

the bfem post- purchase playbook

BEST PRACTICES TO INCREASE CLTV ON
BLACK FRIDAY, CYBER MONDAY, AND BEYOND



chatdesk



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scope

BLUE LAND PARTNERS



Are you ready for the Holidays?

Who doesn't love the holidays? Aside from the good food and togetherness, there's something special about this time of year—unless you're an eCommerce merchant—in which case, the best way to describe the holidays would be, "loosely organized chaos." That's why we're here.

In 2020, eCommerce merchants across the globe brought home \$5.1 billion USD on Black Friday Cyber Monday alone. That's a lot of gravy. According to [a study](#) by Shopify, the Average Cart Value was a little over \$89, the peak time was 12PM EST on Black Friday (which accounted for \$102M), and most of these shoppers came via email campaigns.

The most significant metric here though? There was a 76% increase in sales worldwide between 2019 and 2020.

With so much cash on the table and this holiday season shaping up to see similar upticks in key metrics across the board, how can a business prepare for the inherent bottlenecks that come with a sudden increase in business? How can eCommerce brands leverage the unrivaled discoverability of holiday campaigns to increase brand loyalty and keep these new customers from churning? It all starts now—and we have some solutions.

From procuring inventory, to preparing for inevitable shipping snags, to implementing a proactive customer service practice, you can ensure that your customers will be happy and keep coming back even before they click "checkout."

Let's get into it.



scope

Prepare your Website for the Holidays with the Right Expert Help

As the holiday season approaches, it is important to create a roadmap of website improvements you want to see ahead of the holiday rush.

● **Identify which website improvements will have the biggest impact**

To identify which website improvements will have the biggest impact, start by reviewing feedback from your customers, as well as usage data from your website pages. Next, categorize the feedback into relevant buckets such as: returns, product questions, errors, drop off, etc. Once you have a prioritized list, identify which categories appear to be the most common and might potentially be contributing to lost sales or negative experiences. These organized learnings will help you identify potential goals and improvements. For example, if you are getting ~50 questions and negative customer messages per month about your return process, your goal might be to reduce the number of customer questions and negative feedback regarding returns by 50%

● **Document learnings on the highest impact improvements and updates**

Now that you have your goals clearly defined you are ready to describe which tools you are using and which updates need to be made. Scope recommends that you plan to have all large website changes implemented by the end of October. This deadline will give you time to test and update before the holiday rush. The next step of the process is to establish your budget. While you can leave this open, having a maximum cost will help keep all stakeholder's expectations in check. Consider these questions as you plan for your update: what is hitting that goal worth to you, how much money will it save you and how much would it increase conversions and repeat customers.

● **The final phase of this process is to find an expert to work with.**

While the final phase of this process is the most rewarding, finding the right expert to work with can feel overwhelming, but Scope is here to help! Scope is an Expert Marketplace that matches customers with certified Experts to build solutions. Once you have defined your goals, drafted your project requirements and set your deadline & budget, you can share these with Scope. Scope will review these requirements and find you an Expert that can implement your changes quickly and efficiently. You can track and manage your project within the Scope product to ensure that your project is on track ahead of the holidays!

Ready to find an expert to supercharge your website for holiday shopping? Visit [Scope](#) and get started today.



- **Review your customer activity to help define your goals.**
- **Draft your project requirements, deadline, and budget.**
- **Share your project details with [Scope](#) to get matched with the right expert.**



How to Prepare for the Peak Holiday Season Shipping Crunch

No matter the time of year, shipping should never be viewed as a 'set it and forget it' function of your eCommerce fulfillment operations. Market fluctuations, service disruptions, and an increasingly fragmented ecosystem mean carrier opportunities and challenges will vary constantly. This is especially true during the peak BFCM and holiday season, so it's crucial to pay extra attention to pricing changes, delays, shipping cut-off dates, and other factors that could impact your fulfillment process.

Educate yourself ahead of crunch time so you can identify which carriers are best equipped to help you meet your goals.

If you're shipping internationally vs. exclusively domestically, for instance, you'll want to explore a range of global carrier options to identify the best fit for your and your customers' needs. Regional carriers may deliver faster at a lower cost to certain destinations, while popular national carriers may make more sense when shipping a certain weight to zones further away. Diversifying your carrier mix according to your specific products, goals, and customer preferences will allow you to offer more robust shipping options to consumers while also maximizing the bang for every fulfillment budget buck.

Stay informed of changes and disruptions, and maintain an agile mindset so you can reassess options when necessary.

