



# **360-Degree Customer Experience: A Holiday Preparation Guide**

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**H**eading into the 2019 holiday season, perfecting the customer experience is more important -- and more challenging -- than ever.

Omnichannel merchants of all sizes are struggling against the dominance of a handful of mass merchants, with Amazon alone dominating some 44% of all sales on the Web. With products and pricing becoming less viable as differentiators, many sellers are positioning themselves as niche experts backed by stellar customer experience. Technology researcher Gartner found that [two-thirds of companies already consider themselves to be competing primarily on customer experience](#) - and that number is forecast to rise to 81% of companies by the end of this year.

Consumers, too, increasingly value customer experience; [they're willing to pay a premium of 16% to companies that provide great customer experiences](#) along with quality products and services, consultancy PwC found. On the flip side, just one poor experience can drive 17% of U.S. consumers to find another brand, while several poor experiences can drive away 59% of shoppers.

But even as customer experience assumes a leading role in brand value, delivering truly standout service is more challenging than ever. That's because:

- Shopping is everywhere. The rise of eCommerce has spurred double-digit revenue growth for years, and now mobile is ascendant, with browsing on smartphones making up the majority of time shoppers spend online with brands. Add to the mix nascent efforts at native commerce for social media platforms from Facebook to Snapchat, opportunities for enabling transactions on devices from watches to refrigerators, and the rise of pop-up retail and other reinvigorating takes on traditional stores, and it's easy to see that merchants face a steep challenge when it comes to providing smooth, agile service. As consumers increasingly expect quick and flawless



execution of online-to-offline services such as Buy Online, Pickup In-Store (BOPIS), merchants must find new ways to coordinate operations internally and to assist shoppers across touchpoints.

- Information is ambient and intimate. Gone are the days when an argument over movie trivia or a sports record lasted the span of an entire meal; nowadays, the debate ends instantly with a quick Google search via smartphone. With such ready access on demand, consumers expect to access brand and product information at any time. Search engines on mobile devices are just the start; as the machine intelligence behind voice recognition grows more sophisticated, the intermediaries of screen and keyboard are increasingly being replaced by digital voice assistants and smart speakers. With information everywhere, consumers expect to be able to access what's personally relevant: Searches containing the phrase "for me" rose 60% from 2015 to 2017, according Kleiner Perkins, [while inquiries about resources "near me" skyrocketed a whopping 900%](#).

To meet these challenges, merchants are providing customer assistance through ever more outlets and formats -- and increasingly rely on artificial intelligence (AI) to help process and respond to the growing demand for relevant information and assistance. [More than half of marketers globally surveyed by Business Insider are already using AI](#), and BlueShift found that among U.S. B2C companies, [64% of marketers predict they'll increase AI use in the coming year](#).

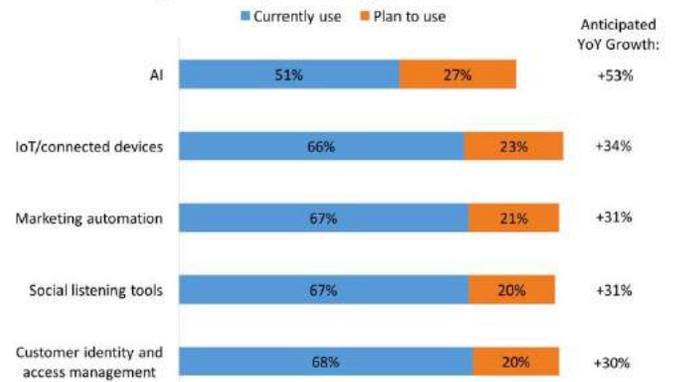
The peak holiday season raises the stakes still higher for standout service, with shoppers' expectations running high for convenience, savings, and service within a tight calendar of sales events and delivery deadlines. With fourth-quarter sales representing up to 30% of retailers' total yearly revenues, it's crucial to demonstrate customer service prowess during the peak season in order to compete successfully in a crowded marketplace.

As merchants head into the final countdown to the holidays, this guide provides a comprehensive overview for delivering a proactive differentiated customer experience across touchpoints. The following pages detail

- The proactive service content merchants need, and the formats and touchpoints shoppers use to find it
- The omnichannel handoffs sellers must execute flawlessly in order to deliver a seamless, responsive experience
- How merchants can build on customer interactions to encourage future re-engagement and repeat purchases

With these fundamentals in place, merchants can meet and exceed customer expectations for quality customer experience during the holidays and beyond.

