

Implementing Retail Technology

5 Steps to Defining Your Clienteling Strategy





Once you've made the decision to invest in a clienteling solution, it's important to define your strategy before reaching out to vendors. Start by identifying your clienteling goals and ensure all internal stakeholders are aligned. You'll want to make sure all parties understand:

- Issues the company is experiencing that need to be addressed
- Customer engagement goals (expected customer behaviors and results)
- Specific customer journeys that you want to fulfill
- Expectations for improvements and business value gains
- KPI metrics to track

“79% of consumers say they would shop at a store because they received personalized service from a sales associate.”

— Boston Retail Partners

1 Buyer Personas

Based on current data, describe the different buyer personas that your customers represent. By determining these personas, you will be able to visualize and map out the possible customer journeys that each persona needs.

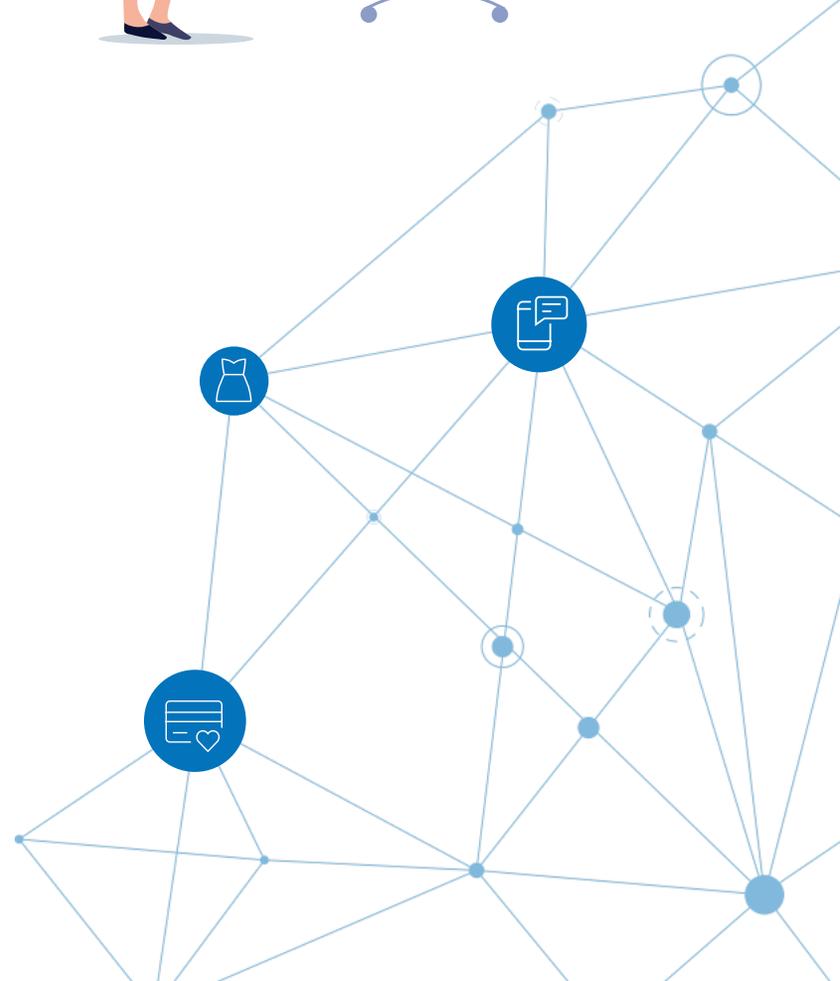


2 Customer Journeys

Map the ideal customer journeys you want to achieve in order to drive engagement and loyalty. For example, where do your customers first interact with your brand, and what are all the omnichannel touchpoints that follow? Then compare with the journeys your brand currently provides.

73% of consumers say sales associates who remember their preferences impact how much they buy from a retailer

— Salesfloor Study: [“The Omnichannel Shopper”](#)



3 Functional Requirements

The clienteling solution you select will need to **bridge the gap** between the actual and ideal journeys. It should address the functionalities needed to achieve seamless, personalized journeys. Here are some popular requirements in the market:

Serve Customers Throughout their Omnichannel Journey

Connect online customers to store associates to allow a seamless experience across channels (in store, on the e-commerce site, e-mail, SMS and live chat). Leverage your store associates' online networks by allowing them to create shoppable posts on social media. Provide mobile checkout capabilities and endless aisle inventory to save the sale for in-store customers.

Enable Personalized Service and Communication

Arm associates with detailed customer and product information as well as purchase history to help them serve customers better. Enable automated alerts to notify associates of important clienteling task reminders. The alerts let the associate know when, through what channel, and with what messaging they should communicate with customers.

Implement a Data-Driven Strategy

Help associates enhance the customer's profile by capturing additional buying preferences during interactions. Give associates access to customer dashboards and analytical insights. Ensure your associates get credit for online sales by implementing a solution that will track omnichannel sales and attribute it accordingly.





4 Technical Requirements

Consider your current system architecture, other overlapping systems, and what your stores' IT infrastructures can support. The answer to the below questions should be reflected in your requirements.

