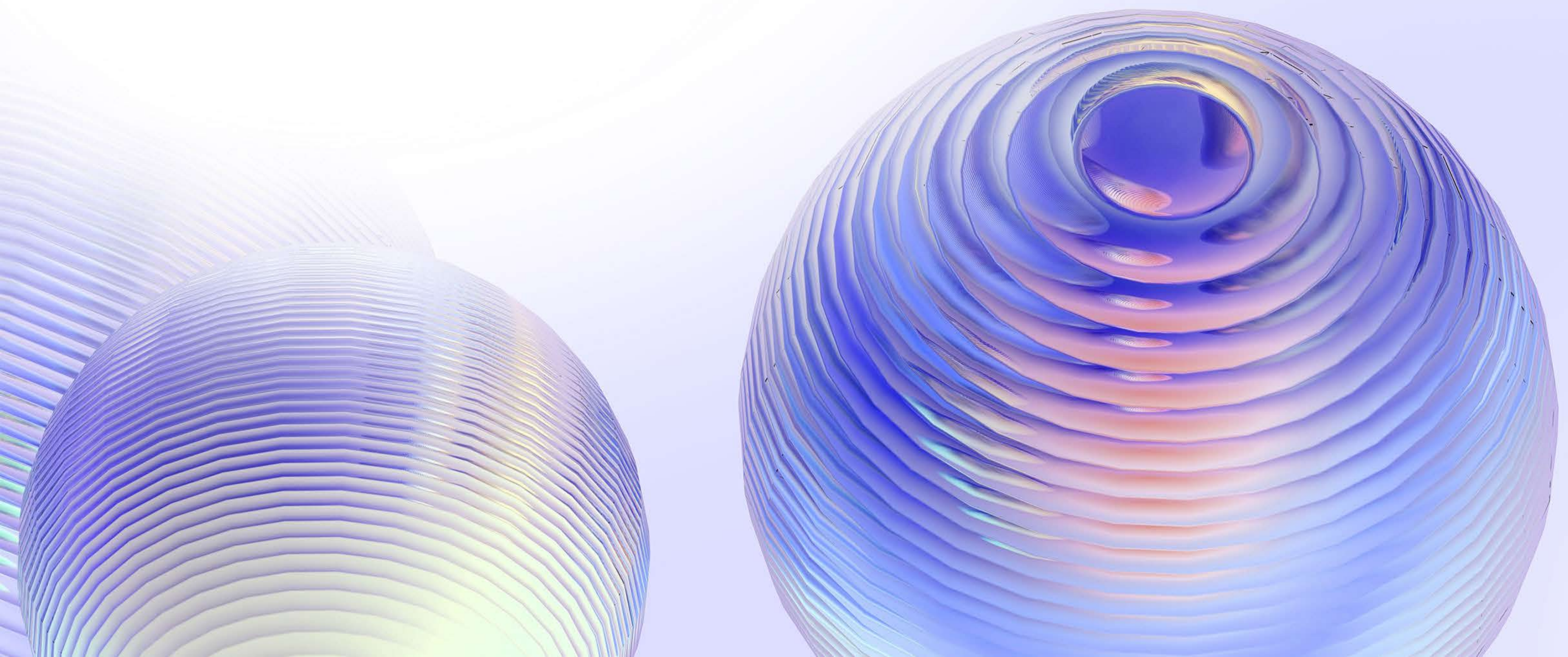




Seller

Playbook



Preface

In the last decade, India's eCommerce landscape has transformed from a handful of online stores to a thriving ecosystem of lakhs of sellers. What began as a simple experiment has evolved into one of the strongest engines of economic growth and innovation. At the heart of this transformation are you, the entrepreneurs who dared to build direct relationships with your customers.

At Shiprocket, we have had the privilege of working closely with some of the most successful D2C brands at every possible stage, from their first few shipments to delivering thousands of orders a month. Across all their journeys, we have seen one common thread: growth is not a straight line. It is a series of deliberate stages, each requiring different mindsets, systems, and capabilities.

This playbook was born from that realisation.

It is not another theoretical manual. It is a field-tested, stage-wise roadmap distilled from millions of transactions, thousands of success stories and the operational intelligence of Shiprocket's full-stack ecosystem. Every section is designed to answer one question: "What do I need to focus on right now, at this exact stage of my business?"

Whether you are sending out your first fifty parcels or managing nationwide deliveries every hour, this playbook will guide you to take the right actions, not someday but today.

Why We Built This

Running a D2C brand can feel overwhelming. Between logistics, checkout optimisation, retention and customer experience, it is easy to get lost in noise, tools and jargon. What most brands need is not more information, but clarity.

That is exactly what this playbook delivers.

It is structured across four stages of the D2C journey: Launch, Growth, Scale and Leadership; each with practical checklists, must-have actions and self-assessment tools. You will find what is non-negotiable, what is worth optimising and what is best left for later.

You will also find insights that go beyond operations: lessons from real sellers, data-backed recommendations and impact statements that show why each action matters. From building multi-carrier logistics flexibility to reducing cart drop-offs, automating CRM flows or running predictive remarketing, every page helps you unlock new efficiencies, higher conversions and stronger customer loyalty.

Our goal is simple: to help every seller grow confidently and profitably, with systems that scale not just revenue, but trust.

The Future Belongs to Builders

eCommerce in India is entering its most exciting phase yet. With rising consumer expectations, faster delivery promises and the explosion of new digital channels, the brands that thrive will be those that build resilient systems: ones that balance speed with sustainability, data with empathy and automation with authenticity.

This playbook is your blueprint for that journey, filled with clarity, tools and proven actions to help you navigate from idea to leadership.

At Shiprocket, we are proud to be your growth partner, powering logistics, checkout and engagement for over 400,000 brands across India. More than being your platform, we see ourselves as your co-builder in this journey, enabling you to deliver not just products but experiences that delight your customers every single day.

Wherever you are in your D2C journey, take this playbook, assess where you stand and take the next decisive step forward. Every small improvement compounds. Every shipment builds trust. And every stage, when done right, prepares you for the next.

The road from zero to 20,000+ orders a month is no longer a mystery; it is right here – mapped, measured and ready for you to activate.

Let us build the future of commerce together.

Saahil Goel

MD & CEO, Shiprocket




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About This Playbook

This playbook is designed for D2C brands at every stage of growth, from those just starting to those fulfilling 20,000+ orders a month.

It offers a stage-wise roadmap to help you build, streamline, and scale your direct commerce operations using Shiprocket's full-stack ecosystem's knowledge.

No jargon. No fluff. Just the exact actions you need to unlock growth, optimise workflows, and create a better experience for your customers.

What You'll Find Inside



Must-have actions
you shouldn't skip at
your current stage



Best practices or should-haves
to get more efficient, profitable,
and brand-ready



Self-assessment tools
to help you measure
where you stand



Quick activation steps
so you can implement with
speed

Note: This playbook is focused purely on the direct-to-consumer journey via Shiprocket's ecosystem. It does not cover marketplace selling (like Amazon or Flipkart) or third-party ad platforms such as Meta, Google Ads, etc.

Stage 1

Launch Stage

0-500 Orders/Month



From idea to first customer

You're in the zero-to-one phase. Your product is ready, the website is live, and you're getting your first few orders. This stage is all about building trust, delivering reliably, and setting up processes that don't break when you scale. Every order matters, and every buyer experience has the power to define your brand.



Broader industry advice

Your early customers are not just buying a product, they're testing your brand's reliability. Focus on clarity, consistency and communication. Nail these, and your repeat orders will come without ads.



Core objectives

1. Build a reliable, scalable shipping workflow
2. Communicate proactively with buyers (especially post-purchase)
3. Optimise checkout to reduce cart drop-offs
4. Start capturing customer data for remarketing down the road



Logistics & Fulfillment Readiness

Lay the groundwork for **reliable, cost-effective** delivery operations from day one.



Must-Have Actions (Non-Negotiables)

1 Use a multi-carrier shipping platform

Don't rely on a single courier. Flexibility across serviceability, speed and pricing can save costs and improve reach.

Impact: Avoids operational bottlenecks and ensures consistent delivery coverage.

2 Understand volumetric vs dead weight

Learn how courier billing works. Wrong dimensions lead to inflated costs and disputes.

Impact: Prevents billing surprises and improves profitability.

3 Enable OTP-based delivery confirmation

Add a layer of security to every delivery using OTP verification.

Impact: Reduces "not received" claims and improves courier performance.



Must-Have Actions (Non-Negotiables)

4 Print manifests and get pickup acknowledgements

Get your pickups documented and signed by the courier, claims are easier when you have proof.

Impact: Adds leverage in case of disputes and improves accountability.

5 Record packaging videos before dispatch

A 10-second video can resolve complaints like “wrong item” or “empty box” without hassle.

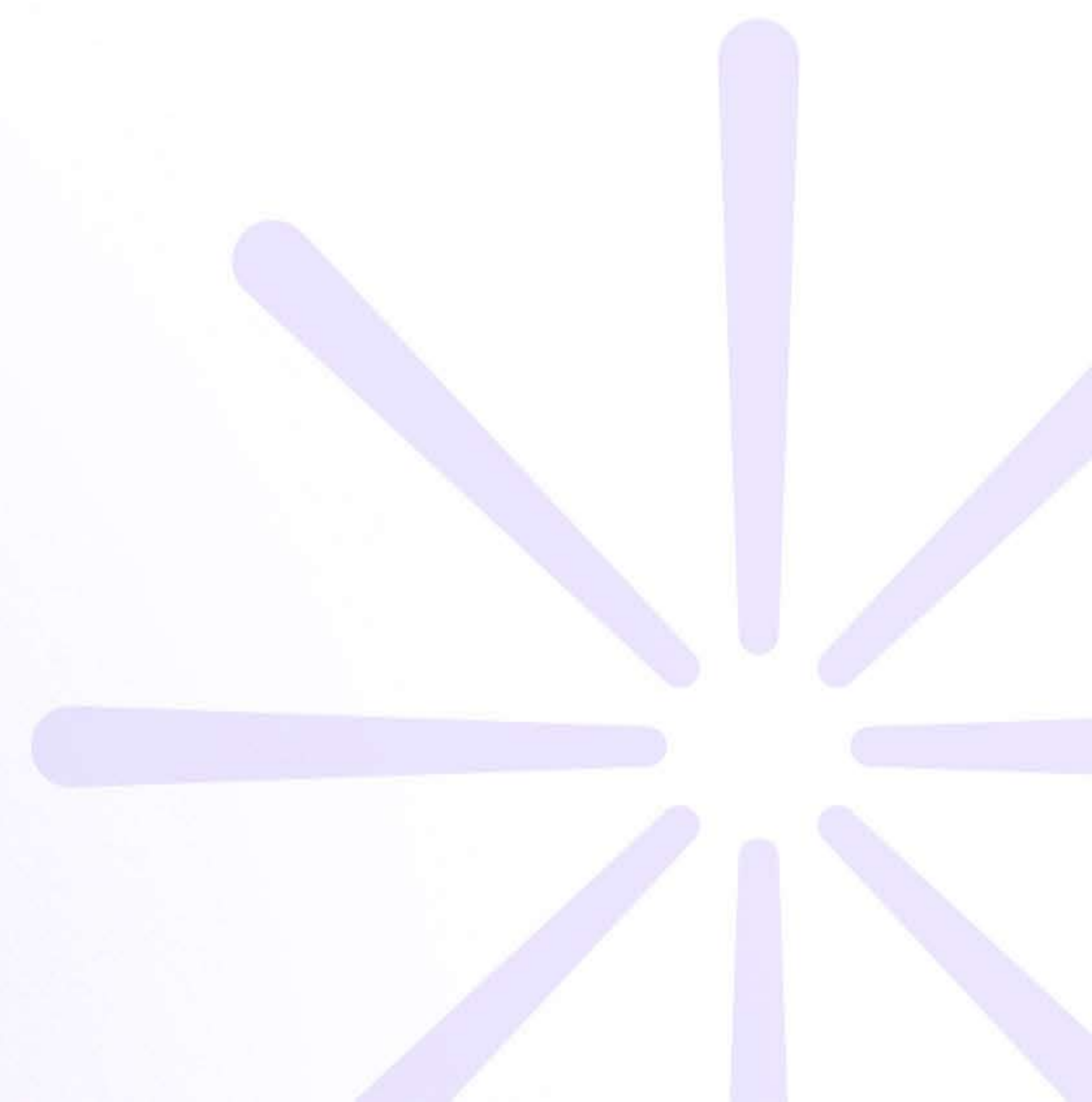
Impact: Shields you from fraud and saves time on claims.

6 Start tracking key delivery metrics

Measure what matters:

- Pickup success rate
- Delivery conversion rate
- Delivery TAT and SLA adherence
- Carrier-wise RTO and NDR %
- Terminal statuses (delivered, damaged, RTD, etc.)

Impact: Builds operational visibility and data-driven improvement from the start.





Should-Have Actions (Easy Wins That Build Trust)

1 Set up a branded tracking page

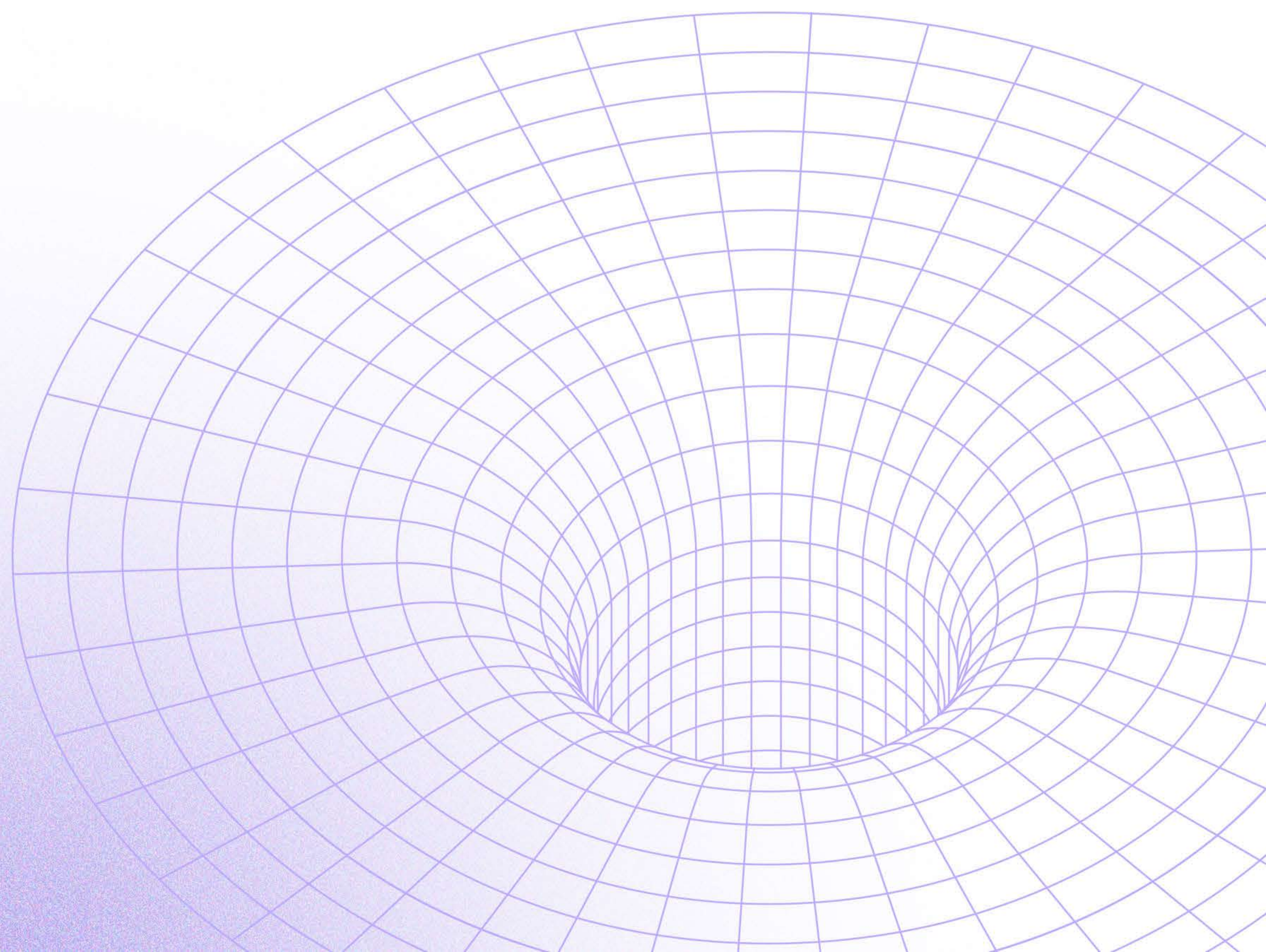
Let customers track orders in your brand environment, not a generic courier site.

Impact: Builds consistency, trust and reduces “Where is my order?” queries.

2 Capture delivery NPS post-fulfillment

Collect simple feedback after delivery.

Impact: Helps fix issues before they turn into negative reviews or poor word of mouth.





Checkout Experience

Your checkout isn't just a form, it's the final pitch before money hits your bank. At stage 1, it's all about **reducing friction**, **building trust** and **converting** first-time browsers into buyers. If your checkout feels clunky or untrustworthy, even the most interested customer might walk away.



Must-Have Actions (Non-Negotiables)

- 1 Enable one-click checkout with address autofill**

Skip the forced account creation. Let users check out fast with verified address autofill to reduce typing and delivery errors.

Impact: 15–30% drop in cart abandonments. Better delivery accuracy.
- 2 Display clear pricing and trust badges**

Show final pricing upfront and use “Secure Checkout” badges to ease buyer anxiety.

Impact: Fewer last-step drop-offs. More confidence to pay.
- 3 Welcome offers for new users**

First-time traffic is your biggest asset at this stage. Offer a visible, flat discount coupon at checkout.

Impact: Higher first-time conversions. Immediate incentive to buy.
- 4 Offer all key payment methods (UPI, cards, COD)**

UPI and COD are must-haves for Indian shoppers. Don't make users hunt for familiar options.

Impact: Prevents drop-offs due to missing payment methods.



Should-Have Actions (High-Impact Additions)

1 Display banners for key offers

Use banners to highlight first-order discounts, prepaid perks or urgency cues (use all three if needed).

Impact: Boosts offer visibility without making users search for deals.

2 Show estimated delivery date (EDD) clearly

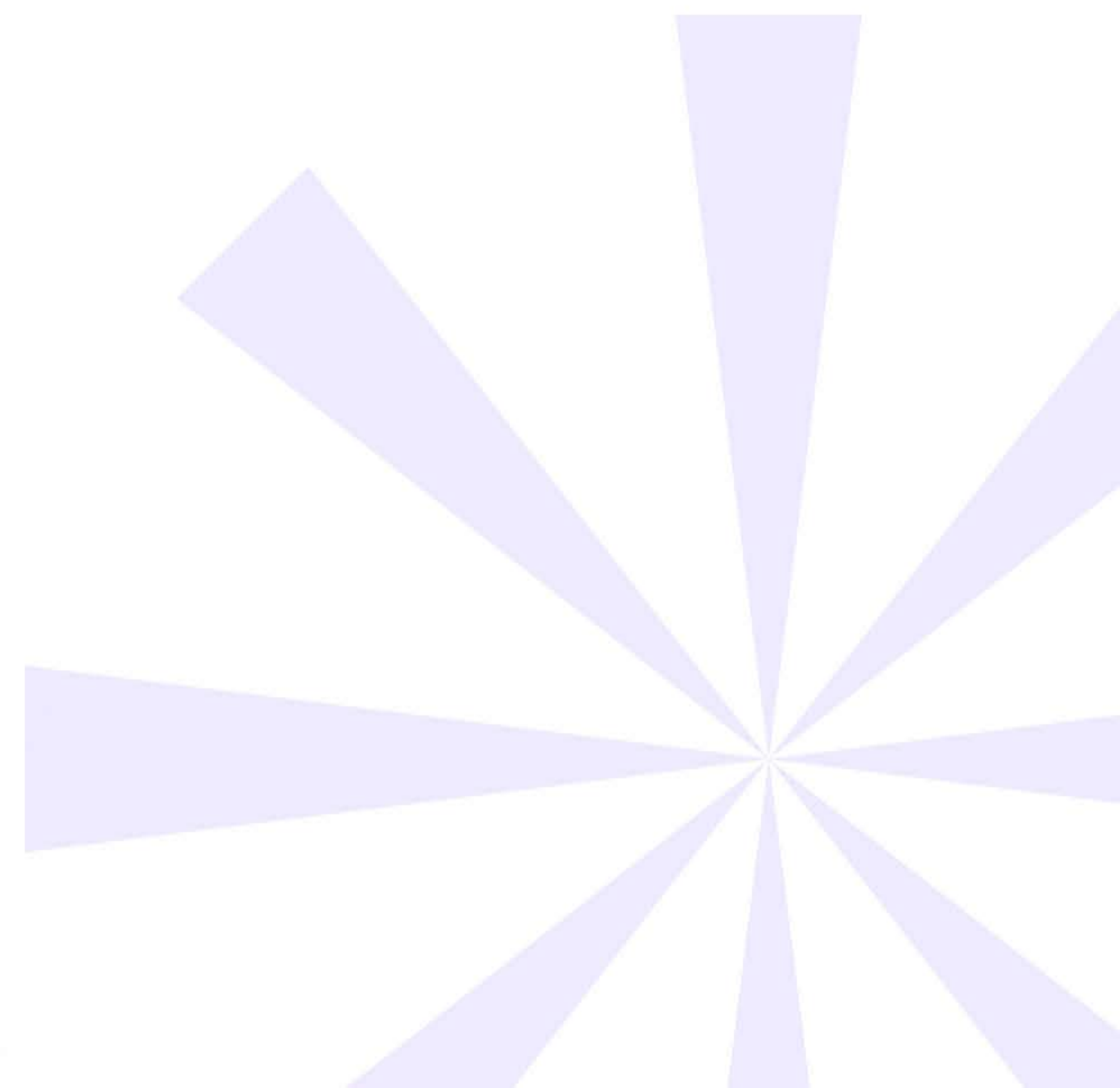
Mention delivery timelines on the checkout page too, not just the product page.