### Fastest Growing Marketing Technologies



n=3,500 global marketing leaders  
Source: Salesforce, State of Marketing, 2017

BI INTELLIGENCE

Source: BI Intelligence

## Proactive Content Preparation

As merchants prepare to navigate holiday sales spikes, they should focus on proactive triage. By addressing common questions and straightforward topics before shoppers dial the call center, sellers save their valuable in-person live help resources for the most complex cases.

That doesn't mean merchants should rely on generic content or "canned" responses to divert shoppers. Instead, merchants should view proactive service as an opportunity: by identifying where shoppers get stuck and delivering the right information at the right time to overcome purchase hurdles, sellers demonstrate that they understand their customers' needs and honor their concerns.

### Address customer pain points with key content

To pinpoint likely questions -- including those specific to the holiday season -- merchants should be sure not only to address current hot topics, but also to mine prior years' peak-season data from the

call center, email and live chat logs, and social media. Although concerns will vary by industry and business, every merchant is likely to need to address:

- **Fit issues.** The inability to touch and try items online is the reason [62% of shoppers still prefer stores](#), according to Retail Dive, and the problem is compounded during the holidays, when [more than half of gift seekers consider apparel purchases for others](#), a Deloitte survey found. Online sellers should over-communicate sizing and dimensions, including in FAQs and proactive chat.



- **Assembly how-tos.** Gift givers who want to put presents under the tree already assembled need help with setup -- sometimes in the wee hours when live tech support isn't available. Ready access to how-to videos and

manufacturer manuals will help customers get the job done.

- **Delivery timeframes.** Linc found that some [40% of customer service calls are related to WISMO](#) -- that is, "Where is my order?" -- and [shipping speed is the number one customer service concern](#) when shopping online, according to an ICSC survey. Merchants should communicate early and often about fulfillment options and shipping timeframes -- and during the holidays, when delivery timing is crucial, they should prominently message deadlines for ordering.
- **Returns and exchanges.** Given that some [28% of gifts are likely to be returned](#), according to a RedStag survey, it's no surprise that Deloitte found the ease of the returns process factors into purchasing decisions for 60% of holiday shoppers. Merchants should translate return and exchange policies into plain English and promote them far beyond the fine print of customer service pages. Merchants should also implement automated assistants to help shoppers with their returns and exchanges questions.
- **Store hours and services.** In 2018, two-thirds of shoppers told Deloitte they planned to research online and buy in-store, and 45% said they would order online for store pickup -- making easy access to store information vital for the eCommerce site.
- **Gift options.** In addition to describing such services as gift wrap and corporate gifting options, merchants should prominently highlight information about gift cards, which continue to grow in popularity. The number of shoppers planning to buy gift cards has grown 23% in the past five years, with 54% opting for one during the 2018 holiday season, Deloitte found. Gift card information should also be available on all messaging platforms.

## Syndicate for automation and interactive use

Once merchants have identified the customer needs specific to their products and audience and gathered information to proactively address those pain points, they should prepare content for use across multiple touchpoints.

To do so, sellers need to get creative with how content is packaged and promoted -- not simply cutting and pasting existing information from the customer service section of the website, but re-imagining how that content can be accessed by automated shopper assistance tools as well as by call center reps and by online shoppers themselves. Among the ways content should be developed and repurposed:

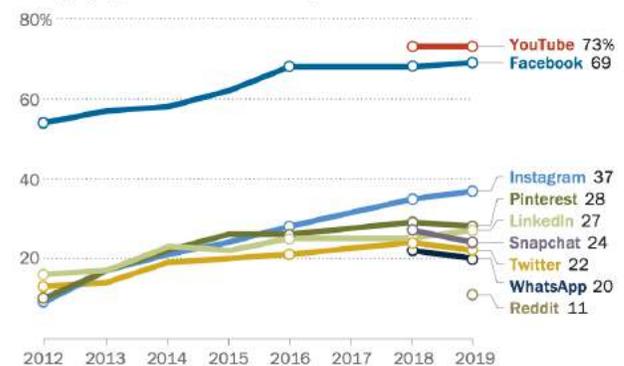
### 1. Provide self-service access anywhere.

