SHOPIFY PLUS MERCHANDISING

The Automate-or-Keep-Human Worksheet

Ten recurring decisions, four questions each. List the merchandising decisions your team makes every week, answer the four questions for each one, and sort it into automate, automate with a guardrail, or keep human.

Your decisions

#	RECURRING MERCHANDISING DECISION	Q1 DOES DATA YOU TRUST SETTLE IT?	Q2 CAN YOU UNDO A WRONG CALL CHEAPLY?	Q3 DOES THE DATA EXIST YET?	Q4 BRAND, LEGAL, OR PRICING MEANING?	VERDICT
1		Y / N	Y / N	Y / N	Y / N	A / G / H
2		Y / N	Y / N	Y / N	Y / N	A / G / H
3		Y / N	Y / N	Y / N	Y / N	A / G / H
4		Y / N	Y / N	Y / N	Y / N	A / G / H
5		Y / N	Y / N	Y / N	Y / N	A / G / H
6		Y / N	Y / N	Y / N	Y / N	A / G / H
7		Y / N	Y / N	Y / N	Y / N	A / G / H
8		Y / N	Y / N	Y / N	Y / N	A / G / H
9		Y / N	Y / N	Y / N	Y / N	A / G / H
10		Y / N	Y / N	Y / N	Y / N	A / G / H

What your answers mean

Keep human (H): a No on Q1 or a Yes on Q4. A person decides; software carries it out.

Guardrail (G): a No on Q2 or Q3. Automate it behind a preview, a staged edit, a strength limit, and a change log.

Automate (A): Yes on Q1, Q2, and Q3, and No on Q4. Data settles it, and a mistake is cheap to undo.

If answers point two ways, the stricter verdict wins.

Run it in five steps

1. Log one week of merchandising work, task by task.
2. Answer the four questions for every task that recurs.
3. Automate the A rows first: sold-out handling, pin cleanup, schedules.
4. Switch on G rows only once preview, staged edits, and a change log are live.
5. Write the H rows down as a short merchandising policy, then review the log weekly.

Reference: 19 common tasks, already sorted

#	TASK	VERDICT	GUARDRAIL
1	Push sold-out products below in-stock ones	AUTOMATE	Preview; location scope
2	Clear pins when a product sells out	AUTOMATE	Change log
3	Re-rank collections by recent sales daily	AUTOMATE	Backtest; staged metric switches
4	Switch campaigns and drops on schedule	AUTOMATE	Change log labels each flip
5	Send policy searches to policy pages	AUTOMATE	Manual redirects win
6	Compute data badges (new, % off, low stock)	AUTOMATE	Preview
7	Watch for buried sellers and dead pins	AUTOMATE DETECTION	Flags never change live ranking
8	Give new arrivals exposure	GUARDRAIL	Pins beat boosts
9	Reorder broad searches	GUARDRAIL	Strength dial; demotion log
10	Fill recommendation blocks	GUARDRAIL	Minimum products; fallbacks

#	TASK	VERDICT	GUARDRAIL
11	Push clearance and final sale down	GUARDRAIL	Shopper intent wins
12	Order and group filter values	GUARDRAIL	Lands as an unsaved draft
13	Apply a suggested fix	GUARDRAIL	Staged edit; rollbacks shown
14	Redirect product searches to a collection	GUARDRAIL	Test against product searches
15	Decide what the ranking optimizes for	KEEP HUMAN	Test with experiments
16	Pick hero products and campaign stories	KEEP HUMAN	Check pins earn their slot
17	Set markdown depth and prices	KEEP HUMAN	A person approves
18	Write claim badges and banner copy	KEEP HUMAN	Legal review for claims
19	Decide what never gets promoted	KEEP HUMAN	Written policy

Want to see where the guardrails sit on your catalog?

Book a demo and we'll show you which of the 19 tasks we'd automate on your store, and where a person stays in charge.

Book a demo