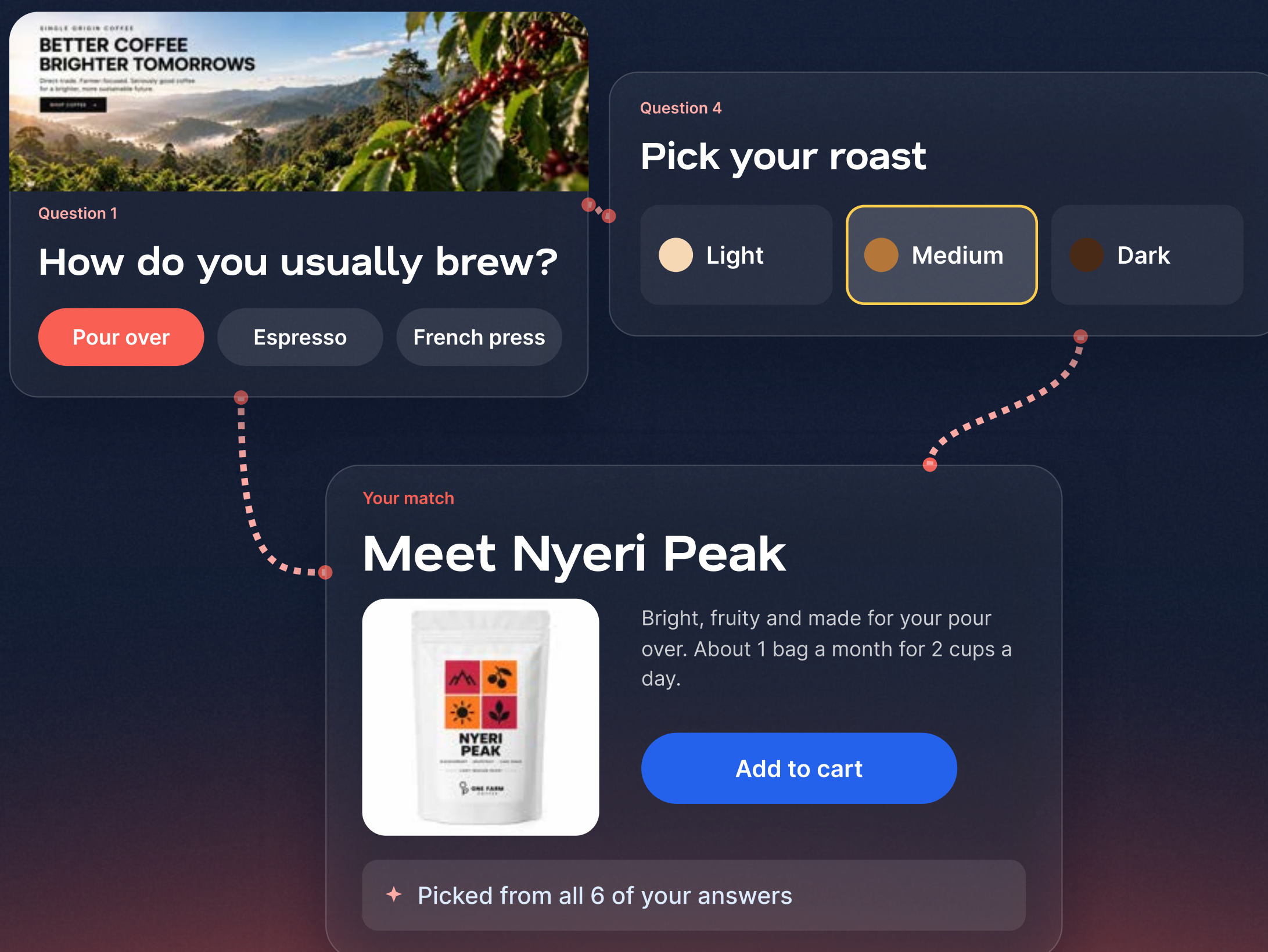


The Shopify Quiz Playbook

From first visit to repeat purchase, powered by **Octane AI Phoenix**



Question 1

How do you usually brew?

Pour over Espresso French press

Question 4

Pick your roast

Light Medium Dark

Your match

Meet Nyeri Peak

Bright, fruity and made for your pour over. About 1 bag a month for 2 cups a day.

Add to cart

✦ Picked from all 6 of your answers

- ✓ Let Phoenix build and check your quiz
- ✓ Give every shopper their perfect match
- ✓ Grow revenue with tests Phoenix runs for you

The 3 quiz mistakes most brands make

Most online stores convert under **3% of visitors**. That means at least **97 out of 100 shoppers** leave without buying.

Across all live Octane AI quizzes, **15% of shoppers** who finish a quiz place an order. So a quiz isn't a nice-to-have. It's one of the highest-leverage things a Shopify brand can build.

Yet most brands make these 3 quiz mistakes:

1 One quiz and done

A single product finder only reaches one moment in the journey. Winning brands use several quizzes, like gift finders, seasonal and educational quizzes, each built for a different goal.

2 Recommendations with no reason why

"Here are your recommendations" doesn't sell. Brands with the highest AOV use each shopper's answers to explain why every product is the right match.

3 Sitting on the data

Most brands send one results email and stop there. Top-selling brands use every answer to segment audiences, personalize marketing and shape their next product.

Dynamic Yield ecommerce benchmarks, 2026.



Marina Pérez García 
President at Octane AI

In this guide, you'll learn how to avoid all three, and how Phoenix, our new AI quiz builder, helps you build quizzes that give shoppers exactly what they need.

Octane AI quiz users

15%

average lift in shop revenue

UP TO

62%

lift in AOV

29%

average email opt-in rate



Table of contents

INSIDE THE PLAYBOOK		Build your best quiz with Phoenix17	
The 3 quiz mistakes most brands make	02	🎯 Step 1: Plan your quiz strategy	18
Phoenix: moving towards fully AI-assisted quizzes	04	🌟 Step 2: Build it with AI	21
Old way vs. the Phoenix way	06	🧠 Step 3: Design and fine-tune	23
Personalization: Built on zero-party data	07	🔗 Step 4: Connect your tools (Integrations)	28
• Personalization with products	08	✅ Step 5: Before you launch (Checklist)	29
• Smart Copy / Smart Properties	09	📊 Step 6: Improve with real data (Experiments)	30
• Image generation / Image analysis	10		
• Formulas: calculated results	11		
• Fixing quiz issues / Own your data, sync it anywhere	12		
• See what each answer earns	13		
• Talk to Phoenix via MCP	14		
• Email and SMS personalization	15		
• Proven results, now with Phoenix	16		
		Start with one quiz	31

Phoenix: moving towards fully AI-assisted quizzes

Since day one, we've kept track of every piece of feedback: what you love, what frustrates you, and what you wish Octane could do. Phoenix is the result, the most powerful version of Octane AI we've ever built. Describe the quiz you want, AI builds it from your Shopify catalog, and you refine it by chatting.



Gabriel Menezes 
CEO at Octane AI

- ✓ **AI builds it, you steer.** Phoenix builds the logic and checks thousands of paths for dead ends and out-of-stock products.
- ✓ **On-brand without developers.** Restyle every page with one prompt or match your site's theme.
- ✓ **Every sale counted.** See which orders came from your quiz, even when shoppers buy later, with every answer saved to their shopper profile.
- ✓ **The deepest quiz analytics on Shopify.** See how much every page, answer and product earns. Let Phoenix recommend what to improve next. No stats background needed.
- ✓ **Open platform.** Build on Phoenix and connect via API or MCP, or use major integrations (Klaviyo, Postscript, Attentive, Gorgias), feeding your CRM, email and SMS tools.

\$1.4B+

in revenue from Octane AI quizzes

14.9M

orders from Octane AI quizzes

190M+

quiz starts

See Phoenix in action

Book a 30-minute demo and we'll walk you through what Phoenix could build for your store.

[Book a demo](#)

★★★★★ 4.9 stars (200+ ratings)

 **shopify app store**

What you'll learn in this playbook:



Personalization built on zero-party data



Everything a quiz can do for your store



Building quizzes in minutes with Phoenix



Best practices for quizzes that convert

Old way vs. the Phoenix way

Phoenix is Octane AI’s new AI quiz builder. It handles the hard parts of running a quiz, from building it to making it better every month.

	THE OLD WAY	THE PHOENIX WAY
Building	Hours writing questions and rules by hand	Share your plan or describe it, and AI builds the whole quiz
Logic	A rule for every answer combination	AI sets up all the logic for you
Design	Custom code or a developer for anything on-brand	Match your site’s look, or restyle every page with one prompt
Checking	Clicking through every path yourself	AI flags dead ends and out-of-stock products before shoppers see them
Results	The same generic results page for everyone	Every shopper sees why each product fits them
Insights	Basic totals	See what each answer earns, and ask AI what to fix
Improving	Rarely, because testing takes time	AI suggests tests and publishes the winner

See the difference

THE OLD WAY

Build every page and rule by hand

When these conditions apply:

All of the following are true

Any of the following are true

Which sounds like your skin on a random Tuesday?

is Shiny zone by 2pm or Tight after washing

AND

Any of the following are true

What is your biggest skin goal right now?

is Stay shine-free all day or Boost hydration

Hours of manual work for one quiz

Every path needs its own rule

Limited design without custom code

A developer for anything custom

THE PHOENIX WAY

Describe it, and AI builds it

Create this quiz

Build a skincare routine quiz from my product sheet. Ask about skin type first.

Done. I built 5 questions, an email opt-in, a loading page and 4 results pages, each with its own products.

Checked every path - 0 problems

Ask AI to create or modify...

1/6

Which sounds like your skin on a random Tuesday?