Impact: Reduces post-purchase anxiety and WISMO (where is my order) queries.

3 Use partial COD for high-value orders

For orders over ₹4,000, enable prepaid only or partial COD (collect ₹100 upfront).

Impact: Filters low-intent buyers, protects margins and reduces high-ticket RTO risk.





CRM & Retention

Marketing at stage 1 isn't about blasting emails, it's about building trust, improving the post-purchase experience and creating subtle nudges to convert more Buyers. You don't need an entire team to do this. Just a few smart automations can make you look like a polished brand from day one.



Must-Have Actions (Non-Negotiables)

1 Activate post-shipment order update flow

Use tools to send automated WhatsApp updates after shipping. With virtual number onboarding taking less than five minutes, there's no excuse to leave customers in the dark.

Impact: Reduces WISMO (where is my order) queries and builds post-purchase trust.

2 Collect customer feedback

After delivery, send a simple feedback link via WhatsApp or email (Google Form or Typeform works). It's your best chance to learn directly from the customer what worked and what didn't.

Impact: Uncovers friction points and helps you fix issues early.

3 Launch basic automated flows to increase conversions

Set up abandoned cart and checkout reminders via WhatsApp or email. Keep the message helpful, not pushy.

Impact: Recovers lost intent and improves sales without ads.



Should-Have Actions (Next-Level Enhancers)

1 **Activate email channel to build brand recall**

Send a welcome email after the first purchase with your brand story, usage tips and support info. It costs nothing and earns trust.

Impact: Builds emotional connection and long-term recall.

2 **Activate pre-shipment WhatsApp updates**

Send order confirmation, address confirmation or about to dispatch messages before shipping. This sets the right expectations.

Impact: Reduces address errors and failed deliveries.

3 **Launch anonymous traffic identification and journeys**

Utilise tools like Shiprocket Engage 360's identification technology to track up to 40% of anonymous site visitors and engage them through automated and targeted campaigns.

Impact: Turns unknown users into known leads for future campaigns.

Self-Assessment & Scoring

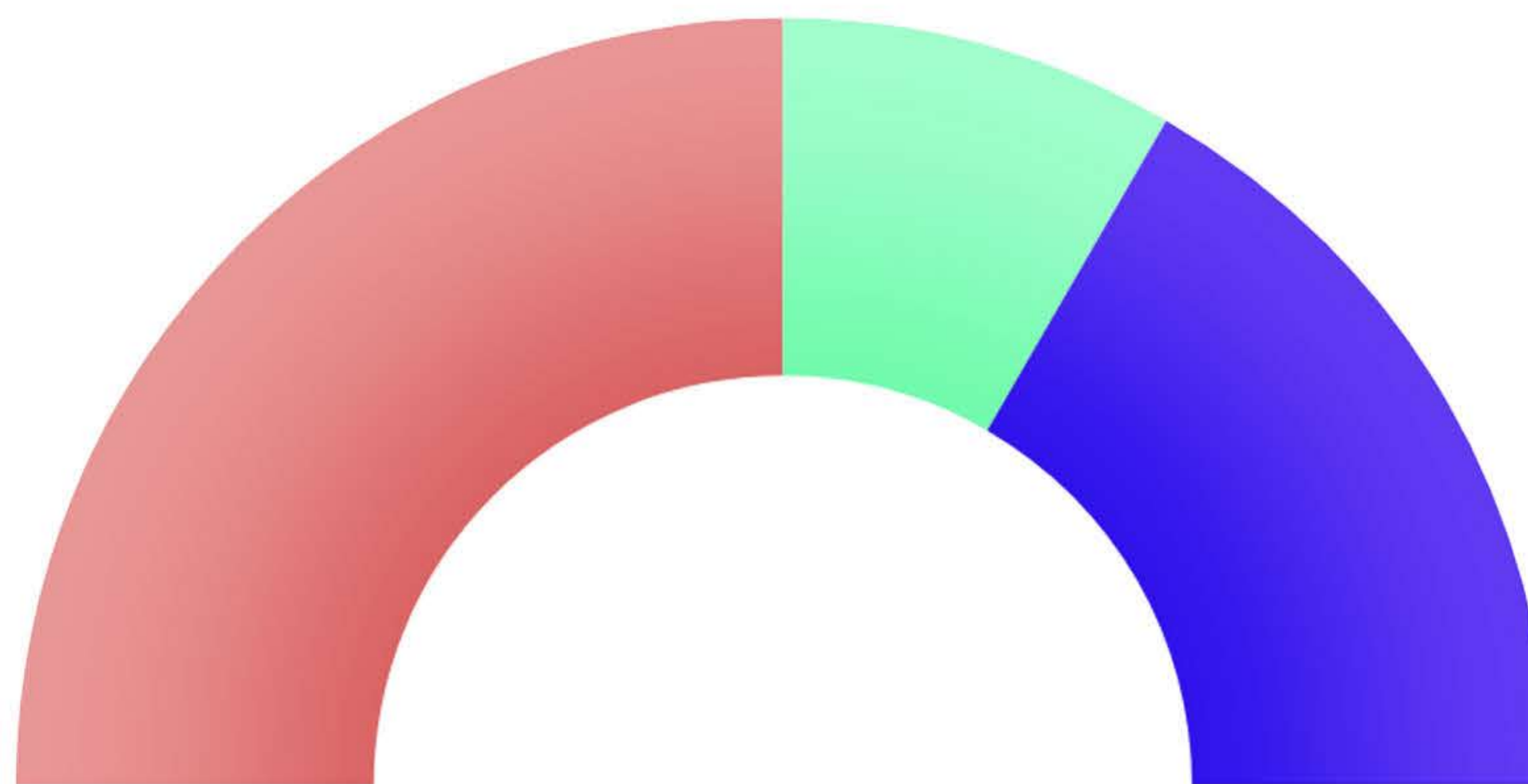
Evaluate your current readiness and identify gaps across core D2C pillars.

Area	Must-Have (2 points each)	Should-Have (1 point each)
Logistics & Fulfillment	<ul style="list-style-type: none"><input type="checkbox"/> Multi-carrier setup<input type="checkbox"/> NDR tracking via dashboard<input type="checkbox"/> Manifest & pickup acknowledgement<input type="checkbox"/> OTP-based deliveries<input type="checkbox"/> Packaging videos	<ul style="list-style-type: none"><input type="checkbox"/> Branded tracking page<input type="checkbox"/> Delivery NPS tracking
Checkout Experience	<ul style="list-style-type: none"><input type="checkbox"/> One-click checkout with autofill<input type="checkbox"/> Welcome offer for new users<input type="checkbox"/> Clear pricing & trust badges<input type="checkbox"/> All key payment methods (UPI, cards, COD)	<ul style="list-style-type: none"><input type="checkbox"/> Checkout banners for clear communications<input type="checkbox"/> EDD display<input type="checkbox"/> Partial COD for high-value orders
Customer Communication (CRM)	<ul style="list-style-type: none"><input type="checkbox"/> Post-shipment WhatsApp updates<input type="checkbox"/> Automated customer feedback<input type="checkbox"/> Basic flows (abandoned cart, checkout reminder)	<ul style="list-style-type: none"><input type="checkbox"/> Pre-shipment WhatsApp updates<input type="checkbox"/> Welcome email<input type="checkbox"/> Anonymous visitor identification
Retention	<ul style="list-style-type: none"><input type="checkbox"/> Contact capture for remarketing<input type="checkbox"/> WhatsApp/email automation	

Performance Ratings

Function-Wise Breakdown

Logistics & Fulfillment (Max: 12 points)

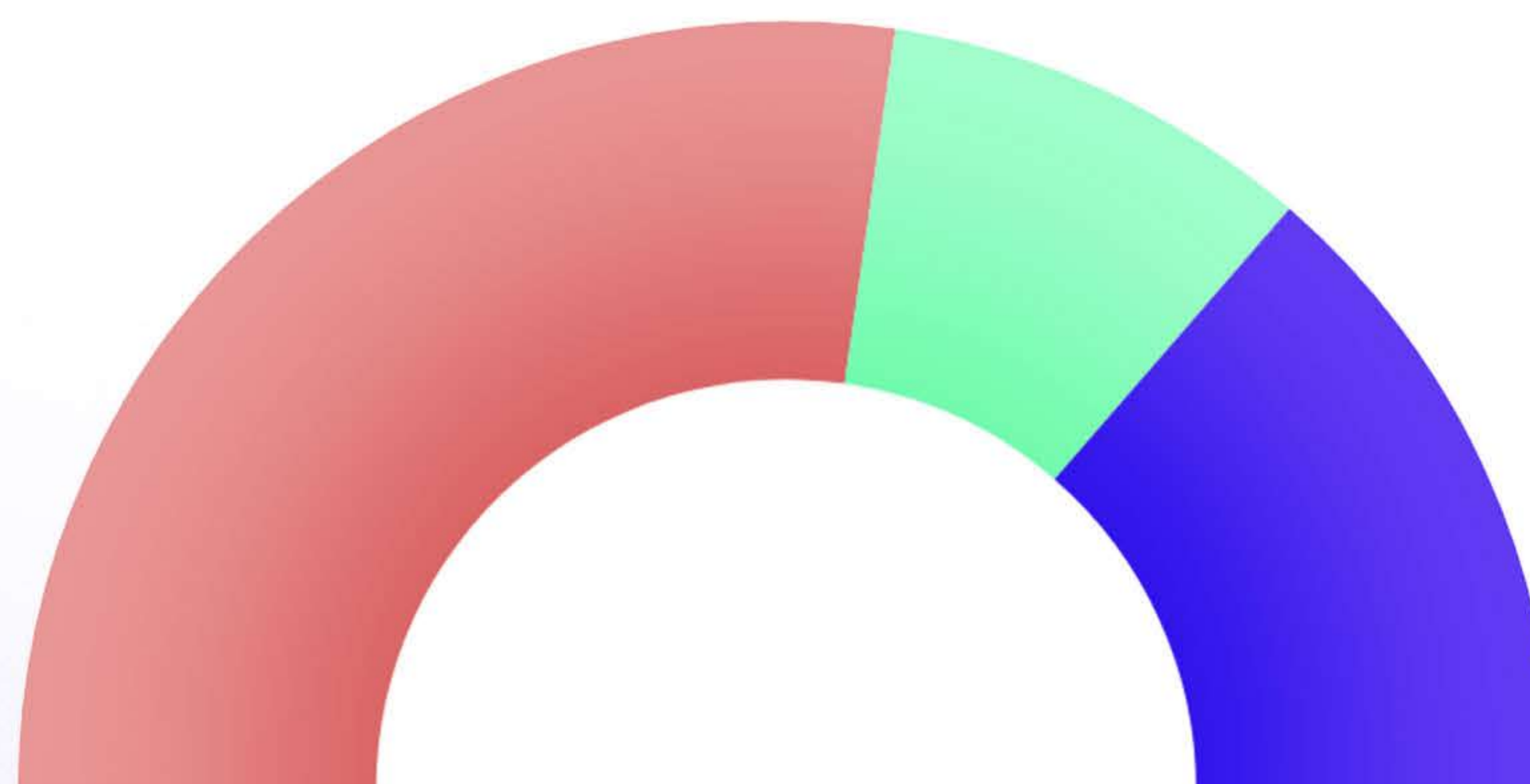


● Needs improvement: **Below 6**

● Average: **6-8 points**

● Best in class: **9-12 points**

Checkout Experience (Max: 11 points)

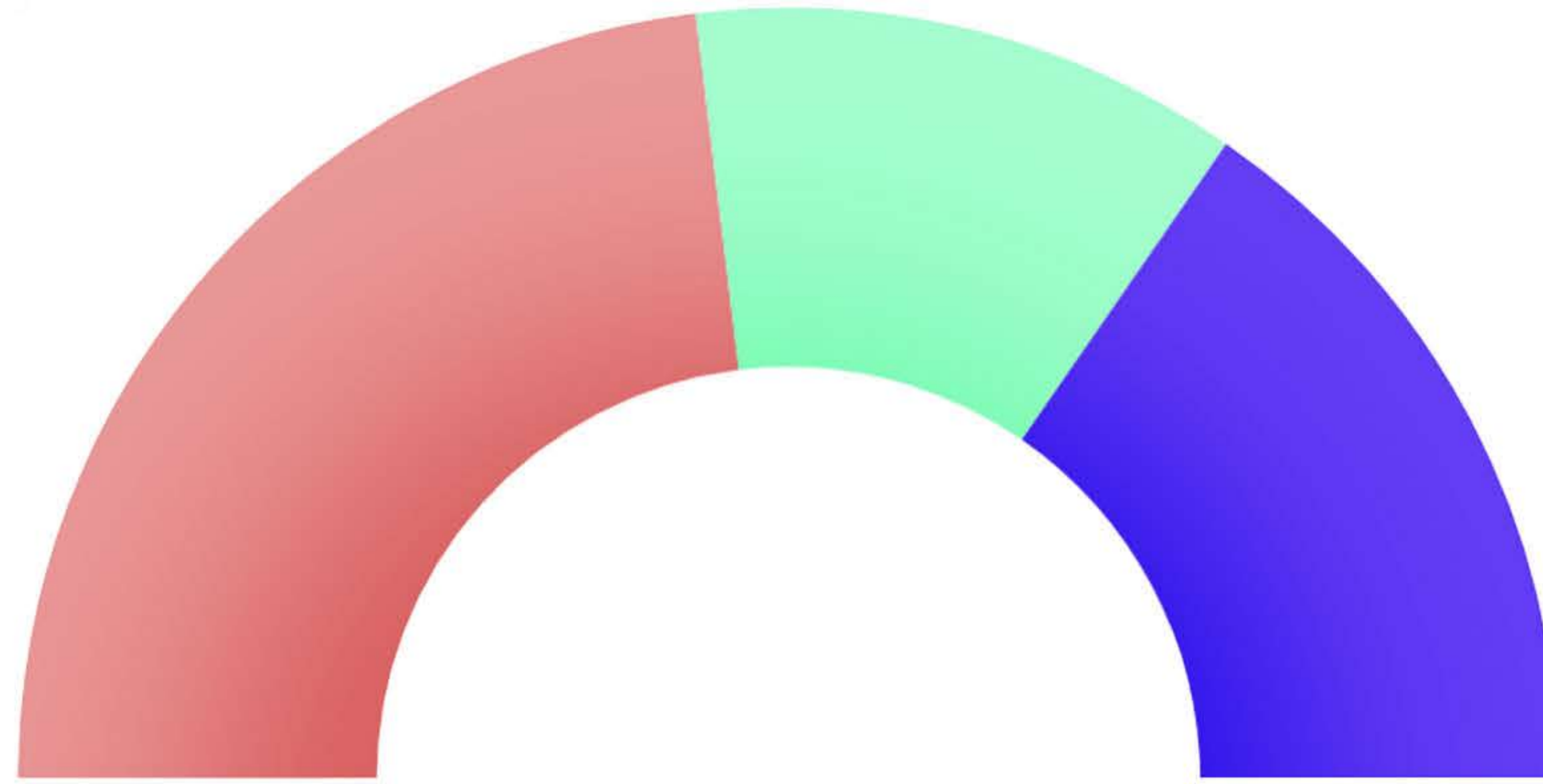


● Needs improvement: **Below 6**

● Average: **6-8 points**

● Best in class: **9-11 points**

CRM & Retention (Max: 13 points)

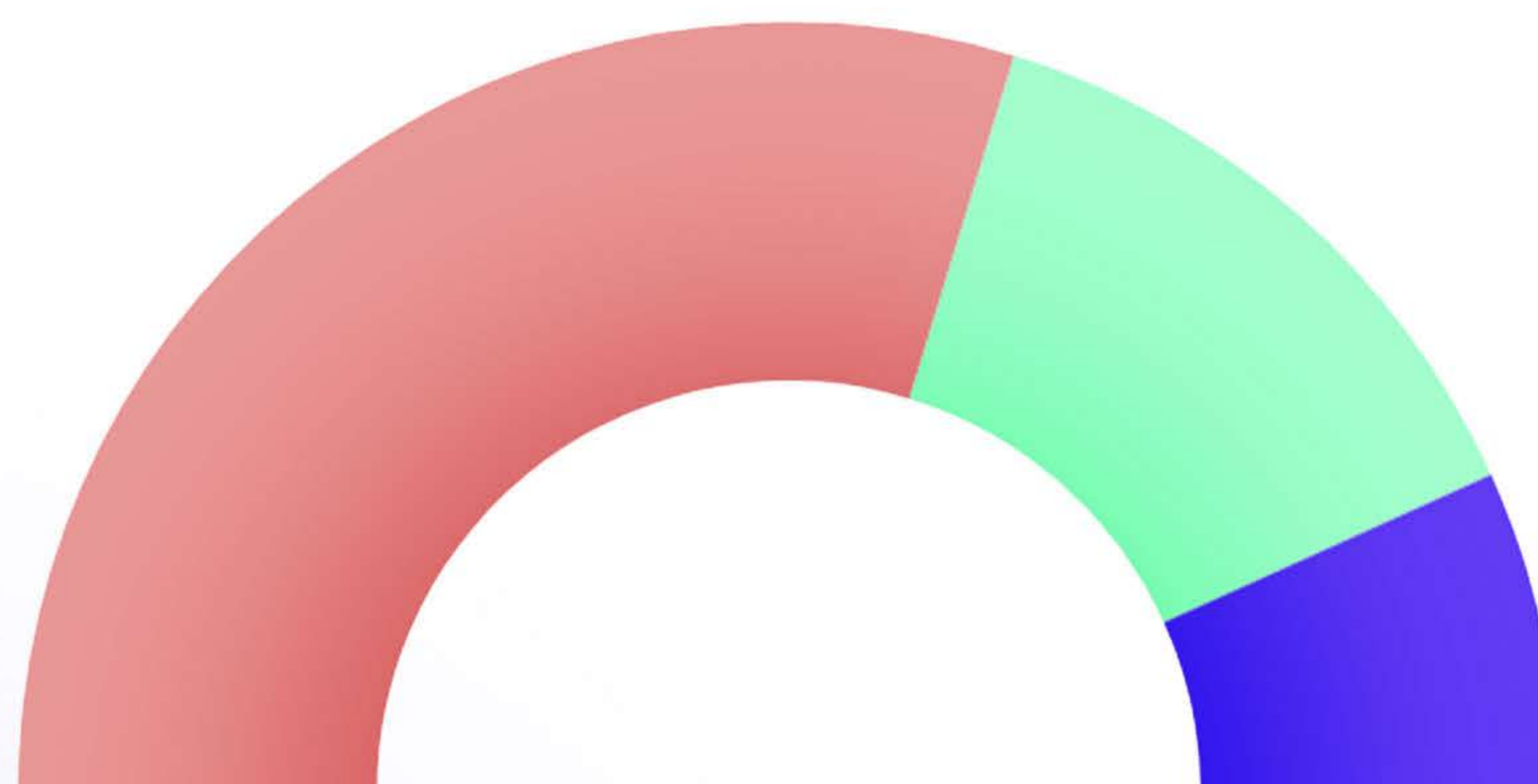


● Needs improvement: **Below 6**

● Average: **6-9 points**

● Best in class: **10-13 points**

Overall (Max: 37 points)



● Needs improvement: **Below 22**

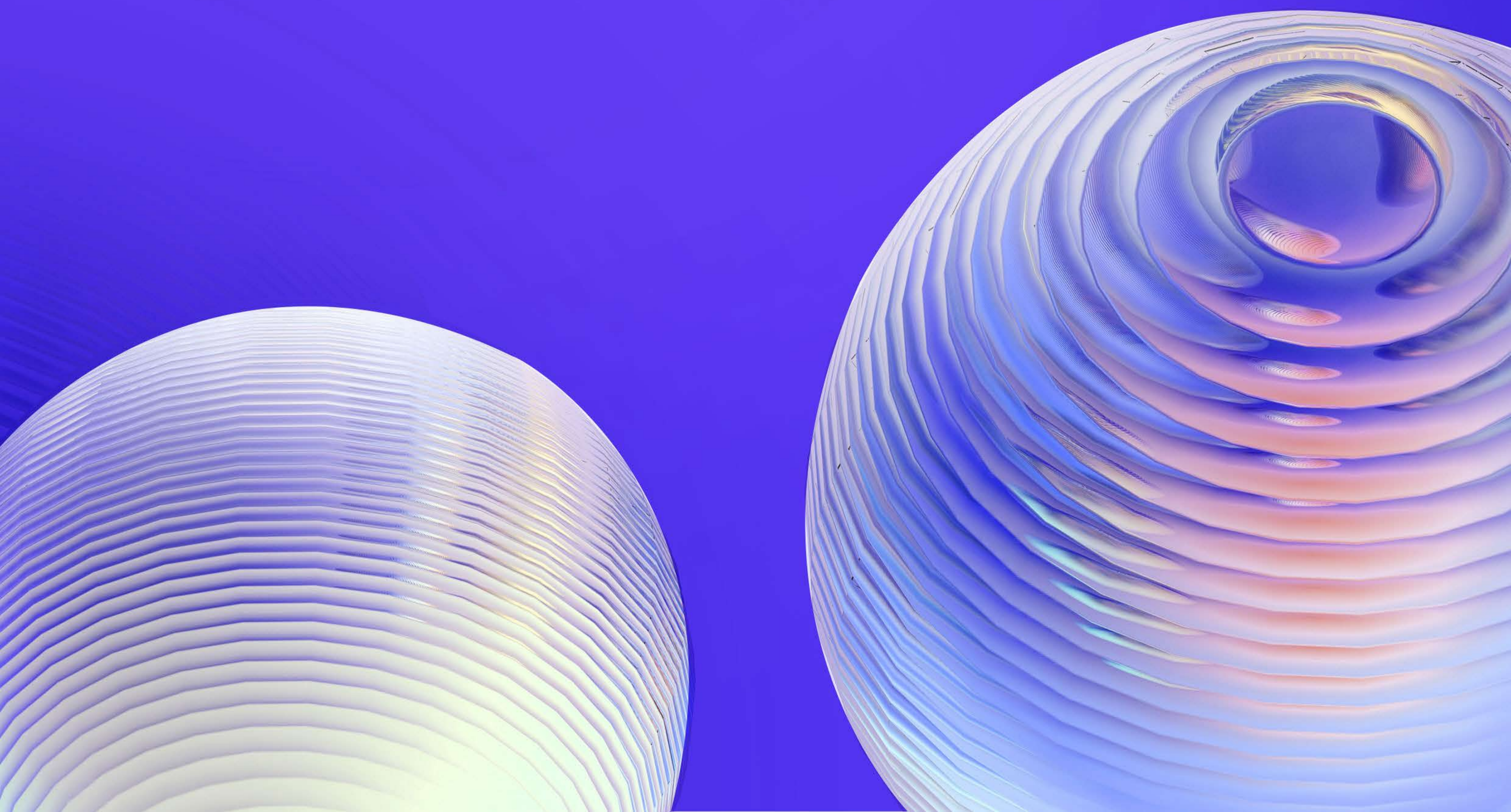
● Average: **22-32 points**

● Best in class: **33-37 points**



Shifting Gears: **Entering the Growth Stage** **500–5,000 Orders/Month**

You've found your product-market fit. Now, it's time to stabilise operations and drive repeatable growth.



