A Buyer's Guide to Choosing Remote Selling Software
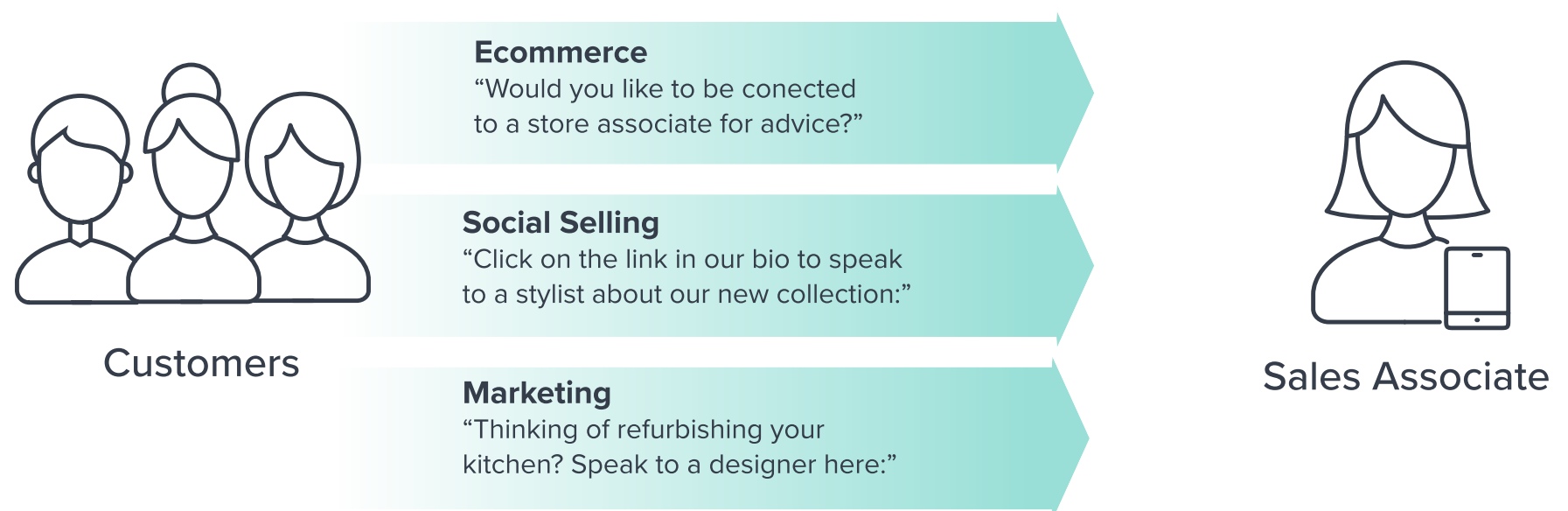
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Looking to incorporate **Remote Selling** into your business and wondering what vendor to choose? To assist you in making the right decision, we've compiled a Buyer's Guide where we'll walk you through the questions you should be asking your shortlist of vendors at every stage of the decision making process (and what answers to look out for). But first, let's explain what it is:

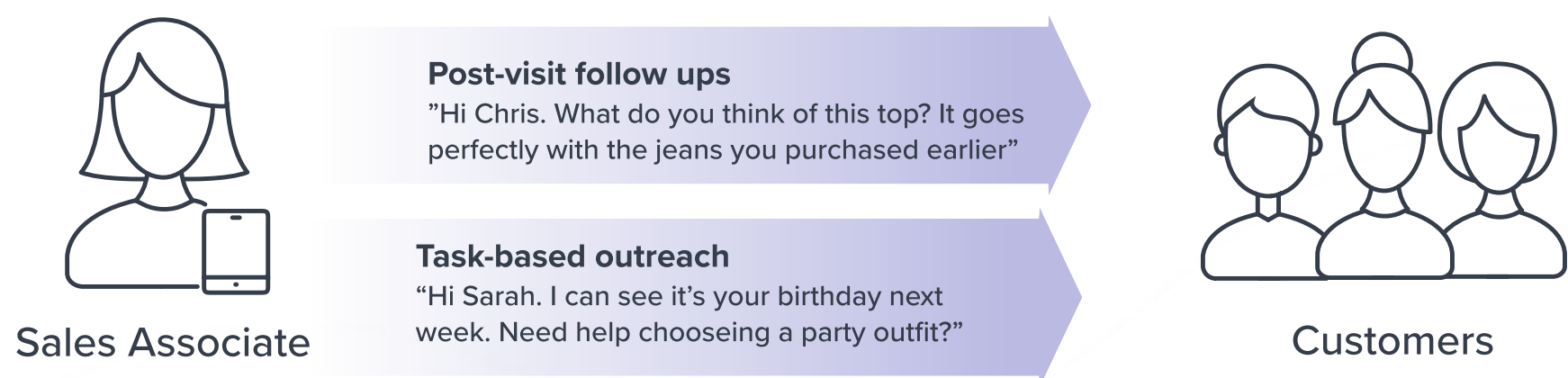## What is Remote Selling - and what can you achieve?