Shiny zone by 2pm, we call it dewy

Comfortable, does its own thing

Tight after washing, kind of over it

Gets mad if I so much as look at it

AI handles the whole build

No code or developer needed

Redesign every page with prompts

Issues flagged before shoppers see them

See what Phoenix could build for your store

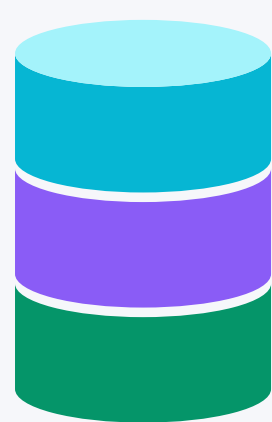
Book a 30-minute demo with the Octane AI team.

Book a demo

Personalization: Built on zero-party data

Octane AI collects what shoppers tell you, not what they browse. Every answer lands on a shopper profile you can filter into segments and market to later.

Zero-party data is:



Accurate

It comes straight from the shopper.

Owned

A brand keeps the data forever.

Builds trust

It provides value and builds relationships with shoppers.

What you can do with Octane AI

- ✓ Detailed analytics down to the revenue per quiz or full profile for every shopper – answers, visits, orders in one place.
- ✓ Cookie-independent: 100% of user answers saved; privacy applies to PII data

When a brand already knows what a shopper wants, because the shopper **said so**, marketing doesn't have to guess or push.

← People / visitor-9529699bcf43@example.com

Profile

Sync to Shopify
Export this person

visitor-9529699bcf43@example.com

Quiz sessions
1
1 completed

Quizzes taken
1
of 2 published

Orders
1
last on Sep 7

Spent
\$59.00
after taking a quiz

Bounce Skincare Routine Quiz
Completed

Latest result · v52 · Sep 6, 2026 · Results link

ANSWERS

skin_type

Comfortable, does its own thing

skin_concern

Breakouts that show up uninvited

under_eyes

Could use a little de-puffing

sun_exposure

Basically a vampire

steps_count

One step

Orders after a quiz

Order #1767
Matched by email
\$59.00

Sep 7, 2026 · after the Bounce quiz

Total spent
\$59.00

Orders count for up to 90 days after a quiz, at the amount paid at checkout.

Example of a shopper profile on Octane AI



“We never want to be seen as salesy. Marketing is just education.”

Desiree, ND Advisor at Eversio Wellness

Octane AI · The Shopify Quiz Playbook

7

Personalization with products

The right products for each shopper

Phoenix looks at every answer together, so each shopper gets products picked for them.

Picture two shoppers taking a **skincare quiz**. Both have oily skin and stick to one step. Shopper A just had a breakout. Shopper B’s skin feels dry.

Their answers	 Shopper A	 Shopper B
Skin type	Oily	Oily
Same		
Main complaint	Breakout	Feels dry
Different		
Routine size	One step	One step
Same		

Different products for each

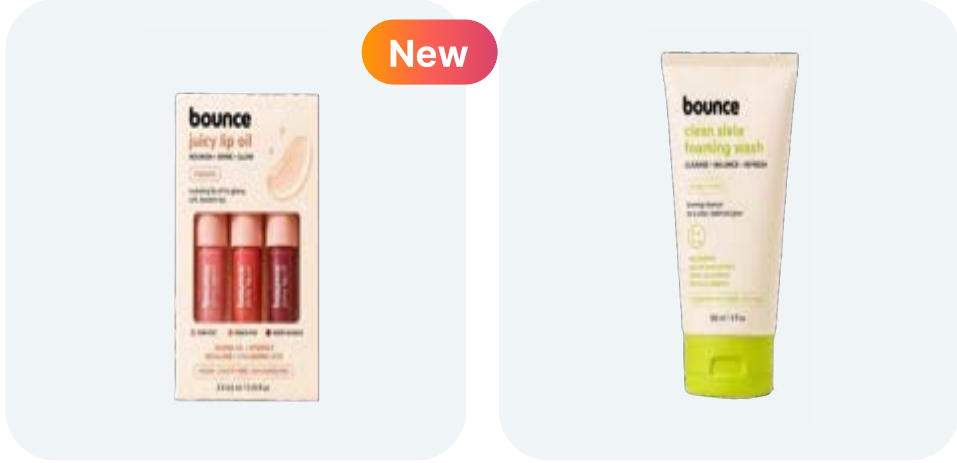
You decide which answers matter and how products should be matched. Phoenix builds all the logic for you and keeps it in sync with your Shopify catalog, so every shopper gets a result made for them.

Gentle routine



Why: oily skin with a fresh breakout

Stronger routine



Why: oily skin that also feels dry

Phoenix reads all three answers together and builds each result from there. Change one answer and the products change with it. What used to require a developer now happens automatically.

Personalization with text

Smart Copy

Results page text references what a shopper answered. Instead of a generic “here are your recommendations,” every shopper reads why this routine fits them.

Skincare quiz results page.

Smart copy

Explain why this routine suits their skin type (answer to question `{{skin_type}}`) and how it helps with their main skin goal from question `{{skin_concern}}`. Include their answer to question `{{steps_count}}` and explain how the recommended products fit their chosen routine steps.

A

B

A Shopper A

Oily Breakout One step

Calm skin, fewer breakouts.

Your skin gets **shiny by 2pm** and **just broke out**, so we kept this to **one gentle step**: a salicylic gel that clears pores without drying you out. **New to actives?** Start every other night.

B Shopper B

Oily Dryness One step

Less shine, no tight feeling.

Your **T-zone shines** but your **cheeks feel tight**, so this **one step** balances oil while it hydrates. You’ve **used actives for years**, so the stronger serum goes straight in.

Same quiz, same results page, same layout. **Smart Copy** writes the supporting text from each shopper’s answers, so nobody reads a line that wasn’t meant for them.

Smart Properties

Want to go further? Smart Properties work the same way, but you can use them anywhere on your results page, including custom sections, and they can show images and scores as well as text. In this scorecard, each row reads one answer, sets a level and writes a line just for that shopper.

WHAT FEEDS EACH ROW

Skin type: Oily → Oil control

Main complaint: Breakout → Breakout care

Steps: One step → Routine size

Not asked → Safe fallback

A Your skin scorecard

Shopper A

OIL CONTROL

HIGH NEED

Your skin **runs oily**, so every pick is light and oil-free. Nothing here adds shine by 2pm.

BREAKOUT CARE

FOCUS

With a **fresh breakout**, a 2% salicylic gel clears pores. Spot-treat it; scrubbing only makes it angrier.

ROUTINE SIZE

ONE STEP

You do **one step**, so the cleanser carries the actives. Add a second step once your skin settles.

Octane AI · The Shopify Quiz Playbook

9

Image generation

Ask Phoenix to **create images** for your answers, page backgrounds or icons, in any style you want. Already have your own images? Phoenix can **resize** them to fit too.


Phoenix AI


Use this image as a style reference.
Create a cat image for each answer in question 2.

✓ Generated 3 images

Done. 3 cat images in the same style, one per answer.

2/5

How old is your cat?


Under 1 year


1–7 years


8+ years

Image analysis

Let shoppers **upload a photo**. Phoenix figures out what matters, like skin tone or a dog's size, and uses it to pick products, just like any other answer.

YOUR RESULTS

Your selfie analysis

We looked at your tone and undertone to find the shades that will look most natural on you.



YOUR ANALYSIS

SKIN TONE

Medium

UNDERTONE

Warm

Your medium complexion has a warm, golden undertone. Your skin looks smooth and warmly luminous.

COMPLEXION

Medium with a warm undertone

SKIN LOOKS

BEST SHADE FAMILY

YOUR RECOMMENDATIONS

Here's your shade match

A skin tint and concealer chosen to blend seamlessly with your complexion for a natural, radiant finish.



Skin Tint SPF 20

US\$36.00

SHADE

Fair Cool Light Neutral Medium Warm **Tan Warm**

Deep Neutral Deep Cool

Add to cart



Radiant Concealer

US\$26.00

SHADE

Fair Neutral Light Neutral Medium Neutral **Tan Neutral**

Deep Neutral

Add to cart

With image analysis you can:

- ✓ Recommend products based on the **shopper's photo**
- ✓ Calculate **results** using formulas (portions, sizes, scores)
- ✓ Build **complex logic** directly from the image, without asking shoppers extra questions.
- ✓ Personalize copy and **display the uploaded photo** later in the quiz

One photo can replace five questions shoppers struggle to answer.

Phoenix saves what it learns like any other answer, so you can track it in Analytics and use it in Shopify, email and your other tools.

Formulas: calculated results

When a recommendation needs a little math, use Formulas based on the quiz taker's answers. For example, you could output the cat's daily food amount and how many bags will last a month.



Formula

**You describe it, Phoenix
does the math.**

Tell Phoenix what you want to calculate, and it builds the formula for you. If it needs more details, like the size of a bag, it will ask.

What you can do with Formulas

- ✓ **Get the numbers right.** Work out portions, sizes or quantities from the shopper's answers.
- ✓ **Set the quantity for them.** The recommended amount goes straight into the product's quantity selector, ready to add to cart.
- ✓ **Calculate from a photo.** Combine formulas with image analysis, like estimating a cat's weight from a photo and working out its daily portion.
- ✓ **Show it or send it.** Display the result on the results page, or send it to your email platform to share in a follow-up.

Fixing quiz issues

Phoenix checks its own work. It walks thousands of paths a shopper could take, flags what's broken and fixes it, turning a multi-week email thread into a 10-minute chat.

[Find issues](#)

✓

Checked all 80 answer combinations

2 problems

2 warnings

0 notes

⊘

Nobody can reach the "Dry Routine" page

⊘

The answer "dark_spots" was deleted, and 2 rules still name it

⚠

Some shoppers finish on the "Loading Page" page, before any results page

+ 1 more

fix it
in chat

Issues review · Phoenix AI

Help me fix: No combination of answers leads to "Dry Routine": every rule pointing at it can never match and...

✓

What I did · 6 steps

Fixed. Both rules for "Dry Routine" pointed at the deleted answer "dark_spots", so they could never match. I moved them to "Tight after washing", and shoppers with dry skin now reach the page.

