A Buyer's Guide to Choosing an In-store Clienteling Solution

Brought to you by:

MERCAUX

Looking for more information on how to choose the right in-store Clienteling solution for your Store Associates? To assist you in making your decision, we've compiled a "Buyer's Guide" where we'll walk you through the questions you should be asking at every stage of your decision making process - and what answers to look out for. But firstly, what exactly is Clienteling?

What is Clienteling, and Why Should You Implement It?

Clienteling is a powerful retail strategy that **transforms the in-store shopping experience** by offering personalised, high-touch service to every customer who walks through your doors. By integrating clienteling capabilities into your retail operations, you can gain a comprehensive, 360-degree view of your customers—especially those already in your CRM system. This enables you to **curate a hyper-personalised shopping journey** tailored to each individual's preferences, past purchases, and shopping behaviours, whether online, offline, or through remote selling channels.

Choosing the right clienteling solution not only elevates the in-store experience but also drives **tangible business outcomes**. You'll see a boost in both in-store & online sales, while also increasing customer lifetime value (LTV). This is achieved by leveraging deep insights into your customers' behaviours and preferences, allowing you to engage them with the most relevant products & services.

To deliver this level of superior service, you'll need to focus on three essential components:

Customer
Data
(CRM, CDP)

Product
& Inventory
(PIM, IMS/OMS)

The In-store
Clienteling
Solution
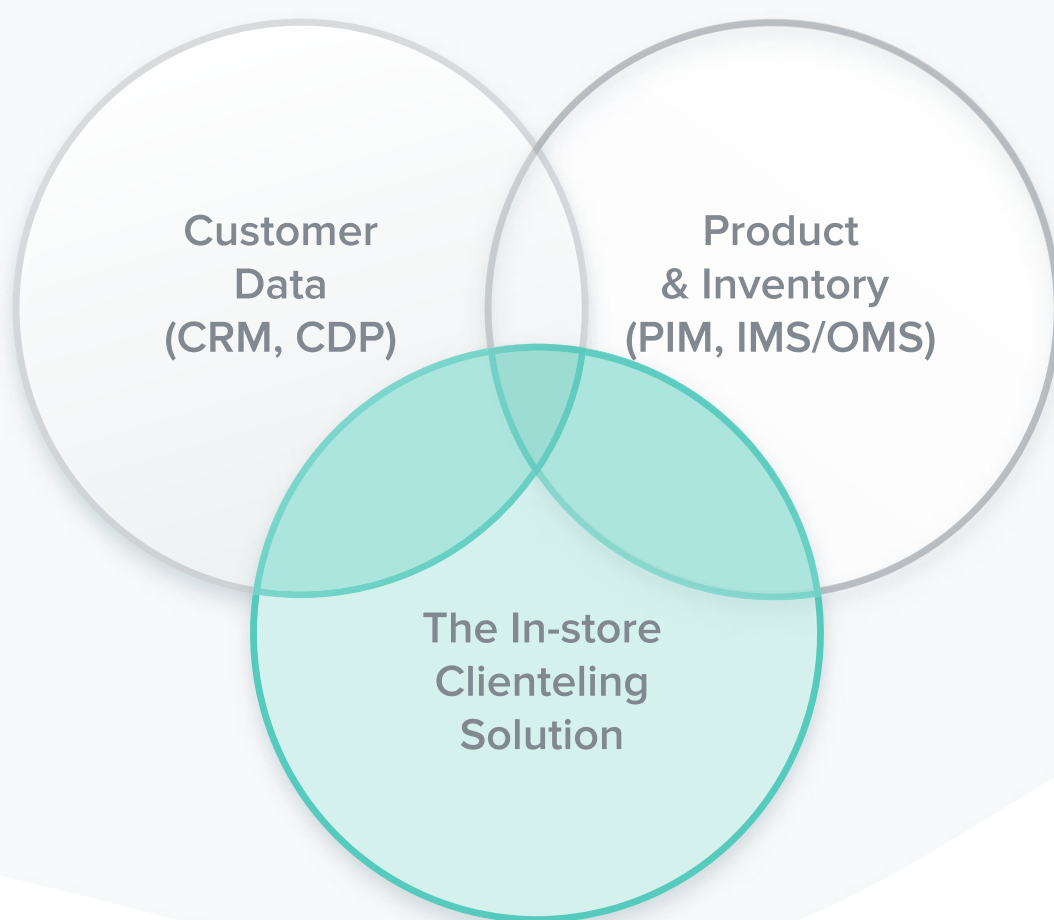
Clienteling software can typically be deployed within a matter of weeks or a few months, depending on the vendor you choose. It's crucial to **evaluate how seamlessly the software integrates with your existing systems** and how quickly it can be configured to meet your specific business needs. Once you understand the implementation effort, it's important to assess the potential impact on critical KPIs such as in-store sales and customer LTV. Therefore, selecting a vendor that provides robust analytics and can readily demonstrate value and ROI is key to making an informed decision.