Stage 2

Growth Stage

500–5,000 Orders/Month



From survival to steady growth

You've moved past the chaos of early launches. Orders are coming in, marketing is gaining traction, and now it's about consistency. In this stage, you need to start building systems, automating decisions, and protecting your margins while improving buyer experience at scale.



Broader industry advice

Your brand is now competing with more established players. Customer expectations are rising and inefficiencies will cost you. This stage is about tightening operations and refining buyer journeys without bloating costs. Before diving into stage 2 must-haves and should-haves, make sure you've completed all essentials from stage 1. If you haven't gone through the full stage 1 playbook, you can simply take the stage 1 assessment to identify what's missing.



Core objectives

- Achieve consistent delivery timelines across zones
- Reduce RTOs and COD-related losses
- Improve checkout conversion with dynamic logic
- Scale CRM and remarketing using behaviour data
- Introduce systems for data-driven decisions



Logistics & Fulfillment Readiness

Build intelligent, scalable delivery operations.



Must-Have Actions (Non-Negotiables)

- 1 Use RTO predictor for COD orders**

Factor in address quality and buyer profile before dispatching.

Impact: Prevents avoidable RTOs and improves margins.
- 2 Avoid owning warehouses too early**

Leverage shared warehousing options instead of building your own infrastructure.

Impact: Reduces capex and keeps operations lean.
- 3 Expand carrier network + introduce NDD**

Use multiple carriers and Next-Day Delivery where feasible to improve SLAs.

Impact: Faster delivery = better conversions and fewer “where’s my order?” tickets.
- 4 Add EDD on PDP and tracking page**

Let customers know delivery timelines upfront and post-purchase.

Impact: Increases trust and reduces anxiety-driven support queries.



Must-Have Actions (Non-Negotiables)

5 Automate NDR handling

Auto-trigger customer callbacks or WhatsApp pings for failed deliveries.

Impact: Speeds up recovery and improves NDR-to-delivery rates.

6 Turn branded tracking page into a revenue engine

Show banners, upsells, and smart product recommendations on the tracking page.

Impact: Boosts retention, repeat revenue, and NPS.

7 Deep dive into delivery metrics

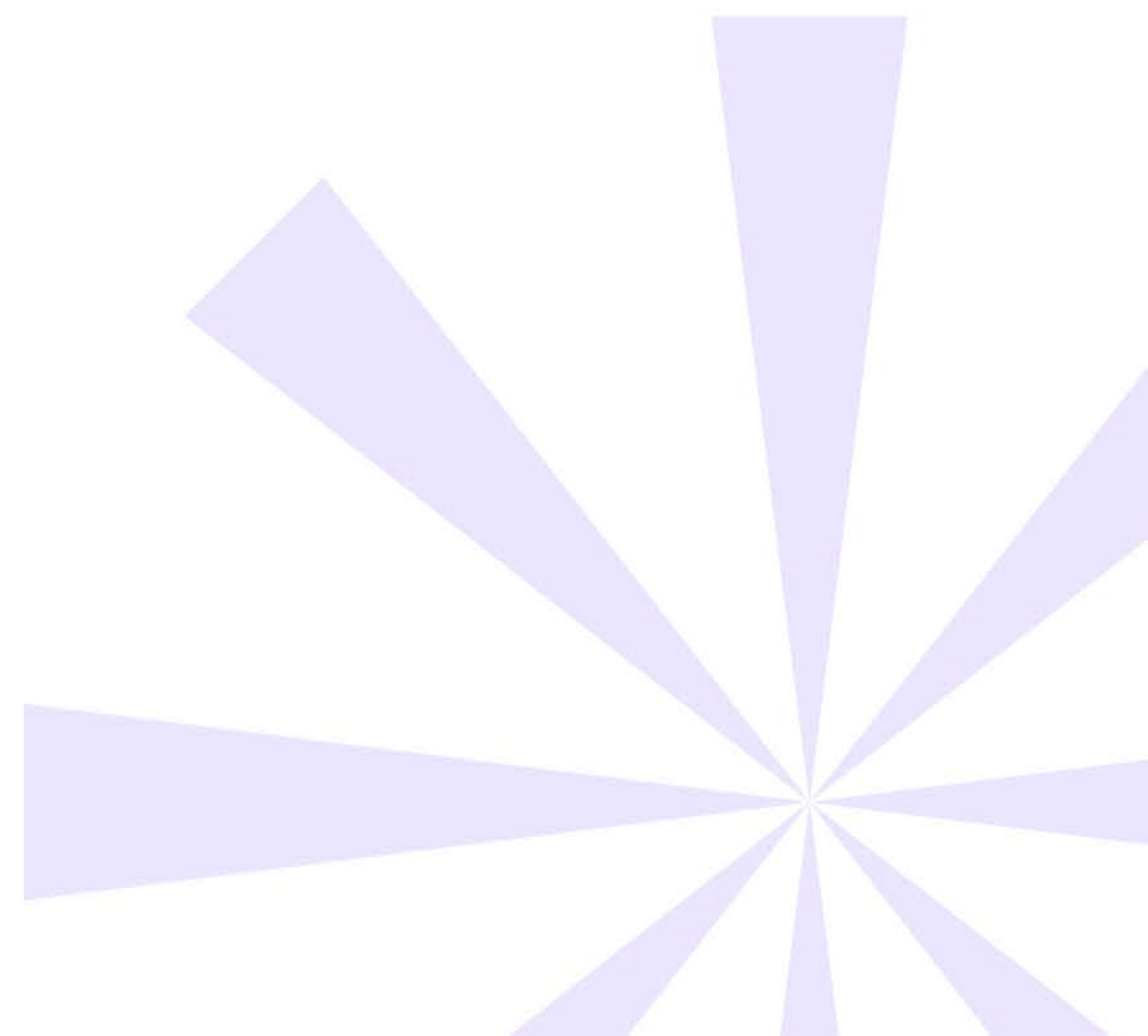
Track COD RTO%, average TAT by zone, and NDR recovery% broken down by carrier.

Impact: Helps eliminate underperformers and double down on what works.

8 QC-aligned reverse pickup handling

Ensure reverse pickups are coordinated with quality checks.

Impact: Reduces disputes and smoothens return experiences.





Should-Have Actions (Easy Wins That Build Trust)

1 Introduce NDD in key pin codes

Pilot faster delivery services where order volumes justify the investment.

Impact: Premium customers convert faster and churn less.

2 Monitor lost/damaged shipment trends

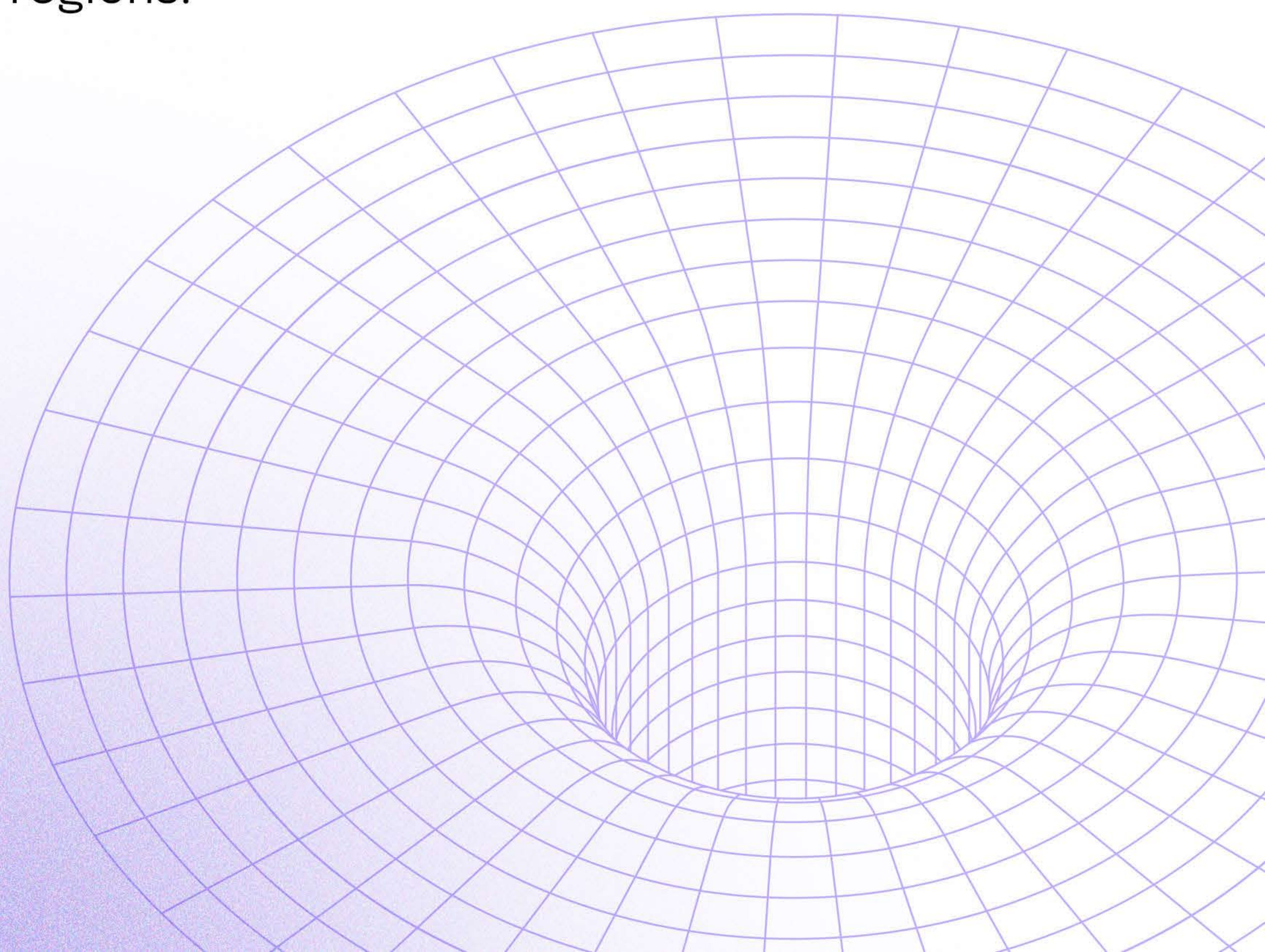
Flag hotspots and apply insurance for high-value shipments where risk increases.

Impact: Minimises financial leakage and enhances the buyer experience.

3 Explore multi-warehouse strategy

Use distributed warehouses to improve reach—without owning the infrastructure.

Impact: Reduces last-mile costs and boosts speed in Tier 2/3 regions.





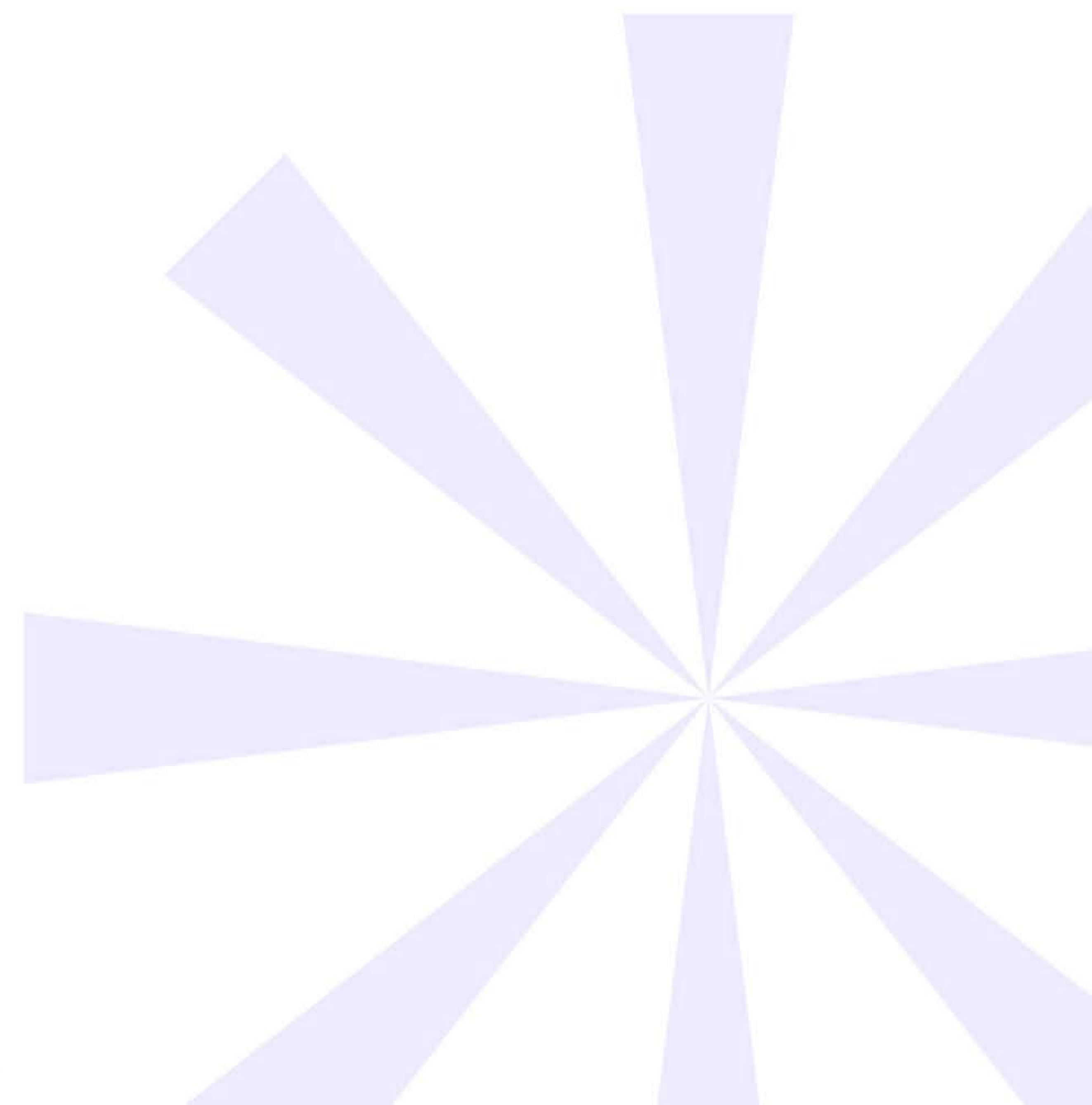
Checkout Experience

Smooth out the buying journey and increase AOV.



Must-Have Actions (Non-Negotiables)

- 1 Show dynamic EDD based on pin codes**
Auto-calculate delivery dates using courier SLAs.
Impact: Improves buyer trust and decision-making.
- 2 Use partial COD for high-value orders**
For carts over ₹3,000, collect a partial prepaid amount.
Impact: Reduces fraud, RTO, and filters low-intent buyers.
- 3 Enable cart-based/tiered discounts**
Move beyond flat discounts to incentivise higher cart values.
Impact: Raises AOV without unnecessary discounting, helping you achieve higher ROAS.





Should-Have Actions (Easy Wins That Build Trust)

1 Track checkout funnel via GA4 or Metabase

Monitor drop-offs step by step: login → address → payment.

Impact: Helps prioritise friction fixes for dev and product teams.

2 Add prepaid-only freebie offers

Offer samples or small perks to customers who prepay.

Impact: Boosts prepaid share, reduces RTO, and builds loyalty.

3 Use smart PG routing by region/device

Route payments through high-performing gateways based on failure rates or preferred modes.

Impact: Reduces failed transactions and customer drop-offs.



CRM & Retention

Turn one-time buyers into loyal customers.



Must-Have Actions (Non-Negotiables)

1 Use branded WhatsApp for order updates

Send pre and post-shipping updates from a verified business number.

Impact: Builds trust and improves transparency.

2 Launch conversion flows

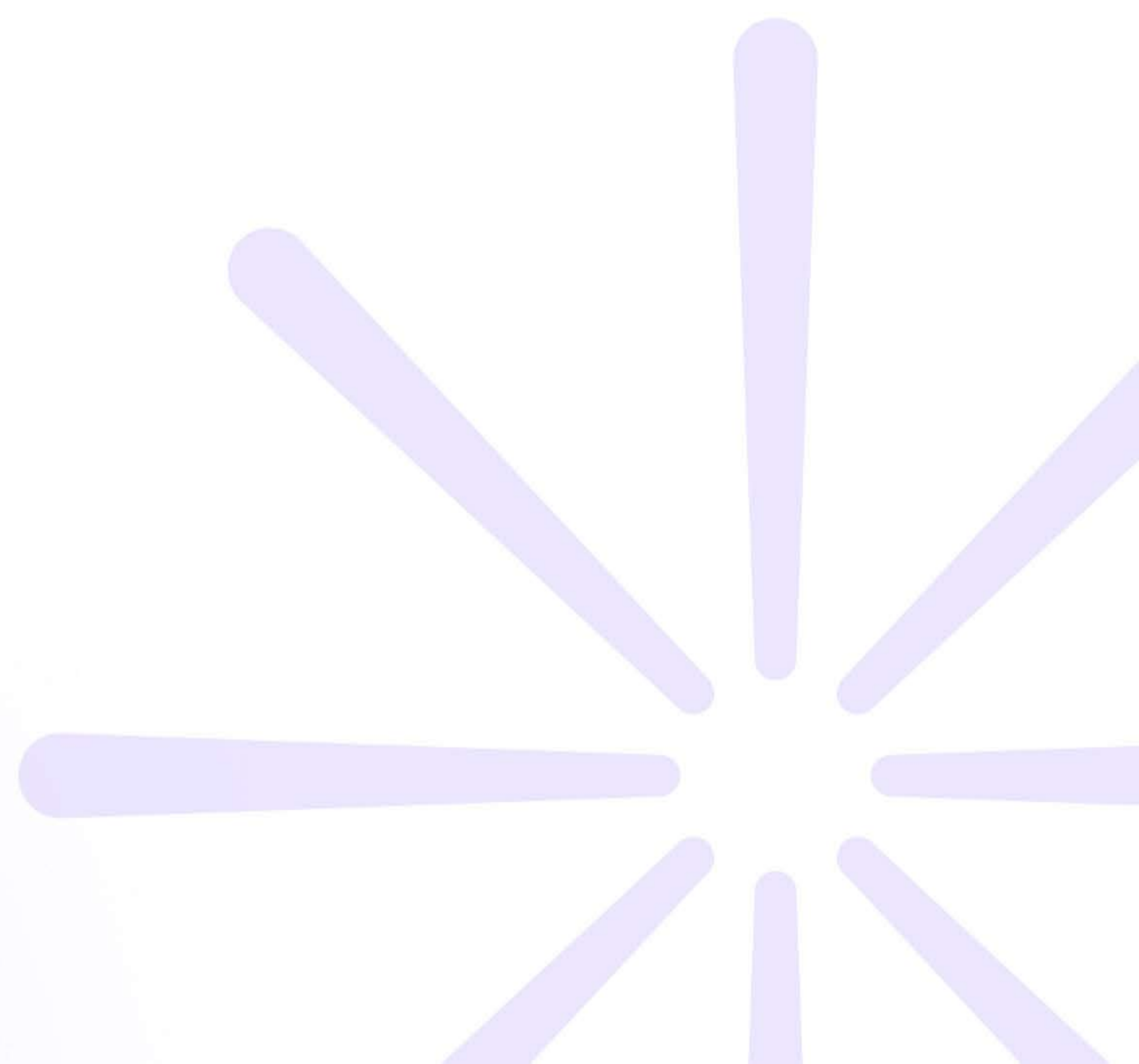
Trigger WhatsApp/email nudges for cart and checkout abandonment.

Impact: Recovers lost revenue with minimal effort.

3 Identify and onboard website visitors

Use tools (like Shiprocket Engage 360 Magic Onsite) to show welcome or exit-intent popups.

Impact: Captures first-party data and builds a remarketing base.





Must-Have Actions (Non-Negotiables)

4 Launch anonymous user journeys

Use AI to identify 30-40% of unknown traffic and trigger re-engagement journeys.

Impact: Boosts retention from unreachable traffic and improves ROAS.

