businesses of our Shopify merchants. Some partners have been doing this for years, and some for only months, but it's important to remember that we all provide value to the Shopify merchant ecosystem.

Whether it's fresh eyes, a ton of experience, or just a difference of opinion, never be afraid to ask your colleagues for advice or to help you troubleshoot an idea. As a team, you should keep each other in the loop as to how merchants are doing, and leveraging each other to provide the best individual and collective experiences for merchants as possible.

Lastly, remember that merchants are people too! They chose Shopify because they believe it is the best platform out there and they want to be aligned with the company in a lucrative and intimate way. Just be yourself. Be genuine and committed to these individuals, and you'll succeed as a top-ranked partner in the Shopify Experts Marketplace and beyond!

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