More than [60% of U.S. consumers look for information themselves](#) before attempting to contact a brand, according to a Microsoft survey, and still more -- 88% -- expect companies to provide self-service information, even if they don't use it. To maximize the chances that holiday shoppers will find the information they need when they need it, merchants should not only develop self-service content, but create versions in different formats, lengths, and styles that can be used across multiple touchpoints. Among them:

- **In graphical (and even video) formats.** Visual content is increasingly important online, where [four of the top five social media networks are image-centric](#), according to the Pew Research Center; as smartphones have proliferated, visual content is easier to view on small screens and to respond to with taps or swipes, versus lengthy typing. Using snippet-style pop-ups or video promos that link to more details, merchants can highlight service without diverting shoppers away from the purchase path. Similarly, short-form videos and easy-to-scan tables, graphics, and icons make information both eye-catching and easy to process for harried holiday shoppers.
- **Throughout the eCommerce site path to purchase.** While most merchants understand that the product page should provide all the information shoppers need to make a purchase decision, they shouldn't neglect other key locations on the purchase journey -- from the home page to checkout -- where customer service content is helpful. Merchants should use analytics to identify where shoppers abandon the purchase path, and what content can be presented at those key junctures to encourage continuing.
- **On social media.** Some 39% of U.S. consumers have used social media for customer service, according to Microsoft, so syndicating critical holiday customer service content to social channels is a smart proactive move. Content should be tailored to the network and provide links to more extensive information on the eCommerce site.

### Facebook, YouTube continue to be the most widely used online platforms among U.S. adults

*% of U.S. adults who say they ever use the following online platforms or messaging apps online or on their cellphone*



Note: Pre-2018 telephone poll data is not available for YouTube, Snapchat and WhatsApp. Comparable trend data is not available for Reddit.  
Source: Survey conducted Jan. 8-Feb. 7, 2019.

PEW RESEARCH CENTER

Source: Pew Research Center  
by Andrew Perrin and Monica Anderson

- **In stores.** Omnichannel retailers should ensure that the trove of online customer service information is highlighted for the [close to 60% of shoppers who conduct research in the aisles](#). Links to assembly instructions, customer reviews, and guidance on gift shipping and other services can all be promoted alongside products on shelves to enhance the store experience.



- **Proactive live chat.** [Live chat is second only to phone service as the preferred channel for reaching live help](#), according to eMarketer, so merchants should implement it prominently on the eCommerce site, and prompt shoppers proactively to use it based on products under consideration, time on page or time on site, and prior order history, among other factors. Automating delivery of routine product and fulfillment information means merchants can confidently boost visibility of live chat without overburdening their customer support teams.

- **Mobile SMS service.** Currently, [1 in 10 consumers use SMS text messaging](#) to communicate with businesses, according to ClickZ, and 91% of those who've opted in view the service as useful. Such services not only provide a direct means to communicate about shipment status and other transactional details, but can also be a means to encourage automated Q and A style interactions about product usage and reordering options.

## 2. Parse content for automated intelligence.

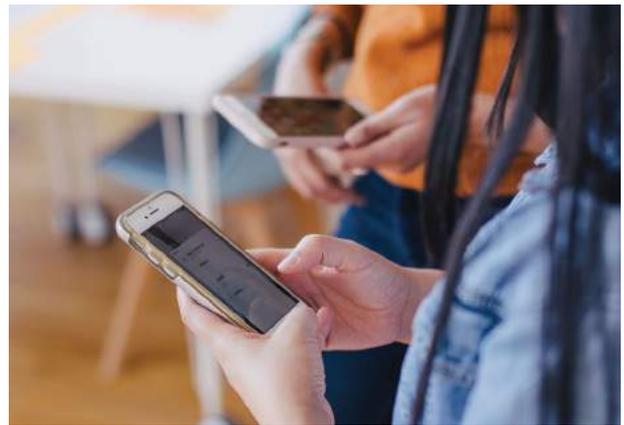
Not only are some 40% of customer service contacts related to WISMO (“where is my order?”), but Linc estimates that fully [70% of customer service interactions can be fully automated](#), from requests for store directions and hours to questions about return and exchange policies to product information. By relying on AI-powered automated intelligence to handle these routine questions, merchants can not only save their human customer service corps for complex situations; they can also reach shoppers via new shopping touchpoints that rely on “conversational commerce.” Among them:

What is your warranty policy?