5 Automate pre and post-ship flows

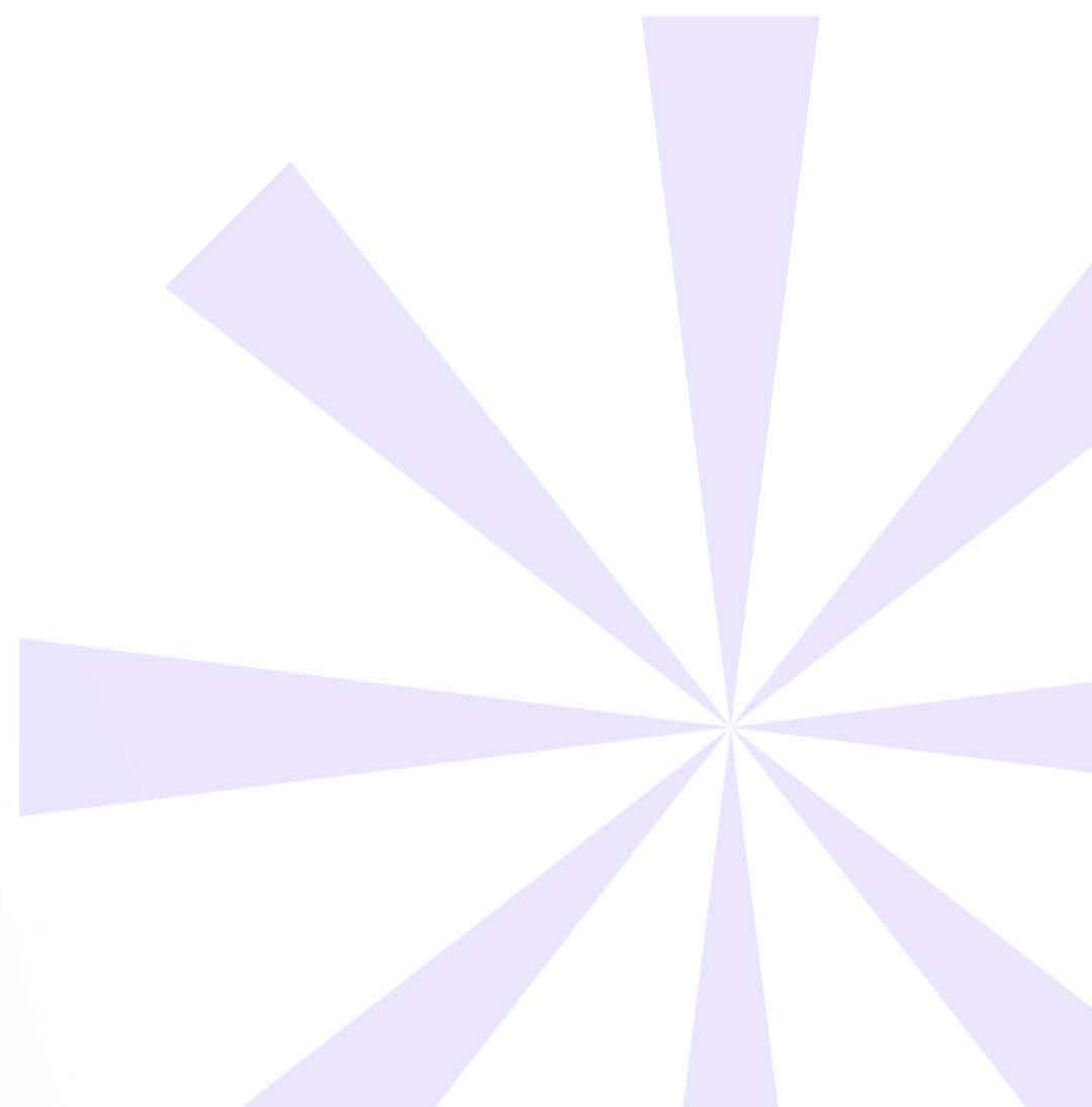
Send address confirmation and order updates before and after dispatch.

Impact: Prevents failed deliveries, surprises, and RTOs.

6 Double-click on RTO reasons

Analyse RTO trends by pin code, persona, and order history.

Impact: Adds depth to your prevention strategy.





Should-Have Actions (Easy Wins That Build Trust)

1 Build behaviour-based campaigns

Personalise outreach based on AOV, product interest, and purchase patterns.

Impact: Drives higher engagement and repeat purchases.

2 Add omnichannel campaigns (SMS/RCS/email)

Don't rely solely on WhatsApp, use multiple touchpoints.

Impact: Reduces drop-off risk and ensures message delivery.

3 Deploy a basic WhatsApp chatbot

Automate replies to FAQs like delivery status, cancellations, or returns.

Impact: Reduces support load and improves CSAT.

4 Enable WhatsApp reordering via catalogue

Allow users to reorder directly through the WhatsApp product catalogue.

Impact: Increases repeat sales with minimal effort.

Self-Assessment & Scoring

Evaluate your current readiness and identify gaps across core D2C pillars.

Area

Must-Have (2 points each)

Should-Have (1 point each)

Logistics & Fulfillment

- Use tools to understand RTO risk
- Start tracking COD RTO%, Avg TAT, NDR to delivery %
- Set up NDR automation
- Enable EDD on the PDP & tracking page
- Consider shared warehousing instead
- QC-aligned reverse pickup process

- Add NDD services
- Insure high-value/lost parcels
- Explore multiple warehouses with shared setup

Checkout Experience

- Display EDD by pin code
- Partial COD for high-value orders
- Use tiered/cart-based discounts

- Set up checkout funnel tracking (GA4, Metabase)
- Introduce prepaid-only gifts
- PG auto-routing

CRM & Retention

- Send branded WhatsApp updates pre and post-delivery
- Launch cart/checkout reminders
- Grow site subscribers via popups
- Build anonymous user journeys
- Run deep-dive RTO analysis across key customer segments

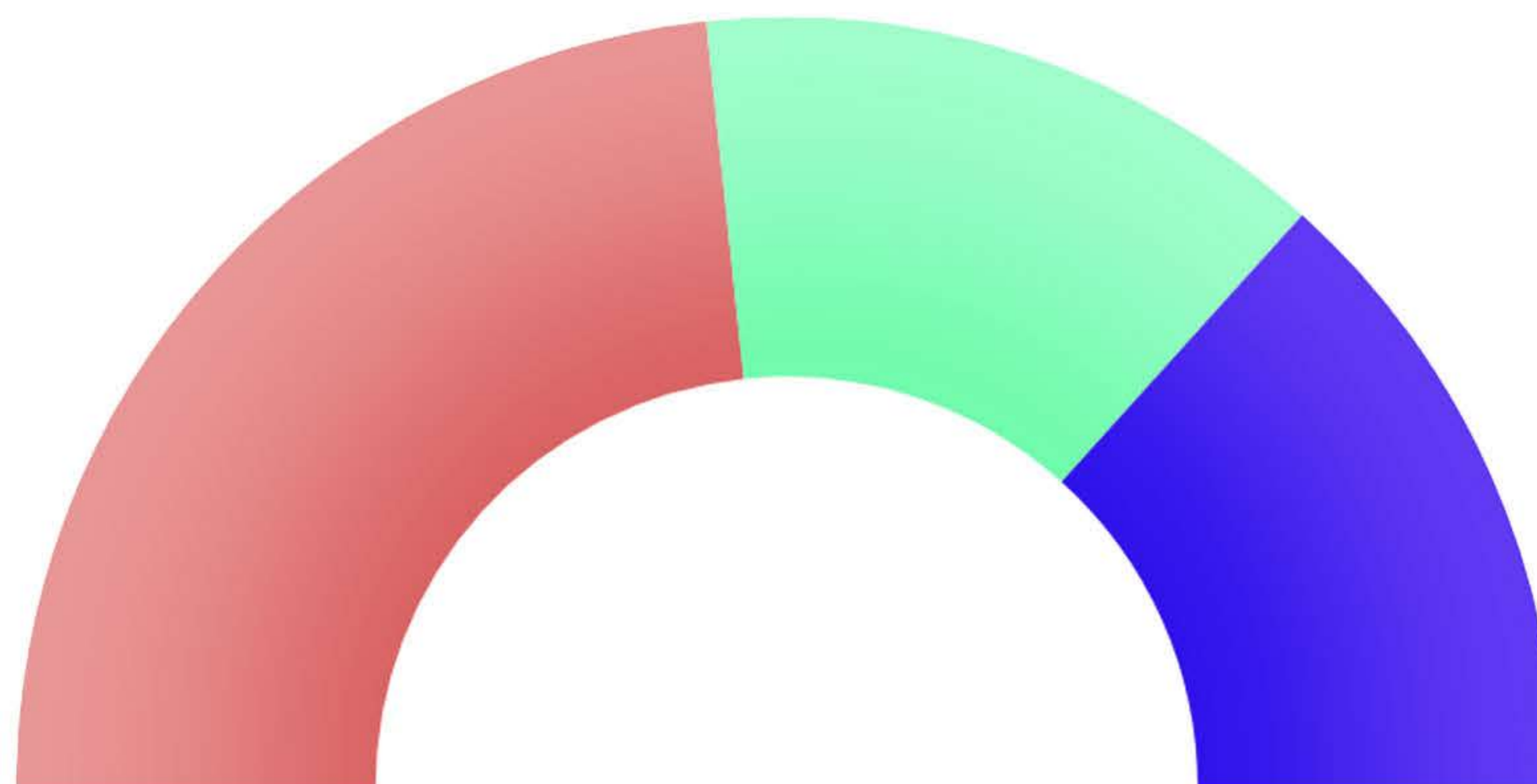
- Set up segmented remarketing flows
- Add omnichannel campaigns (SMS/RCS/email)
- Enable WhatsApp catalogue reorders

Performance Ratings

Function-Wise Breakdown

Logistics & Fulfillment

(Max: 15 points)



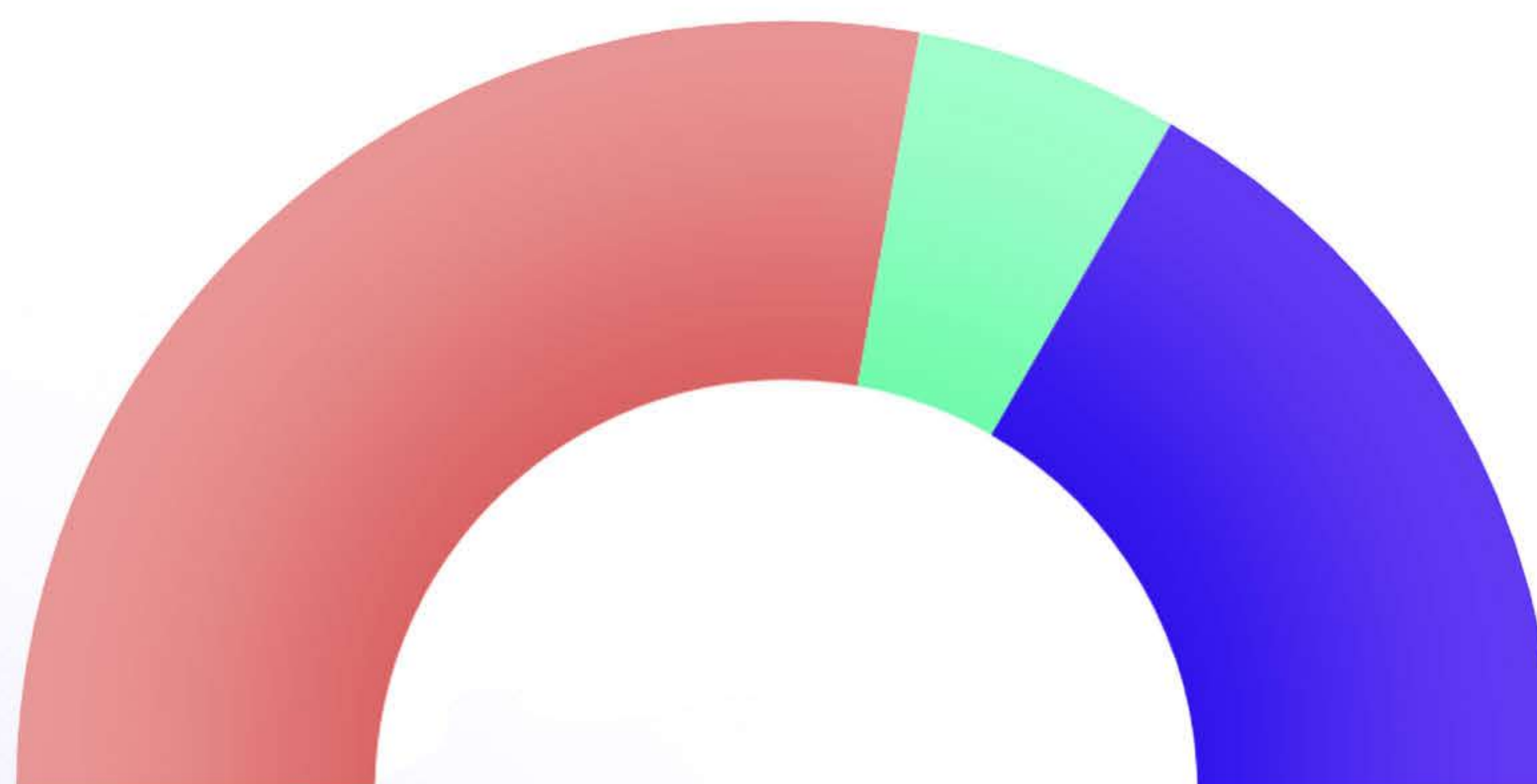
● Needs improvement: **Below 7**

● Average: **7-11 points**

● Best in class: **12-15 points**

Checkout Experience

(Max: 9 points)

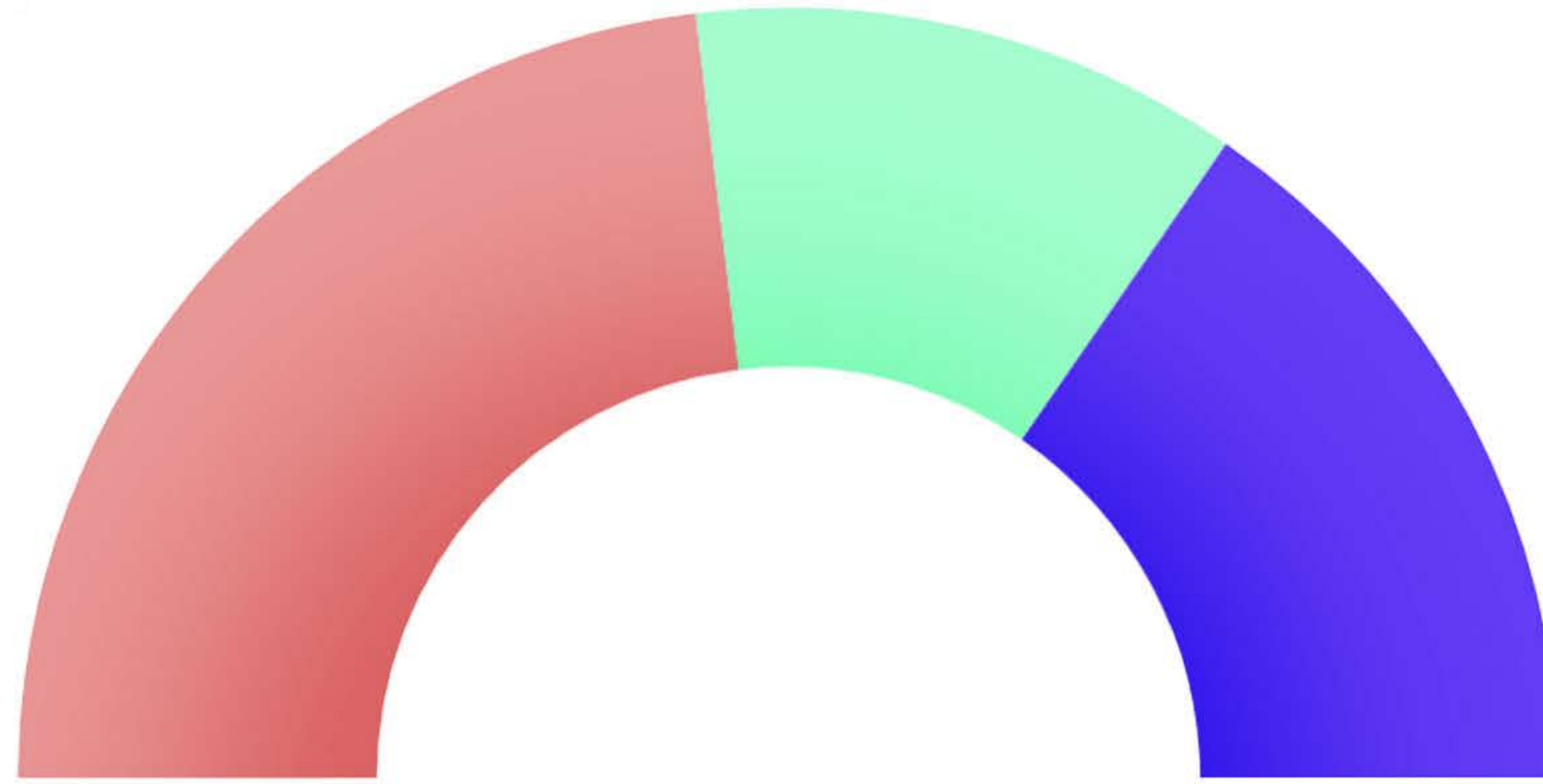


● Needs improvement: **Below 5**

● Average: **5-6 points**

● Best in class: **7-9 points**

CRM & Retention (Max: 13 points)

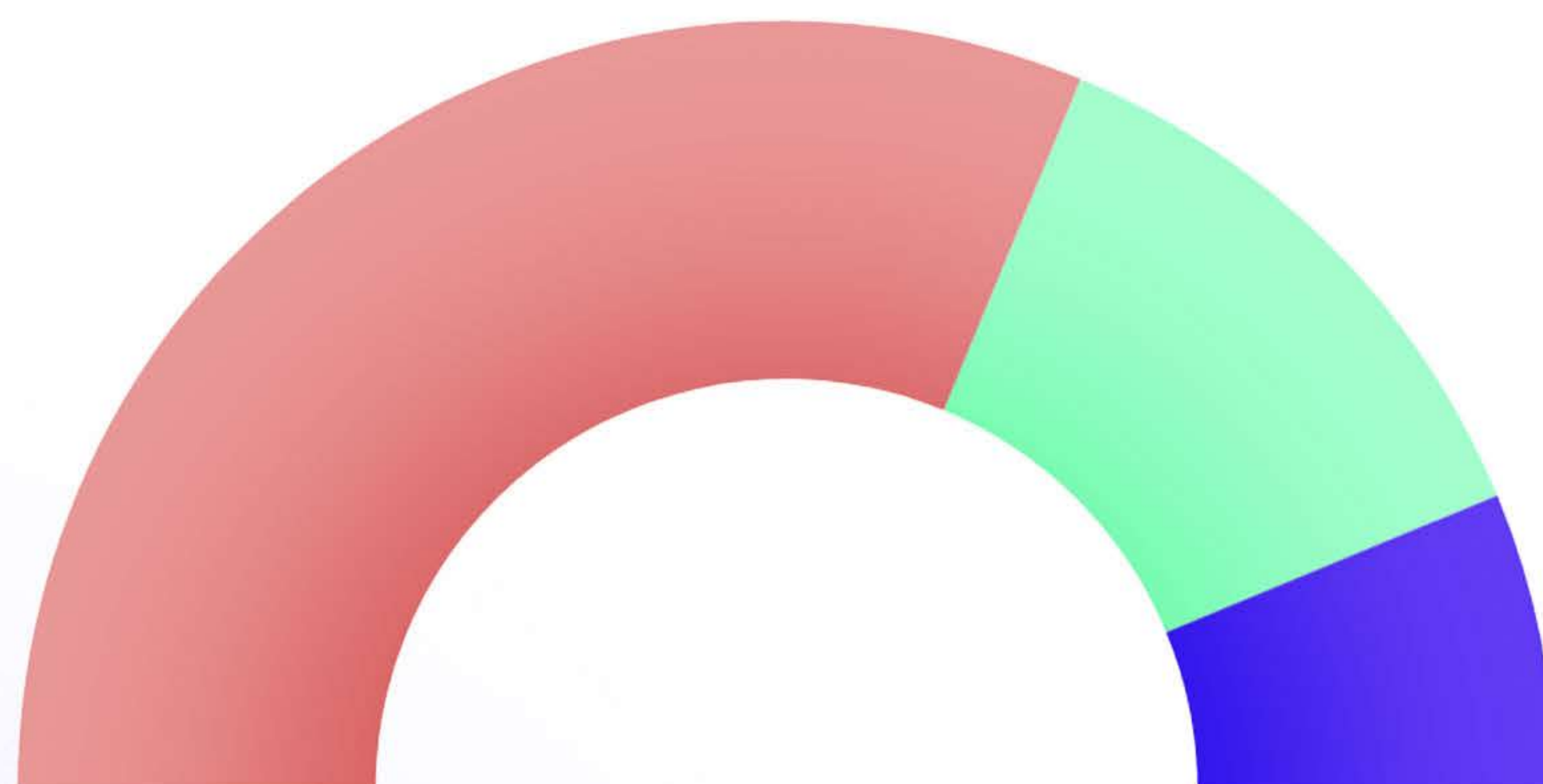


● Needs improvement: **Below 6**

● Average: **6-9 points**

● Best in class: **10-13 points**

Overall (Max: 40 points)



● Needs improvement: **Below 19**

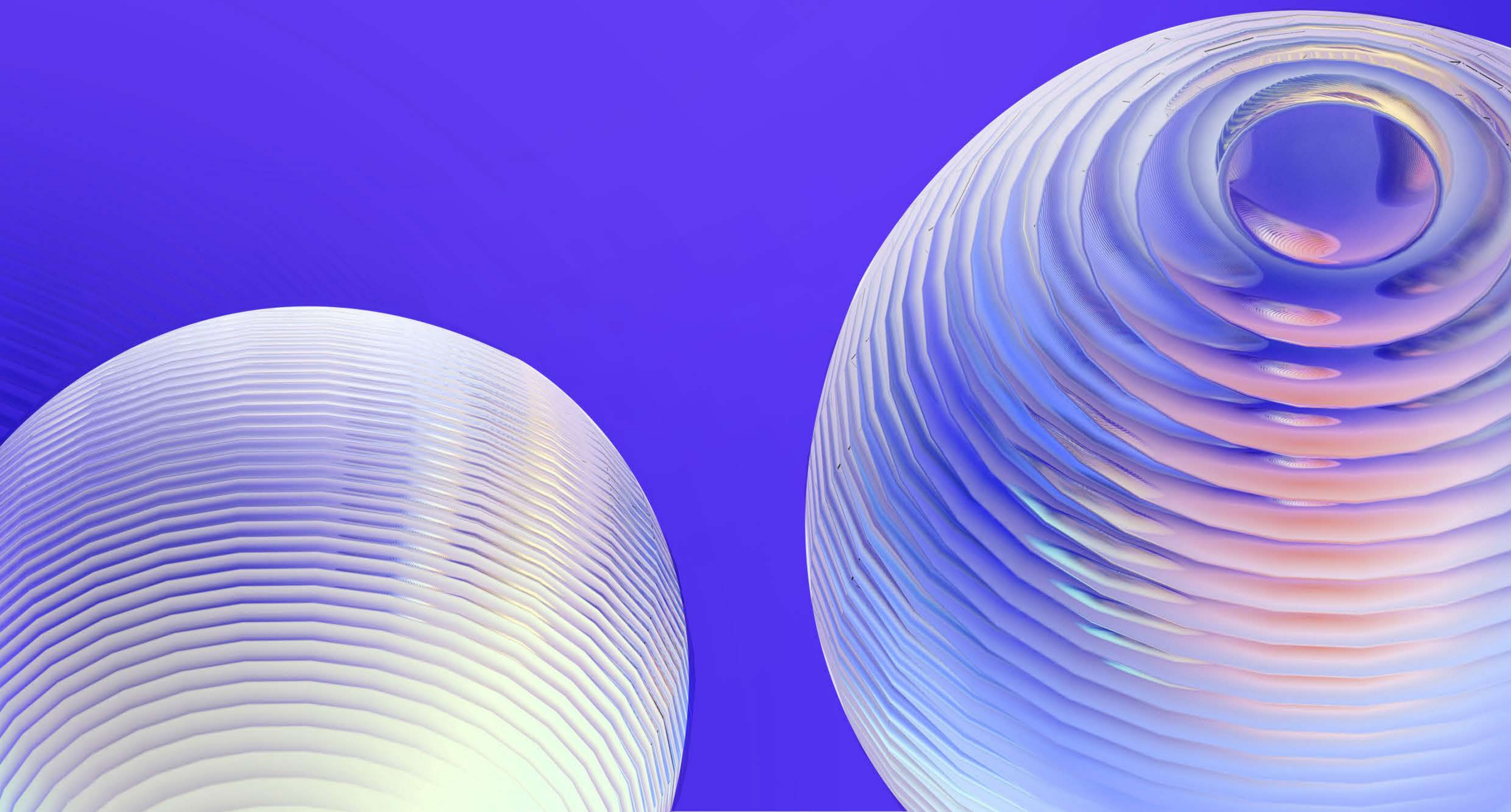
● Average: **19 - 28 points**

● Best in class: **29 - 40 points**



Scaling Up:
Welcome to the
Expansion Stage
5,000–20,000 Orders/Month

You've built momentum. It's time to optimise, automate and scale profitably.