We recommend keeping tabs on the following:

● Price increases

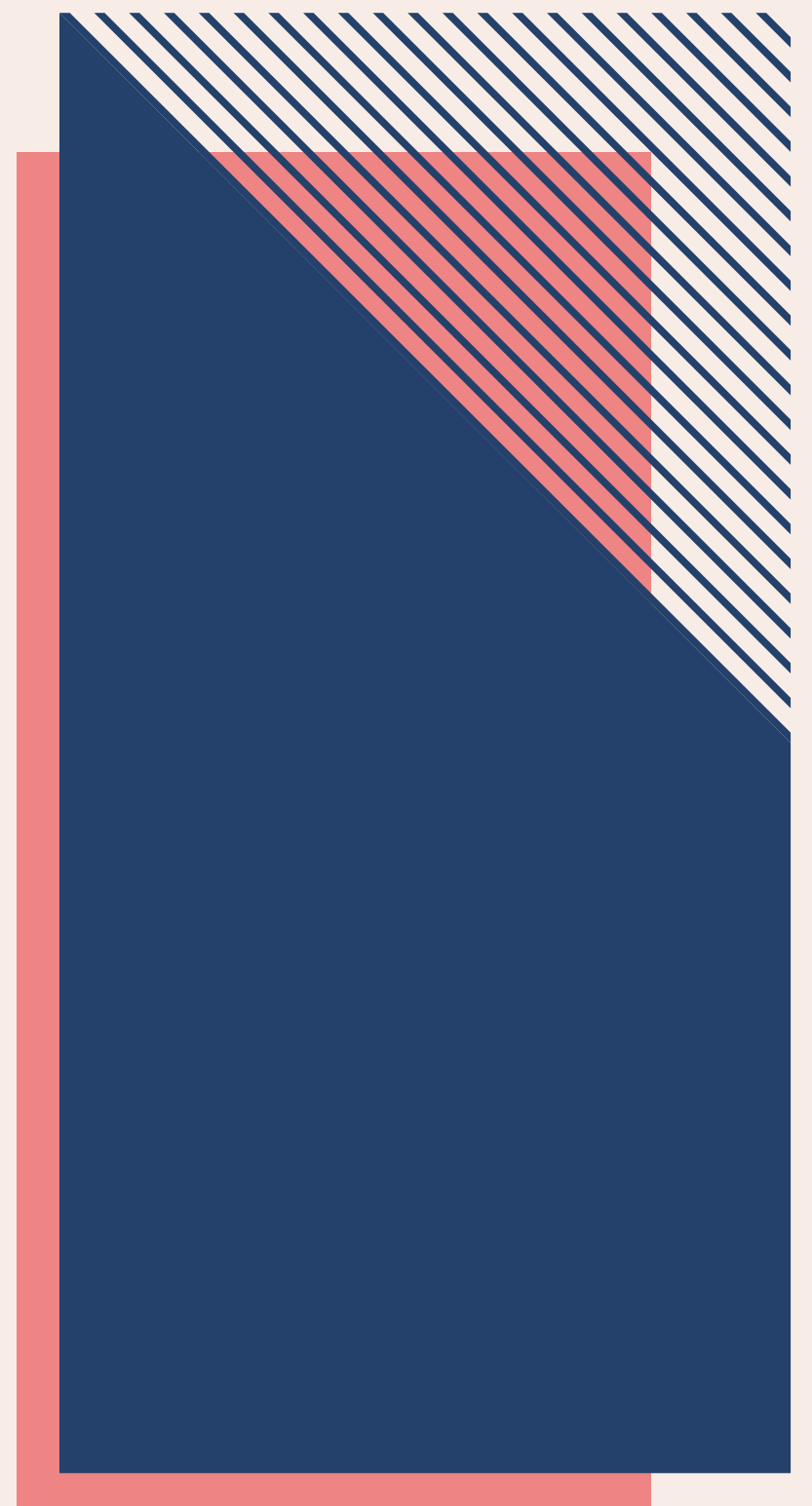
Most carriers increase their rates ahead of the busy holiday season. This may be a one-time change at the beginning of the season, or several changes rolled out over weeks or months.

● Delivery timelines

As demand and deliveries increase, resources get stretched thin. Carriers usually offer guidance around updated pick-up and delivery timelines as well as cut-off dates — you need to be aware of these timelines to make sure orders get out the door in time, and so you can communicate them to your own customers. We recommend getting ahead of customer stress or confusion by making sure these "Purchase By" deadlines are clear and prominent throughout your website, marketing emails, and other channels.