Common issues Phoenix's AI can easily fix

- ✓ **Dead ends:** A shopper finishes the quiz, and there's nothing to buy.
- ✓ **Products that could never be recommended,** no matter what a shopper answers.
- ✓ **Catalog rot:** Archived, deleted or out-of-stock products still sitting in the rules, quietly getting recommended.
- ✓ **Manual QA that doesn't scale:** One merchant calculated over 1,000 possible outcomes by hand. That's more than 10 hours of work for a single quiz.

Own your data, sync it anywhere

Once shoppers take your quiz, their answers can flow straight into your CRM and marketing tools like Klaviyo, so every message reflects what they told you.

Full documentation at developers.octaneai.com.

- ✓ **Real-time triggers (webhooks):** get notified the moment a shopper starts, finishes or leaves a quiz, and send the right message automatically.
- ✓ **Flexible, secure API:** connect in-quiz events like add-to-cart to your own setup, with scoped API keys and permissions so each tool only gets the access it needs.

See what each answer earns

- Phoenix shows you exactly which orders came from your quiz, and how. Shoppers who buy later, even on another device, are still linked through the email they gave in the quiz. Every number is explained, from the whole quiz down to a single shopper.
- ✓ **Where shoppers drop off:** see which question loses the most people and the different paths they take through your quiz.

✓ **How the quiz drives sales:** see what shoppers bought straight from their results, what they bought later, and what else they bought in your store, plus how long they take to buy.

✓ **What every answer and product earns:** conversion, opt-ins and revenue for each answer, and how each product was bought.

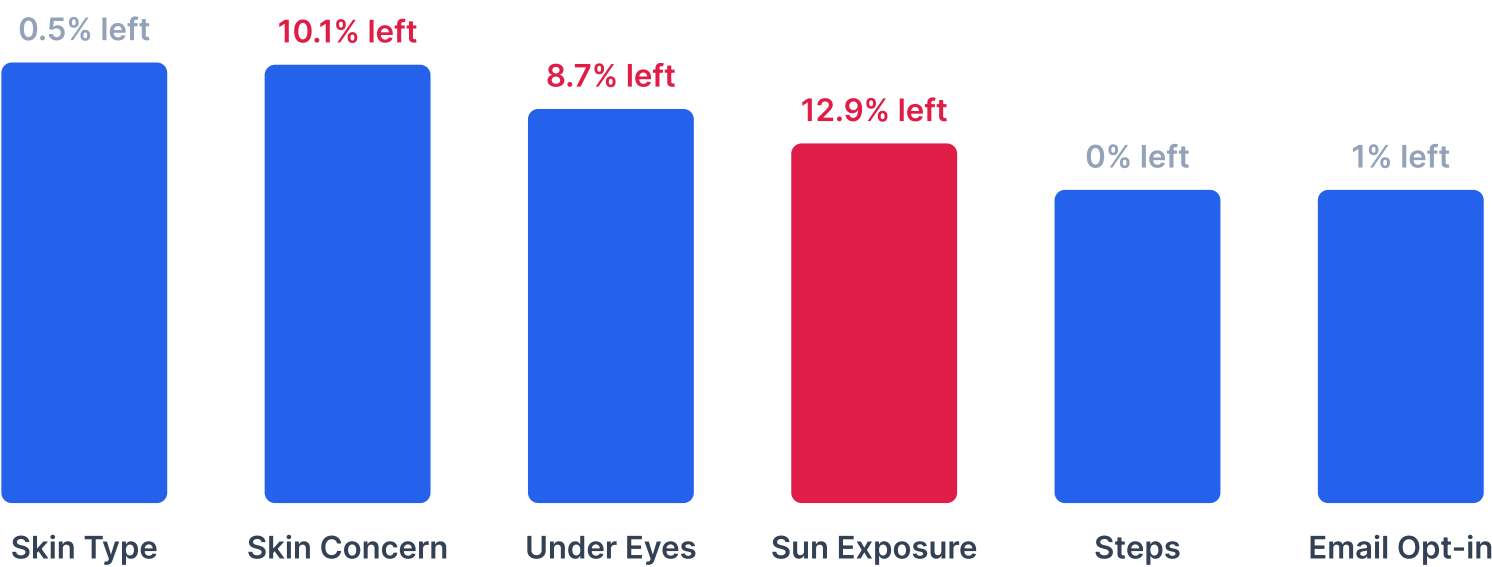
✓ **Break it down any way you need:** by channel, device, country, new or returning shoppers, and each version of your quiz you’ve tested.

SKINCARE ROUTINE QUIZ · AUG 28 - SEP 26, 2026

The quiz was seen **674** times in the last 30 days. **585** people started it and **409** finished, a completion rate of **69.9%**. Those finishes turned into **56** orders worth **\$3,430**.

Funnel by page

Biggest drop: **Sun Exposure**



Answers **skin_type**

ANSWER	CHOSE	COMPL.	CONV.	REVENUE
Shiny zone by 2pm, we call it dewy	49%	69.6%	8.0%	\$1,338
Comfortable, does its own thing	25%	65.1%	10.1%	\$968
Tight after washing, kind of over it	15%	76.4%	5.6%	\$290
Gets mad if I so much as look at it	10%	73.8%	0.0%	—

Added from the quiz

\$1,904

Shown, bought later

\$1,246

Average order value

\$61.25

tell me how my quiz did the 30 days after launch · 06/10/2026

Your quiz did well in its first 30 days, Aug 8 to Sep 6. The sample is large enough to trust: 1,604 starts.

Results

- 1,797 people viewed the quiz and 1,604 started it (89%).
- 1,098 finished it, a 68% completion rate. The median time to finish was about 2.5 minutes.
- It led to 118 orders and \$6,961 in revenue, with an average order of \$58.99.
- About \$3,616 of that revenue came from products added to the cart straight from the quiz. About \$2,755 came from shoppers who were shown a product and bought it later.
- 617 people gave their email, which is 56% of those who reached that page. 481 skipped it. 182 saw the marketing consent box and declined it.

Results were split like this:

- Oily: 539
- Normal: 247
- Dry: 194
- Sensitive: 118

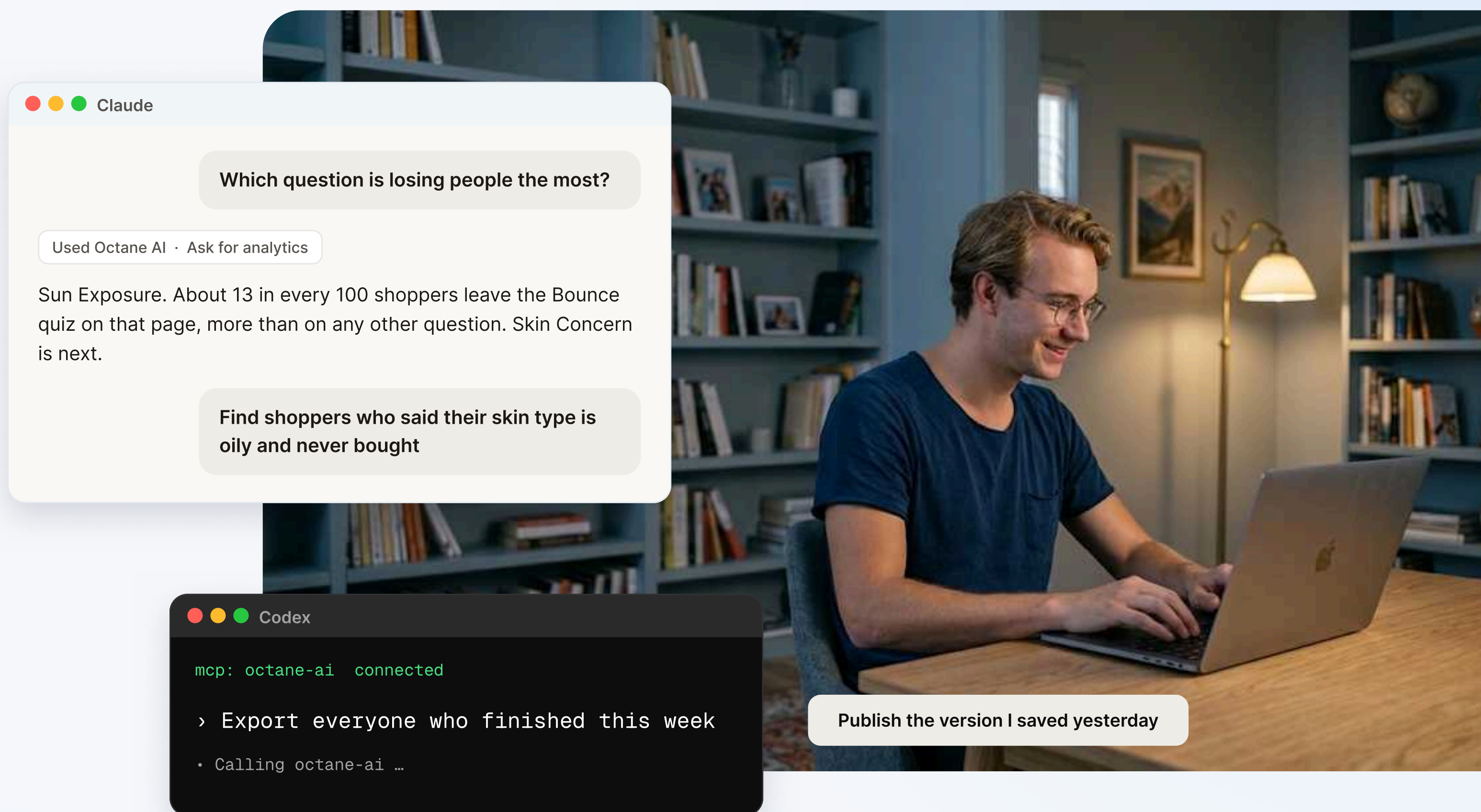
Where people left

Nearly all the lost shoppers dropped on three question pages in a row:

Page	People who dropped	Share who reached it
Skin Concern	173	11%
Under Eyes	160	11%
Sun Exposure	173	14%

Talk to Phoenix via MCP

Ask questions about your quizzes and quiz takers in plain language, from the assistant you already use: Claude, ChatGPT, Codex, or Cursor.