Stage 3

Scale Stage

5,000–20,000 Orders/Month



From consistency to intelligent scale

At this stage, your business is scaling rapidly, and the complexity of operations is increasing. Your focus shifts from just execution to optimisation, reducing inefficiencies, increasing automation, and fine-tuning processes that directly impact cost and profitability.



Broader industry advice

As brands scale, the winners are not those who sell the most but those who optimise the best. From regional warehousing to dynamic checkouts, scaling efficiently means using tech, data and modular solutions to stay ahead in speed, experience and cost control. Before diving into Stage 3 must-haves and should-haves, make sure you've completed all essentials from Stage 2. If you haven't gone through the full Stage 2 playbook, you can simply take the Stage 2 assessment to identify what's missing.



Core objectives

- Maximise operational efficiency and reduce logistics costs
- Offer an advanced, frictionless checkout experience with a strong focus on conversion
- Strengthen proactive, personalised customer communication
- Execute sophisticated remarketing campaigns and segment-based automation



Logistics & Fulfillment Readiness

Drive **cost-efficiency** and **reduce turnaround time (TAT)** with **localised** and **automated operations**



Must-Have Actions (Non-Negotiables)

1 Introduce local fulfillment centres + last-mile services

Set up strategic fulfilment points to improve delivery speeds and reduce logistics costs.

Impact: Cuts average delivery TAT and last-mile charges.

2 Enable hyperlocal, next-day & same-day deliveries

Move beyond standard shipping to delight customers with same and next-day delivery options.

Impact: Boosts prepaid conversions and repeat purchases.

3 Track delivery & RTO metrics proactively

Monitor out-TAT shipments, COD RTO%, EDD adherence, NDR → attempt → delivery%, and BPR conversions.

Impact: Increases visibility and control across last-mile operations.



Must-Have Actions (Non-Negotiables)

4 Offer self-serve returns & exchange flow

Allow customers to initiate returns or exchanges with minimal friction.

Impact: Improves experience, reduces support load, and builds loyalty.

5 Use a dispute management dashboard

Resolve weight discrepancies, lost shipments, and damage claims through a centralised dashboard.

Impact: Speeds up issue resolution and improves accuracy.



Should-Have Actions (Easy Wins That Build Trust)

- 1 Set up dark stores or micro-fulfillment for fast-moving SKUs**
Localise storage of fast-moving SKUs.
Impact: Reduces TAT and increases delivery success rate.
- 2 Automate refunds for prepaid RTOs & QC-passed returns**
Enable quick refund cycles through automation.
Impact: Improves buyer trust and post-purchase satisfaction.
- 3 Onboard a B2B logistics partner for bulk movements**
Handle W2W, W2S, or marketplace and quick commerce shipping via PTL, LTL, or FTL models.
Impact: Reduces cost and enables operational scale.
- 4 Partner with a 3PL for advanced return inwards**
Implement refurbishments or graded returns for resale.
Impact: Adds margin recovery layer to returns handling.



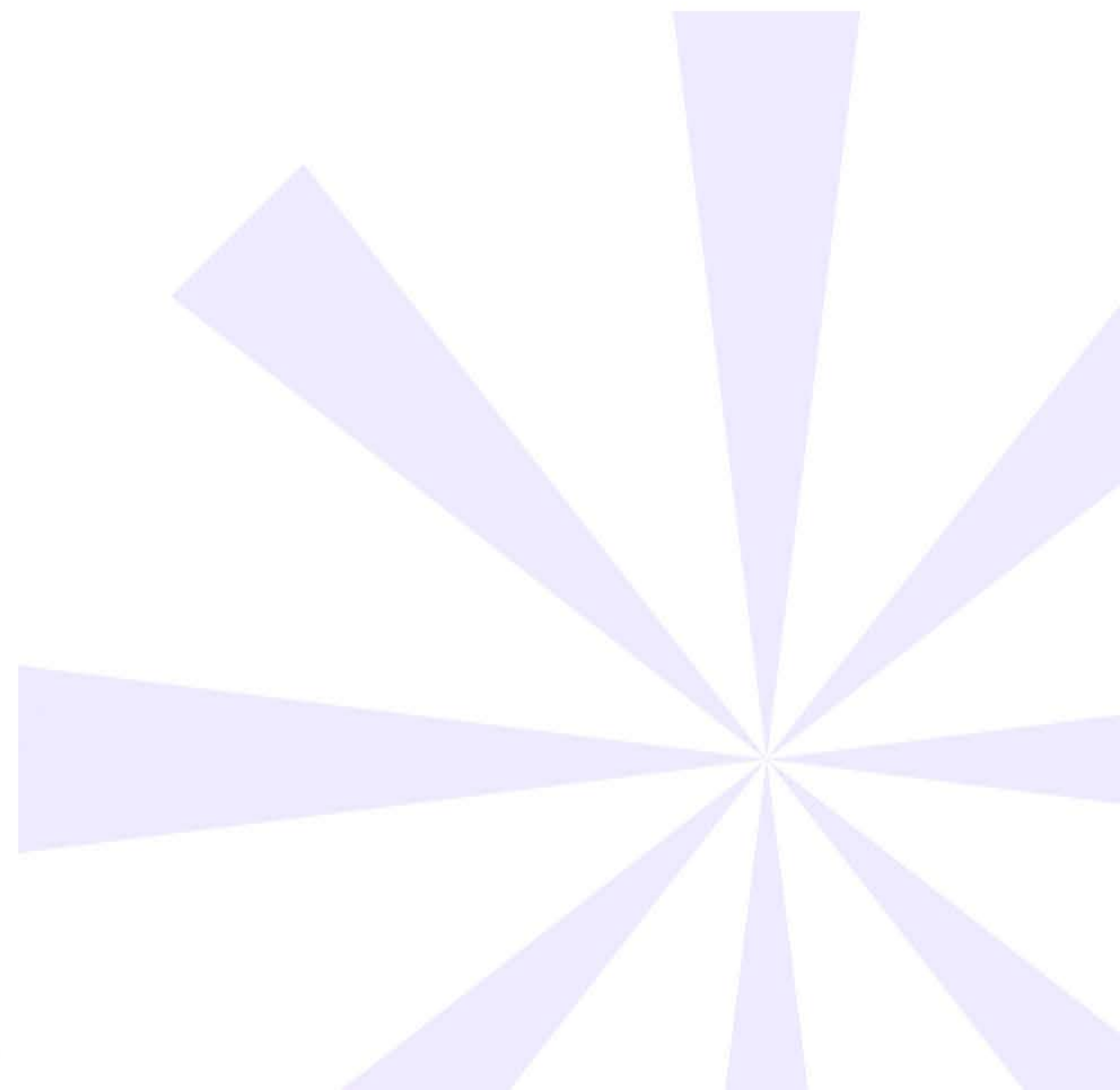
Checkout Experience

Streamline user journey and increase prepaid conversions with personalisation and logic.



Must-Have Actions (Non-Negotiables)

- 1 Track the checkout funnel in GA4 or Metabase**
Capture events across login → address → payment → confirmation.
Impact: Identifies drop-off points for data-driven fixes.
- 2 Introduce prepaid-only free gifts**
Reward prepaid customers with samples or free add-ons.
Impact: Encourages low-risk, high-margin payment behaviour.
- 3 Run A/B tests on checkout nudges and risk flows**
Compare prepaid nudges, COD fee, and partial COD across cohorts.
Impact: Optimises strategy and reduces COD dependence.





Must-Have Actions (Non-Negotiables)

4 Auto-switch to best performing PG in real time

Route payments to the PG with the highest success rate per success rate and cart value.

Impact: Reduces payment failures and cart abandonment.

5 Display EDD by pin code on PDP and checkout

Use dynamic logic to show the delivery promise accurately.

Impact: Builds trust and impacts purchase decisions positively.

6 Convert failed prepaid to high-intent COD via payment recovery screen

Use fallback logic for multiple payment failures: “Having trouble? Auto-place as COD.”

Impact: Saves potential lost orders, with higher intent confidence.



Should-Have Actions (Easy Wins That Build Trust)

1 Personalise offers by source/campaign

Use UTM-based logic to customise banners or discounts.

Impact: Maximises ROI on influencer and paid traffic.

2 Auto-trigger exit-intent nudges on checkout drop-offs

Add subtle reminders when the user shows intent to exit.

Impact: Recovers lost carts without eroding pricing discipline.

3 Enable smart upsells and bundles at checkout

Show personalised cross-sell options during the final step.

Impact: Increases AOV with minimal user effort.

4 Integrate checkout with loyalty and rewards

Allow loyalty point redemptions directly within the checkout flow.

Impact: Encourages repeat buying and improves LTV and conversions.



Should-Have Actions (Easy Wins That Build Trust)

5 Enable headless checkout for one-click journeys

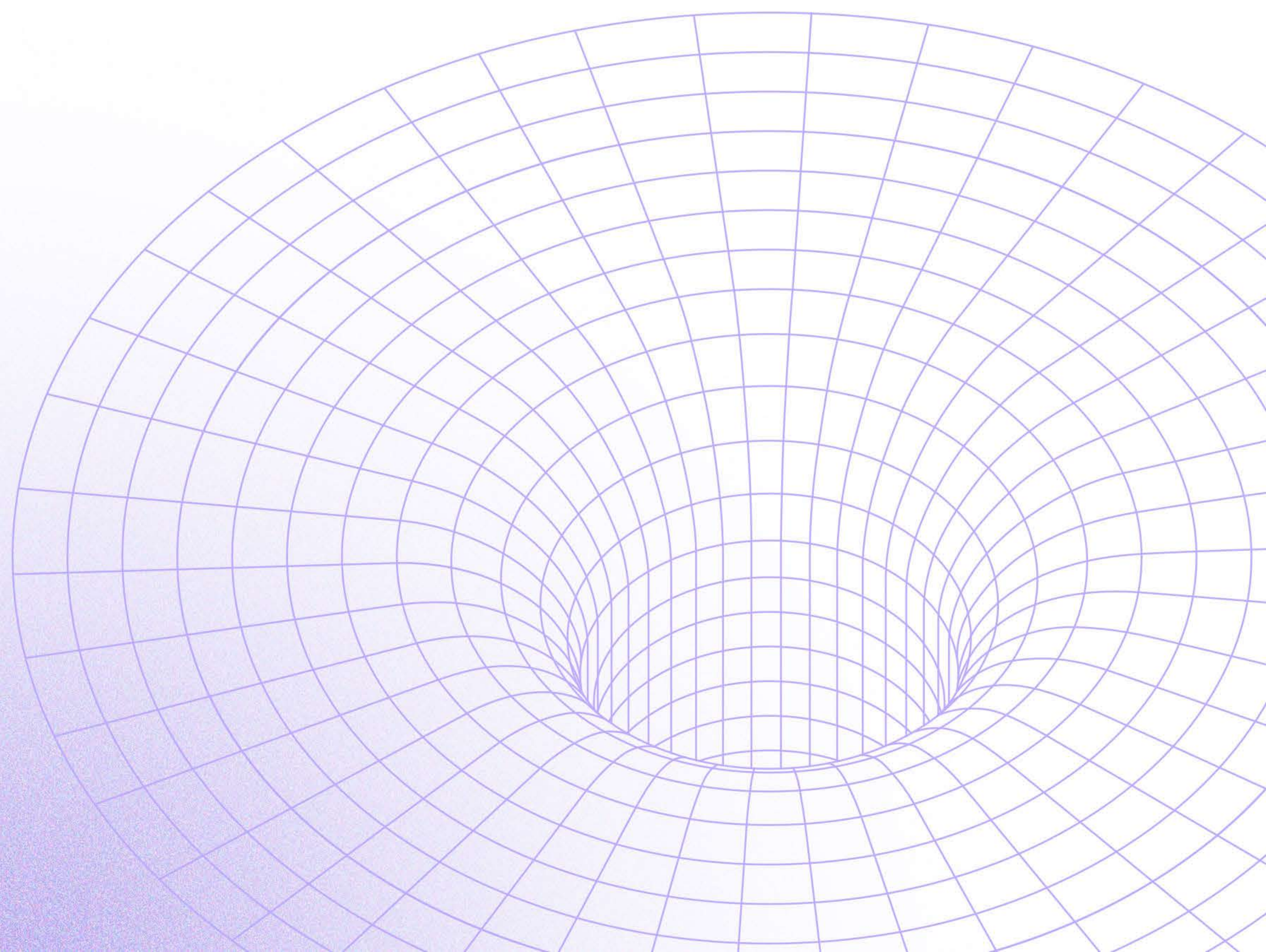
Launch mobile-first PDP-to-checkout journeys with faster load time.

Impact: Uplifts conversions 20–30% on mobile-heavy traffic and helps personalised targeting.

6 Use pre-checkout RT0 risk prediction engine

Show nudges or prepaid-only logic for risky customers.

Impact: Prevents potential RT0s at the intent stage.





CRM & Retention

Move from reactive to proactive personalisation with intelligent automation.



Must-Have Actions (Non-Negotiables)

- 1 Launch segmented remarketing campaigns and calendars**

Segment by AOV, recency, churn risk; plan monthly campaigns for festivals, launches, and past-season cohorts.

Impact: Drives repeat orders and recovers lapsed buyers.
- 2 Identify anonymous traffic and create complex journeys**

Use tools with advanced anonymous identification flows for high-performing targeting.

Impact: Unlocks engagement from the 40% who remain unidentified.
- 3 Enable WhatsApp catalogue browsing and repurchases**

Allow browsing and repeat buying within WhatsApp.

Impact: Increases frequency of orders and CX satisfaction.



Should-Have Actions (Easy Wins That Build Trust)

1 Launch multi-channel automated flows

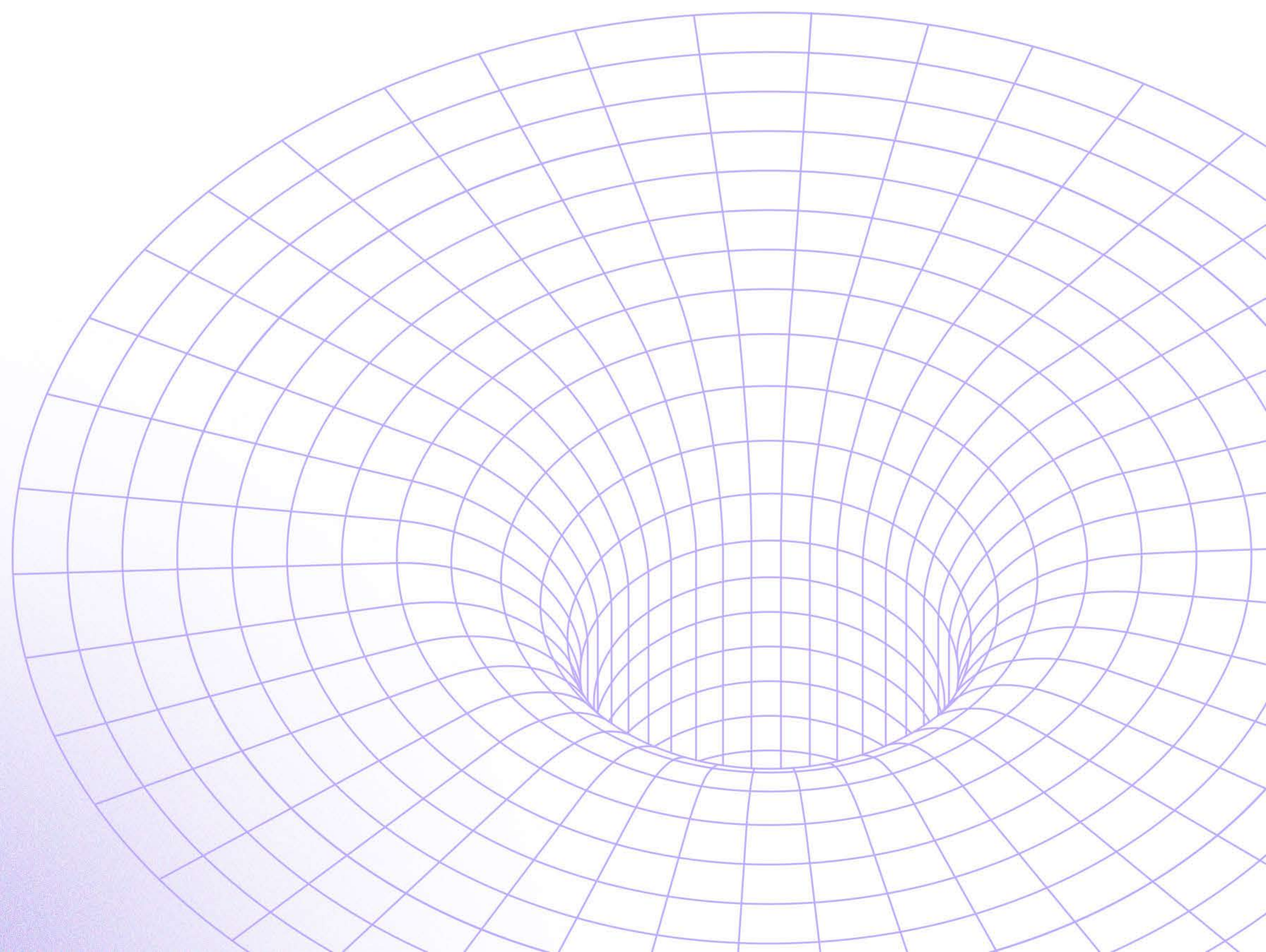
Use email and WhatsApp fallback logic across journeys like RTO to C2P, NDR, winbacks, and cart abandonment.

Impact: Prevents drop-offs and automates retention.

2 Deploy AI chatbots for pre and post-order queries

Use intelligent bots for order issues, NDRs, or FAQ deflection.

Impact: Reduces manual support effort and increases resolution speed.