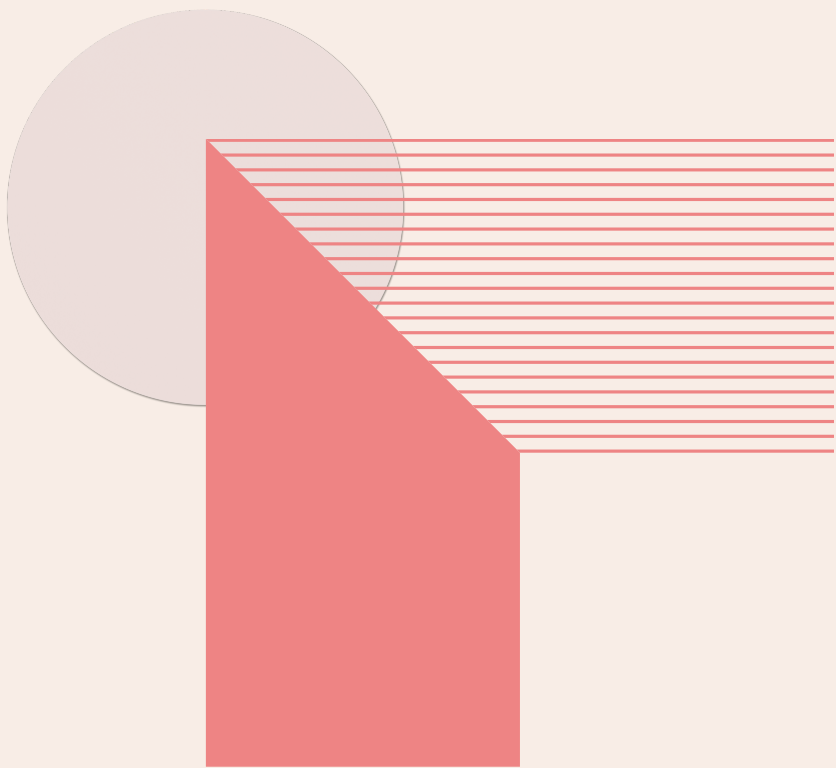
● Service disruptions

As we've all had hammered into our heads over the past year and a half, it's crucial to not only expect but anticipate the unexpected. Disruptions can occur for any carrier, for any number of reasons, and the only way to get your holiday shipments around these challenges is to make sure you're aware of and prepared for them.





Harness the right tools and technology to efficiently make the best shipping decisions for your business. Comparing carrier rates across service-levels will help you determine which options are the best for your needs at any given time, but you need the right technology in place to do so in a way that's both time and cost-effective. Best-in-class shipping solutions such as Shippo enable e-commerce merchants to compare rates across a vast network of carriers in real time, and integrate with e-commerce platforms and logistics providers to sync order and inventory data for seamless end-to-end fulfillment. Features such as batch label printing, partial fulfillment, and automations — which apply predetermined rules to label purchases according to factors such as package weight, destination, or SKU — can cut the time it takes to ship in half. That time saved will come in extra handy as you scale your fulfillment operations during the busy holiday season.