Connect Octane AI via MCP



Add Octane AI as a connector to Claude, Cursor or ChatGPT. Approve what it can do, and which stores it can reach.

Your server address

`https://mcp.octaneai.com/mcp`

 Copy

[Read the MCP connection guide →](#)

Check results, find shoppers and publish changes, all from the AI assistant you already use.

Email/SMS personalization

Phoenix saves every quiz answer and syncs it to **Klaviyo**, **Attentive** and **Postscript** (with new integrations added all the time), so you can use those answers to:

- ✓ Trigger an email/SMS flow when someone finishes the quiz.
- ✓ Hyper-personalize messaging with details like skin type, results and matched products.
- ✓ Build targeted segments from any combination of answers, age, gender or buying categories.
- ✓ Bring shoppers back by sharing links to their personalized results.

klaviyo

Profile · Custom properties

Octane: email_input	shopper@example.com
Octane: skin_type	oily
Octane: skin_concern	dark spots
Octane: Quiz result	Oily Routine

+ every other quiz answer, synced as its own property

- 1

Personalize images
Change what you show based on the shopper's answers, like age or skin type.
- 2

Answers inside email copy
Skin type and concern drop straight into the copy.
- 3

Products from the quiz result
Title, description, and price are pulled from the routine the shopper was matched to.
- 4

A link to the results page
“See my results” opens the shopper’s personal product recommendation page.

1

2

Text

Hey First name OR beautiful, your Octane: skin_ty... skin is going to love this new routine!

All these steps combined will help you t

Octane: skin_conce... and help you love y

? octane.title

? octane.description|striptags

? octane.price_formatted

SHOP NOW

3

4

SEE MY RESULTS

Search personalization...

All types

Octane: Want 10% off your routine? >

Octane: email_input >

Octane: skin_concern >

Octane: skin_type >

Octane: steps_count >

Octane: sun_exposure >

Octane: under_eyes >

No longer want to receive these emails? Unsubscribe.

Bounce Skincare

Example of a personalized quiz email in Klaviyo. The name, skin type and products change for each shopper.

29%

average email opt-in rate on Octane AI quizzes

62%

higher average order value when shoppers take the quiz

Octane AI · The Shopify Quiz Playbook

15

Proven results, now with Phoenix

Octane AI quizzes performed well across 15 verticals in 2025. Achieve even greater results with Phoenix, which lets you build and test new quizzes in a fraction of the time.

Vertical	Completion	Conversion	AOV uplift	Email opt-in
 Home Products	77.1%	7.8%	61.9%	25.4%
 Luxury	74.2%	5.1%	40.4%	27.3%
 Skincare	83.0%	14.9%	38.2%	30.5%
 Jewelry	76.3%	6.2%	34.8%	32.5%
 Makeup	83.2%	12.5%	29.1%	23.2%
 Apparel	75.9%	14.1%	25.7%	20.1%
 Fertility & Women's Health	76.0%	11.1%	25.3%	37.5%
 Haircare	86.6%	13.8%	24.5%	41.2%
 Health / Wellness / Fitness	81.2%	13.3%	22.2%	18.2%
 Outdoor Sports & Gear	82.4%	5.4%	21.8%	19.0%
 Vitamins / Supplements	77.4%	13.7%	20.2%	36.3%
 Baby Products	56.2%	16.6%	19.3%	26.0%
 Food & Beverages	72.7%	18.6%	10.0%	22.8%
 Fragrances	77.2%	14.8%	2.4%	36.8%
 CBD	74.9%	16.8%	0.9%	28.4%

Want results like these?

Book a demo and we'll show you how Phoenix could work for your store.

Book a demo

★★★★★ 4.9 stars (200+ ratings)



Build your best quiz with Phoenix



A step-by-step guide to AI-assisted quiz building, from strategy to launch

You bring the strategy: your goal, your products and whatever ideas you already have. Phoenix turns it into a working quiz and helps you fix anything missing. You can step in and edit anything by hand at any time.

 **Create New Quiz**

 **Describe your quiz**

 **Have a quiz sheet or document?**
Upload or drag in a Word, Excel, or PDF file and I'll read it and build your quiz from it.

Create a product quiz based on my questions



 Skincare_quiz_logic... 

Your quiz opens in the editor while the AI builds it.

Cancel

Build my quiz

Build with AI

RECOMMENDED

Describe your quiz or upload what you have, and Phoenix builds it for you. The fastest way to launch, and the path this guide follows.

Build it yourself

Prefer full control? Build every page and rule in the editor. You can switch between AI and manual editing at any point.

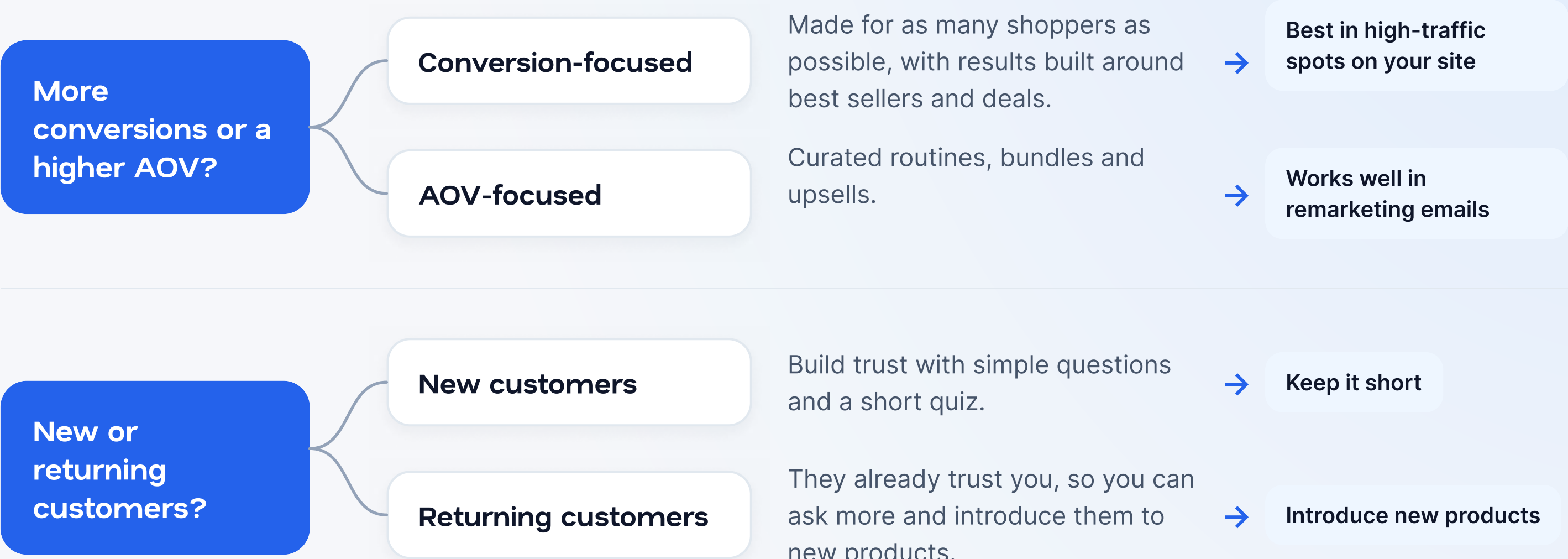
Step 1

Plan your quiz strategy

1.1

Your quiz goal

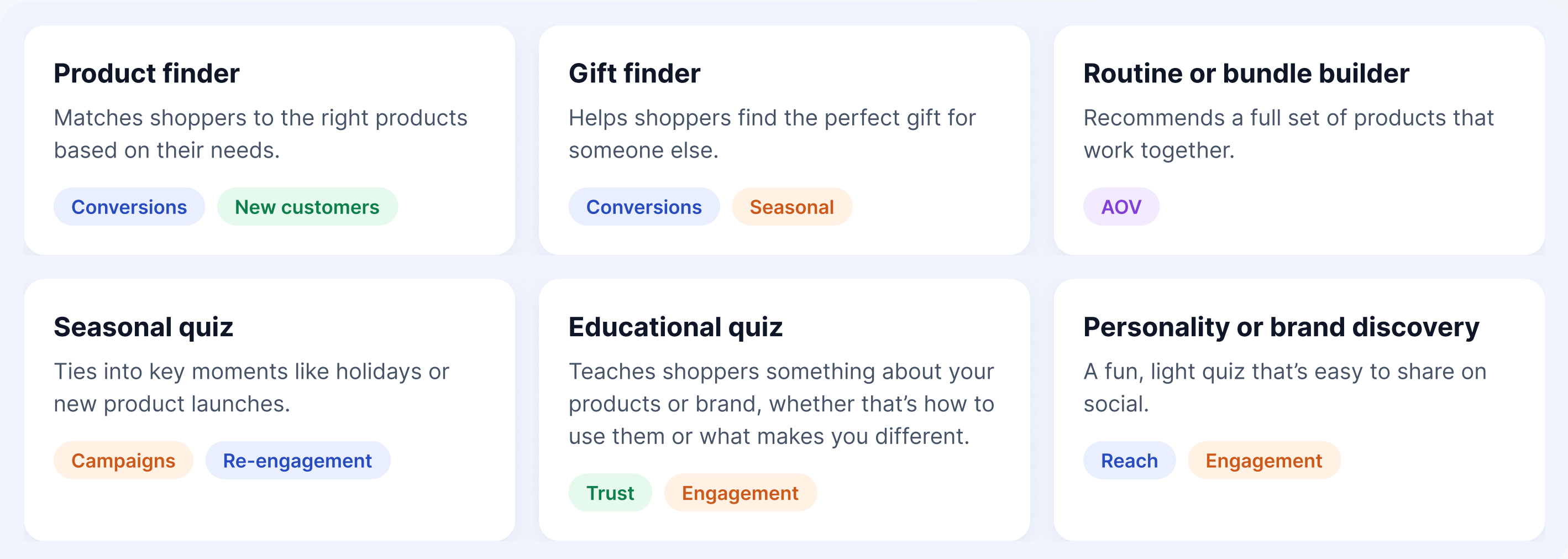
Start with what you want the quiz to achieve, as this will help shape every question, result and placement.