Remote Selling covers a multitude of different mediums. Certain strategies have been around for a while in the retail world, for example, selling via email or more recently, chat bots fielding inbound queries on e-commerce - effectively providing an automated remote selling service.

Growing in popularity are **real-time human remote selling interactions**, mainly in the form of video and WhatsApp selling. This is allowing retailers to extend their selling capabilities from reacting to inbound enquiries to facilitating outbound sales conversations. **Today's remote selling is no longer just reactive.** Solutions on the market are now beginning to provide sales associates with the intelligence to generate brand new conversations that are targeted, personalised and timely. Here's a few examples:

Inbound Remote Selling — in-store sales associates (or dedicated sales teams) are connected with customers who are shopping online, browsing social media or responding to marketing campaigns

Ecommerce
"Would you like to be conected to a store associate for advice?"

Social Selling
"Click on the link in our bio to speak to a stylist about our new collection:"

Marketing
"Thinking of refurbishing your kitchen? Speak to a designer here:"

Customers

Sales Associate

Outbound Remote Selling — sales associates continue conversations that originated in-store after the customer has left, or instigate brand new conversations that are timely and personal

Post-visit follow ups
"Hi Chris. What do you think of this top? It goes perfectly with the jeans you purchased earlier"

Task-based outreach
"Hi Sarah. I can see it's your birthday next week. Need help chooseing a party outfit?"

Sales Associate

Customers

Remote Selling is in the top five most popular solutions currently being implemented at 29%, reported in a survey of 500+ leading retailers

The Pulse of Retail 2023

There are many providers of remote selling across video, Live Chat, SMS and WhatsApp, and so it warrants your time to deep dive into the different capabilities on offer. Careful consideration also needs to be given to the processes in place to facilitate these conversations (i.e. who is it that monitors or is alerted to new chat requests). With these initial thoughts in mind, this guide highlights the questions you need to be asking your vendors:

Think about asking the following key questions to Remote Selling vendors:

1 **Business Readiness:** What can I achieve given my current business and technology infrastructure?

2 **Tailored talking points:** How does your solution ensure conversations are tailored and relevant?

3 **Quality Control & Measurement:** How can I ensure conversations are appropriate and on brand?

4 **Ease of Deployment:** How difficult is it to launch and train employees in using your tool?

5 **Business Value:** What can I expect to achieve with your solution, and how can I measure this success?