The following key questions you should be asking your Clienteling vendors will now be covered in this guide:

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

2   **Solution Readiness and Configurability:** Does the solution require extra development or just integrations? Is the UI/UX (look and feel of the solution) configurable?

3   **Ease of Deployment:** How difficult is it to integrate with my existing technologies and how are staff trained?

4   **In-store Data Capture:** Can I capture in-store customer behaviour data and use across other channels?

5   **Measurement:** What can I expect to achieve with the solution, and how can I measure this success?

6   **Proven Successes:** What evidence do you have of the solution being successfully used today?
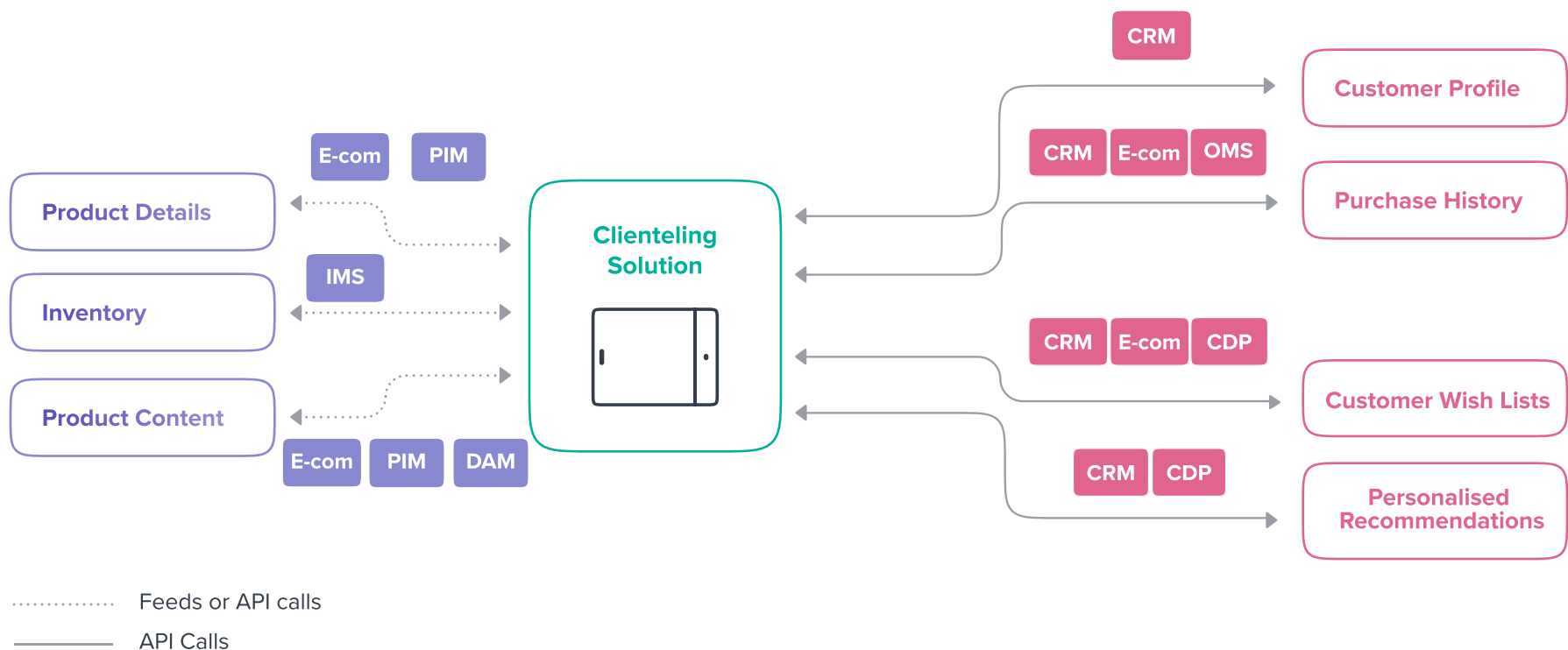
This guide will now focus on each section individually, so you are armed with the right questions to ask as part of your due diligence for finding the perfect Clienteling provider.

1 Business Readiness

What level of personalisation can I achieve with your solution given my current technology infrastructure?

Clienteling is not a stand-alone solution that provides your team with the ability to deliver highly personalised shopping experiences at the flip of a switch. The software surfaces data from existing systems to deliver the service. The good Clienteling providers will then go one step further by using proprietary and partner technologies to make this data actionable, providing sales team with the actions, additional content and tailored talking points needed to personalise the experience.