- Do your stores have adequate Wi-Fi connectivity?
- Will the systems in place monitor and create safety controls for a Bring-your-Own-Device (BYOD) program, or will you have to provide corporate devices? If you already use devices in store (iOS/Android), are they compatible with the clienteling solution being considered?
- What hardware do you currently integrate with?
- Do you need support for multiple languages and currencies?
- What new integrations will be required for this project (CRM, e-commerce, ERP, POS, Order Management System etc.)?

5 Security Requirements

Customer data should not be compromised with the implementation of a new clienteling solution. The solution should comply with all the latest privacy and protection regulations.

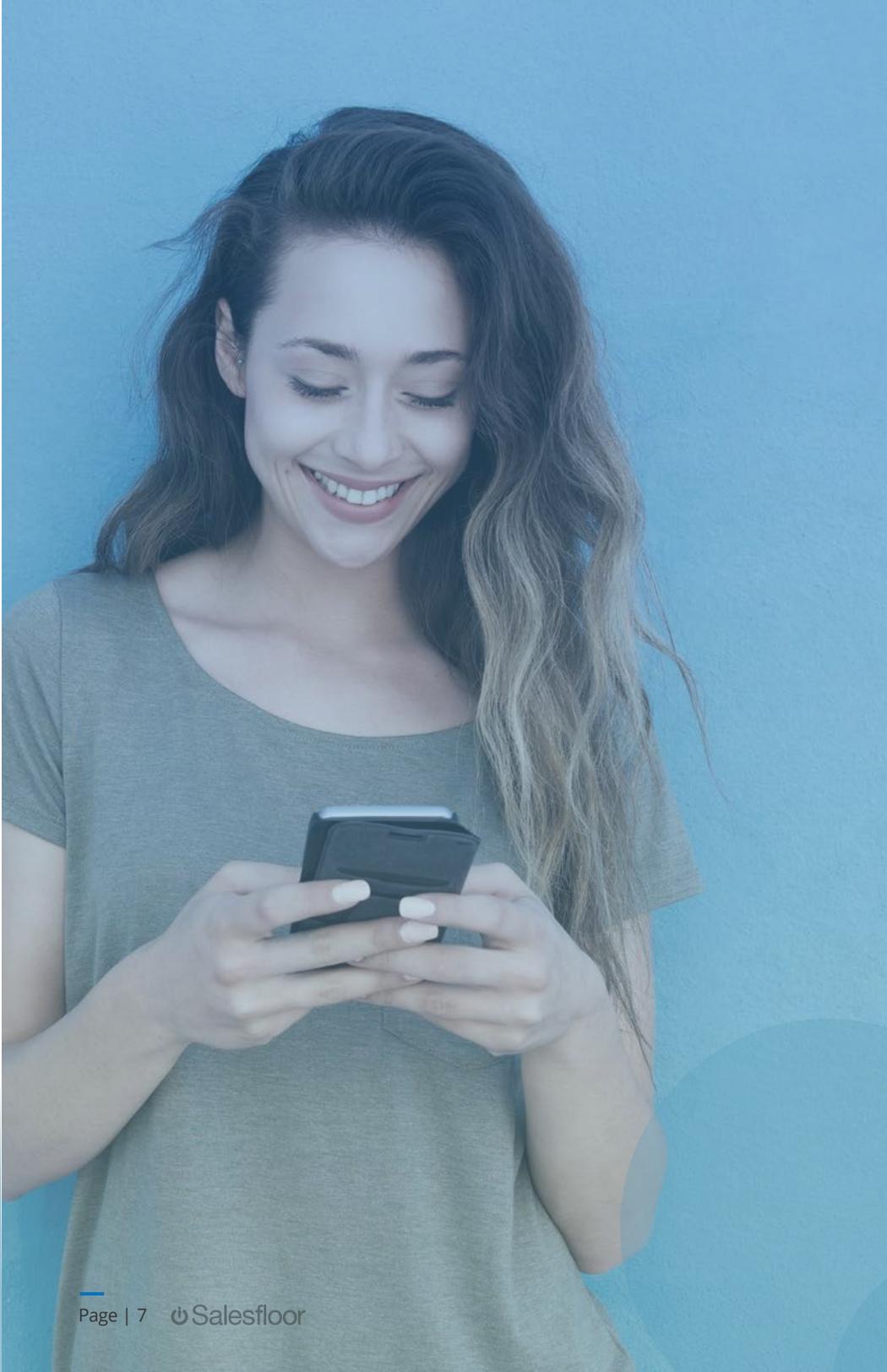
Security

- Consider the use of Same/Single Sign On (SSO), registration and authentication approach where applicable.
- Determine password policies, assign role-based permissions.
- Identify your data security policies.

Privacy & Compliance

- You should abide by state privacy regulations such as CASL, GDPR, CAN-SPAM, PIPEDA, etc.
- Consolidate customer data across different systems (CRM, Marketing Automation/email, e-commerce, etc.), and determine where you will centralize clienteling data.





Once you have defined your requirements, selecting the right vendor and partner will become much easier. For more information on defining your clienteling strategy and implementing mobile store technologies, [contact Salesfloor](#) or [request a demo](#) today.



For the full guide, contact us.

This guide will help you:

- 1 Determine how your business can benefit from clienteling, assisted selling, and mobile checkout
- 2 Define your clienteling and personalization strategy
- 3 Select the right solution / vendor
- 4 Deliver a successful implementation
- 5 Measure the success of your new mobile technologies