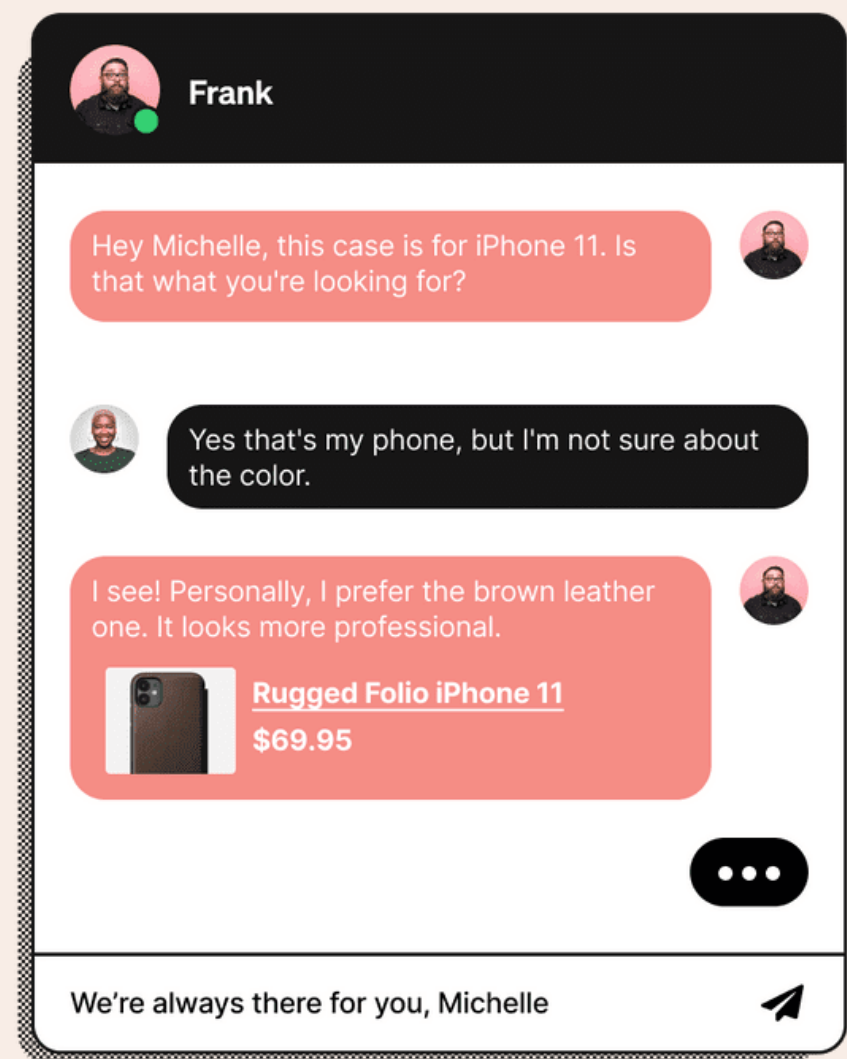


- **Educate yourself** about individual carrier strengths and weaknesses ahead of BFCM and the holidays so you can identify which carrier mix is best equipped to help you meet your goals.
- **Stay informed** of carrier service changes, timelines, and disruptions throughout the peak eCommerce shopping season, and maintain an agile mindset so you can reassess options when necessary. Following e-commerce news, blogs, and social media accounts will help you stay in the loop.
- **Harness best-in-class shipping technology** that enables you to compare rates across multiple carriers in real-time, save time on operations by automating manual tasks, and — ultimately — make the most cost and time-effective shipping decisions for your business.

Turn Your Customer Support Into A Personal Shopper Experience

In a landscape as competitive as eCommerce, businesses are constantly looking for ways to convert visitors into customers and then, of course, into repeat customers. One oft-overlooked area to achieve this is through customer support which, with the right tools, can be supercharged into a personal shopper experience for your clientele.

It begins with Live Chat. As soon as someone visits your site, you must have the capacity to assist them. Live Chat allows you to greet the visitor, anticipate and answer their questions in real time, and provide constant help as they navigate your site. Items placed in a shopping cart create further sales opportunities based on histories of what other people have bought in combination with those items. And, as the checkout process progresses, Live Chat can be employed to “hold the hand” of the customer, and answer questions, every step of the way.



A powerful Helpdesk in concert with Live Chat can up your game even more. Having detailed, well-organized customer data pulled from multiple sources, all in one place, is critical. Aggregated, non-siloed, data, from order histories to social media profiles, provide your customer support team with a holistic view of the client. Armed with this wealth of information, extremely personalized interactions can take place that facilitate, in concert with Live Chat, what is increasingly being known as conversational commerce.

- **With the right tools, a Customer Support team can create an extremely helpful and personalized visit for shoppers on your site.**
- **Live Chat gives you the ability to meet the customer at every step of their journey on your site.**
- **A Helpdesk with aggregated, organized customer data completes the personal shopper experience.**



Scale Personalized Support and Drive Sales

As a result of COVID-19, more customers are shopping online over the holiday period. Customers expect brands to provide a personalized experience similar to shopping at a store.

Brands may not have the luxury of hiring a holiday support team to quickly respond to customer inquiries across email, chat, social channels, and more.

From our conversations with hundreds of companies, here are two ways to ensure you have the proper support setup needed to capture sales and increase loyalty:

● Have a support plan for emerging channels

Outside of your traditional channels (e.g., email, chat), there are other fast-growing channels where customers are finding you (e.g., TikTok, YouTube, Reddit). It's not enough to market on a channel. You need to be prepared to engage any people who reach out – especially if it's a pre-sale question. One example of this:

- TikTok: Influencers are finding products similar to yours and reviewing them every day. Shea Moisture, one of our clients, uses this as a big opportunity to engage these influencers and drive conversion.