Clienteling Ecosystem

Product Details — E-com, PIM

Inventory — IMS

Product Content — E-com, PIM, DAM

Clienteling Solution

CRM — Customer Profile

CRM, E-com, OMS — Purchase History

CRM, E-com, CDP — Customer Wish Lists

CRM, CDP — Personalised Recommendations

.... Feeds or API calls

———— API Calls

Questions to ask

Q: What data feeds / APIs are needed in order to launch Clienteling software?

As shown above, Clienteling is a tool to provide hyper-personalised shopping experiences, so the primary data feeds / APIs needed are related to general product information, customer profiles and their points of engagement across offline, online and remote channels. The basics begin with your CRM, but in order to future proof your project, you will want the vendor to be able to integrate with your CDP and / or Marketing Automation Platform to accept data from all engagement channels and give Sales Associates maximum visibility on customer behaviour.

Q: What if we don't have all of the systems identified in place?

This question will reveal the flexibility of the vendor's solution to see if you can launch with a "light" version and align to your wider re-platforming roadmap. For example, your phase 1 implementation might include the general profile of your customer and their purchasing history, whilst phase 2 will add e-commerce behaviour and marketing engagement, and phase 3 will incorporate notes from previous remote selling conversations via WhatsApp or video calls.

> A vendor should be flexible enough to integrate with your existing infrastructure (Phase 1), but is prepared to integrate other systems and data sources when ready

2 Solution Readiness

Does the solution require extra development or just integrations, and is the UI/UX configurable?

Once a vendor has an understanding of your current technology infrastructure, the next thing for them to tell you is the additional (if any) developments required on your side to deploy. The better vendors out there will not require you to do any development at all, and will simply integrate their solutions with your existing tech stack and allow configuration on the look and feel.

Questions to ask

Q: Do you have a readily available native app solution?

Asking the question if the vendor has a native app will reveal how much time and effort will be needed on your end to deploy the solution. A native app will be pre-built and allow you to plug and play through simple integrations with your existing technology stack.

Q: Is your app configurable? How difficult it is to adapt the look & feel to reflect our branding?

The extent to which a solution is configurable can be a deal-breaker for some retailers - configuring a solution is the closest you will get to deploying a bespoke solution. Will they not allow configuration at all, allow you to change the colours and apply your logo only, or go as far as configuring layouts?
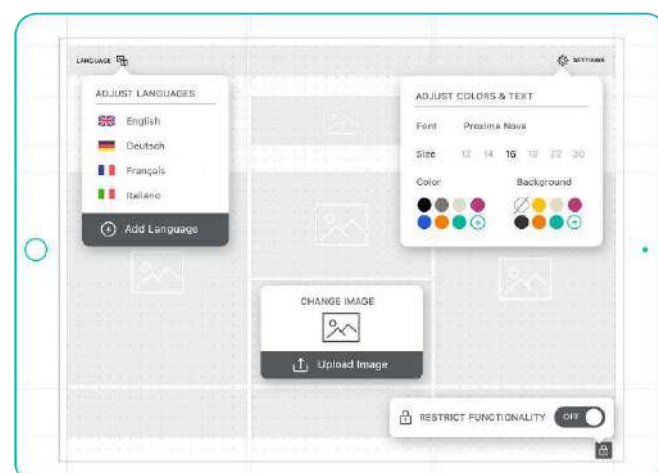
3 Ease of Deployment

How difficult is it to integrate with my existing technologies and train staff on the solution?

When choosing a clienteling tool, the integration process should be one of your first considerations - how long will this take to integrate and how easy is it for staff to be trained on the solution?

Questions to ask

Q: How difficult and long is the implementation process?

Ease of integration should be top of mind when launching clienteling. Look for solutions that integrate with your existing tech, data formats & APIs, and have pre-built integrations or plug-ins into these systems. That way, you can go live in a matter of weeks instead of months. Furthermore, asking if the solution is modular will reveal if you have to deploy all the features in one go, or if you can decide to "switch on" features at a later time when you feel ready, such as remote selling.

