

Metrics that Matter:

5 Steps to Measuring Clienteling Success



Tracking the Right Key Performance Indicators (KPIs)



Whether you've just implemented a new clienteling platform or are looking for ways to optimize your current solution, there are important insights and analytics that can be tracked to determine your return on investment (ROI).

From adoption rates to omnichannel sales increases, all KPIs that affect your business should be identified and reported on.

1 Associate Engagement and Adoption

Ensure the solution is used frequently and to its full potential by rewarding top performers through recognition programs. Track both online and in-store sales so associates can see first-hand the impact they have on the overall business.

Track KPIs that will help understand how frequently your clienteling solution is being used, like:

- Daily and weekly active users.
- Number of communications sent per associate per week.
- Top performing associates (highest sales and their customers' response rates).

Report on the quality of associate activity such as:

- Tasking execution.
- Customer communications.
- Service response times.

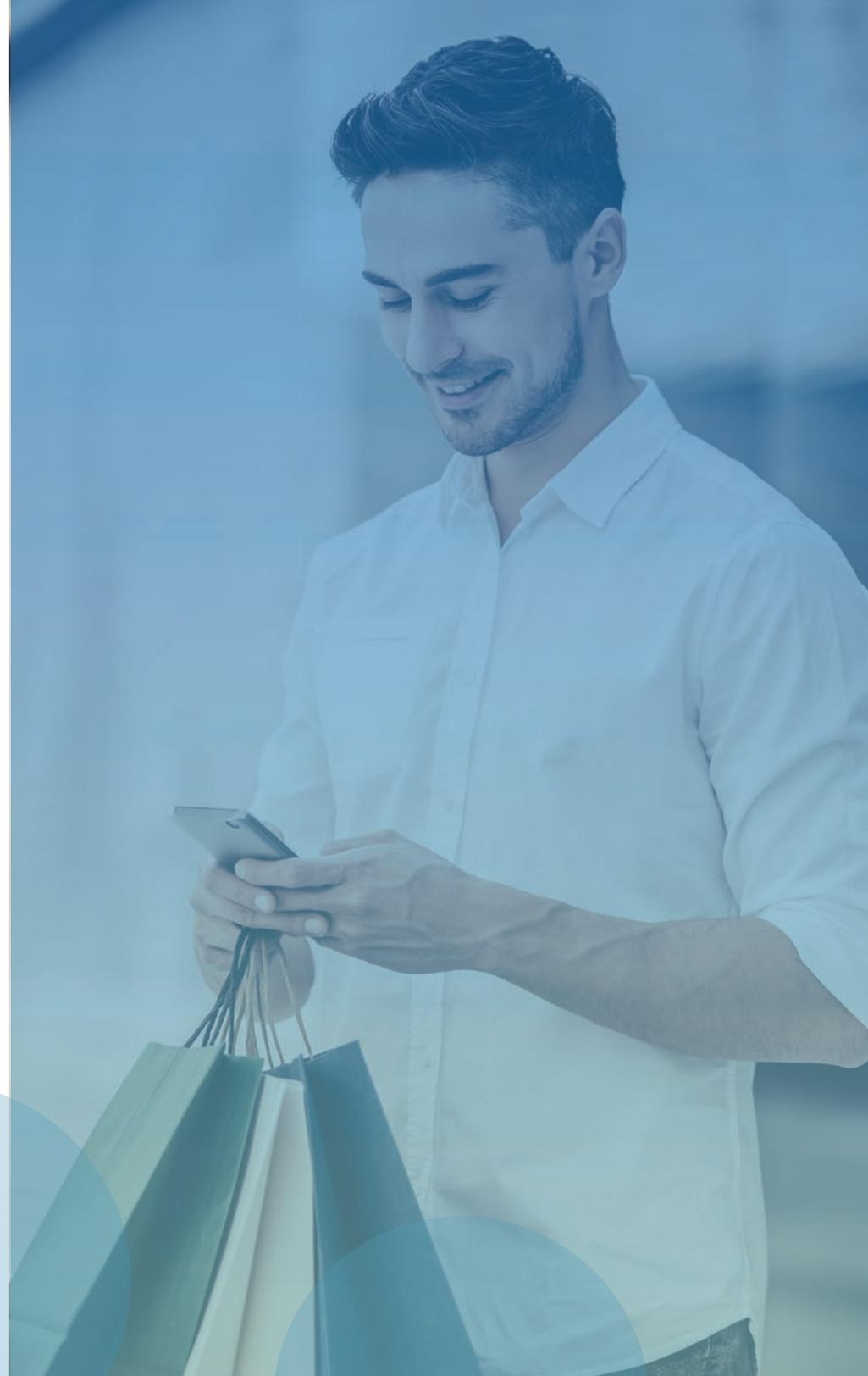
Credit associates for online sales.



2 Customer Engagement

Personalized emails and other types of communications created and sent by an associate will usually result in higher engagement rates when compared to newsletters or national email campaigns. Measure the impact that clienteling has on your customers' experiences by tracking:

- How customers are responding to outreach compared to traditional marketing channels (like open and click-through rates).
- The number of interactions initiated via the clienteling platform.
- On-site customer engagement stats like online visits and time spent on the website and in store.



