

Shopify Guidelines and Template for Writing Case Studies

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Best practices

This guide is designed to help you write case studies to publish on your own site. Case studies should tell the story of how you helped one specific business overcome challenges using Shopify.

When writing a case study including Shopify, please keep the following best practices in mind:

- **Shopify + partner lens:** Everything in a case study needs to serve the ultimate purpose of showcasing how you help merchants use Shopify to solve their problems. The best stories show how partners, merchants, and Shopify collaborated with each other in unexpected ways to create the best possible solutions.
 - **One merchant:** Focus on how your agency helped one specific merchant. Remember to always bring the value back to the value your merchants saw from working with you and Shopify.
 - **Challenge, solution, and results:** A case study always speaks to clear challenges, solutions, and results. This is a required framework for our case studies (see examples and framework below).
 - **Results required:** Case studies need to include tangible success metrics to be the most valuable (ideally at least three.)
 - **Details matter:** Case studies avoid general statements like “performance improved” and instead dive into the details of why and how performance improved. Provide examples from your merchant, then expand on them. Length is not the enemy, and in fact can work in our favor, so long as we’re adding quality detail.
 - **Just “Shopify”:** When referring to our business, please stick to “Shopify” and not “Shopify Plus” unless you’re talking specifically about the Plus plan.
 - **Write conversationally:** Writing conversationally means writing like you would talk, plain and simple. (Not like robots, computers, or apps.) While Shopify’s solutions are technical, our merchants are people, so keep their ambitions central to the story, and quote them in moments of tension, problem solving, and success.
 - **Referencing competitors:** Unless the merchant is opposed, we prefer mentioning the platform they were on prior to Shopify. When talking about their former platform, be as objective and tactful as possible.
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Recommended interview questions

You may choose to interview the merchant you've selected to showcase. You'll likely already know a lot from working with them, but these questions can help fill in the gaps to tell a more complete story. Even if you choose not to interview, use these questions as a checklist for the information to include in the draft.

Here's a tip: Interviews should feel like a conversation. By bringing curiosity and open mindedness, you can encourage the business you worked with to do the same. The most successful interviews happen when people let their guard down and talk about their passion behind the projects, not just the business use cases and numbers.

While the questions below are a good guideline, each interview will be unique. **Please customize the questions based on your research.**

- Remember to record your interview.

About

These questions will help you understand the business and enable you to write an effective overview of their brand for the intro.

- Tell us about how your business got started. How did your products come to be?
- Explain the mission behind your brand. How do your products support this mission?
- Why are you personally passionate about [core goal/mission statement for the company]? What about this work makes you feel energized?

Challenge

These questions will help you understand the business's motivations behind choosing Shopify and partnering with you.

- Before partnering with us, what was going well & what was challenging?
- Before Shopify, what platform were you using and what challenges were you running into with it that caused you to consider replatforming?
- What ultimately led to your decision to migrate to Shopify? To work with us as a partner? What excited you about this opportunity?

Solution

These questions will help you understand the business's experience using Shopify.

- In migrating to Shopify, were there any surprises along the way (good and bad)? What aspects of the technology were you most excited about?
- In what ways were we most helpful during your migration?
- What were the key factors that contributed to a successful replatforming?
- Any change management tips for others making a similar migration?
- What's your advice to others who might be considering migrating to Shopify?
- After going live on Shopify, were there any benefits you noticed right away?
- What feedback have you received from customers since moving to Shopify, if any?
- Any Shopify products/features that have been particularly valuable to your business?
- Can you give an example of how you're now better equipped to highlight [mission statement of brand]?
- What have been your/your staff's favorite things about Shopify so far?

Results

It's very important that we try to get quantitative success metrics. If they don't know off the top of their head on the call, say you'll follow up via email to get the metrics after. The best case studies use data.