Lamps Plus, Inc. proudly stands behind the products we sell. The Lamps Plus One-Year Warranty states that we will repair or, at our option, replace at no charge, your purchase within one year of the purchase date should you discover any defect in materials or workmanship.

Thank you!

- **Social chatbots.** It's now estimated that [some 80% of the global population uses one or multiple social messaging apps](#), according to eMarketer. Customer service chatbots launched on leading app Facebook Messenger in 2016, and merchants should take advantage of this opportunity to deliver one-to-one service at scale through the platform -- especially as 44% of U.S. consumers expect response times of under an hour on social media.
- **Digital voice assistants.** Fully [69% of consumers have now used a digital voice assistant](#), according to Microsoft, which predicts 75% of U.S. households will own a "smart speaker" by the end of 2020. As realms of search and shopping shift rapidly from text-and-keyboard based inquiries to voice commands and questions using natural language, merchants should position their brands for maximum visibility by integrating automated customer service responses with leading voice platforms.



To ensure they can meet these high expectations, sellers should spend the remaining months until holiday kickoff perfecting and testing the transitions that drive successful omnichannel experiences.

## Optimize engagement across the online/offline divide

Given that more than half of all retail transactions involve digital brand interactions at some point in the research and purchase process, capabilities for tracking orders and customers across multiple touchpoints are now mandatory, and delivering experience that seamlessly picks up where shoppers last left off is crucial to customer satisfaction.

Time sensitivity is an added factor during the holiday season, with shopping activity spiking on key sales days and fulfillment activities geared toward specific dates. As shoppers hurry to complete their gift lists, the pressure is on for merchants to deliver seamless, unflappable experiences. In the weeks prior to holiday kickoff, they should optimize and test:

### 1. Flexible fulfillment services.

Putting gifts into shoppers' hands on time is merchants' top customer service job during the holiday season. Although the goal is straightforward, the logistical challenges behind it are increasingly complex. As newer store fulfillment services and online delivery options

# Practice Omnichannel Transitions

Stellar holiday customer experience now requires that merchants orchestrate offerings across multiple boundaries. Not only must merchants follow shoppers as they move from touchpoint to touchpoint; they must also coordinate customer interactions with both automated systems and human representatives to ensure consistent, effective communication.

With holiday shoppers placing a premium on time savings and convenience, merchants need to enact a customer experience strategy that proactively addresses the most common fulfillment questions as orders move across touchpoints and channels.

become increasingly popular, merchants must have rock-solid order management capabilities and inventory tracking to ensure that products are routed to where customers need them. Sellers should optimize and test:

- **Buy Online, Pickup In Store (BOPIS).** [Seven in 10 consumers now report using BOPIS](#), and 50% say availability of the service determines where they'll shop, according to Business Insider. The free service is an ideal way for shoppers to take advantage of anytime, anywhere online ordering, while avoiding home delivery charges.

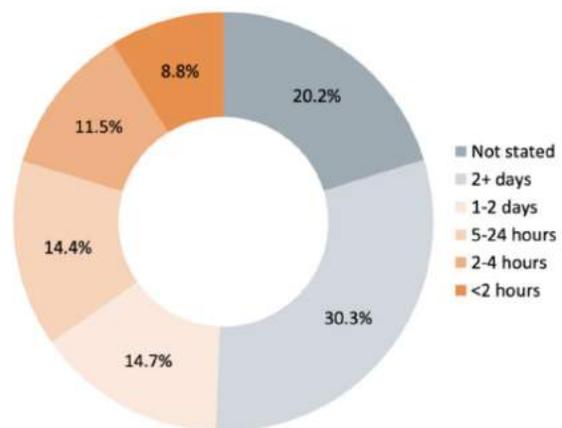
The potent combination of convenience and savings makes BOPIS especially attractive during the holidays. Last year, [holiday usage of BOPIS jumped 50%](#), according to the Adobe. [More than a quarter of Black Friday shoppers visited stores to pick up something](#) they'd already ordered online, and close to two-thirds of those order pickups resulted in additional in-store purchases, the ICSC found.