Self-Assessment & Scoring

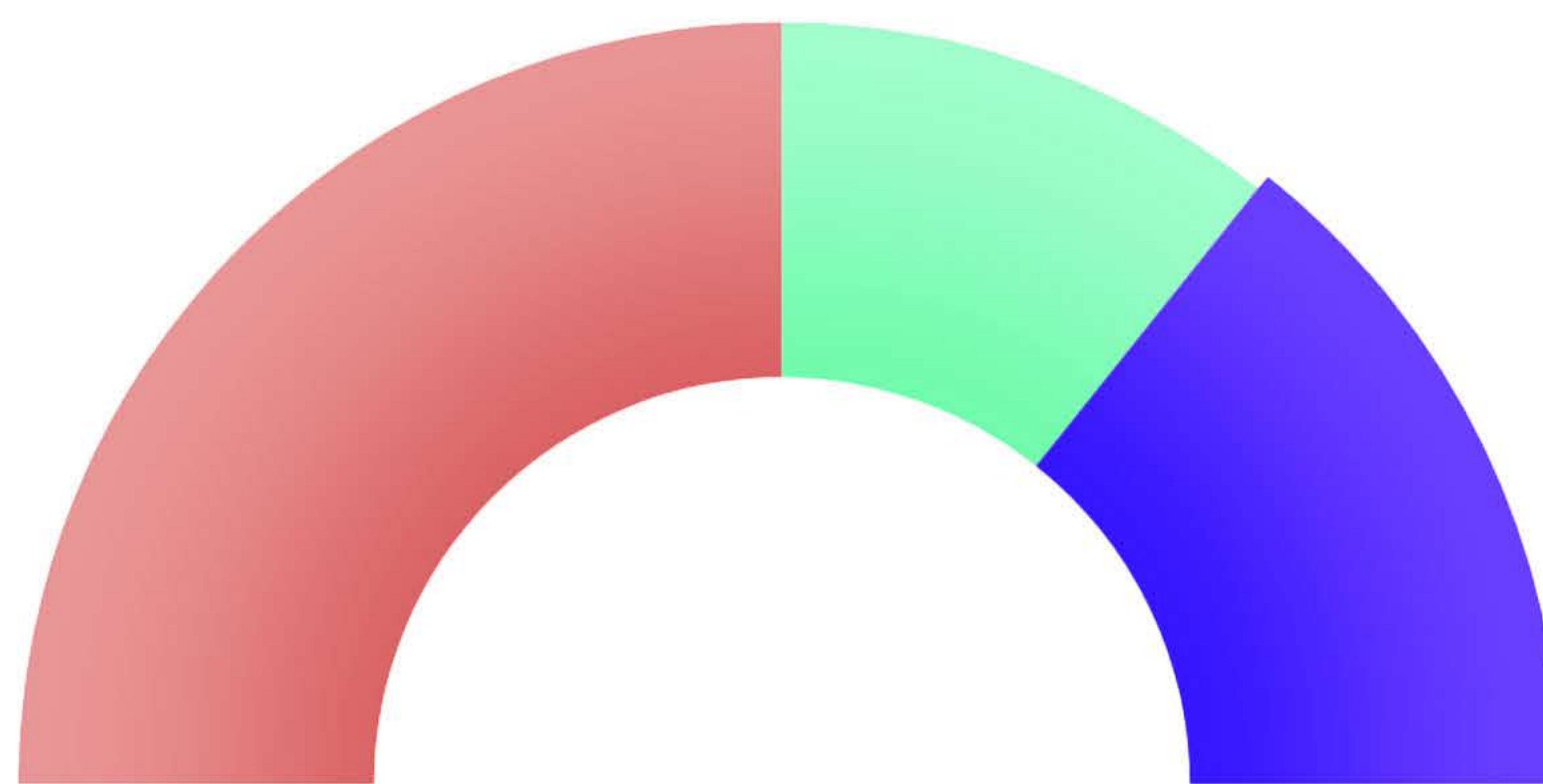
Evaluate your maturity across all critical areas.

Area	Must-Have (2 points each)	Should-Have (1 point each)
Logistics & Fulfillment	<ul style="list-style-type: none"><input type="checkbox"/> Local fulfillment and last-mile services<input type="checkbox"/> Hyperlocal, same-day, or next-day deliveries<input type="checkbox"/> Advanced delivery tracking metrics<input type="checkbox"/> Self-serve return & exchange<input type="checkbox"/> Dispute resolution dashboard	<ul style="list-style-type: none"><input type="checkbox"/> Dark stores for top SKUs<input type="checkbox"/> Automated refunds<input type="checkbox"/> B2B partner for bulk movement<input type="checkbox"/> Advanced return inwards process
Checkout Experience	<ul style="list-style-type: none"><input type="checkbox"/> Checkout funnel tracking<input type="checkbox"/> A/B test prepaid nudges<input type="checkbox"/> Auto PG switch<input type="checkbox"/> Estimated delivery date logic on PDP and checkout<input type="checkbox"/> Payment recovery for failed prepaid	<ul style="list-style-type: none"><input type="checkbox"/> Personalised UTM-based offers<input type="checkbox"/> Exit-intent offers<input type="checkbox"/> Loyalty & rewards integration<input type="checkbox"/> Headless checkout<input type="checkbox"/> Pre-checkout RTO risk logic
CRM & Retention	<ul style="list-style-type: none"><input type="checkbox"/> Monthly remarketing calendar<input type="checkbox"/> Anonymous traffic identification<input type="checkbox"/> WhatsApp catalog browsing	<ul style="list-style-type: none"><input type="checkbox"/> Multi-channel automated flows<input type="checkbox"/> AI chatbot integrations

Performance Ratings

Function-Wise Breakdown

Logistics & Fulfillment (Max: 14 points)

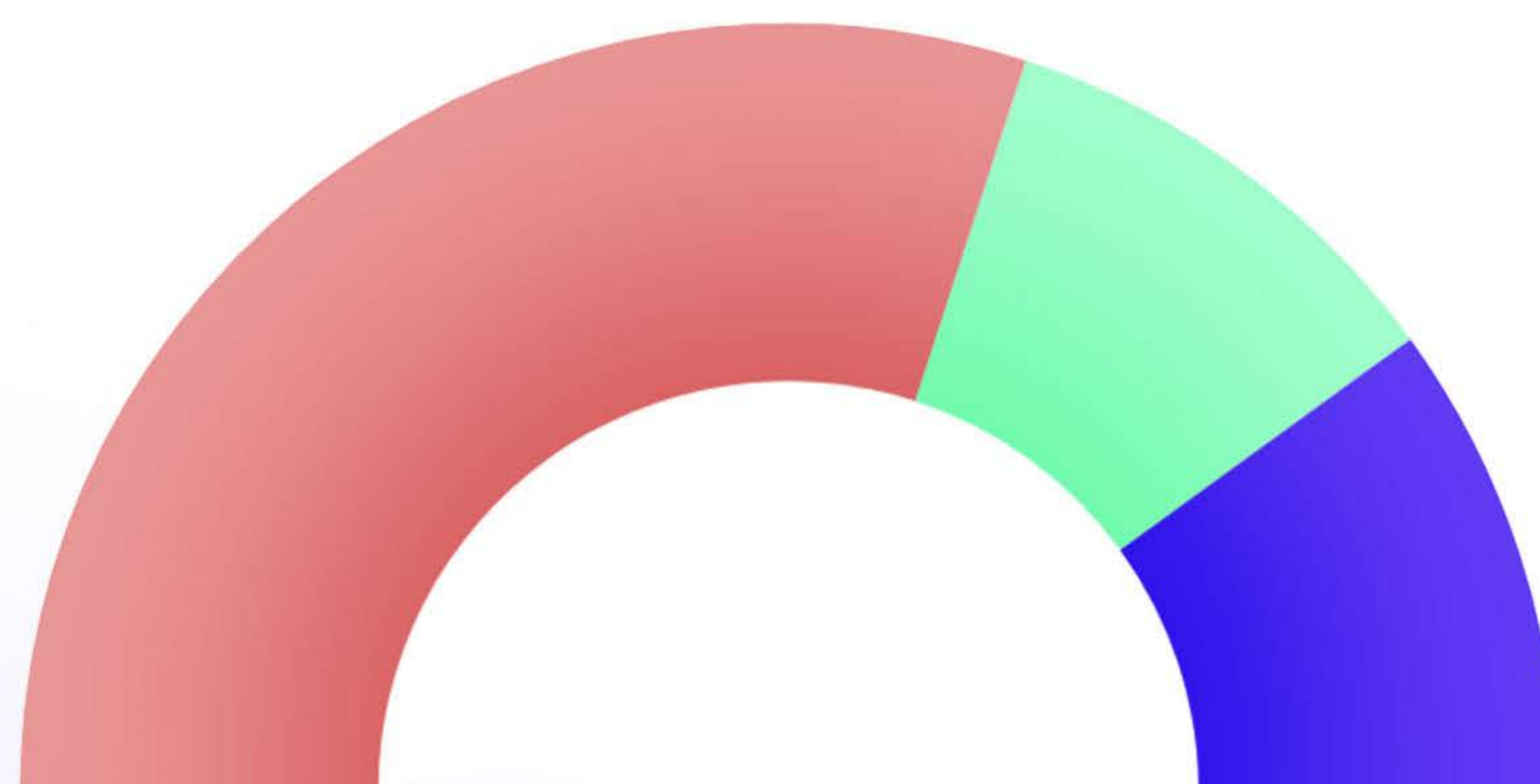


● Needs improvement: **Below 7**

● Average: **7-10 points**

● Best in class: **11-14 points**

Checkout Experience (Max: 15 points)

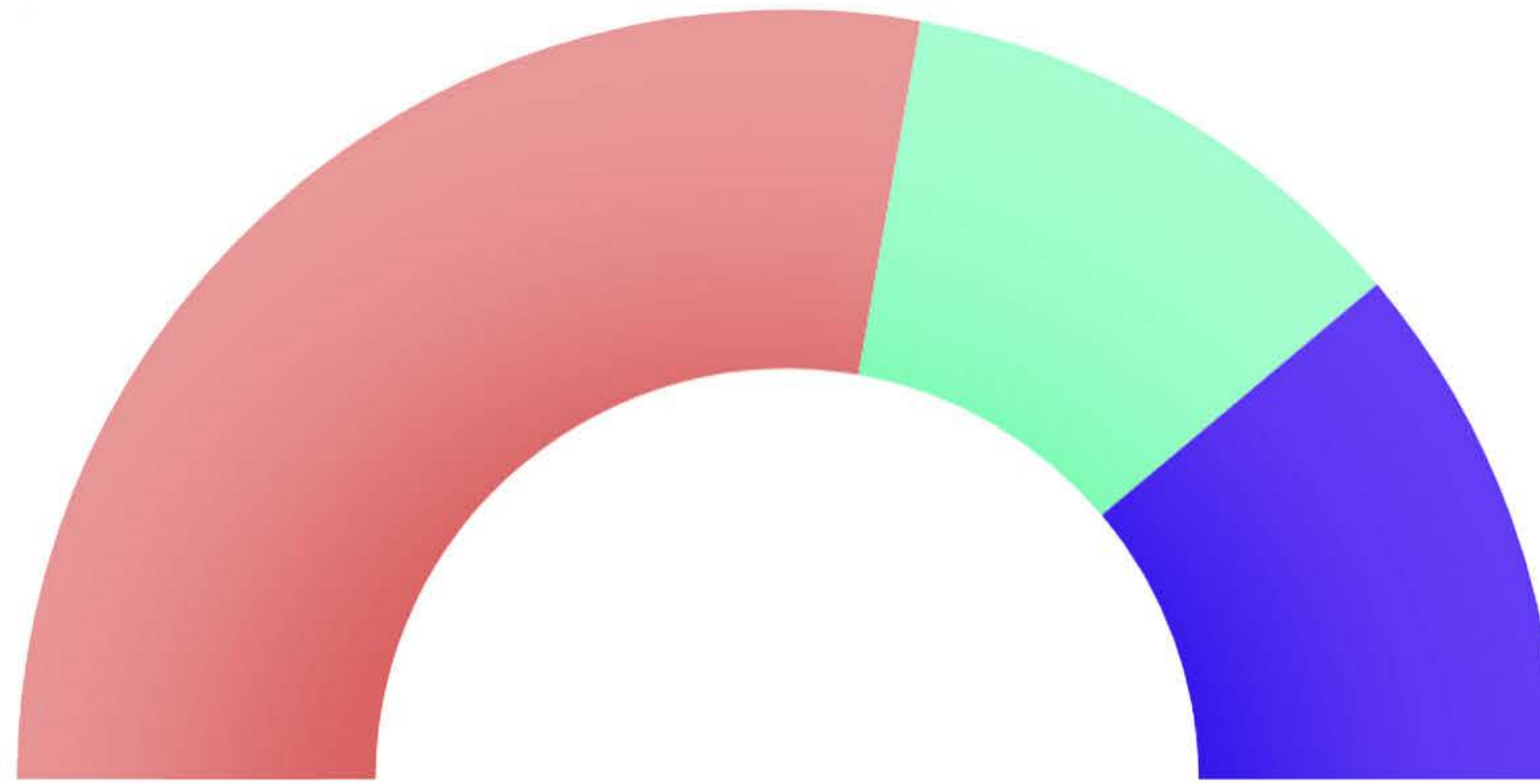


● Needs improvement: **Below 9**

● Average: **9-11 points**

● Best in class: **12-15 points**

CRM & Retention (Max: 8 points)

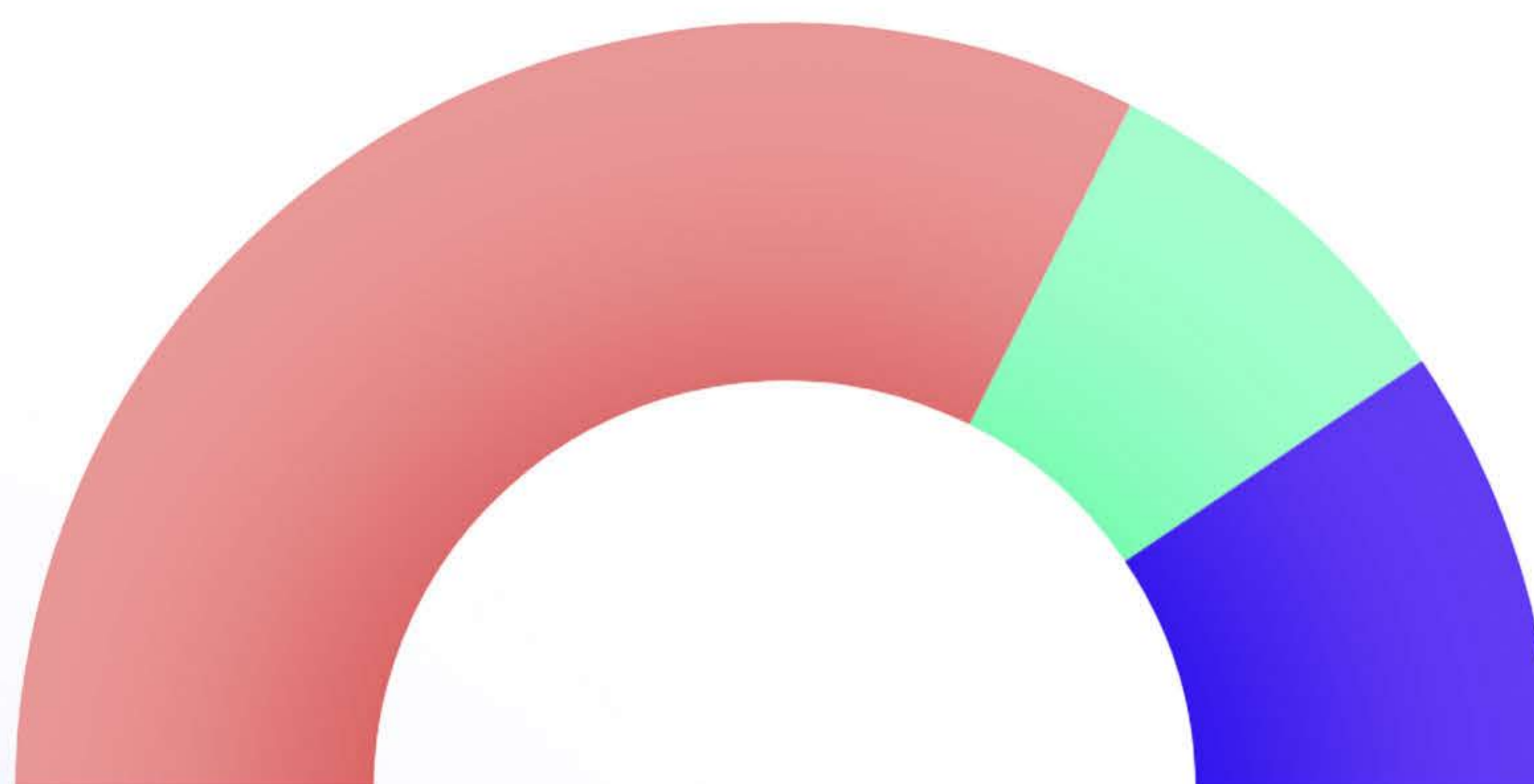


● Needs improvement: **Below 5**

● Average: **5-6 points**

● Best in class: **7-8 points**

Overall (Max: 37 points)



● Needs improvement: **Below 24**

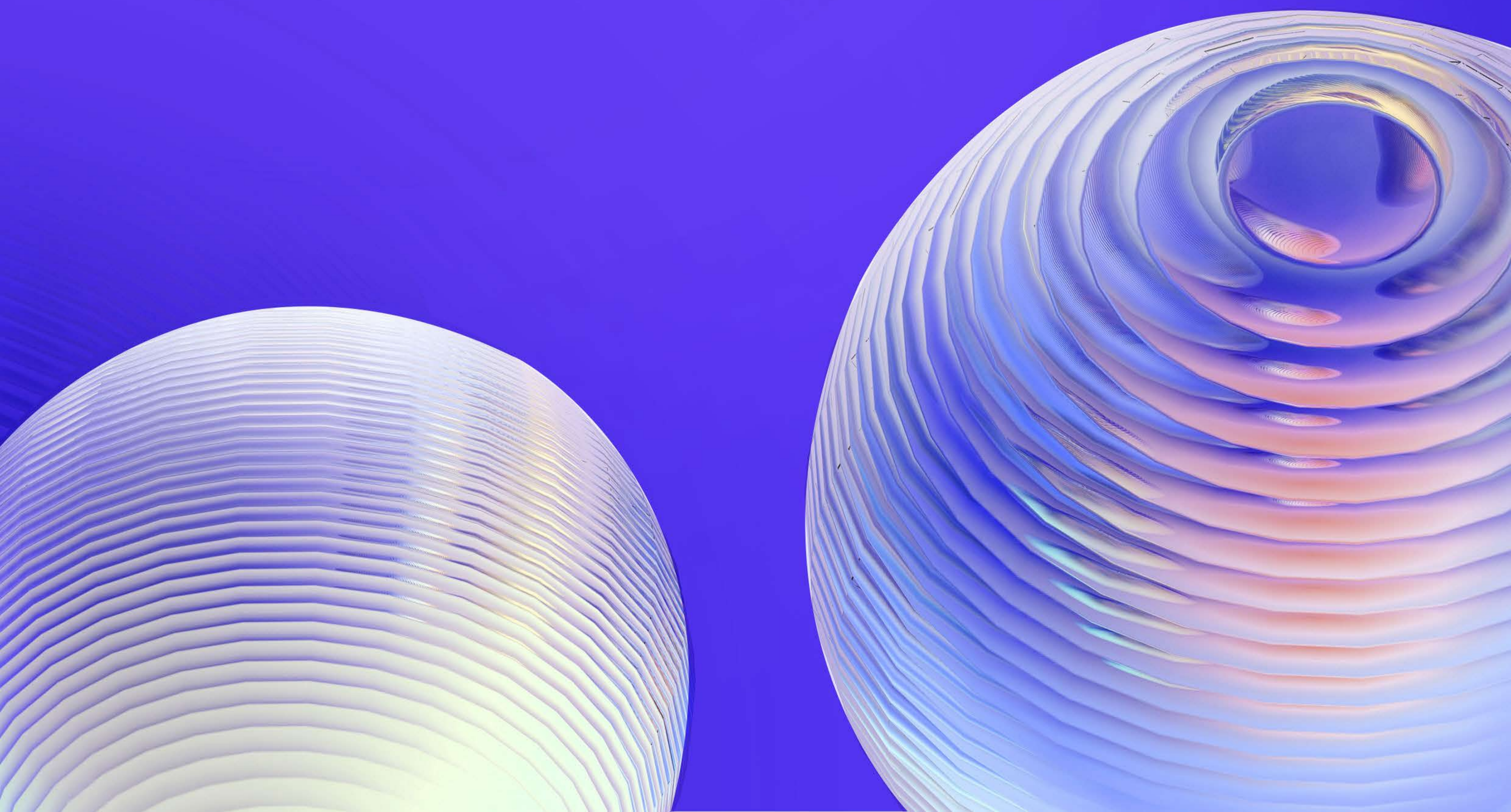
● Average: **24 - 30 points**

● Best in class: **31 - 37 points**



Playing Strategically: Entering the Optimisation Stage 20,000+ Orders/Month

You're a market player. Time to dominate your niche and build a leadership brand.



Stage 4

Leadership Stage

20,000+ Orders/Month



From market player to market leader

At this stage, your brand is trusted, recognised, and scaling at speed. The focus shifts to innovation, customer experience maturity, and consistently staying ahead of competitors through exceptional journeys, automation, and advanced analytics.



Broader industry advice

Brands at this scale must lead by example: prioritising innovation, sustainability, and customer-centric strategies. Continue investing in cutting-edge technologies, analytics, and forward-thinking logistics to maintain leadership and long-term customer loyalty. Before diving into Stage 4 Must-Haves and Should-Haves, make sure you have completed all essentials from Stage 3. If you have not reviewed the Stage 3 Playbook, you can take the Stage 3 assessment to quickly identify what is missing.



Core objectives

- Lead market trends through logistics innovation and advanced CX strategies
- Fully optimise the checkout experience to maximise conversions
- Automate deeply personalised communications at scale
- Execute predictive, loyalty-driven remarketing strategies to build lifetime value



Logistics & Fulfillment Readiness

Building logistical maturity to support **high volume** and **customer satisfaction**.



Must-Have Actions (Non-Negotiables)

1 Enrol in weight-based shipping programmes

Optimise logistics costs by participating in weight slab freezing with major carriers.

Impact: Significantly reduces average cost per shipment and prevents billing disputes.

2 Allocate shipments using performance-based carrier logic

Route shipments based on FASR (first attempt success rate), delivery %, NDR %, and TAT adherence.

Impact: Increases delivery speed and reduces RTO by leveraging smart allocation.

3 Open dark stores for hero SKUs in top metros

Maintain inventory in decentralised dark stores to quickly serve fast-moving products.

Impact: Improves same-day/next-day delivery capabilities and reduces last-mile costs.



Must-Have Actions (Non-Negotiables)

4 Build sophistication in promise logic

Show delivery timelines based on inventory availability and carrier allocation logic.

Impact: Lowers WISMO (where is my order) queries and boosts customer trust.