1.2

Choose your quiz type

Each quiz type serves a different goal. Pick the one that fits yours, and add more as your strategy grows.



Already have a quiz? Add a post-purchase or seasonal quiz to bring existing customers back with new recommendations.

1.3

Follow quiz best practices

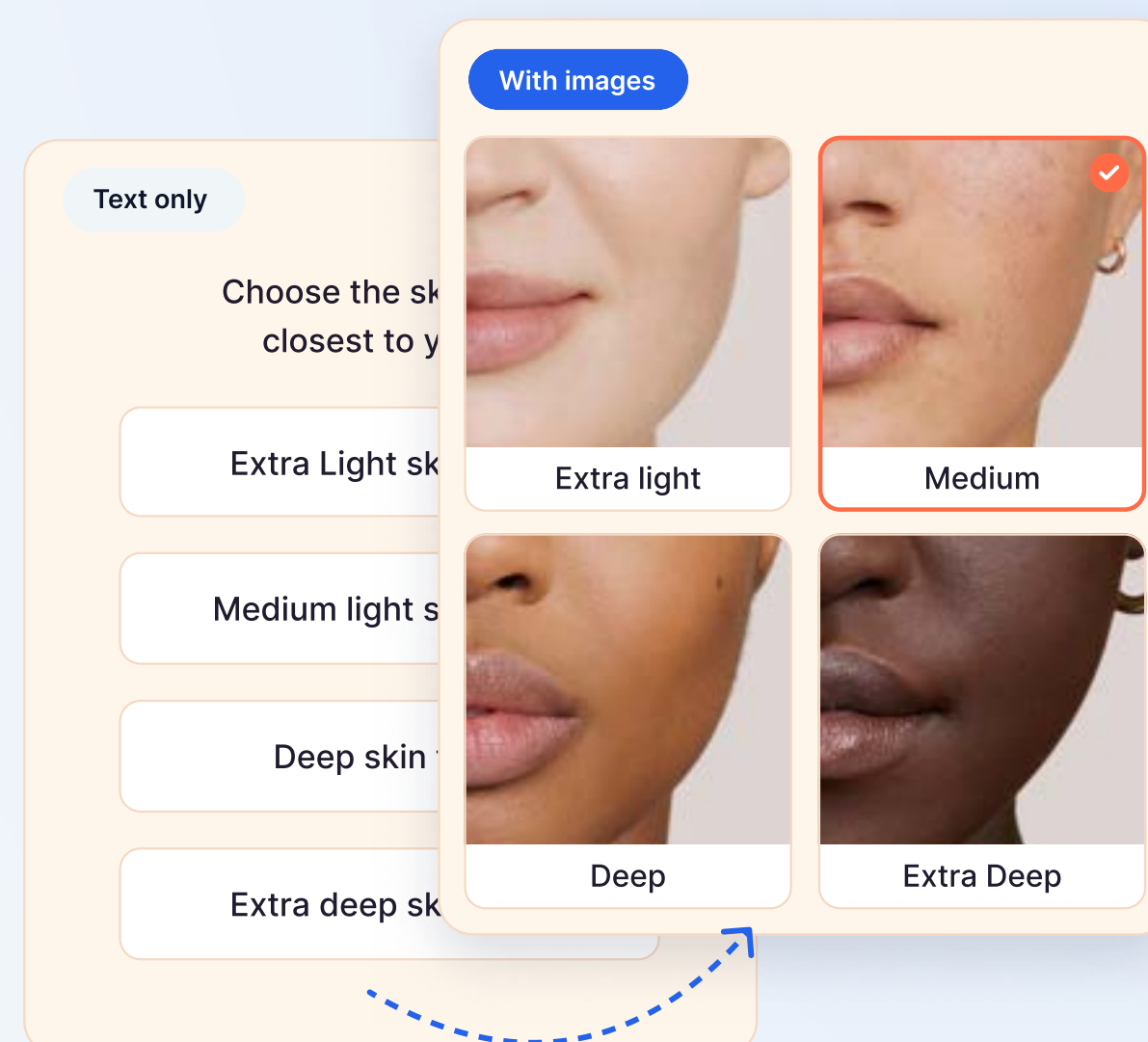
What we've learned from building thousands of quizzes, from your first question to your results page.

01 Keep it short

5 to 8 questions. Health-related brands can go up to 12 when more context is needed.

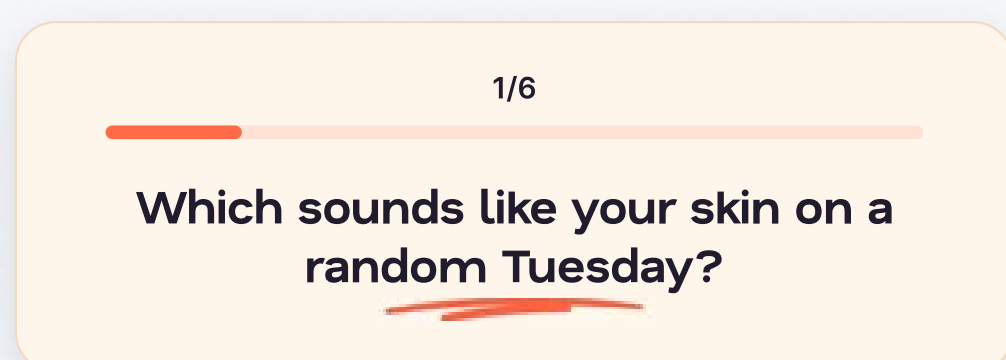
02 Mix text and images

Text works for how something feels, images for how it looks, like skin tone.



04 Set expectations

A progress bar or "1 of 6" tells shoppers how long it'll take.



05 Explain the harder questions

If it takes more than a few seconds to answer, say why you're asking.

We ask so we can tailor product suggestions to you. This is never shared or sold.

EMAIL OPT-IN

06 Make it skippable, or offer an incentive

Let shoppers skip it, or give them a reason to share, like a discount.

Get your personalized results plus 10% off when you purchase your recommendations*

Enter your email address

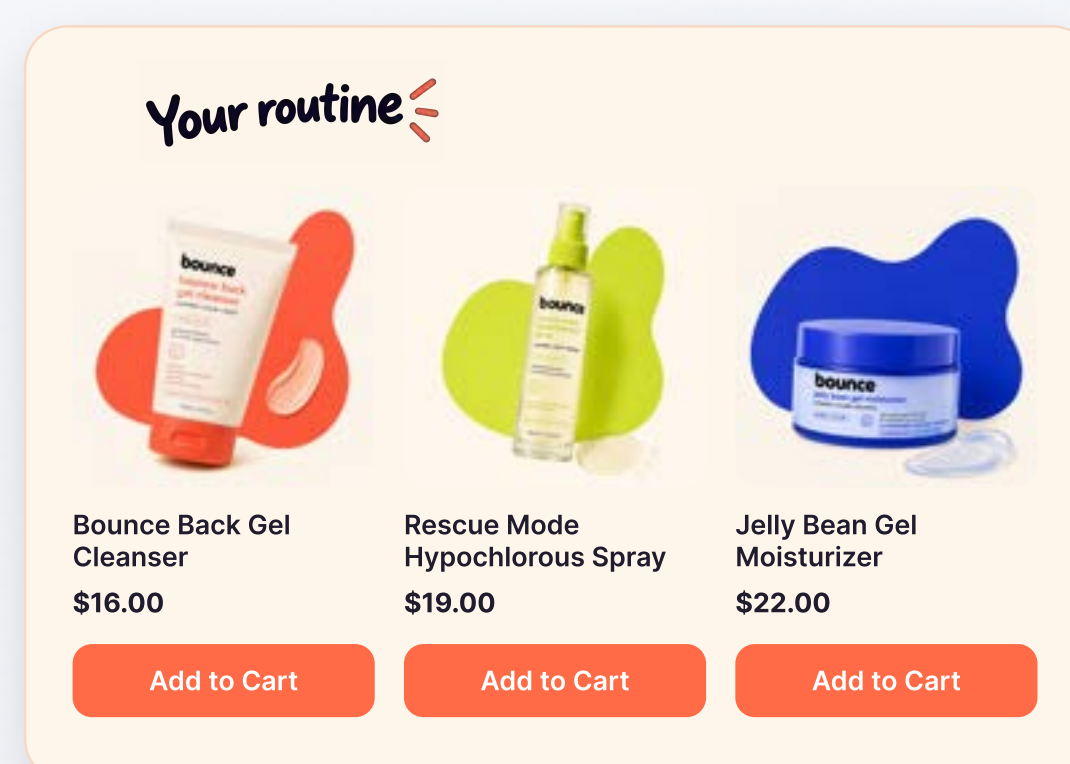
☐ Yes, send me emails from Verum *Unsubscribe anytime

SKIP 10% OFF →

RESULTS PAGE

07 Show 1 to 3 hero products

Plus upsell options for a higher AOV.



BEFORE LAUNCH

08 Set up Klaviyo

Or your email platform, so you collect emails from day one.




09 Not every question needs to change the result

An 8-question quiz with only 2 that decide the products is normal.

QUESTION	CHANGES THE RESULTS?
Which sounds like your skin on a random Tuesday?	Yes
What's your skin's main complaint this week?	Yes
And your under-eyes, what's the vibe?	Adds a product
How much sun are you actually getting most days?	Adds a product
Be honest, how many steps do you usually do?	No

“Adds a product” means the answer doesn’t change the main routine, but adds an extra product, like an SPF for shoppers who spend lots of time outdoors.