As BOPIS demand rises, merchants are struggling to keep up. Two thirds of retailers say [inventory inaccuracies made their offerings inconsistent](#), RetailWire reported, and [40% have identified new fraud threats related to BOPIS orders](#), a survey from Signifyd found. Heading into the holidays, merchants should do their utmost to smooth out any such glitches.

- **Ship-from-store and store-to-store networks.** Retailers who can tap store inventory to fulfill requests from other locations stand to benefit on multiple levels. For online orders, delivery costs are potentially lower and customers may receive items faster than from a centralized distribution center, while also giving them the opportunity to connect with local store services and events. In addition, stores that can route merchandise to other nearby outlets where items are out-of-stock gain flexibility and,

ultimately, a better picture of inventory demand. Managing the complexities of intra-store transfers and multi-store shipping networks requires not only accurate inventory, but up-to-the-minute order management tracking and plenty of store employee training -- all three of which should be tested in the weeks leading up to holiday kickoff.

### Most Retailers Won't Commit To Filling BOPIS Orders In Less Than 2 Days



Source: Business Insider Intelligence

- **Reverse logistics.** With close to one in three gifts due to be returned, merchants should ensure store personnel and call center reps alike are well-versed in the process and consistently execute policies, especially for cross-channel returns (such as online purchases brought back to a store location).

### 2. Store associate interactions.

Retailers increasingly acknowledge that store associates hold the key to omnichannel success. Execution of online-to-offline services such as BOPIS rely on front-line personnel who are tech-savvy and customer-focused. For that reason, technology researcher Forrester found that [61% of retailers plan to boost investment in store](#)

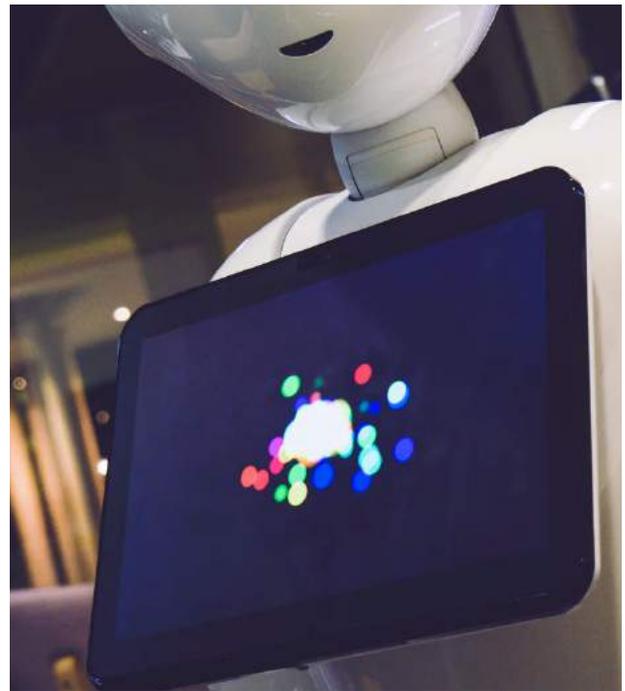
[employee training and development](#), and 42% reported hiring more or significantly more store staff.

During the holiday season, front-line staff are more critical than ever. As retailers bring on seasonal help, they should ensure associates are well-versed in store technologies, and can smoothly deliver:

- **Clienteling and white-glove service.** As more retail brands attempt to differentiate themselves with personal shopping services, stylist appointments, and other one-to-one store interactions, it's crucial that store experts on the ground have access to shoppers' prior online and offline interactions -- from purchases to customer service queries to social media "likes". Armed with integrated customer profile data, store sales reps can make meaningful connections and relevant recommendations. And if inventory visibility and accuracy are tried and tested, they can also confidently place orders for home or store delivery to close the sale.
- **"Endless aisle" capabilities.** Store associates armed with accurate information are critical to "saving the sale" when items are out-of-stock in stores, a potentially dangerous situation that can cause 17% of consumers to immediately order online from a competitor, technology researcher Forrester found. On the upside, retailers who can navigate shoppers to items they can order for home delivery from other nearby locations can realize a 10% revenue lift, according to Forrester.

## Perfect blended human/AI interactions

As shoppers increasingly rely on digital assistants such as Siri and Alexa, and as merchants use AI to deliver personalized service for routine inquiries, synchronizing the work of automated tools and live human agents is more important than ever.