- Growth.** Any conversion lifts or other notable growth metrics you've achieved since moving to Shopify? (e.g. YoY sales, AOV, speed of execution, incremental revenue you've been able to add from new channels easily accessible on Shopify, etc.)
- Savings.** Did you experience any cost savings by switching to Shopify? If so, do you know the main areas those savings came from (e.g. platform fees, dev costs, support, etc.)? Could you quantify those savings?
- Site Performance.** Any improvements to your site speed/performance/uptime?
- Where would you be today if you had not used Shopify?
- What aspect of our partnership have you come to value the most?

What's next

- What's next for your business? What outcomes are you focused on next? Any strategic growth initiatives?
- Fun question to end:

- Different angles to take that get at why the interviewee loves what they do:
 - Find them on LinkedIn and see what they're passionate about, then ask them to tell you about it.
 - Ask what their favorite product is in their store.
 - Ask what they'd be doing if they weren't working at [company].
- Some successful IRL examples:
 - (Luxury furniture brand) What is your dream space to furnish?
 - (Shipping company) What is the most unique item you've been tasked with shipping?

Recommended partner details

No matter if you choose to focus on one merchant or to use examples from multiple in your case study, look to also include these details related to your own success as an agency:

- Why your agency chose to work with Shopify
 - Any ways in which being a Shopify partner has grown your agency
 - Any solutions you've found from working with one business that you've applied to others
 - Any events that you've attended as a Shopify partner that have been particularly valuable
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Draft template

Use the following template to build out your story. Remember to always bring the examples back the value for your agency.

Case study headline: 12 words or less, suggested format below:

How [partner name] helped [merchant name] achieved [key result] with Shopify

Summary section copy, no header

This section serves as a short summary of the story. It's your opportunity to introduce yourself and your merchant. Highlight why the merchant cares about what they do, and explain one or two challenges that led them to work with Shopify and you as their partner. Always provide outcomes from your projects in the bulleted format below.

Since moving to Shopify and working with [partner name], [business name] has seen:

- Benefit + metric 1
- Benefit + metric 2
- Benefit + metric 3

Challenge section header:

The challenge: [Summarize the top challenge the merchant or your agency was trying to solve, in 50 characters or less.]

Challenge section body copy

This section should clearly explain the ‘what’ of the story. Describe the merchant’s main challenges and goals that were not being met previously. Focus on the tension of why they needed help improving their business, and why they ultimately chose both Shopify and you as their partner. Where possible, mention previous commerce platforms and how they specifically didn’t work for the merchant.

Narrative element: pull quote(s)

Weave any strong quotes from the merchant or yourself as the partner. While pull quotes are given more visual weight than the rest of the body copy, they should flow within the narrative structure of the piece.

Solution section header

The solution: [Summarize the main strategy the merchant and your agency took to overcome its challenges or meet its goals, in 50 characters or less.]

Solution section body copy, ~250-350 words

This section should clearly explain the ‘how’ of the story. Explain how you helped your merchant get the most value out of Shopify’s products. There may be many ways in which the products and services have impacted the business. Try to weave them into a narrative flow that leads to the collective impact of the relationship. If another business were to read this case study, this is where they should feel inspired to tackle similar business challenges by working with Shopify and you as their partner.

Narrative element: pull quote(s)

Weave any strong quotes from the merchant or yourself as the partner. While pull quotes are given more visual weight than the rest of the body copy, they should flow within the narrative structure of the piece.

Results section header:

The results: [Summarize the main impact that has resulted from this partnership, in 50 words or less.]

Results section body copy, 150 words or less

This is our collective moment to shine. Contextualize the main metrics provided by your merchant with details that support why the numbers are so impactful. This is an important place to bring in the merchant’ voice(s) using quotes to highlight the value they’ve gotten out of this partnership. Remember to always bring the value back to your agency with any metrics that highlight your own growth. Wrap up by describing any plans your merchant and your agency have to continue working with Shopify.

Narrative element: pull quote(s)

Weave any strong quotes from the business or yourself as the partner. While pull quotes are given more visual weight than the rest of the body copy, they should flow within the narrative structure of the piece.

Examples of strong partner case studies

- [Rudis](#)
- [Lids](#)
- [Superfeet](#)
- [Groupe Marcelle](#)
- [Tella & Stella](#)