You don’t need the full logic worked out. Just note **which questions** should change the recommendations and how, and Phoenix handles the rest.

Pro tip

Put all your quiz copy into a spreadsheet with tabs for: Questions & answers, Quiz matrix (logic), and Product catalog.

Bounce Skincare Custom Logic		
Questions	Determines recs?	Answer #1
Which sounds like your skin on a random Tuesday?	Yes	Shiny zone by 2pm, we call it dewy (Oily)
What's your skin's main complaint this week?	Yes	Breakouts that show up uninvited
And your under-eyes, what's the vibe?	Yes (extra product)	Could use a little de-puffing
How much sun are you actually getting most days?	Yes (extra product)	Outside a lot
Be honest, how many steps do you usually do?	No	One step
Questions & Answers	Quiz Matrix (Logic)	Product Catalogue

Bounce Skincare Custom Logic					
Skin type	Skin concern	Cleanser	Treatment	Moisturizer	Final step
Oily	Breakouts	Bounce Back Gel Cleanser	Rescue Mode Hypochlorous Spray	Jelly Bean Gel Moisturizer	Pop Off Spot Patch
Oily	Dark spots	Bounce Back Gel Cleanser	Bright Side Vitamin C Serum	Jelly Bean Gel Moisturizer	Pop Off Spot Patch
Oily	Dryness	Bounce Back Gel Cleanser	Glow Getter PDRN Ampoule	Jelly Bean Gel Moisturizer	Pop Off Spot Patch
Oily	More collagen	Bounce Back Gel Cleanser	Plump Squad Hyaluronic Serum	Jelly Bean Gel Moisturizer	Pop Off Spot Patch
Normal	Breakouts	Clean Slate Foaming Wash	Rescue Mode Hypochlorous Spray	Jelly Bean Gel Moisturizer	Pop Off Spot Patch
Normal	Dark spots	Clean Slate Foaming Wash	Bright Side Vitamin C Serum	Jelly Bean Gel Moisturizer	Bounce House Jelly Mask
Dry	Dryness	Clean Slate Foaming Wash	Glow Getter PDRN Ampoule	Barrier Bestie Ceramide Cream	Bounce House Jelly Mask
Sensitive	Breakouts	Clean Slate Foaming Wash	Chill Pill Azelaic Acid Serum	Barrier Bestie Ceramide Cream	Pop Off Spot Patch
Questions & Answers	Quiz Matrix (Logic)	Product Catalogue			

Step 2

Build it with AI

2.1

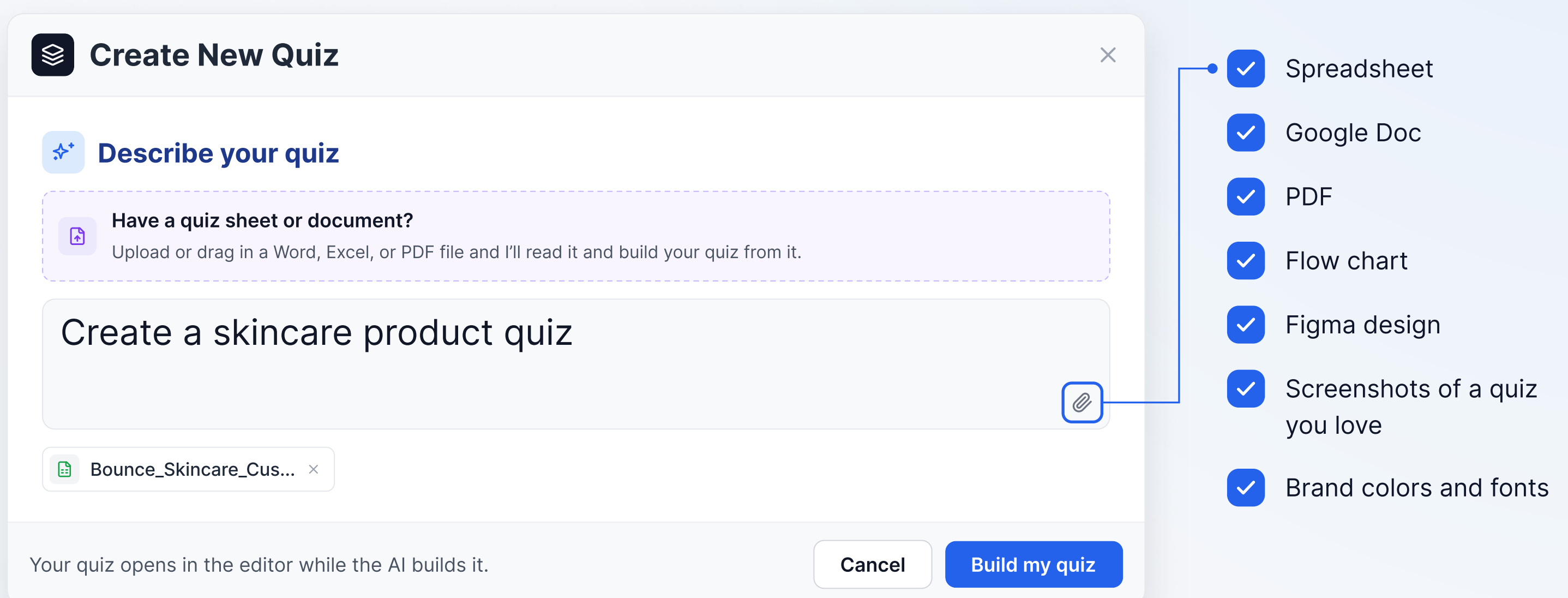
Start with whatever you have

Your quiz plan doesn't need to be complete or in any set format. Just share what you've got, and add as much detail as you can to get the best first draft.

2.2

Upload and prompt

Drop your files into Phoenix, describe the quiz you want and click **Build my quiz**. Your quiz opens in the editor while the AI builds it.



- ☒ Spreadsheet
- ☒ Google Doc
- ☒ PDF
- ☒ Flow chart
- ☒ Figma design
- ☒ Screenshots of a quiz you love
- ☒ Brand colors and fonts

Pro tip

Use separate AI assistant chats for logic, design and layout. Phoenix follows each request more accurately, and your team can work on different parts at the same time.

Missing images? Phoenix can generate question images, backgrounds and icons for you.

2.3

Check your quiz before shoppers do

Once your quiz is built, let Phoenix check it. It catches problems that would take hours to find by hand.

1

Build your quiz.
With AI, by hand, or both.

New quiz · Phoenix AI

Build a skincare routine quiz from my product sheet. Ask about skin type first.

✓ What I did · 5 steps

Done. 5 questions, an email opt-in and 4 results pages, each matched to your products.

Ask AI to create or modify...

2

Click Find issues.
Phoenix checks every path a shopper could take and lists anything broken. The full report is under Quiz Flow > Issues.

✓

Checked all 80 answer combinations

2 problems

2 warnings

0 notes

⊘

Nobody can reach the “Dry Routine” page

⊘

The answer “dark_spots” was deleted, and 2 rules still name it

⚠

Some shoppers finish on the “Loading Page” page, before any results page

+ 1 more

3

Fix it in chat.
Pick an issue and ask Phoenix to fix it, or fix it yourself.

Issues review · Phoenix AI

Help me fix: nobody can reach the “Dry Routine” page.

✓ What I did · 6 steps

Fixed. Both rules pointed at a deleted answer, so I moved them to “Tight after washing.” Shoppers with dry skin now reach the page.

✓ Fixed and confirmed · 0 problems

4

Check again.
Run it once more until you see 0 problems.

✓

Checked all 80 answer combinations

0 problems

0 warnings

0 notes

✓

Phoenix has checked your quiz and found nothing to fix.

Tip: Run a check every time you change your quiz or your product catalog.

Octane AI · The Shopify Quiz Playbook

22

Step 3

Design and fine-tune

Now that the foundations of your quiz are in place, it's time for the details that make shoppers stay, share their info and trust their results.

3.1

Optimize your opt-ins

Whether you're collecting emails or phone numbers, the same rules apply: make the step easy to skip and give shoppers a reason to share their details.

7/7

Stay in the loop?

Get your personalized results plus 10% off when you purchase your recommendations*

☐ Yes, I'd like to receive emails from Verum

SKIP

10% OFF →

← BACK



Skip option keeps shoppers moving

- ✓ **Let shoppers skip.** Skippable email opt-ins see an 11% drop-off, compared to 29% when the email is required.
- ✓ **Offer something in return,** like a discount on their first order. Phoenix syncs with your Shopify discount codes.
- ✓ **Ask again on the results page.** Give shoppers who skipped a second chance with a special offer, right when they're most interested.

62%

lower quiz drop-off rates with skippable email

Skippable opt-in 11% drop-off



Non-skippable opt-in 29% drop-off



If a shopper never shares their details, you don't lose their data. Their answers are still saved, so you keep learning from every quiz taker.

3.2

Make the wait part of the experience

A short loading animation keeps shoppers from dropping off while their results load. It also builds trust, showing that their answers are being matched to the right products rather than jumping straight to the results.



 **GIF animation on a results load step with appearing products**

Matching you with 3 formulas



 **Custom HTML on a loading results page**

3.3

Prefer to set the logic yourself?