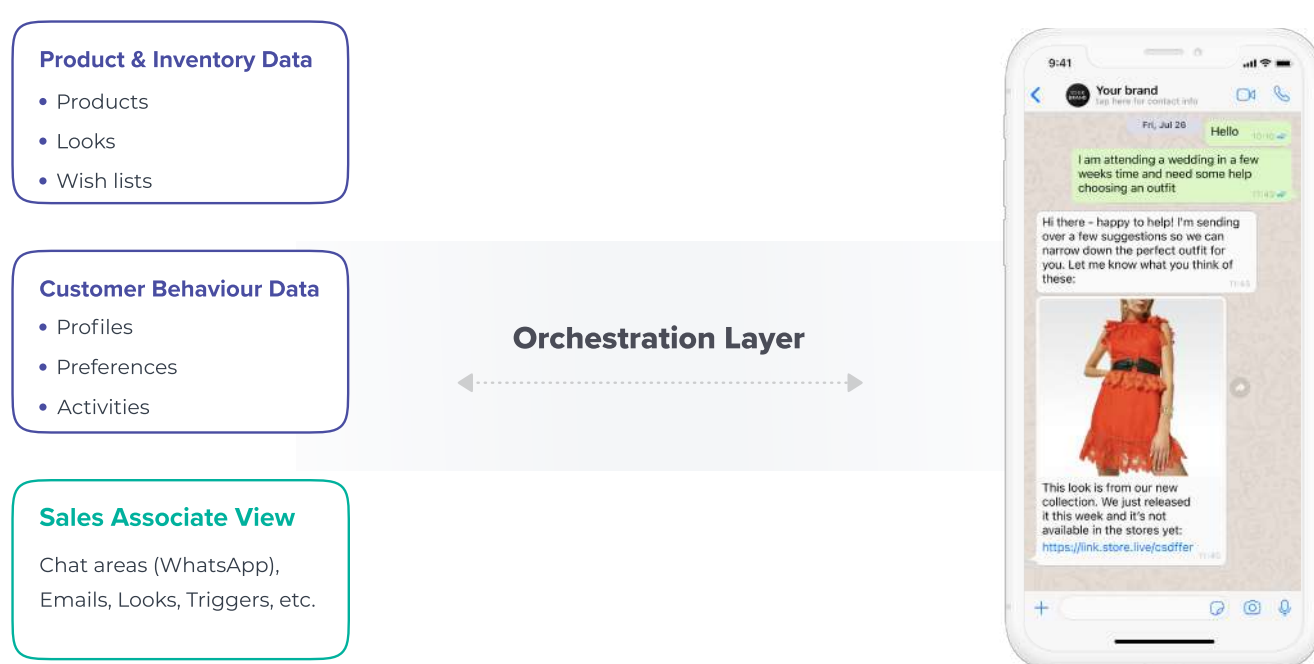**6** **Proven Successes:** What evidence do you have of your solution being successfully used today?

This guide will now walk you through each of these sections individually, equipping you with the questions to ask shortlisted vendors as part of your due diligence.

1. Business Readiness

Given my current business and technology infrastructures, am I in a position to launch your remote selling tool?

Remote selling should not be a standalone solution, but should be fully integrated with your existing technology ecosystem. Look for a solution that connects seamlessly so that valuable data flows from your backend systems (such as your CRM) into the hands of your sales associates and vice versa.

Remote Selling via WhatsApp Integration, Data flow and Orchestration from Mercaux

Question to ask

Q: Which of my existing systems does your solution need to integrate with?

This question will reveal how connected their solution is with your existing ecosystem. If they respond with 1 or 2 examples (i.e. with your ecommerce platform only), then you are speaking to a vendor that provides the technology to facilitate the conversation only, and not one that considers the larger ecosystem. You also **want to find a vendor that can work with your existing technology stack - not one that requires you to replatform your backend systems** to deploy their remote selling solution.

Q: How will inbound requests be orchestrated?

Ask the vendor what the process is for fielding in-bound enquiries to chat. What algorithms do they have in place to direct the customer to the most appropriate store associate or sales team member. Is it the location of the customer, the customer's previous engagement in CRM, or most recent active store associate to ensure a speedy response? Once this has been shared, determine your readiness to put the required processes in place to facilitate this.

2. Tailored Talking Points

How does your solution ensure conversations are tailored and relevant by providing sales associates with customer insights?

In addition to facilitating the conversation technically, the solutions you choose need to also provide tailored talking points for staff to use. This is why **it's important that your remote selling solutions integrate with your existing CRM/ CDP or Clienteling solution so that staff can access a 360 degree view of your customer's profile.** The better solutions out there will also connect with your PIM or Assisted Selling solution so that sales associates can access bespoke recommendations of products to share based on the customer's profile.

> # Remote Selling Vendors will of course provide the Technology, but must also help with generating Tailored Talking Points

Questions to ask

Q: Does your solution integrate with my CRM/ CDP System?

To ensure sales teams can provide the best possible virtual experience, they need clear visibility on the customer's previous engagement with your brand. Sales teams should have full access to customer profiles, including historic purchases, saved items/ online wish lists and abandoned baskets.

Q: How will my sales associates access the tailored talking points in real-time whilst in conversation with the customer?

It's a good start for sales associates to be able to view a customer's historic engagement with your brand to inform how they might start a new conversation, but it's equally as important that they can access additional information as the conversation progresses. Ask for a demo for how this information is accessed mid-conversation and (in the case of WhatsApp or SMS) how sales associates share these suggestions with the customer.

