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Tulip Boardroom CX Week

The retail landscape has been forced to change drastically over the past months. Back in February, none of our members had ever talked to us about a need for clienteling solutions, yet today the question around how they can utilise store associates to enhance the digital customer experience is permeating every conversation we are having.

As part of The Retail Hive: CX Week, we teamed up with Tulip to explore how the industry is working to create true omnichannel experiences that keep customers at their heart, regardless of channel. As a result of this discussion, we have pulled together experiences and observations from our members on how clienteling can be utilised to replicate elements of the store experience online.

We hope that it will provide some useful insight for those who are exploring how to use clienteling or those building a business case for adoption.

Retail Hive: *There has been a major shift to online over the past few months. Now that stores are able to reopen, what do you expect will happen to customer demand? Will they shift back to an in-store experience?*

Member: “Our business is reliant on bricks and mortar, so for us, transitioning our customers back in-store is essential. One of the ways we’re doing this is through segmentation with a specific focus on our VIP customers first. We are thinking about what makes the “custom” part of customer and working toward creating authentic experiences in store specifically for these groups. There is also a safety angle - we need to reinvent the in-store experience so that everyone feels safe and looked after when physically with us.”

Member: “I’m not sure customers will go back to shopping in store the way they did before. It’s not just a question of safety, but habit. The fact that more retailers are now able to deliver a quality service online means customer are getting used to these digital channels and are more likely to stay with them. Today it is more important than ever to put the customer in the centre of everything and so, as retailers, we need to make sure we give customers the chance to *choose* the channel and journey that they prefer. ‘In-store only’ campaigns that drive customers back to store are actually forcing them to do something outside of their comfort-zone and will only have a short success rate.”

Retail Hive: *What does a VIP experience look like now? What are retailers doing to make the most out of clienteling?*

Tulip: The main factor we are hearing from our retail clients is the importance of personalisation and intimacy. This is not something that needs to be taught to sales associates from scratch. The knowledge is embedded in them and they know how to unlock these experiences. It is not about training but about unlocking what they already know and making this knowledge more scalable. Digital tools to help level up associates so can provide same support to more customers.”

Member: “Generally, we think VIP customers will use online channels now more than they used to. As a result, we’ve mobilised all retail store staff to provide online services for our VIP customers online. We are encouraging these customers to embrace omnichannel and have emotive conversations with their sales associates through tools such as live chat. This is working really well for us as it gives our customers better access to the information that they want from our knowledgeable retail staff, whilst cultivating relationships with the brand. Customers like it as they are able to have a conversation with one associate and then organise a digital or face-to-face appointment with that very same person without having to start over.”

Retail Hive: *How are you using digital solutions to empower your sales associates?*

Member: “We have a central 360-degree view of our customers which is integrated deeply into our website. When our customers put in an enquiry or request to chat, these conversations all feed into the central CRM. This includes everything that happens both on and offline – there is no point having one but not the other as you won’t get full view of the customer journey. One of the most annoying things for any customer is talking to one associate and then having to repeat your conversation again when passed onto another. With our system, any associate can pick up any conversation where the last associate left off. This enables global support for customers and ensures our associates are well equipped to solve any customer need at any time.”

Retail Hive: *More so today than ever before, associates are having to manage the way clients are shopping – what are your associates doing to make it work for your customers?*

Member: “For us, a sale is a sale for the brand – it doesn’t matter which channel it comes through. A lot of what we do is based on building relationships between customers and their client advisors. Our customers can get in touch with their advisor by text or WhatsApp whenever they like. It is important that our store associates feel empowered to engage their clients and encourage them to make a purchase regardless of the channel. This ensures that the customer remains at the centre. Whatever you do online impacts in store and vice versa. When our customers initiate a conversation online, we recognise who they are as soon as they start to chat or send an email. By doing so, we can direct them straight to their personal advisor if they are a VIP. Regardless of whether that associate is available or not, our customers can rest assured that the next available associate will be able to pick up the conversation as the system provides a complete view of the customer and their journey.”

Retail Hive: *How has the pandemic affected your technology roadmap strategy?*

Member: “I think technology has now become the number one priority for retailers in general and we are all working toward getting our C-suite really focused on investment. It’s certainly accelerated our thinking in the space. What’s important now is to prioritise technology in the right way as there are finite resources and budgets. My advice for retailers in the process of starting over with a different mindset toward rolling out a digital first approach would be to expect to see a resistance to change – the biggest challenge will be overcoming the mindset that technology is bad. People are used to what they’re used to and when trying to implement a completely new approach it will be hard to get people on board at the start. However, if you promote from within and teach people how lucrative digital is as a channel they will quickly come around to the idea. Make sure you give them the tools and ability to get up to scratch with any technology you bring in.”

Advice from the Hive

- There is a clear opportunity here for retail to start from a fresh slate – to stop thinking about store vs. website and to start thinking about customers and the metrics to unlock value for them, regardless of channel

- It is important to continue to educate your wider teams on putting customers in the centre and to make sure that their action follows through with a single aim of helping the customer
- Combining customer feedback with KPIs will help to keep your customer at centre of any strategy and develop a mindset across the team with the customer at its heart
- Whilst technology is an enabler, we are still all human beings and retailers should take into consideration the importance of human interaction
- By starting small and keeping technology simple, you will be amazed how quickly internal teams can adapt to change