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Membership Functionality Blueprint

For BigCommerce, Shopify, and Beyond

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Step 1: Define Your Membership Model

🎯 Membership Goals

- [ ] Increase MRR
- [ ] Boost Retention
- [ ] Create exclusivity
- [ ] Unlock higher CLTV
- [ ] Launch subscription-based offers

🧩 Membership Type

- [ ] Monthly subscription
- [ ] Annual subscription
- [ ] One-time lifetime access
- [ ] Free trial access

🧱 Tier Structure

- [ ] Single-tier (eg, $10/month)
- [ ] Upgrade / Downgrade paths
- [ ] Multi-tier (e.g, Silver / Gold / Platinum)
- [ ] Limited-access tiers or timed promos

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Step 2: Plan Your Member Benefits

🛍️ **Access & Visibility**

☐ Gated products / categories ☐ Early product drops

☐ Hidden bundles ☐ Member-only collections

💰 **Pricing & Perks**

☐ VIP pricing tiers ☐ Free shipping or exclusive rates

☐ Auto-renew discounts ☐ Loyalty points or credits

📚 **Content & Experiences**

☐ Private blogs, videos or downloads

☐ Training or support libraries ☐ Exclusive webinars/events

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Step 3: Set Up Technical Infrastructure

💳 Recurring Billing

- [ ] Stripe Subscription
- [ ] Authorize.net ARB
- [ ] Bold Memberships (Shopify)
- [ ] Recharge (Shopify)

🔐 Access Logic

- [ ] Shopify: Liquid code + tags
- [ ] Middleware/API for automation
- [ ] BigCommerce: Customer groups + API

🧠 Automation

- [ ] Post-purchase group assignment
- [ ] Auto-renewals & cancellations
- [ ] CRM and ERP sync
- [ ] Real-time status triggers

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Step 4: Map Email Automation Flows

✉️ Must-Have Flows

- [ ] Member onboarding
- [ ] Renewal reminders
- [ ] Expiry notifications
- [ ] Churn winbacks
- [ ] Tier upgrade suggestions

🔧 Tools

- [ ] Klaviyo
- [ ] Mailchimp
- [ ] ActiveCampaign
- [ ] Hubspot / Custom CRM

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Step 5: Lauch, Measure, Optimize

📊 Metrics to Track

- ☐ Conversion rate to member
- ☐ Churn rate
- ☐ Average order value (AOV)
- ☐ LTV (Lifetime Value)
- ☐ Email engagement by segment

🧪 Testing Ideas

- ☐ A/B different pricing tiers
- ☐ Test gated vs. public offers
- ☐ Trial-to-paid conversions
- ☐ Referral or affiliate incentives for members

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🛠️ Ready-to-Launch Checklist

Task	Complete
1. Defined membership goals & pricing	☐
2. Selected platform & billing method	☐
3. Set up product gating logic	☐
4. Connected email flows	☐
5. Launched initial test group	☐
6. Monitored KPIs	☐
7. Created feedback loop & optimization plan	☐

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🚀 Need Help?

Optimum7 builds custom membership ecosystems for ecommerce brands on BigCommerce, Shopify, Magento & more.

✅ Done-for-you implementation

✅ Recurring billing integrations

✅ Gated content & access

✅ CRM + email automation

✅ End-to-end scaling

👉 **Book Your Free Strategy Call**