> " In other emerging digital trends, messaging apps leveraging remote clienteling are proving their value in supporting consumer purchasing decisions, ... tapping hundreds of millions of users. "
>
> **The State of Fashion, BoF and McKinsey & Co.**

3. Quality Control & Measurement

Remote Selling solutions are used by multiple sales associates, so it's imperative to keep quality under control

For remote selling solutions to work in practice, you need a team of sales associates who can be called upon to respond to inbound requests quickly as they come in. To ensure your brand integrity is upheld, make sure that you are able to track, measure and analyse conversations easily.
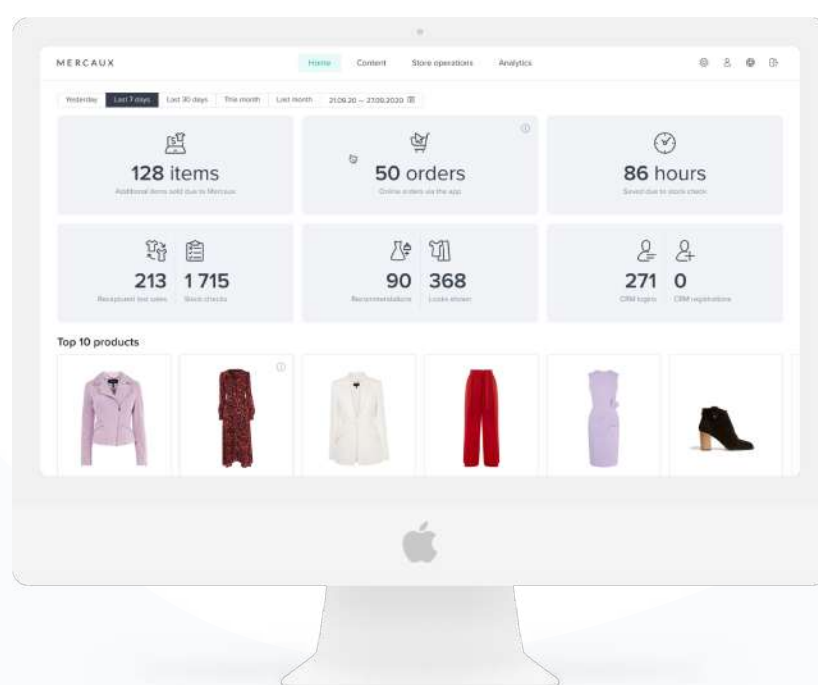
Questions to ask

Q: Can I view individual conversations for quality control and ongoing training?

Regularly reviewing conversations between sales associates and customers will give your management teams an opportunity to continually critique the remote selling experience for customers.

Q: How does your platform report on usage?

Ask your vendors how usage of the solution is measured and how its use can be tied back to your business critical KPIs. You will want to choose a supplier that can attribute use of the tool to bigger basket sizes, better online and in-store conversion and of course, how it's leading to a healthier LTV. Ask what analytics tools they have to measure these KPIs and how the data can be dissected.

Mercaux's Analytics Dashboard

4. Ease of Deployment

How quick and easy will it be to integrate and train staff in using the remote selling solution?

When considering any new tech solution, the integration process is likely to be one of your first considerations - will it integrate with my existing tech stack, how long will it take to integrate, and how easy will it be for staff to learn how to use the solution?

Questions to ask

Q: How long is the implementation process?

Launching new tech solutions is often perceived as a lengthy, resource intensive process - but it doesn't have to be. Depending on the method of communication you are deploying, you can go live in a matter of weeks (or a number of months). Ask your vendor what the integration process looks like and what internal resources they will need from your end.

Q: What does the onboarding/ training process look like?

The ease with which the remote selling solution can be accessed will be paramount to the ongoing success of the platform. You will want to have the communication tool accessed easily from within your existing Clienteling or CRM system to launch new conversations from a customer's profile, or for inbound requests to talk, a clear and easy way to notify sales staff to respond. Ask your vendors for their onboarding programme so you have a clear understanding of the training required.

A solution that can be deployed in a few weeks and can be easily used by staff will let you see results fast

5. Business Value

What can I expect to achieve, and how can I measure this?

When choosing between different solution, some of your questions could include - how will we benefit from this digital investment, which forms of remote outreach should we prioritise, and what does the return on investment look like? Find out more by asking your shortlisted vendors these key questions.