Even as AI-driven shopper assistance becomes commonplace, merchants still need to demonstrate its effectiveness. Currently, shoppers still prioritize in-person service: [83% of consumers said interacting with real people will become more important](#) -- not less -- as technology improves, according to consultancy PwC. Merchants must do their utmost to ensure automated services deliver true value, not waste time with meaningless responses or off-base recommendations.

At any time of the year, inconsistent interactions can lead to the poor experiences that drive shoppers away. And with the high-stakes holiday season in the balance, the handoffs from AI to human help -- and back again -- can't be tested rigorously enough. Among the best practices:

- **Define what's automated, and when humans step in.** Merchants should clearly delineate the types of interactions AI-powered services can handle, and which are best routed to in-person help. Customer service inquiries easily addressed with information lookups such as order status or store hours are prime candidates for automation; even simple transactions -- ordering gift cards, for example

-- can be handled by intelligent avatars. But alongside the use cases for automation, merchants should develop a comprehensive set of keywords and triggers that signal a complex situation is developing requiring human oversight, so that shoppers aren't left stranded.

- **Label bots clearly.** [Shoppers react negatively to machines masquerading as humans](#), SAP found, so AI-driven chatbots and live chat avatars should be explicitly identified as such. Robot icons or non-human profile pictures instantly communicate to shoppers that they're interacting with a machine, as do artificial-sounding names such as 1-800-Flowers' GWYN (an acronym for Gifts When You Need them). Not only do such cues provide transparency; they also set expectations with shoppers, who are increasingly accustomed to automated services delivering information based on specific commands or keywords.
- **Stress time savings as an AI benefit.** Efficiency and convenience top the list of elements important to a good customer experience, according to PwC -- so retailers can highlight response speed and 24/7 availability as reasons to give automated services a try, especially during the busy holiday season.
- **Make transitions clear and seamless.** If human help does take over from an automated interaction, the handoff should be flagged to shoppers. Customer service agents should have access to prior questions and responses to [avoid repetitive information-gathering, which is customers' top peeve](#), according to Chatbots.org.
- **Let humans and machines learn from each other.** Call center reps and store associates should have access not only to chat logs, but to personalized recommendations, abandoned cart reminders, and other AI-enhanced brand

interactions. Similarly, AI chat tools should be populated with plenty of data from prior in-person conversations in order to shorten the learning curve for intelligent algorithms. This step is particularly important if merchants are heading into their first holiday season with AI-driven service offerings that have no prior "experience" with seasonal queries.



## Use Holiday Service as a Loyalty Builder

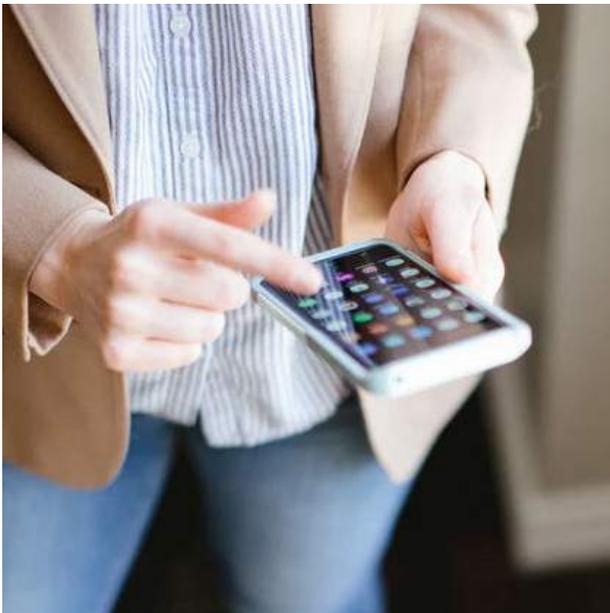
The bar is moving higher for what constitutes standout service. Self-service content and smooth interactions across touchpoints are now considered must-haves for merchants; with them, customers' expectations are fulfilled, while without them, brands risk falling behind.

To truly differentiate themselves, merchants must move beyond addressing existing questions and concerns to provide the content, products, and offers shoppers haven't yet discovered. By anticipating customers' needs, brands can prove their relevance and expertise, winning not only sales, but earning credibility and loyalty.