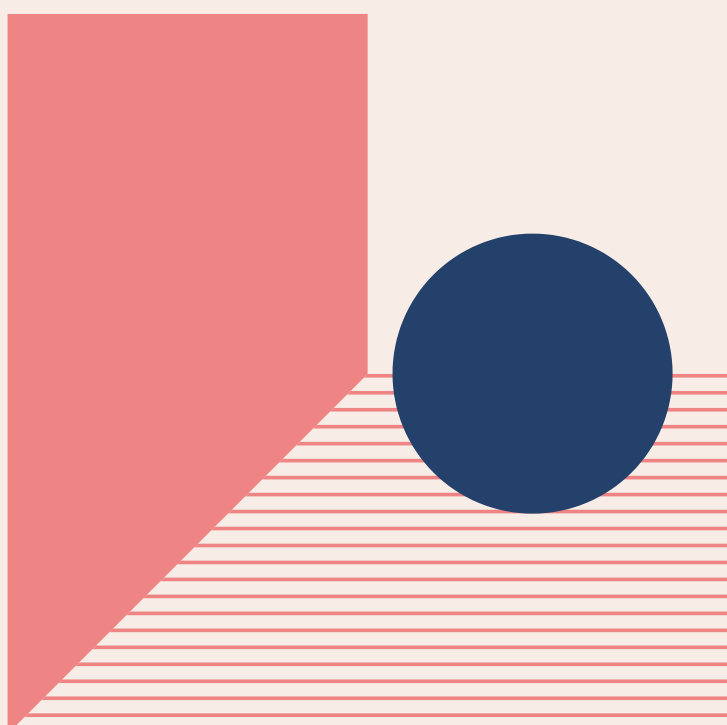
● Hire promoters of your brand for 24 / 7 support

Now Holiday support hiring can be very expensive and time-consuming. One trend we're seeing with best-in-class companies is leveraging local "Superfans" who are excited to work for brands they are customers or promoters of. These Superfans work on a "pay-per-ticket" basis instead of hourly rates. They can help to reduce potential churn during the holidays and drives loyalty scores

- Example: Fable, a Pet accessory brand, partners with Chatdesk to leverage US-based pet owners who understand the nuances of pet related questions. Their Superfans deliver 24 / 7 support across all channels which leads to more personalized, quality answers for customers and increased sales by 15%+

In summary, leaders who can create a support plan for emerging channels and find on-demand solutions for quickly onboarding and training brand experts will succeed this holiday period.

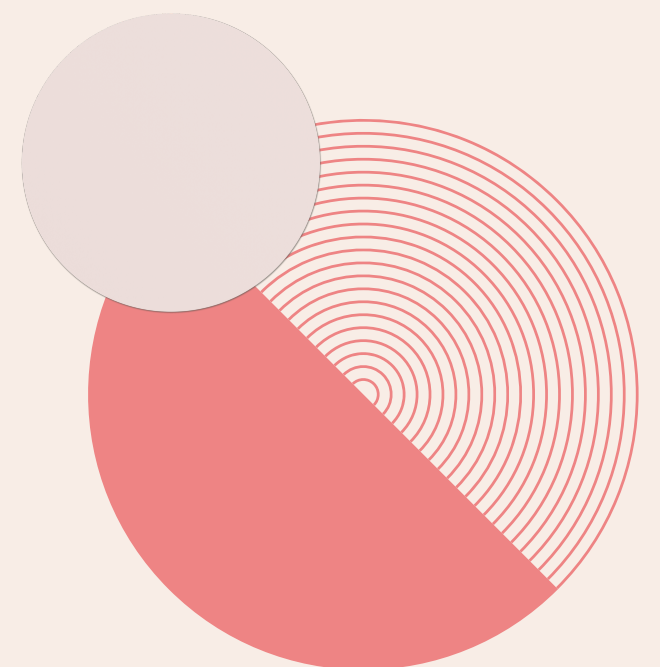
For more information around effectively scaling support during the holidays, feel free to reach out at info@chatdesk.com.



Turn New Customers into Loyal Brand Champions with Dedicated Ad Campaigns

Converting new customers is hard work — but the work doesn't end once you score an initial purchase. Past purchaser segments are often ignored when it comes to ad campaigns despite their high propensity for being extremely valuable customers. Marketers have a golden opportunity to increase lifetime values & cross-sell happy customers into new products by bringing these segments into their ad campaigns.

Another added benefit for past purchaser segments — we can speak to them in a wholly different tone than a brand-new prospect. They're already familiar with your brand & service, allowing marketers the opportunity to get creative & highlight new offerings or products that the company is focused on getting out the door & into the hands of its customers.