Question to ask

Q: What benefits can we expect to see from remote selling?

There are big sales opportunities available with the right remote selling tool. These personalised interactions are improving customer conversion, basket size and LTV - ensure that your vendor explains which of your KPIs they will be impacting and what the average uplift is they can expect.

Remote Selling is a strategy to drive business critical KPIs - ensure your vendor can measure success against these

6. Proven Successes

What evidence is there of your solution being successfully and securely used today?

It's easy for vendors to sell their dream, but you will want to see real-life examples from retailers that have successfully launched. Results and returns are great indicators, but ensure that you also ask for testimonials on business readiness, security, speed and ease of deployment too.
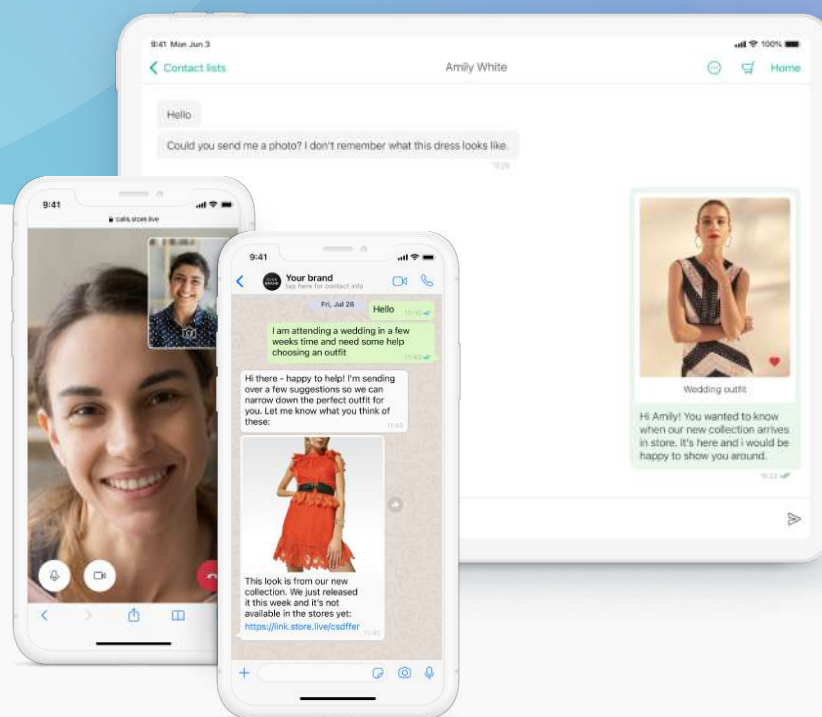
Question to ask

Q: Can you tell us a bit about your customers?

When comparing providers, look for breadth and depth of experience within your industry and region. An experienced provider will provide case studies for all stages of deployment, offer specialised support in your local language, and put you in touch with current customers who will be willing to take a phone call.

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Remote Selling Vendor Spotlight

Mercaux's **Remote Selling** Solution helps retailers achieve a single customer view across all channels, deliver a highly personalised shopping experience, while also improving brand loyalty. Integrating with a retailer's existing technology stack means there is no need to replatform, enabling you to go live in a matter of weeks. Remote Selling can be easily linked up with **Clienteling, Assisted Selling & Omnichannel Fulfilment** to further enhance the customer experience.

Centralised customer insights from your **CDP/CRM** are surfaced in-store on Mercaux's **Assisted Selling** solution, such as Clienteling, so your store staff can deliver a more personalise in-store experience through **tailored talking tracks**.

Ready to see Mercaux's Remote Selling Solution in Action?

Mercaux is transforming legacy Point of Sale into a suite of composable 'Points of Service' solutions that supports a customer's entire in-store path-to-purchase, from product discovery and personalisation all the way through to checkout, and beyond. We're a proud member of the <u>MACH Alliance</u> - an independent organisation on a mission to future proof enterprise technology and to propel current and future digital experiences with open and connected enterprise tech.

Mercaux works with leading retailers such as Jigsaw, River Island, and PVH to help them provide highly personalised customer experiences at every channel and touchpoint.

Click the button below to arrange a convenient time to connect with a member of Mercaux's team and whilst you're waiting, download their **Remote Selling via WhatsApp Solution overview PDF here**.

Let's Talk