The holidays are a particularly ripe opportunity to begin building these long-term relationships. Prior to the 2018 holiday season, Deloitte found that although shoppers anticipated 77% of their gift spending would be with brands they already knew, [fully 75% were willing to try a new retailer](#).

Service-oriented factors such as better shipping policies, positive reviews, and recommendations help convince these potential new customers to try new outlets during the season, Deloitte found -- and proactive service throughout the season can convince them to return.

To stay ahead of shoppers' needs, merchants should combine personalization techniques with customer service messaging and loyalty club offerings to provide inspiration, foster trust, and earn loyalty.



## Automate predictive intelligence to drive re-engagement

Merchants have long known that transactional emails -- messages related strictly to fulfillment of existing orders, as opposed to promotions -- can be effective tools for encouraging re-engagement,

and often drive higher open and click-through rates than routine marketing campaigns. Now, instantaneous chat conversations and SMS alerts powered by machine learning represent the next generation of transactional communication, and present new opportunities for customers to interact further with brands.

These new modes of post-purchase engagement improve on effectiveness and immediacy, thanks to the promise of personal relevance implicit in one-to-one messaging. SMS claims open rates upwards of 90%, with users typically responding to incoming messages within 90 seconds; live chat and social chat interactions can earn click-through rates of up to 60%, dwarfing even transactional emails. Consumers are receptive to these channels for post-purchase service: between 20% and 30% of shoppers opted in to engage with chatbots to track orders, Linc found.

With AI-powered tools enabling delivery of individualized conversations at scale, merchants can take full advantage of holiday opportunities to forge lasting relationships by proactively offering a choice of contact channels for post-purchase communication. Among the opportunities to invite re-engagement:

- **Order status updates.** More than 60% of WISMO inquiries occur before orders have been assigned a carrier tracking number, Linc found, so merchants should develop timeframes for the fulfillment process prior to shipment and invite customers to sign up for updates on the order confirmation page -- a service especially pertinent in the holiday season. Apt cross-sell and add-on promotions interspersed in the informational dialogue can earn conversion rates of 5%, Linc found.
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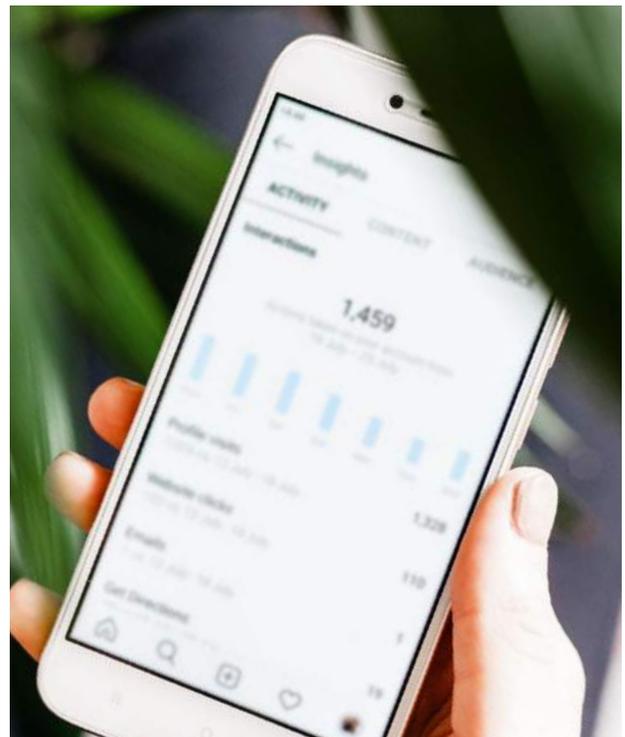
timeframes for the fulfillment process prior to shipment and invite customers to sign up for updates on the order confirmation page -- a service especially pertinent in the holiday season. Apt cross-sell and add-on promotions interspersed in the informational dialogue can earn conversion rates of 5%, Linc found.