3 Sales/ROI

Store associates can provide expert, personalized advice when equipped with clienteling tools that give them access to detailed customer information and purchase history. This gives them a better understanding of the customer's preferences and alerts them of important upcoming events. When combined with global access to detailed product information, associates can effectively make tailored and relevant recommendations in person, by e-mail, SMS, messaging apps, and more.

- Keep track of online and in-store sales attributed to clienteling interactions.
- Compare conversion ratio, average basket size and return rates to other sales channels. There should be meaningful improvements to the majority of these metrics.



4 New Online Customer Acquisitions

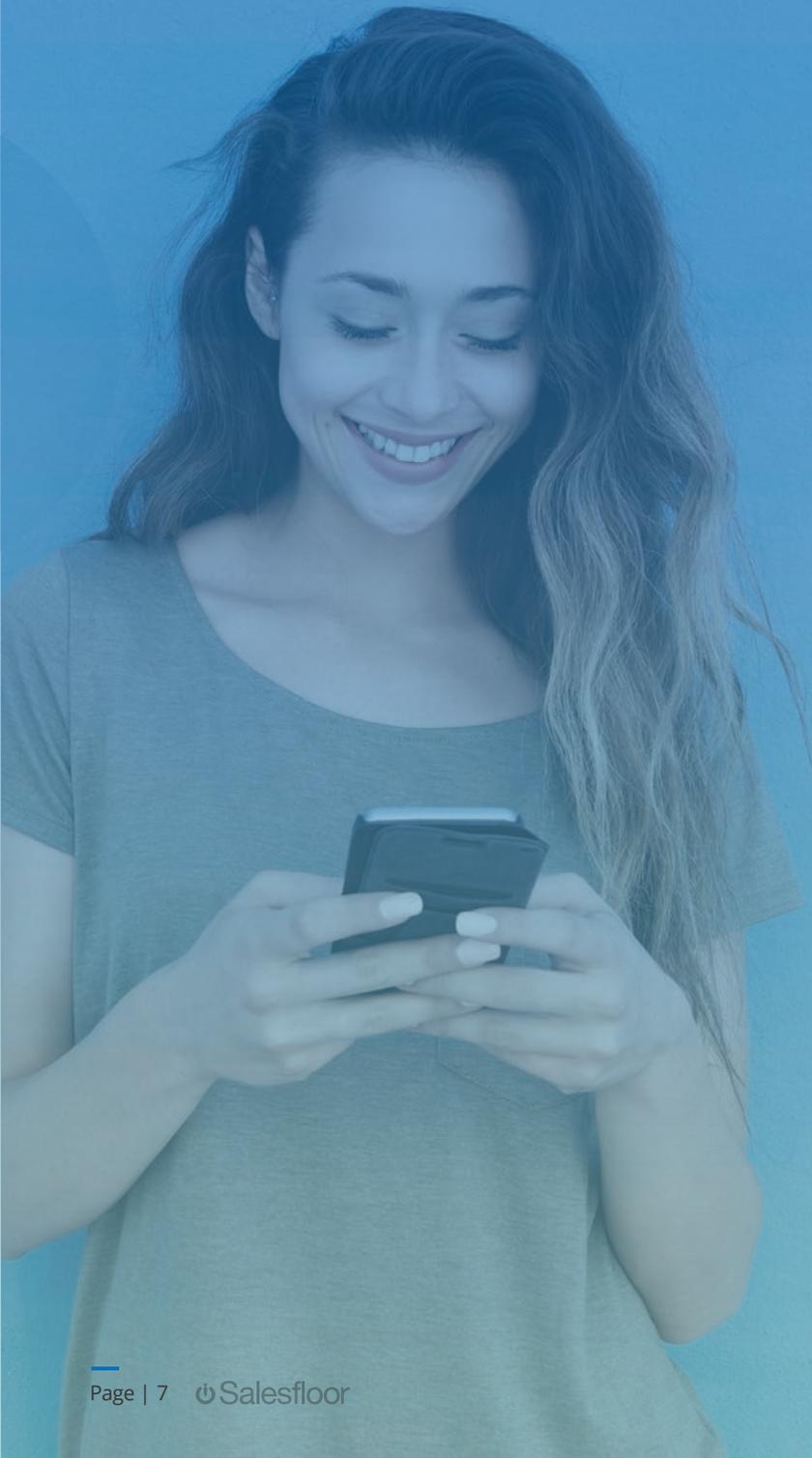
Clienteling can drive significant inbound opportunities for customer engagement online. This creates new channels for customer acquisition and encourages repeat purchases. Key success indicators include:

- Number of new customer contact information acquired (i.e. name, e-mail, phone number).
- Customers who are re-engaged and become a buyer again.
- Increase in number of buyers that purchase for the first time.

5 In-store Conversions

Clienteling tools allow in-store associates to provide personalized service. With mobile check-out and endless aisle capabilities at their fingertips, associates can also deliver fast and convenient in-store experiences.

- New customer acquisitions in store.
- Increase in number of transactions per store.
- Decrease in lost sales due to out-of-stock.



Clienteling allows retailers to provide service that is **personalized at every touchpoint**. It empowers store associates with the appropriate mobile tools to build one-to-one relationships with customers at scale and cultivate these relationships to **grow the business**. They are able to see first-hand the impact they have on the overall business. Results observed are increases in new customer acquisition rates, larger basket sizes, and decreased return rates.

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