5 Establish processes for pickup and quality check failures

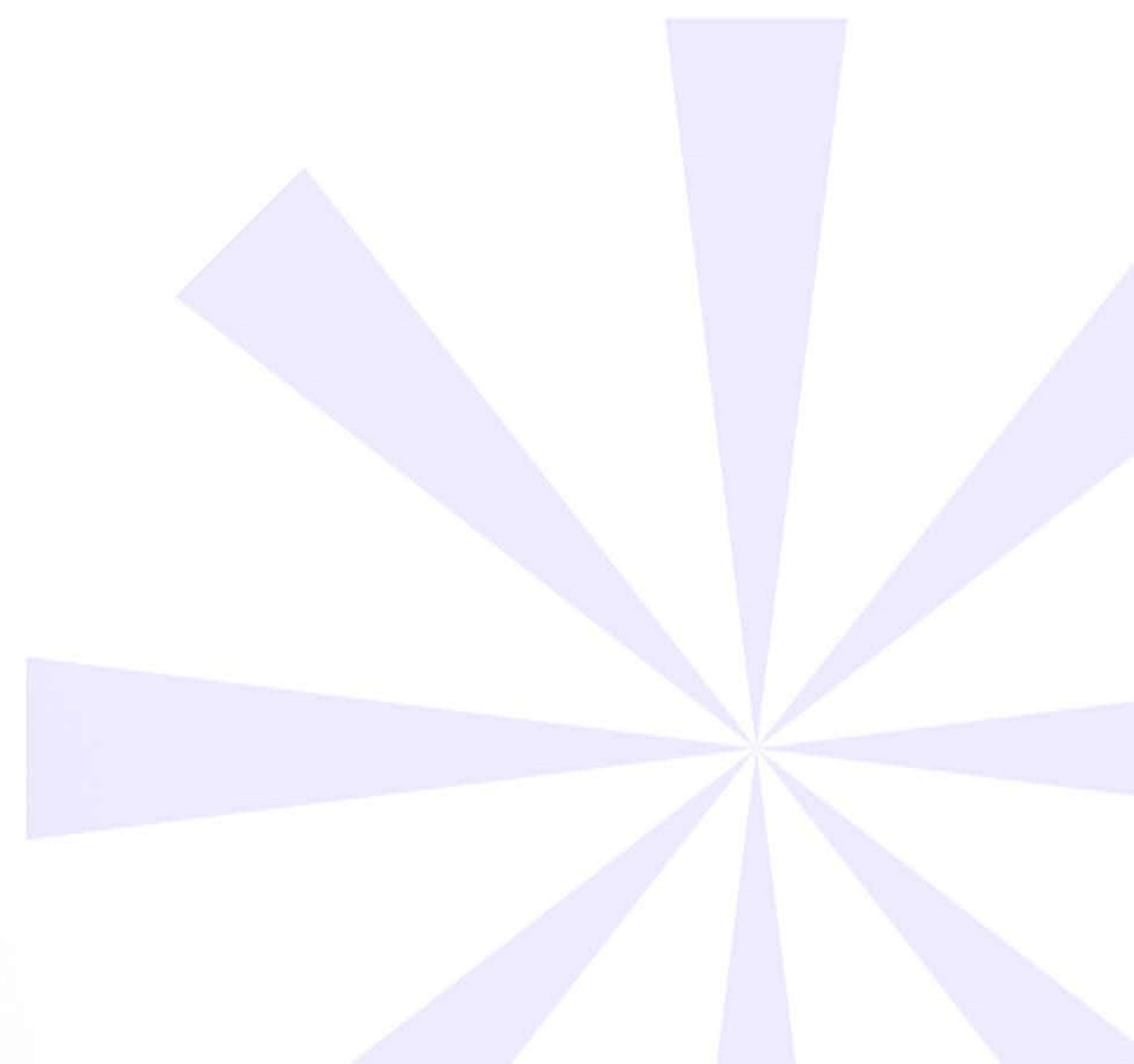
Track and address pickup attempt failures and QC rejections.

Impact: Prevents order cycle delays and enhances the post-delivery experience.

6 Track shipment ageing and delay reasons

Analyse delays, ageing shipments, RTO split across carriers, and their impact on NPS.

Impact: Offers deep operational insights to improve SLA adherence and customer satisfaction.





Should-Have Action (Easy Wins That Build Trust)

1 Start international shipping

Expand fulfillment capabilities to handle cross-border demand.

Impact: Opens new revenue channels and extends brand reach globally.

2 Enable in-store fulfillment where stores exist

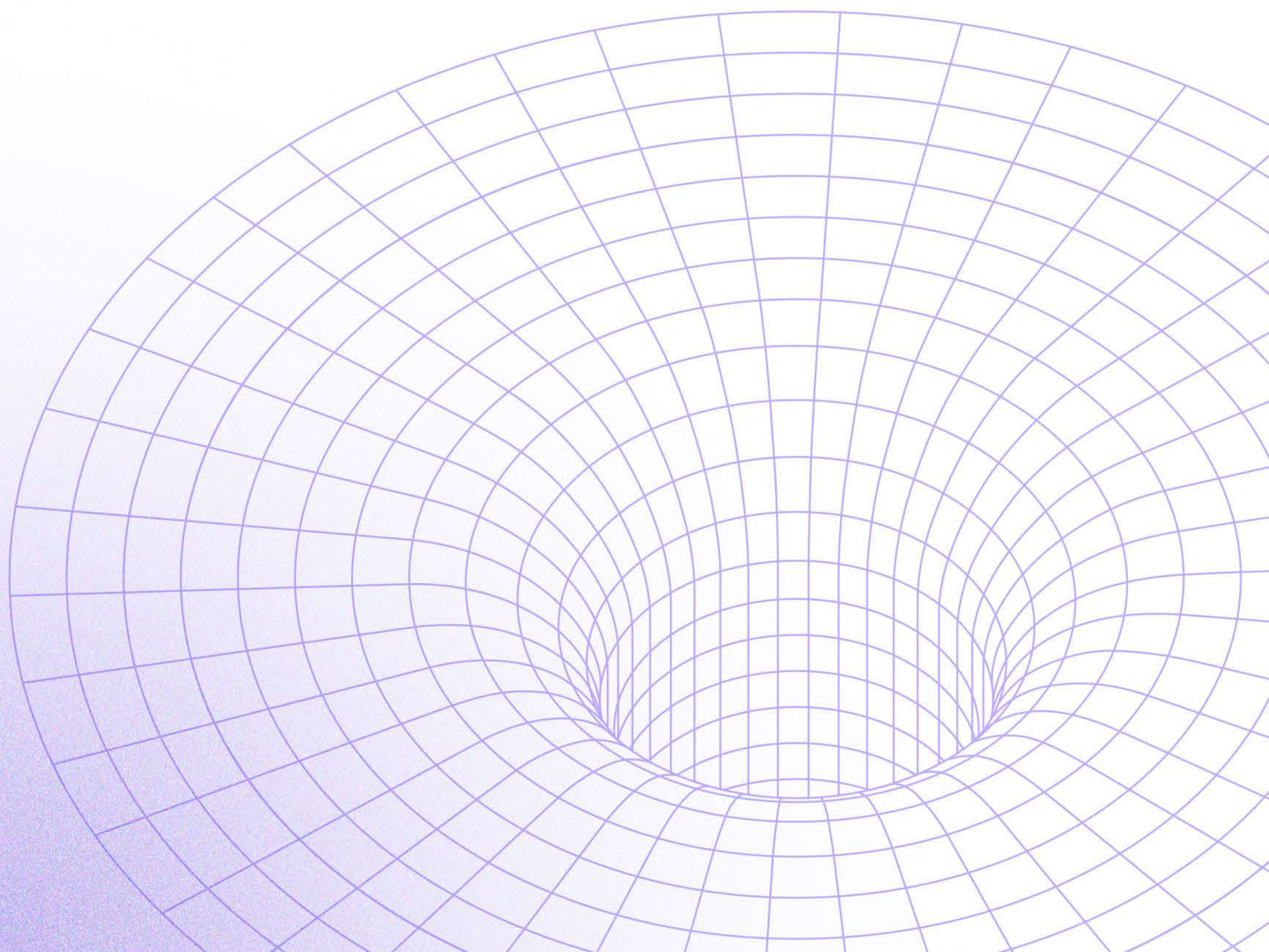
Leverage offline store inventory to fulfil online orders.

Impact: Reduces out-of-stock cancellations and improves delivery speed.

3 Benchmark operational metrics with industry peers

Track carrier performance, RT0, delivery %, and shipping costs against market benchmarks.

Impact: Keeps your supply chain competitive and operationally efficient.





Checkout Experience

Delivering **seamless, intelligent, and brand-aligned** checkout journeys.



Must-Have Actions (Non-Negotiables)

1 Track checkout funnel using GA4 or Metabase

Set up event-based tracking from login to coupon application to payment to order placement. Use Microsoft Clarity for video recordings of checkout drop-offs if required.

Impact: Reveals friction points to continuously optimise conversions.

2 Auto-trigger tiered discounts based on cart logic

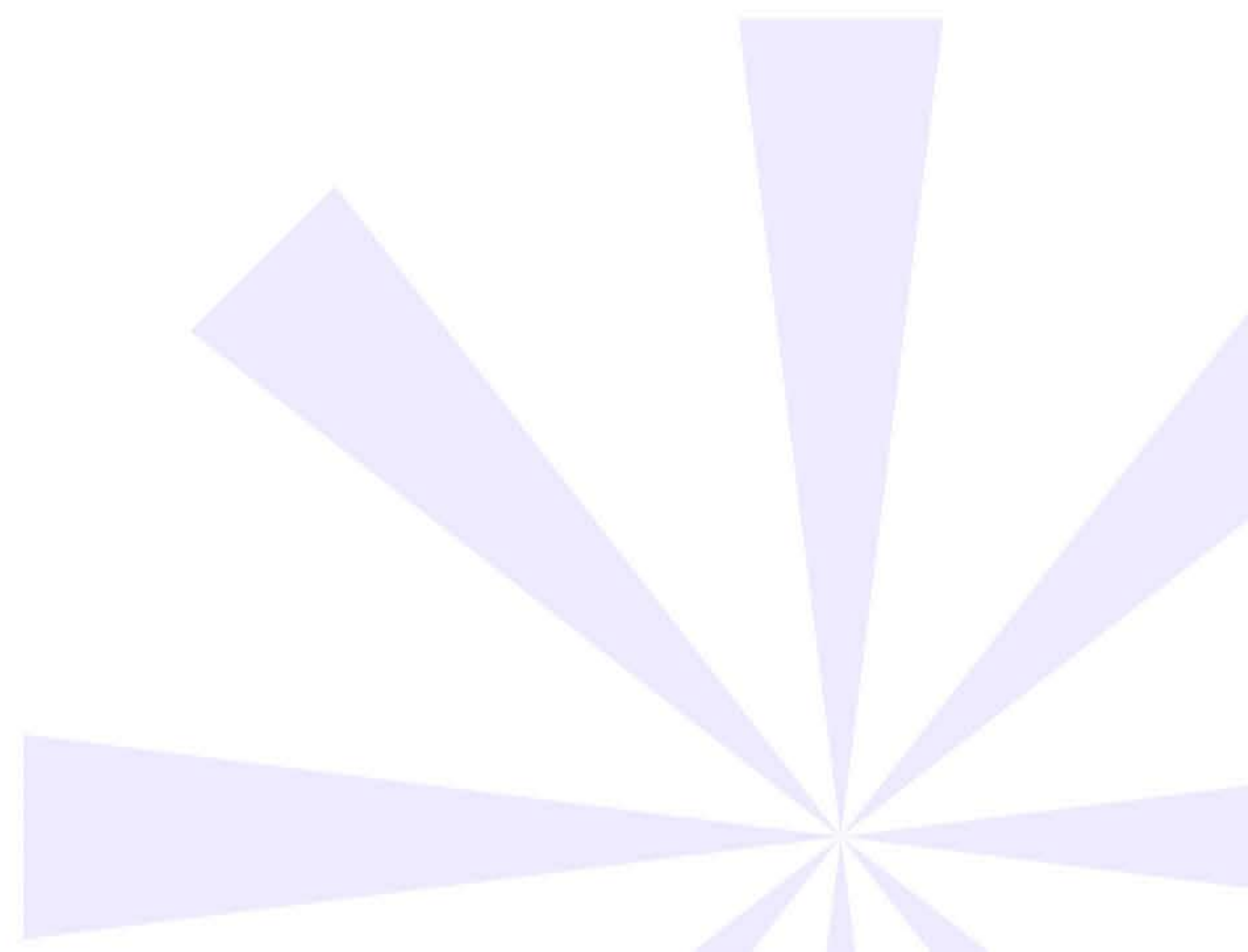
Examples: “₹250 more for a free gift” or “Double your points on prepaid orders.”

Impact: Increases AOV and nudges users towards profitable behaviours.

3 Design checkout UI as a brand canvas

Customise elements such as headers, CTAs, messaging, and backgrounds

Impact: Strengthens brand identity and trust during the purchase process.





Must-Have Actions (Non-Negotiables)

4 Integrate with loyalty and reward systems

Allow users to redeem earned points within checkout.

Impact: Drives stickiness and boosts repeat purchases.

5 Convert failed prepaid attempts to smart COD fallback

Prompt COD auto-conversion for failed payment scenarios.

Impact: Recovers revenue from high-intent users who failed to complete prepaid.

6 Auto-trigger exit intent offers on abandonment

Use exit signals to present an offer before they drop off.

Impact: Recovers users with high intent without mass discounting.



Should-Have Actions (Easy Wins That Build Trust)

1 Capture feedback on exit intent

Ask for reasons if users leave even after nudges or offers.

Impact: Surfaces actionable insights into trust or UX gaps.

2 Deploy multi-variant checkout with payment reordering

Personalise payment screen based on cart value, user UPI app, or past behaviour.

Impact: Improves checkout flow relevance and increases prepaid success.

3 Use headless checkout for PDP-to-payment journeys

Especially useful for ad campaigns or repeat purchases.

Impact: Shortens flow for high-ROI performance marketing.

4 Orchestrate cross-sell using post-checkout pop-ups

Offer complementary items after order confirmation.

Impact: Increases AOV without disrupting checkout experience.





Should-Have Actions (Easy Wins That Build Trust)

5 Trigger RFM-based offers at checkout

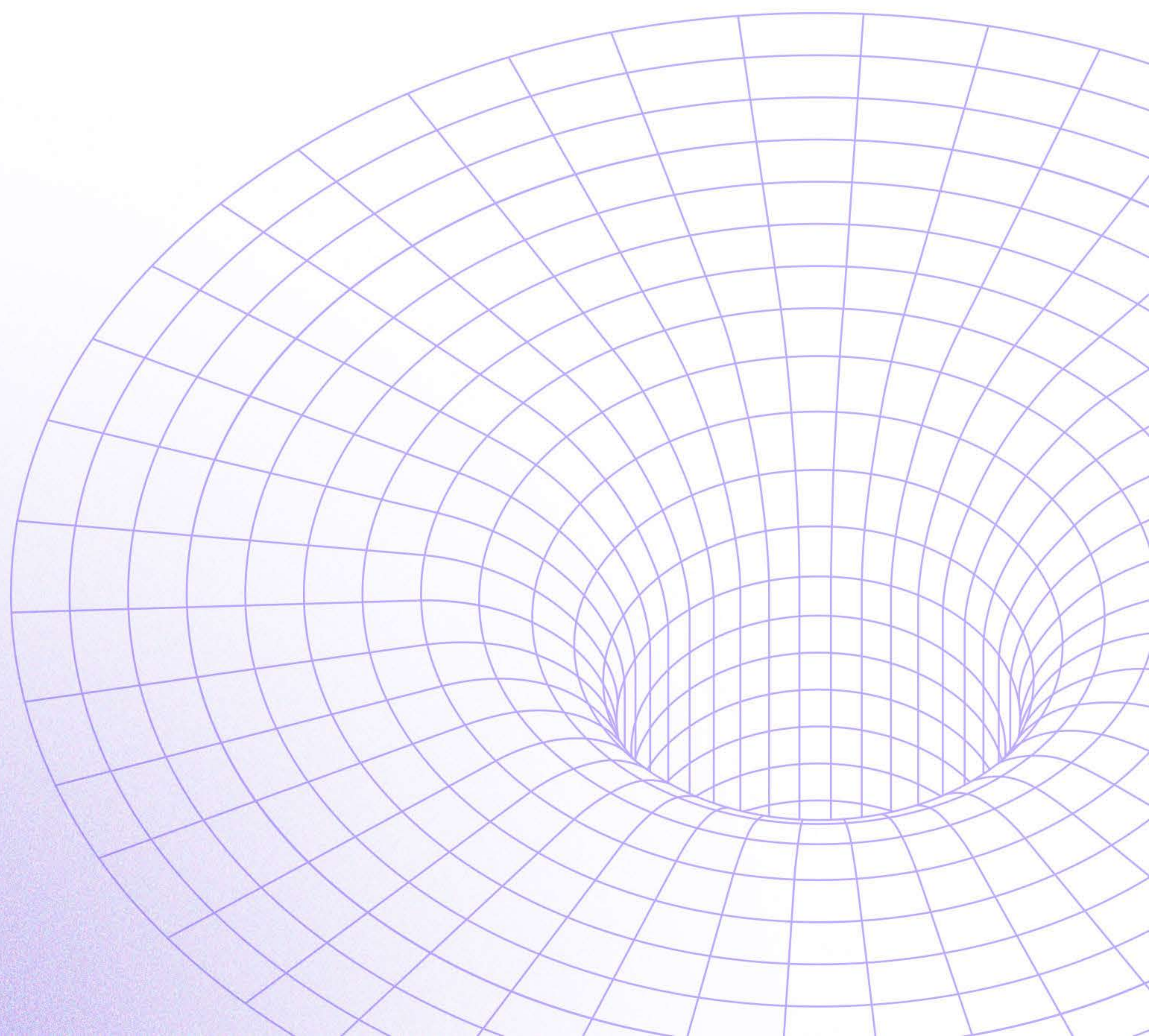
Show loyalty-based offers to high-frequency, high-value customers.

Impact: Enhances LTV and reinforces brand advocacy.

6 Integrate RTO prediction before confirmation

Apply risk-based logic to restrict COD or show alerts.

Impact: Eliminates risky orders proactively.





CRM & Retention

Crafting personalised and intelligent experiences to boost LTV.



Must-Have Actions (Non-Negotiables)

1 Adopt full omnichannel flows

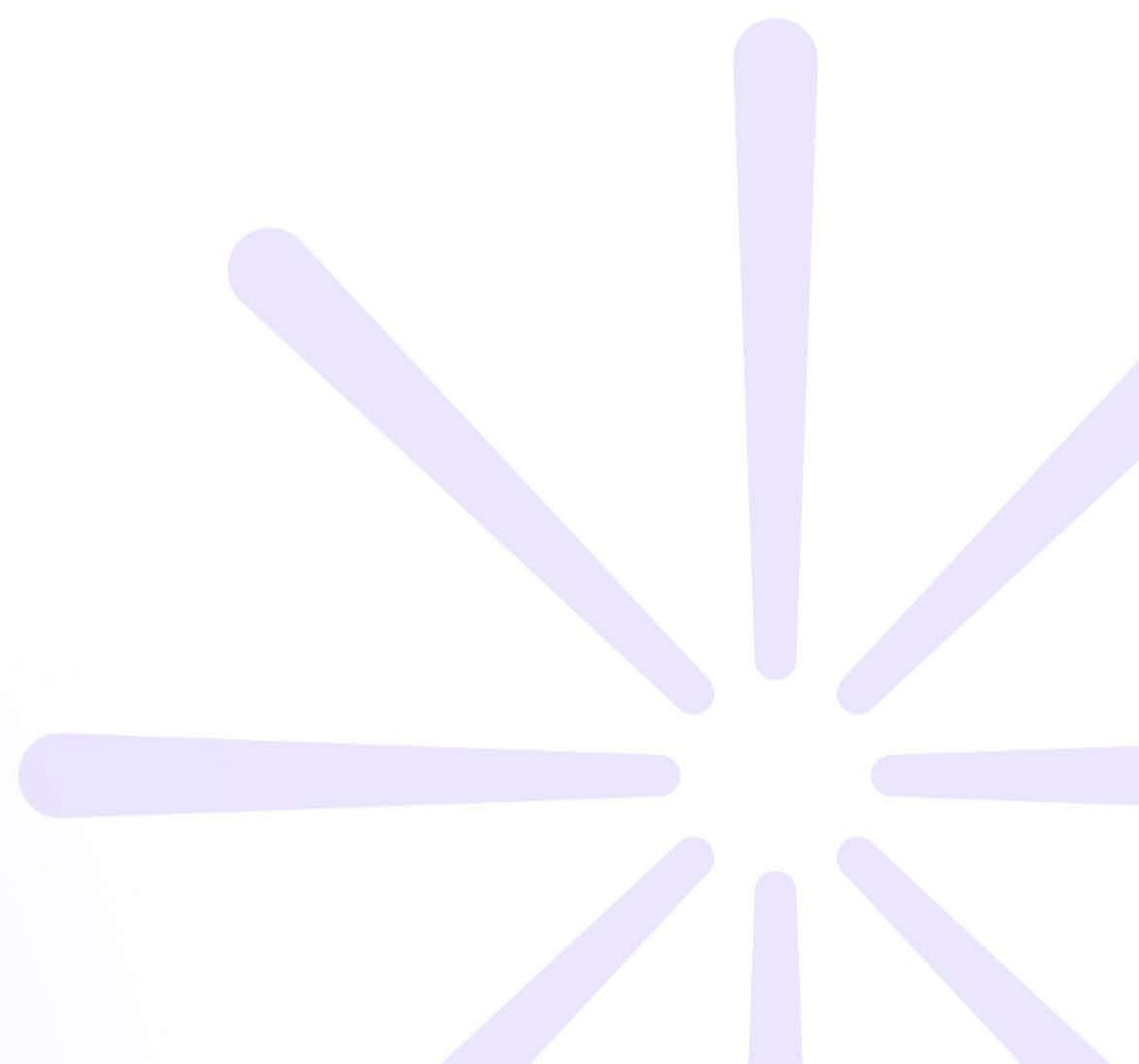
Use WhatsApp, email, push, and in-app notifications to build journeys.

Impact: Ensures high visibility and response across platforms.

2 Deploy deep audience enrichment tools

Build customer profiles with purchase frequency, cart patterns, and behaviour.

Impact: Enables personalised targeting and lookalike audiences.