- **Store pickup notifications.** Multiple clear communications are imperative to ensure BOPIS shoppers pick up their orders with ease, affording merchants the opportunity to showcase store amenities alongside status updates. Dialogues can help shoppers navigate to stores, parking spaces, and pickup counters, as well as deliver information on local promotions, locations in the aisles of add-on items, and holiday services in-store such as gift wrapping and personal shopping.
- **Installation and usage help.** Via support-style chat, merchants can proactively prompt shoppers to connect with product content such as how-to demonstration videos, installation guides, and user-generated content showcasing real-life scenarios. Suggestions for accessories and complementary items can be presented in the context of maximizing usage of products.
- **Seasonal inspiration and guidance.** Inviting customers to receive timely tips and gifting guidance gives merchants another avenue for communicating shipping cutoffs, store hours, gift card purchase options, and other mission-critical information for the holiday season. Relevant products presented as gift picks can stimulate new engagement and purchasing.

## Spotlight loyalty club holiday perks

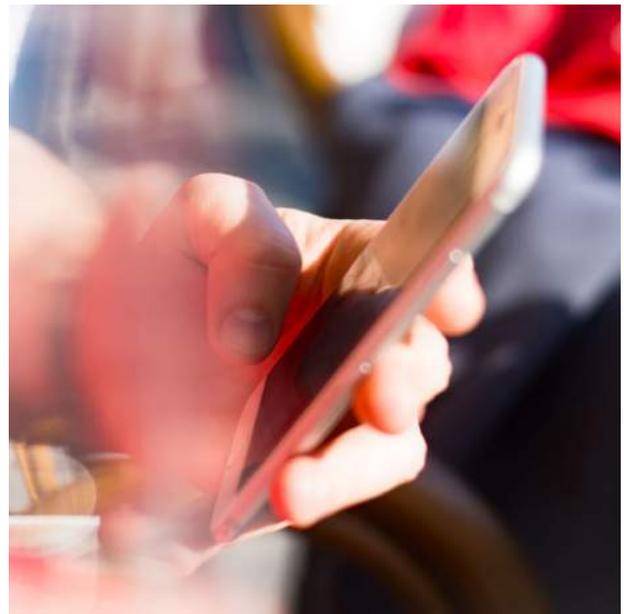
Loyalty rewards programs that give shoppers perks based on spending are widespread and popular.

[More than 7 in 10 consumers belong to at least one loyalty rewards club](#), according to Forrester Research, with most participants holding an average of nine memberships. Forrester confirmed that loyalty club members spend more than other brand customers; additionally, shoppers are increasingly willing to pay for premium-level perks such as free shipping, giving merchants still further bottom-line incentive to maximize loyalty programming. Among all consumers, [37% are willing to pay a fee for top-tier membership](#) -- and that number goes up among younger shoppers, with fully 46% of Millennials and 47% of Generation Z open to paying for membership, Bond Brand Loyalty found.



So although a crush of promotions may crowd the holiday calendar, merchants should find opportunities to highlight loyalty offerings and encourage gift shoppers to join as a means of establishing connections for future engagement. Among the loyalty club services most relevant to holiday shoppers:

- **Price cuts.** More than three quarters of shoppers say loyalty clubs save them money, so merchants should highlight potential savings alongside regular pricing. In so doing, sellers are taking a page from Amazon’s playbook; the online giant now highlights discount pricing for members of its Prime free-shipping club on blue placards throughout the aisles of Whole Foods locations.
- **Shipping perks.** Holiday shoppers are obsessed with on-time delivery of gifts, so merchants should promote members’ discounted access to expedited shipping services as cutoff dates approach.
- **Time savings.** Saved shopping lists and payment data, easy reordering, quick access to discount codes or coupons, and VIP order pickup lanes in stores for rewards members can incentivize time-starved holiday shoppers to sign up.
- **Exclusive personal services.** Members-only access to personal gift shopping services or tech support not only benefit subscribers by saving time; they also encourage the one-to-one interactions that establish brand credibility and rapport. Automated services can be part of the dedicated club offering, as 95% of loyalty club members say they want to engage with their programs through emerging technology such as chatbots.
- **Advance access.** Sneak peeks to new product releases or seasonal merchandise gives loyalty club members a head start when it comes to securing popular gift items; merchants could even experiment with members-only store hours that prioritize entry on crowded days such as Black Friday.



## Conclusion: 360-degree experience is within reach

As merchants head into the crucial holiday season, it’s more important than ever to deliver ubiquitous, proactive service. With comprehensive content development, attention to execution across touchpoints, and a commitment to fostering loyalty, merchants can deliver the standout service that wins sales and earns loyalty. By implementing solid conversational commerce strategies now, your brand will be ahead of the game this holiday season.