Phoenix picks the best logic for your quiz automatically. If you'd rather choose it yourself, go to your results page and open the **Products** menu. There are four logic types to choose from:

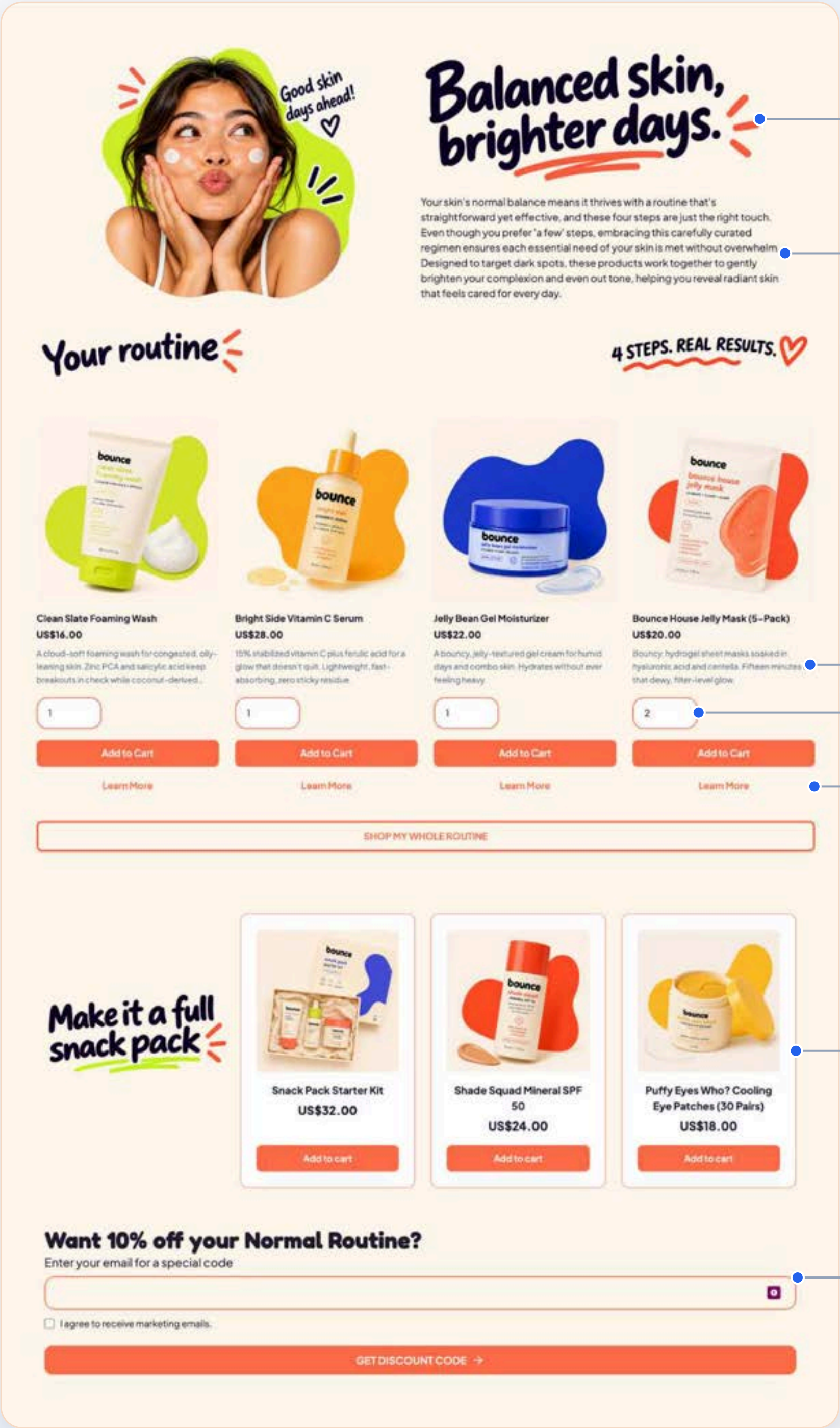
Logic type	Best for	Keep in mind
☒ AI Smart Products AI picks from the full set of answers	Fast setup, catalogs that change often, quizzes still finding their shape, and promoting hero products	Results aren't fully predictable or identical every time
☐ Manual Exact products with IF-THEN rules	Full control over exactly which products each shopper sees, using if/then rules	Products need updating as your catalog changes
☐ Auto from Ranking Filters and ranks by tags and collections	Large catalogs. Filters and ranks products automatically using your Shopify tags and collections, and updates as your catalog changes	Needs clean, consistently tagged product data
☐ Auto from Points Highest scoring products	Assessments and personality-style quizzes that sort shoppers into tiers	Needs careful planning so results feel fair

Editing the logic by hand? Lock your questions first. Changing answers after the logic is built means rebuilding it.

3.4

Build a results page that converts

This is where shoppers decide whether to buy, so it's worth getting right. Phoenix creates a personal results page for every shopper, which you can also link to in your follow-up emails.



What the best results pages have in common:

- A result name that feels personal**

“Balanced skin, brighter days” lands better than “Your results.”
- Copy that reflects their answers**

Mention what the shopper told you, like their skin type or main concern.
- A reason for every product**

One short line on why each product was picked for them.
- The right quantity**

Quantities can come from a formula or the shopper’s answers.
- Clear Add to Cart and Learn More**

On every product, plus an option to shop the whole routine.
- An upsell section**

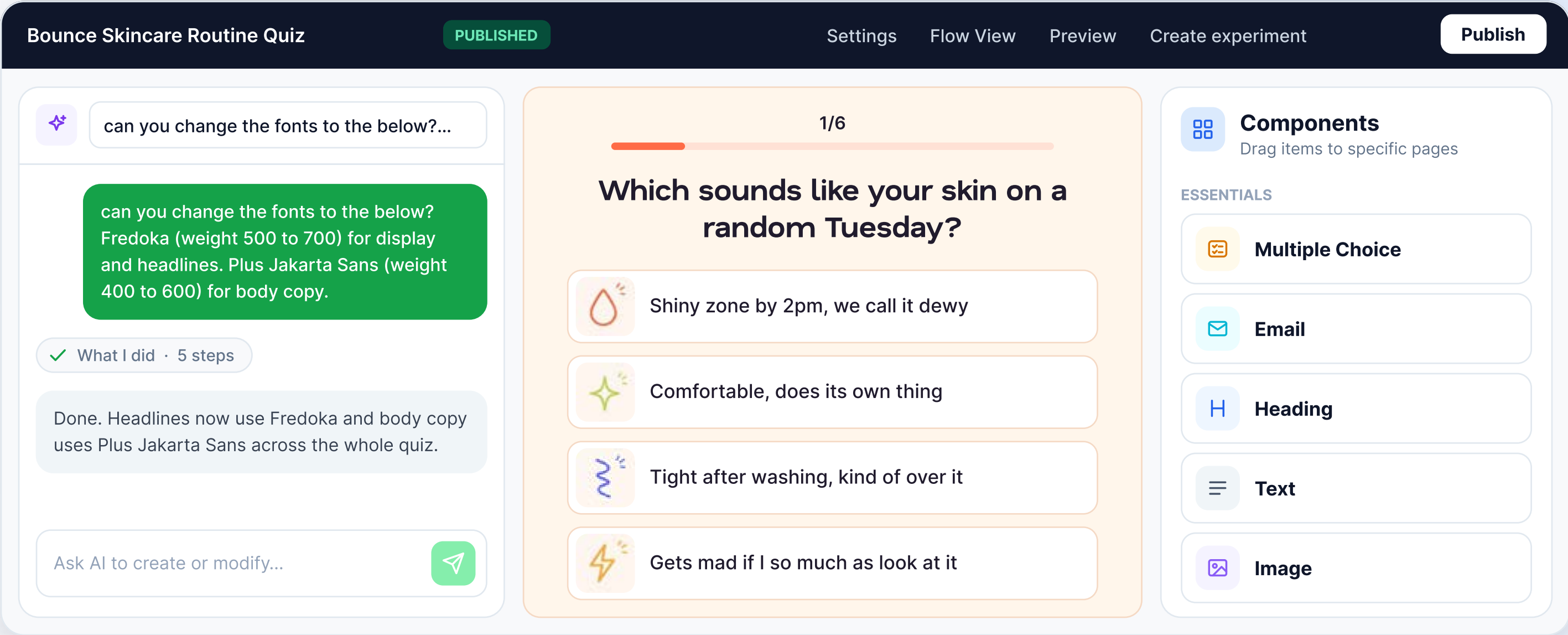
Products that complete the routine.
- Something that builds trust**

Like a short how-to video, a customer review or a special offer.

3.5

Design with prompts

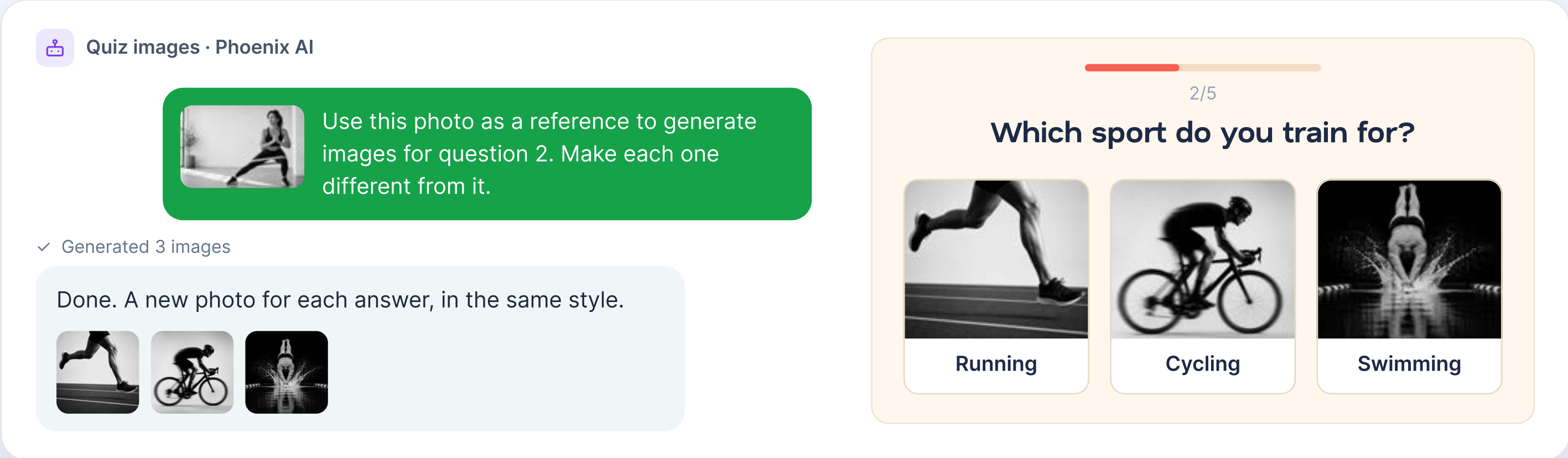
Tell Phoenix what you want in plain language, and it will make the change, even across every page at once.