Should-Have Action (Easy Wins That Build Trust)

1 Enable predictive AI-driven customer journeys

Trigger communications based on churn risk, inactivity, or cart behaviour.

Impact: Anticipates user needs and boosts retention proactively.

2 Use conversational commerce via WhatsApp

Enable product discovery, support, and ordering through WhatsApp.

Impact: Increases repeat purchase and engagement.

3 Integrate social media channels like Instagram

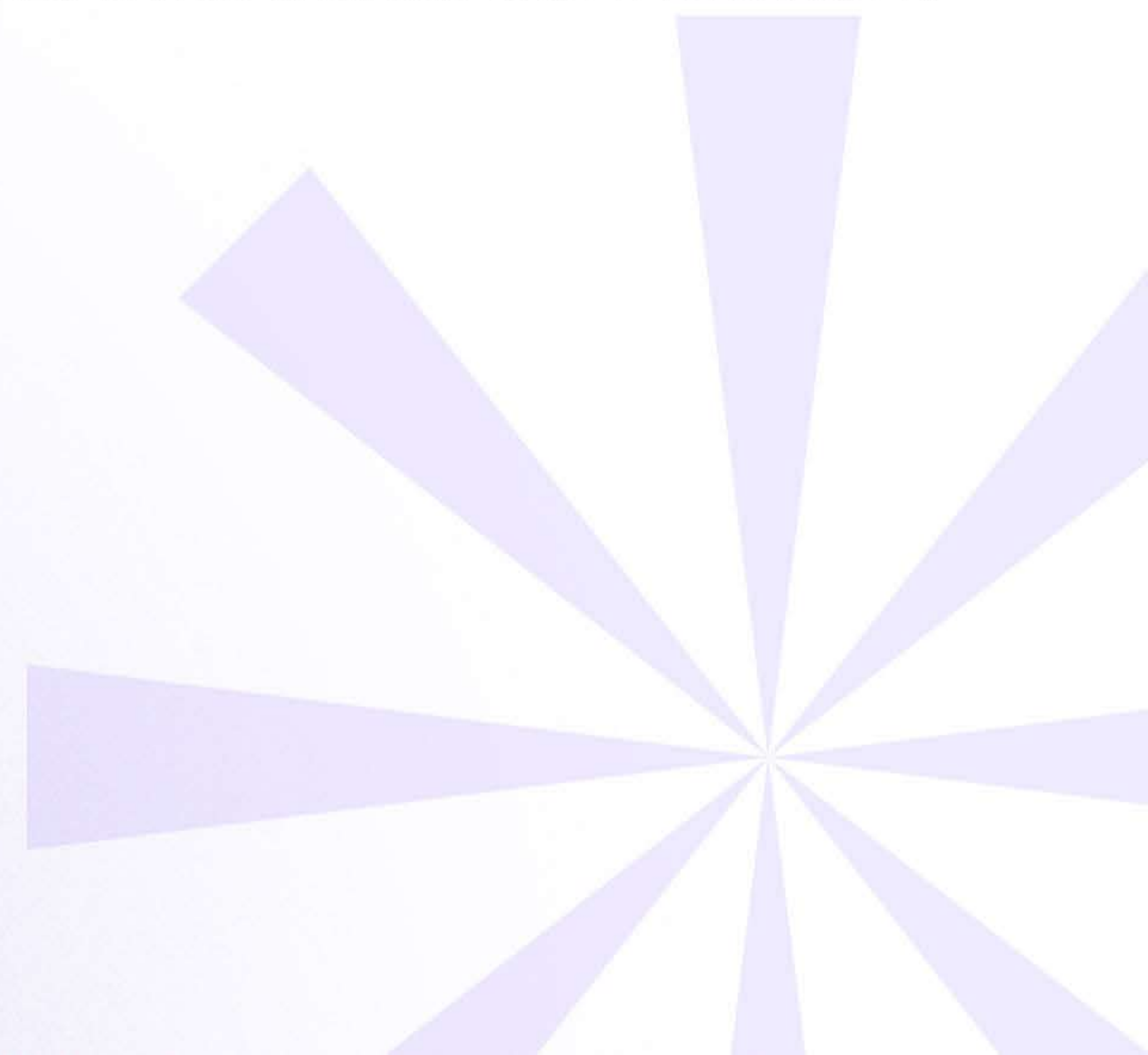
Run remarketing flows and build audience cohorts from engagement.

Impact: Leverages social behaviour to re-engage customers.

4 Automate loyalty programme journeys

Deploy triggers for point reminders, reward redemption, or milestones.

Impact: Builds long-term habit and emotional connection.



Self-Assessment & Scoring

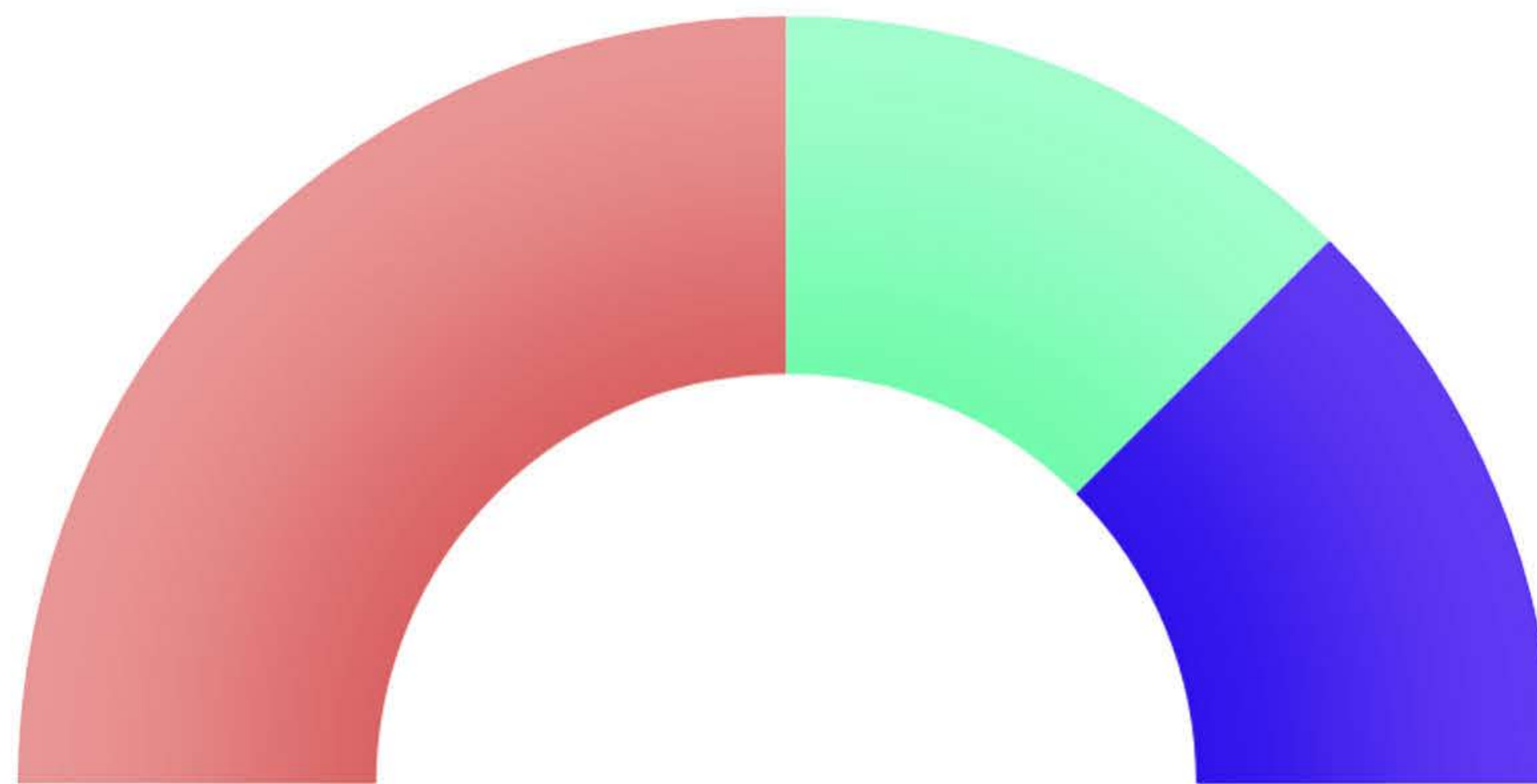
Evaluate your maturity across all critical areas.

Area	Must-Have (2 points each)	Should-Have (1 point each)
Logistics & Fulfillment	<ul style="list-style-type: none"><input type="checkbox"/> Enrol in weight-freezing programmes<input type="checkbox"/> Performance-based carrier allocation<input type="checkbox"/> Set up dark stores for hero SKUs<input type="checkbox"/> Sync inventory and carrier data<input type="checkbox"/> Activate QC and pickup failure workflows<input type="checkbox"/> Shipment ageing and FASR/NDR data analysis	<ul style="list-style-type: none"><input type="checkbox"/> Start international shipping<input type="checkbox"/> Enable ship-from-store capability<input type="checkbox"/> Benchmark against industry standards
Checkout Experience	<ul style="list-style-type: none"><input type="checkbox"/> Track checkout funnel via GA4 or Metabase<input type="checkbox"/> Apply, tiered discounts using cart intelligence<input type="checkbox"/> Customise checkout UI<input type="checkbox"/> Integrate loyalty and rewards systems<input type="checkbox"/> Trigger payment fallback to COD if needed<input type="checkbox"/> Deploy exit-intent discount nudges	<ul style="list-style-type: none"><input type="checkbox"/> Capture exit feedback before drop-off<input type="checkbox"/> Offer multi-variant checkouts<input type="checkbox"/> Build a headless checkout from PDP to payment<input type="checkbox"/> Show post-checkout cross-sell popups<input type="checkbox"/> Deliver RFM-based personalised offers<input type="checkbox"/> Pre-filter high RTO risk before checkout
CRM & Retention	<ul style="list-style-type: none"><input type="checkbox"/> Launch omnichannel flows via email, WhatsApp, and push notifications<input type="checkbox"/> Enrich audiences and build deep customer profiles	<ul style="list-style-type: none"><input type="checkbox"/> Score customers predictively and trigger engagement<input type="checkbox"/> Add WhatsApp commerce as a conversion layer<input type="checkbox"/> Run retargeting campaigns via Instagram and others<input type="checkbox"/> Automate a personalised loyalty programme

Performance Ratings

Function-Wise Breakdown

Logistics & Fulfillment (Max: 15 points)

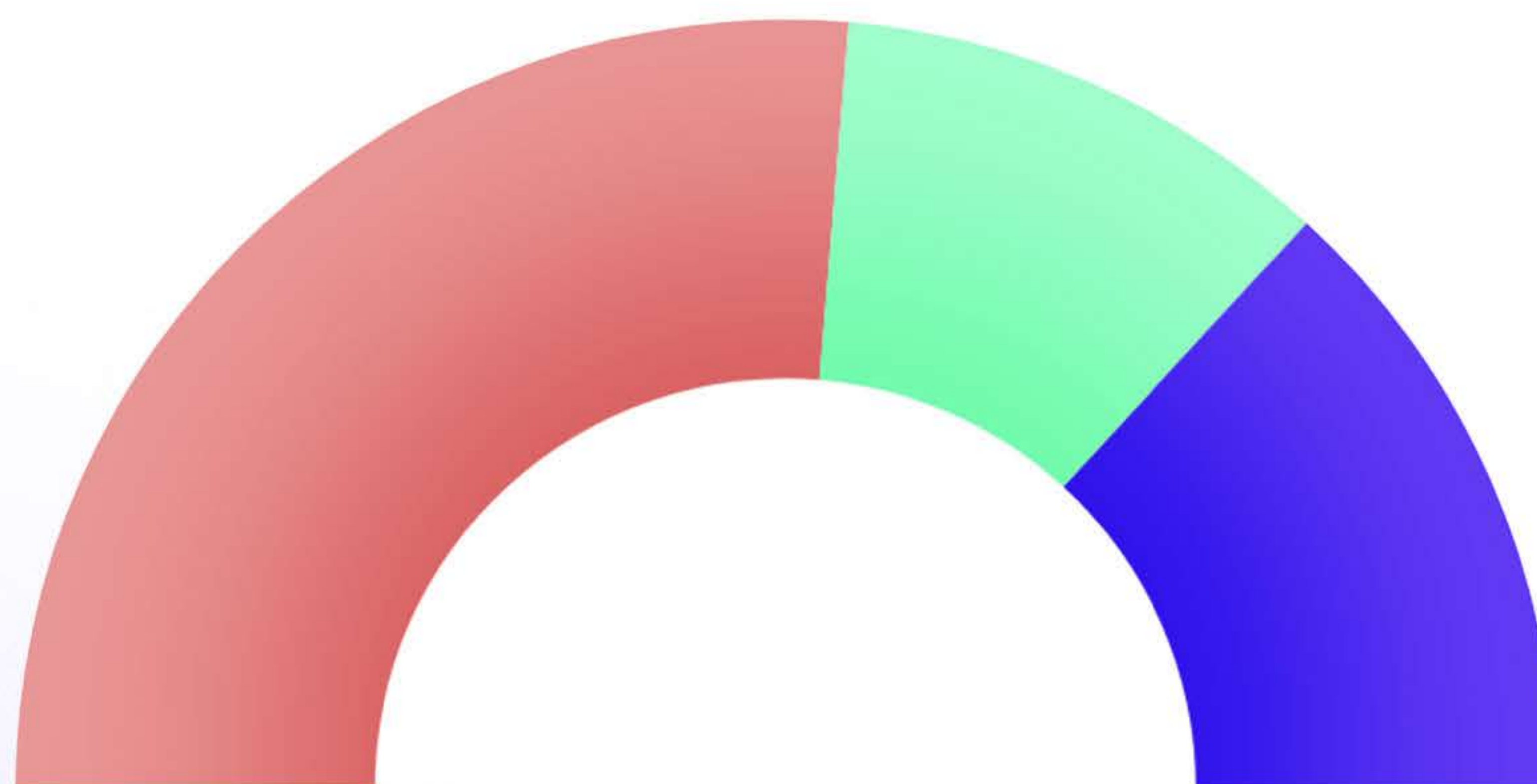


● Needs improvement: **Below 8**

● Average: **8-11 points**

● Best in class: **12-15 points**

Checkout Experience (Max: 18 points)

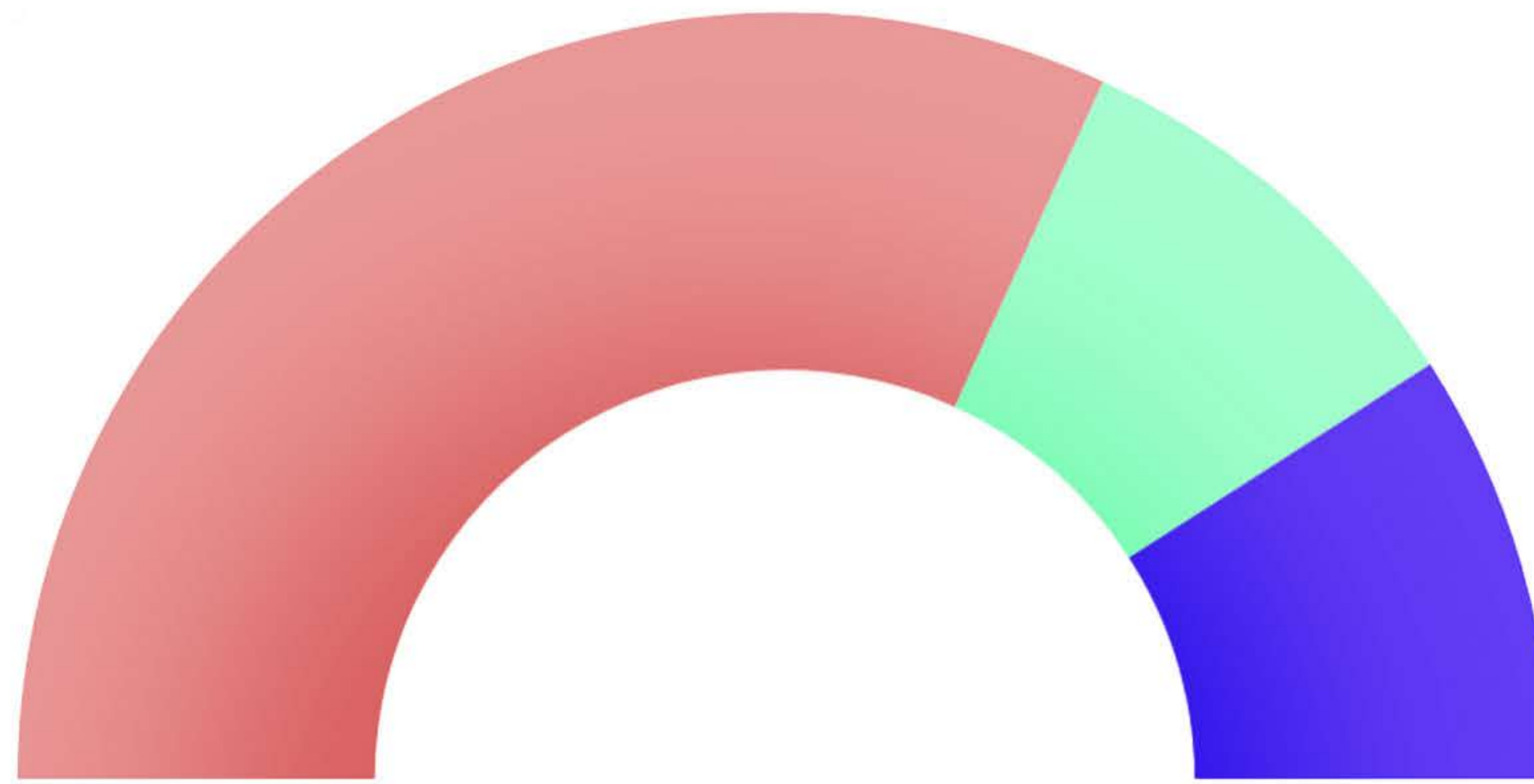


● Needs improvement: **Below 10**

● Average: **10-13 points**

● Best in class: **14-18 points**

CRM & Retention (Max: 10 points)

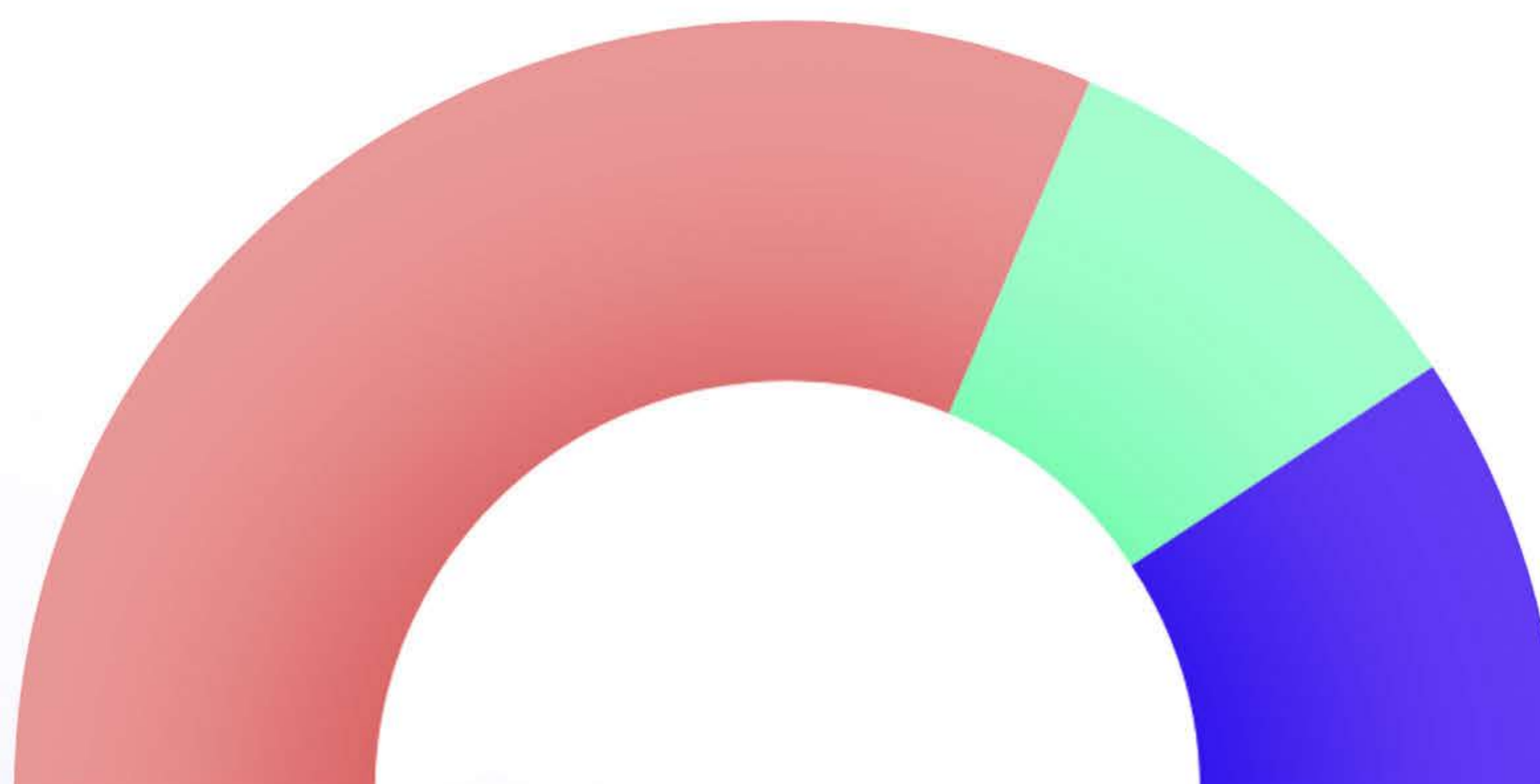


● Needs improvement: **Below 7**

● Average: **7-8 points**

● Best in class: **9-10 points**

Overall (Max: 43 points)



● Needs improvement: **Below 27**

● Average: **27-35 points**

● Best in class: **36-43 points**