- **Create audience segments using email lists, pixels, or other 1st party data sources immediately across as many ad platforms as you can to make sure they're ready for when you want to use them.**
- **Plan for specific assets, ad copy, & offers developed specifically for your past purchaser audiences; you know them & they know you, leverage that familiarity as much as you can!**
- **Prepare to be aggressive — especially with a strong offer around the holidays! You only get one shot per year to make the most of your holiday performance, don't let it go by without accomplishing everything you want to accomplish.**

Unboxing: Turning Customers into Brand Influencers



Fulfillment for LARQ by Whiplash

The unboxing experience, an immersive ritual that involves unpacking an eCommerce order augmented with branded packaging, inserts, and free samples, is not a recent innovation. But in the age of social media, unboxings have highlighted that every customer is a potential influencer – if merchants can inspire them to take action.


It's no secret that everyone loves a good unboxing experience, especially during the holiday season. In fact, there's no better time of year for a thoughtfully curated package to land on your customers' doorstep.

Why? Because a holiday unboxing, especially when combined with a swift shipping strategy, enables direct-to-consumer brands to meet their customer's seasonal needs.

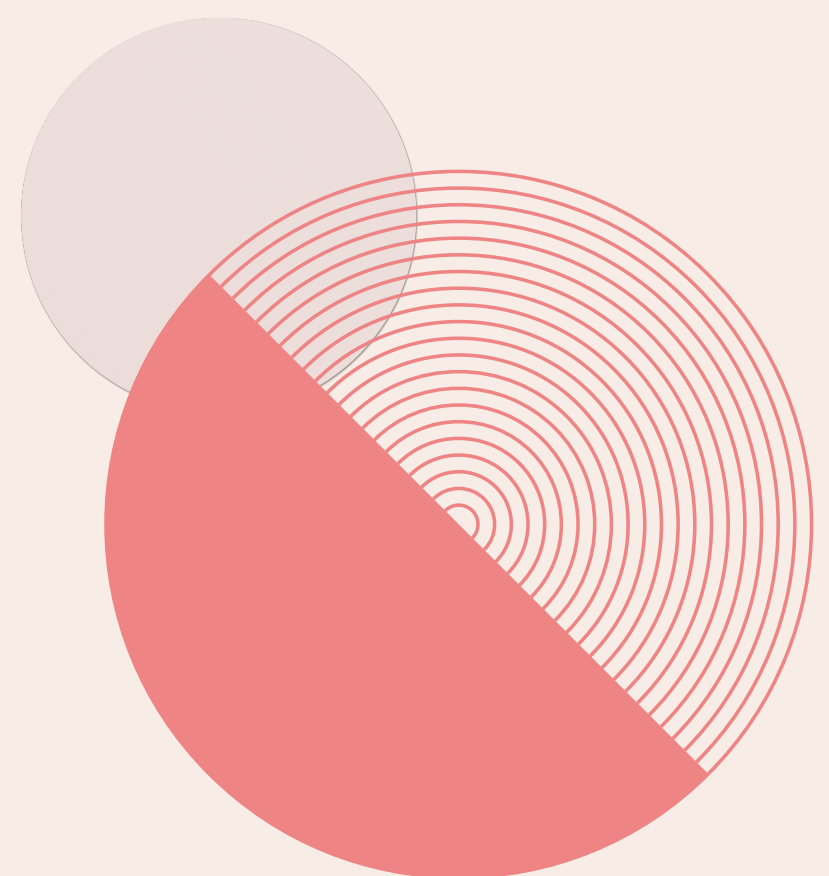
When the gift-buying frenzy begins, consumers gravitate towards merchants who make the end-to-end shopping experience as convenient and stress-free as possible. By removing the need for customers to source packaging and accessories to get their orders ready for gifting, you're also removing considerable friction from the customer experience.

But unboxing experiences are much more than just attractive packaging; they're also a powerful value proposition that helps brands to bridge the experience gap between buying online and enjoying a purchase. By encouraging consumers to share their unboxing experiences online, you have ready-made seasonal marketing content to spruce up your social channels.

Here are three actionable tips to make your unboxing experience as shareable as possible:

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- A series of parallel diagonal stripes in dark blue and white, located on the left side of the dark blue section.
- **Facilitate cross-channel activity.** If you want as many customers as possible to share your unboxing content, you need to make it as frictionless as possible to do so. Adding a QR code in your box that takes customers straight to your Instagram account will encourage them to follow your brand and stay in the loop with your activities.
 - **Give your customers an incentive.** Consider turning your unboxing experience into an official campaign. For example, having your customers post a photo or video with a branded hashtag in exchange for entering a giveaway is low-hanging fruit that will drive user-generated unboxing content.
 - **Make it personal.** Addressing your customers by name in thank-you notes or including samples that complement their purchase will make them far more receptive to getting involved with your marketing efforts.

By partnering with a full-service eCommerce provider like Whiplash, who can facilitate the kitting and subassembly required for a stellar unboxing experience, you can turn D2C fulfillment into a competitive differentiator during the holiday season.