More design prompts to try:

- Add a Back button to all the pages in the quiz.
- Change the fonts and left-align all the questions
- Make the image cards on my skin-type question 4:5
- Add a one-sentence description under each answer

Need images? Share a reference and Phoenix generates new ones in the same style.



3.6

Design prompt best practices

- ✓ **Be specific about the scope.** Say “apply to all pages in the quiz” if that’s what you want, or the AI may only change the current page.
- ✓ **When sharing a screenshot, say what to match,** like the layout or colors, rather than just “make it like this.”
- ✓ **Ask Phoenix to generate any missing images,** for example for the quiz intro page or image-based questions.
- ✓ **Expect some back-and-forth,** the same way you’d work with a designer.

3.7

Manual editing

Themes are the quickest way to change the look of the whole quiz by hand. Go to **Quiz Settings > Themes** and set up the look once for the whole quiz, pulling from your website’s style if you want it to match your brand.

A theme marked Global is available to every quiz, and editing it changes every quiz that uses it.

Active Theme

Default Theme

Shared with all quizzes

Use the globe to share a theme with every quiz on this store

+ Add Theme

Quiz Settings

General Settings

App Layout

Themes

Points

Product Rankings

Product Info

Discounts

Smart Properties

Media Gallery

ACTIVE THEME

Default Theme · This quiz

Use the globe to share a theme with every quiz on this store; private themes only show in the quiz that owns them.

QUICK STYLES

Brand Color

#FF6B47

Text Color

#211B2E

Button Color

#FF6B47

Button Text

#FFFFFF

Font

Plus Jakarta Sans

Used for all quiz text except headings.

Fredoka

Heading font.

Roundness

Square

Subtle

Round

Pill

Custom

Spacing

Compact

Comfortable

Spacious

Motion

None

Calm

Snappy

Playful

Components

Drag items to specific pages

QUESTIONS 7

Multiple Choice

Image Choice

Short Answer

Long Answer

Slider

Number

Date & Time

Text

General

Style

FONT FAMILY

Plus Jakarta Sans

FONT WEIGHT

Regular

FONT SIZE

1rem

LINE HEIGHT

1.5 - Normal

TEXT COLOR

#211B2E

TEXT ALIGNMENT

Width & Alignment

Spacing

Visibility

Advanced

Every part of a Phoenix quiz can also be edited by hand. Click into any component to change its alignment, style, layout and spacing, or drag new components onto any page.

This gives you full control, but it’s the slower option if you’re making the same change across many pages.

Step 4

Connect your tools

4.1

Available integrations

Connect the tools you already use, and every quiz answer goes wherever it’s most useful.

Category	Octane AI integrations
Email & SMS	Klaviyo Attentive Postscript Recart
Analytics & Ads	Google Analytics Meta
Customer Support	Gorgias
Subscriptions	Recharge Stay AI Skio Loop Smartrr
Storefront & Checkout	Shopify (Markets, Metafields)
Mobile Commerce	Tapcart

4.2

What your integrations can do

- ✓ **Email and SMS:** trigger personalized flows when a shopper finishes the quiz or use quiz answers to segment and personalize email content.
- ✓ **Subscriptions:** shoppers can buy a product subscription straight from their results.
- ✓ **Customer support:** your team sees each shopper’s quiz answers and recommendations in Gorgias.
- ✓ **Analytics:** track quiz views, answers and results in Google Analytics.
- ✓ **Ads:** retarget shoppers on Meta based on their answers.
- ✓ **Mobile commerce:** run your quiz inside your brand’s app with Tapcart.

Go further with Shopify

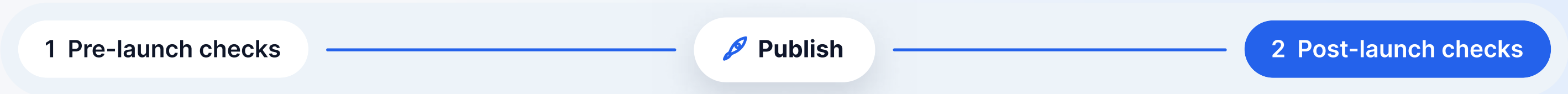
- ✓ **Shopify Flow:** start a flow when a shopper finishes or leaves your quiz, like emailing their result or sending a discount. Or ask Sidekick: “When a customer finishes a quiz, email them their result.”
- ✓ **Customer tags:** quiz takers are tagged automatically.
- ✓ **Customer profiles:** answers sync to each customer’s metafields, ready for Shopify Messaging.
- ✓ **Shopify Markets:** one quiz shows the right price, currency and stock in every market.

Setting one up? Find step-by-step guides in our [help center](#).

Step 5

Before you launch

A few quick checks make sure every answer and order is tracked from day one.



Before you publish

- ☐ The Octane AI app is connected in your Shopify admin
- ☐ Shopify store tracking is switched on
- ☐ Your cookie banner passes shoppers’ choices through to Shopify
- ☐ Phoenix has checked your quiz and found nothing to fix
- ☐ You’ve taken the quiz yourself on your phone, start to finish
- ☐ “Add to Cart” works on every results page
- ☐ Pop-ups are turned off on your quiz pages
- ☐ Using a custom or headless checkout? Check with our team that orders are tracked correctly

After the first visits

- ☐ Quiz data is showing up in your analytics
- ☐ Quiz answers are reaching your email or SMS platform
- ☐ If you use ads, quiz events are showing in Google Analytics or Meta
- ☐ A test order from the results page shows up as a quiz order

Is everything connected?

No orders from Shopify in the last day

Quiz revenue will read low until this is fixed. Check that the Octane AI app is connected in your Shopify admin.

[Open Integrations →](#)

Preview on every screen

Check every page on desktop, tablet and phone before you publish.

Desktop

Tablet

Mobile

Question 1 of 7

What would you most like to work on?

SKIN →

SLEEP →

ENERGY →

DIGESTION →

Question 1 of 7

What would you most like to work on?

SKIN →

SLEEP →

ENERGY →

DIGESTION →

Question 1 of 7

What would you most like to work on?

SKIN →

SLEEP →

ENERGY →

DIGESTION →

Step 6

Improve with real data

Most brands launch a quiz and never touch it again. Setting up a test takes time, and it's hard to know what to change or how to read the results. Phoenix takes care of all three.

Phoenix reads your quiz data, suggests an **experiment**, builds the new version and publishes the winner when the result is clear. All you do is approve.

1 Ask what to improve

“Based on my quiz stats over the past 30 days, can you recommend an experiment to improve conversion rates?”

Phoenix finds the page losing the most shoppers, explains why and suggests what to change. It even tells you when there isn't enough traffic for a reliable result.

☒ Completion rate ?

☐ Email opt-in rate ?

☐ Order conversion ?

☐ Revenue per visit ?

2 Start the split test

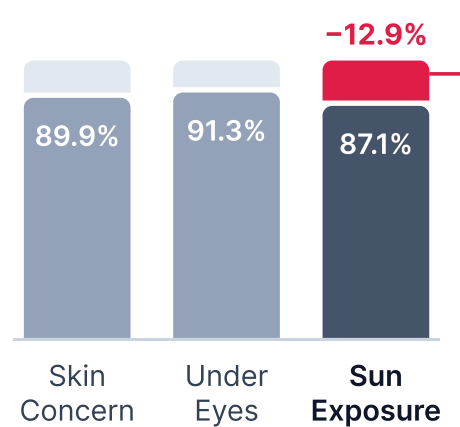
The AI builds the new quiz version for you. Shoppers are split 50/50 between versions (each shopper only sees one variant).

3 The winner goes live

When the result is clear, the AI publishes the better version. If it's close, it recommends one and waits for your click.

Funnel by quiz page

Bounce Skincare quiz

☒ Moved on ☒ Drop-off


12.9%

of shoppers left at Sun Exposure, the biggest drop in this quiz.

Phoenix's review

The Sun Exposure answer images looked like raw screenshots, a likely reason shoppers hesitate.

Shoppers who open the quiz

50%

Latest quiz version
Control

50%

Experiment

The version you pick

Variant B 50% of traffic · v5

Viewed

2,204

Started

1,427

Completed

885

64.7% started · 62.0% finished

Biggest drop: Sun exposure, 38.0% left

Results you can trust

- ✓ **No statistics to decode.** A simple summary tells you who's winning, and whether it's too early to call.
- ✓ **No false winners.** Tests run for at least 7 days, and one unusually large order can't tip the result.
- ✓ **Nothing put at risk.** Protect the metrics you care about, like email sign-ups, so a new version can't win at their expense.

Your quiz keeps getting better, with almost no work from you.

Start with one quiz

That's everything you need to build, launch and keep improving your quiz. You don't need a perfect plan to begin. Start small, and let Phoenix help you improve from there.



Where to go next

Ready to build? Install Octane AI from the Shopify App Store and build your first quiz.

[Install Octane AI](#)

Want to talk it through first? Book a call with our team to see what Phoenix can build for your store.

[Book a demo](#)

Already using Octane AI? See what's new in Phoenix and how to make the move.

[Explore Phoenix](#)

Need help with Phoenix? Enterprise customers can reach out to their account manager. On any plan, our support team is a click away in the app chat.

Agency or tech partner? Our partnerships team can help you deliver great quizzes for your clients.

[Contact partnerships](#)