

Clienteling (In-Store) Technology Best Practice

1. **Build an in-store digital strategy.** Clienteling systems allow the ability to continue the path-to-purchase started in digital channels by sending targeted emails or text messages to drive store traffic, access to store coupons that have been collected digitally, integration with social media channels for store activities, and use of online inventory look-up or reserve/purchase online and pick up in store.
2. **Ensure all stakeholders are on board.** Implementing an in-store clienteling system involves many stakeholders throughout the company; having buy-in is critical. Work with stakeholders and executive sponsors from the beginning to get their input on how the clienteling system will be used. All members should clearly understand the process, goals, and responsibilities of this endeavor.
3. **Leverage as a launching point for increased customer engagement with your brand.** The clienteling systems should empower store associates to engage with customers and ensure they are experience all that your brand has to offer, including loyalty programs, in store or online only product, local events, and social media communities.
4. **Thoroughly vet all your options to create the most valuable for your customers and your store associates.** Create strategy documents for what the optimal customer journey (all touchpoints) should be and how you would like to interact with your customers. Also, create a strategy for how you see your store associates using the platform and what your goals are for them.
5. **Empower your associates with tools for clienteling.** Equip your sales associates with the ability to build customized customer lists, add personal notes about clients, send products to customers, prompt customers about sales/store events, and elicit communication between them and their customers.
6. **Training your associates is a key success factor.** Sales associates must be aware the tech features, how it works, and where to go for questions in order to successfully use it. Most importantly, the associates should understand why they are doing what they are doing. It is imperative that associates are trained once the system is integrated. A clear understanding of customer contact rules/regulations are needed to ensure the best possible customer experience.
7. **Educate your sales associates on the value of using a clienteling system.** Clienteling will increase sales per visit, build lasting and repeat customer relationships, provide an opportunity to upsell based on customer preferences, and strengthen customer loyalty.
8. **Ensure clear understanding of goals, strategy and resources.** Train store associates thoroughly and ensure there is a clear understanding of the goals, strategy, and resources to help for any tech issues.
9. **Ensure that you have control over your data.** Data must have the ability to move back-and-forth between POS systems and your customer database and be integrated into the clienteling platform.
10. **Ensure that your clienteling system offers the ability to email customers or integrates with your email service provider (ESP).** Clienteling relies on the sales associate to be able to contact individual clients as well as lists of clients.
11. **Follow a crawl, walk, run approach.** Rollout your strategy and training in a few of your flagship stores to test implementation, usage, and receive feedback from both your customers and store employees. Tweak your strategy and implementation as needed.
12. **Conduct a survey to understand how the technology is being used in stores.** Your strategy and training for clienteling will always need tweaking and conducting surveys, so utilize surveys to improve the process.

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eCommerce Diligence™ Checklist

Clienteling Technology Key Questions to Ask Providers

Company

1. How long have you been in this business?
2. How many clients? How many have you lost, why?
3. What size/types of clients fall into your “sweet spot”?
4. What peripheral or support services do you offer (e.g., surveys, analytics, direct mailings, email)?

Products/Services

1. Is your solution offered as perpetual licensed software or on-demand solution?
If perpetual license:
 - a. What are the hosting requirements?
 - b. What should I expect regarding upgrades (both timing and pain-points)?
 - c. Do you provide customization /implementation services? Can a third-party?**If SAAS/ASP**
 - a. Do all tiers include maintenance and support?
 - b. How often are new features introduced?
 - c. What do I do if I need a feature you don't have?
- d. Do you offer a free trial? What's missing in the trial version?
- e. What technical support services are available?
- f. Is your support team located in the US or abroad?
- g. What is your SLA for support issues?
- h. Do you have a support knowledge base, community forum, or applications that are shared by customers?
- i. How often is data updated? Is it in real time, after a certain number of hours, daily?
- j. What type of training/support is available to corporate teams and to store sales associates?

Features

1. What key features are geared toward big businesses? What about small and mid-sized?
2. How do you integrate into ecommerce sites? Sync with CRM data? Analytics? POS systems? Loyalty Systems? Gift Card Integration? Social Media?
 - a. Please list the applications for standard integrations vs. custom integrations.
 - b. Do you support APIs for integration with other systems not currently supported by your standard integrations?
3. Does your platform also act as an email service provider allowing individual one-to-one email communication as well as batch emails? If not, what ESPs do you integrate with?
4. Do you integrate with a company's CMS?
5. Does the platform support messaging?
6. How does your platform support B2C, B2B, B2B2C?
7. What internal company resources and technologies are required to manage your platform? Skill set? For B2C and B2B initiatives?
8. What analytic tools does your platform provide? Does your platform analytics integrate into current ecommerce analytics tools?
10. Does your platform offer the ability to create lists based on selected data points? Can rules be set for who has access to which data points?
11. Please describe your customer data, types, what can be included on templates, and how this can be integrated or managed on your solution.
12. Please provide a list of standard reports, tracking and statistical tools included. In what time frame do you provide reporting? Batch, real time, what latency? What type of creative and segment testing can your product support?
13. How does your platform ensure privacy?
14. Does your platform offer the ability to store notes that can be appended to client data?
15. How do you integrate and offer the ability to access product imagery?
16. How does your platform handle Prospecting? Customer lookup? Calendar Planning?
- B2B2**
 17. What strategic services do you offer to help retailers build B2B clienteling system initiatives? Loyalty systems? Customer service integration?
- B2B**
 18. What strategic and technical services do you offer to help retailers build B2B productivity tools and applications? Inventory management integration?

Pricing

1. Describe your pricing model. Do you charge for number of users, etc.? Are there different levels?
2. Why do I want to pay to upgrade to the next level?
3. How do you charge for annual support? What about maintenance?
4. Are there any hidden fees (e.g., implementation, transaction costs, revenue sharing)?

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