You Don't Have to Suffer the Post-Holiday Un-Conversion Blues

Post-holiday letdown is a real thing, and for retailers, it comes in a special package: Confronting “un-conversions” or sales you counted as conversions, but which disappear as those January returns start rolling in. Last year, the National Retail Federation reported that merchants expected \$101 billion in returns related to holiday 2020 — about 13.5% of sales. And worse, according to the NRF, about 5.9% of all returns were fraudulent.

Reducing your un-conversions is a two-step process. Step one: Put yourself in your shopper's shoes when presenting and describing products on your website and when providing channels to seek help operating or using the products you sell. Step two: Protect yourself and your conversions from those with a criminal bent who seek to keep their purchases and land a refund for the item they bought.

Here are three ways to increase your chances that you'll still be feeling that holiday glow all the way through the post-holiday returns season:

- Make sure the photographs and descriptions of what you are selling are clear and accurate on your website. One great way to ensure that your conversion remains a conversion is to make sure your customers know exactly what it is they are buying. Depending on what you're selling, consider creating accurate and helpful sizing charts, or easy-to-understand product manuals or videos. Back all that up with easily accessible customer support, available through multiple channels.

- Sharpen your understanding of your customers' identity and behavior. Knowing the signs of a serial returner or a fraudulent return will allow you to apply that knowledge to incoming orders and prevent trouble later. Consider turning to an expert technology partner with a database sufficient to build the kind of knowledge base necessary. Or get creative with your own customer data platform. Rather than rely on your CDP only for marketing insights, use it to establish a baseline for normal return behavior and keep an eye out for order behavior and histories that deviate from the baseline. Your vision is limited, of course, when relying on only your own data, but it is better than having no vision at all.

- **Watch for common signs of return fraud:**

- **Do you notice a pattern of returns from particular customers during a short time span right after the original purchase? Note how often this occurs.**

- **The returned item is returned from an address different from the delivery address. Signifyd has recently seen cases where merchandise that was to be delivered to the northwestern United States was being returned from the southwestern United States, for example. This is a red flag indicating an organized fraud ring is involved. The scenario raises two key questions: Why is this merchandise being shipped from somewhere other than its delivery address? What items are actually being returned? Are they knock-offs or low-value items unrelated to the original purchase?**

- **Inconsistent return package weight. Is the returned package the same weight as the original? Signifyd has data that shows patterns of returns where the return package does not match the originally stated weight. If the weight isn't right, there is a high risk that your retail outlet is receiving an empty package, a knock-off product or a package weighted down with sand, rocks, etc., to approximate the original product's weight.**

Increase Loyalty with a Customer-Forward Return Policy


Returns are an inevitability in eCommerce, particularly around the holiday season. With merchants ramping up advertising initiatives to increase sales for the season, Black Friday and Cyber Monday are often the first time many customers make a purchase.

To turn these first-time buyers into repeat purchasers, mitigating post-purchase (or in the case of returns, specifically "post-fulfillment") frustrations by proactively viewing the returns process as another touchpoint along the customer journey rather than simply reacting to return rate as a metric to lower can increase loyalty. Along with implementing a returns management solution to create a frictionless returns process, merchants can get ahead of any potential returns issues by putting a flexible, customer-centric returns policy in place. It may seem counter-intuitive, but with the chaos of the holiday season, the last thing an eCommerce brand wants is a dissatisfied customer reluctantly holding onto an item they intended to return because the window was too short or the returns process was too complicated.

Even if the return goes smoothly, what about the time it takes for a customer to receive their refund or store credit? These are all factors that can impact a customer's view of an eCommerce brand, along with their likelihood to come back and make a purchase.

Being up front with a return policy gives shoppers a reasonable expectation of what to expect if they not 100% thrilled with their purchase, and can give a competitive edge over a shop that may not have as transparent of a policy. Consider this—would you be more likely to make a purchase from a new stop if you knew that you could easily return the item? Many shoppers say "yes!"

When crafting your return policy for the holidays, here are a few recommendations:

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- **Keep your return policy front and center: if it's difficult to find, that could mean more questions for customer service. Place a link to the policy in the footer, and perhaps even another link in transactional emails.**
 - **Consider extending return policy's during the holidays—especially in the case of gift returns—give customers a chance to love their product, or to at least wait until the holiday season is over to make their return.**
 - **For customized gifts or ones that could need repairs down the line, implement a solution that allows for effortless warranty process.**

Customer Service Best Practices for BFCM



Data & Communication are Key To Post-Purchase Customer Support Success

You’ve done the heavy-lifting. The visitor to your site converted and made a purchase. And, while the strategies and methods may have changed over time, service after the sale still remains a fundamental part of customer support. Often, the strength of a company’s customer support doesn’t get tested until after a purchase has been made. With a helpdesk full of organized, aggregated customer information, the range of issues that can and do arise at this point may be addressed and resolved in the best possible way for both your customer and your company. Simply put, data is your ammo and quick, clear communication your weapon.

The customer now communicates via a vast array of channels, and you must be able to see and respond to them all. A mere Instagram comment telling you how much they love their new shoes can be handled with as little as a smiley emoji, while a direct, specific question on Facebook about an incorrect shipment needs to be seen and dealt with ASAP.

Having as much information as possible, all in one place, will save time, energy and effort for both you and your customer. If the customer contacts you about their order and, in your prompt reply, your support agent mentions the most recent order number, asks how the sweater fits and wishes them a happy birthday, you have both personalized the communication and let the customer know that you know exactly what is going on.

- Aggregating customer data is a key to seeing the whole picture.
- Monitoring and communicating via a range of channels is vital.
- Having a helpdesk that can do it all in one place is now a reality for eCommerce success.

Tickets

CHAT

FAVORITES

FRANK'S VIEWS

Frank

Re: Update Shipping Address

✓

Shipping

Prospect

Frank

Michelle

Hey, is it still possible to update the shipping address of my order #4567?

12:24 AM

Frank

Hi Michelle, of course it is, which one is it ?

12:24 AM

Michelle

8 Douro 5 Line, K9J 6Y2, Peterborough

12:26 AM

Frank

Updated! You can track your delivery over this link : [2058315839548](#)

12:26 AM

Michelle

Awesome, thank you!

12:28 AM

michelle@gmail.com

Add macro

Hi yes this works perfectly well

Send

Shopify Michelle

Total spent \$ 345

Order #2568

Cancel

Duplicate

Refund

Created 01/26/2020 Paid \$ 47

ID: 387462563

Status

Tracking number: 2058315839...

Shipping address

Street 8 Douro 5 line

City Peterborough

Zip K9J 6Y2

Order #2345

Order #2216

Order #2135

Customer Service Best Practices for BFCM

chatdesk

Three Best Practices to Reduce Holiday eCommerce Returns and Drive Self-Service

According to [Shopify](#), eCommerce returns during the holiday can rise to 30%. With thousands of new customers trying your product for the first time, your post-sale support process can make or break your business. To help reduce returns and ensure customer happiness, below are 3 best practices top brands utilize:

- Educate customers on self-service options: Today, over 40% of consumers now prefer self-service over human contact. [Thinx](#), one of our womens' health clients, built a online helpdesk (below) that highlighted options for quickly tracking an order or processing a return or exchange.
- Offer interactive options to determine size, shade, and style: A recent article on reducing e-commerce returns mentioned the importance of customers getting a better sense of an item's size, color, or feel on a website. By helping customers choose the sizes and styles that best suit their needs, brands minimize their e-commerce return rate and ensure customer satisfaction.
 - Example: CUUP, a womens' intimates brand, offers customers an in-depth "fit quiz," which even compares CUUP's sizing to other leading e-commerce retailers. Still, finding the right bra size can be a hassle — so, CUUP takes their pre-sale customer service a step further by offering online video fittings.

- Make the returns process clear and easy: Many companies feel that having a difficult returns process will prevent customers from returning products and increase sales. This is so far from the truth. Not only will unclear and difficult return policies irritate first-time customers, the lifetime value of those customers significantly decrease. The more efficient your returns process, the happier your customers will be. Many eCommerce brands leverage self-service returns tools such as [ReturnLogic](#) to automate the production of return labels, help track shipments, and even convert returns to exchanges.

RETURNLOGIC

An Operational Approach to Customer Service Creates a Seamless Customer Experience

A smooth customer experience when initiating a return can only go so far—what happens when the return is out of the shopper's hands and in the customer service and warehouse teams'?

The holidays are a great time for brand discovery, but also a time when the stakes are high, leading to inevitable shipping delays, bottlenecks as customer service teams get overwhelmed, and backups at the warehouse.

- Send automated emails to keep the customer up-to-date on the return process and when to expect a refund.
- Embed a live chat in the returns portal to answer questions efficiently. ReturnLogic features a Gorgias integration that allows this, as well as populates RMA data within the CRM.
- How diverse are your customers? If they prefer phone calls to email, consider using ChatDesk to turn phone calls into self-service opportunities, saving customer support resources while reducing friction.