Solutions should be quick to deploy and intuitive for staff to use to ensure high adoption levels

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

A good UI/UX is paramount to not only the onboarding of staff, but also the ongoing use of the solution, as the better solutions in the market will be intuitive to use. You will, however, also want to choose a vendor that has a thorough onboarding programme in place that includes a variety of different options, from in-person or remote training, through to materials for self-training.
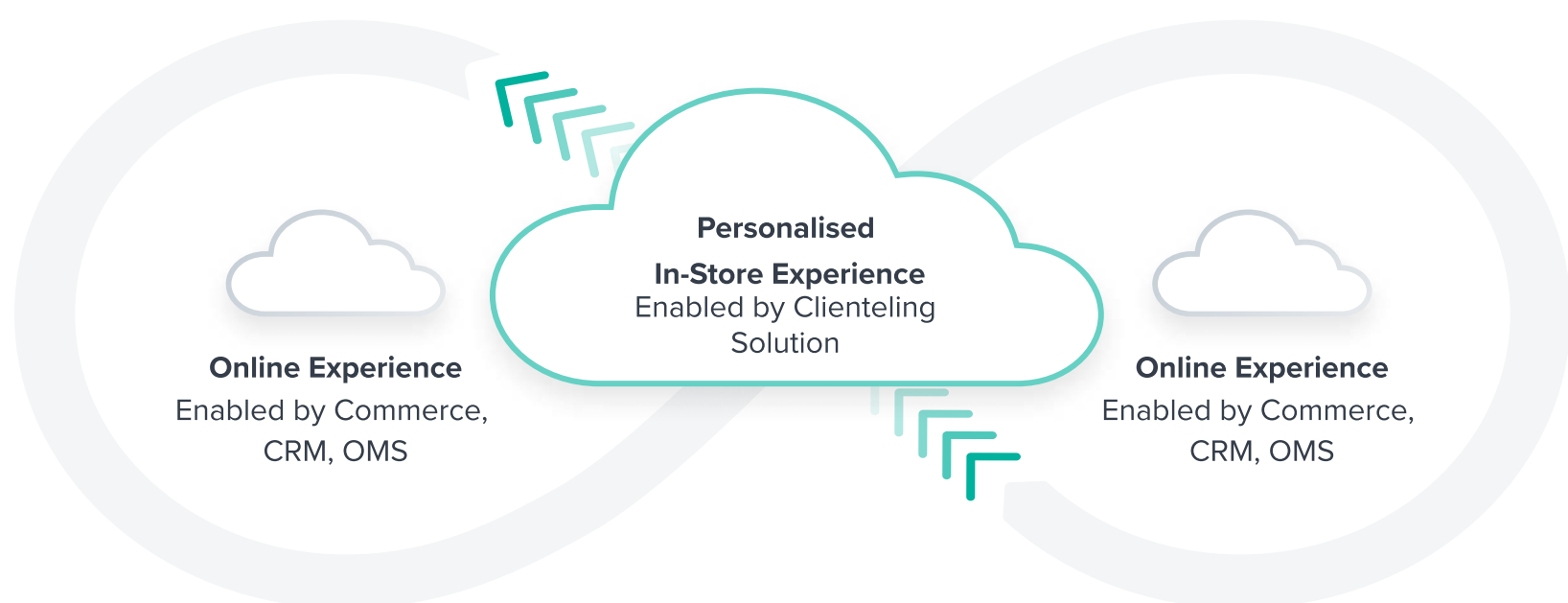
Q: What kind of tracking and monitoring systems do you have in place to identify issues early and ensure integration stability?

Given that some Clienteling solutions might require quite a few different integrations (some of them via feeds, others via APIs), make sure that your vendor captures all the app statistics and has a detailed monitoring and alert systems. This will help the vendor and your teams be proactive in identifying integration issues quickly before the staff even notices them.

4 In-store Data Capture

Your clienteling solution will display valuable insights for Store Associates to use in-store, but can the solution also capture in-store behaviour data to use across other channels?

More and more customers start their journey in one channel but complete the transaction in another. We know how valuable online behavioural data can be for personalising the in-store experience, but you should also ask your vendor how the in-store data being collected (such as interests and "abandoned baskets") can be used for attributing the sale to another channel, or how these in-store insights can be used to personalise the online experience and used for retargeting by marketing.

Personalised
In-Store Experience
Enabled by Clienteling Solution

Online Experience
Enabled by Commerce, CRM, OMS

Online Experience
Enabled by Commerce, CRM, OMS

Questions to ask

Q: What information will be available for Store Associates to see?

The experience that a customer receives will be greatly enhanced when the store associate can access more data, so aside from the basic CRM customer profile, find out what supplementary insights are made available through the solution - one of the most valuable is behavioural data.

Q: What in-store data is captured and how is this accessed by the business?

The use of in-store technologies opens a black box of data that has rarely been made available before to retailers and Clienteling is no exception. Every click, tap or swipe of an in-store digital solution should be recorded as an activity and made available to you in an easy to digest format. Find out what is recorded from your vendors and how these insights are surfaced to your team.

Clienteling must support an omnichannel strategy, so choose a solution that connects online and offline channels both ways

5 **Measurement**

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

When choosing between clienteling providers, some of the questions on your mind could include - how will we benefit from this digital investment, how will the customer experience change, and what does the return on investment look like? Find out by asking your shortlisted providers these key questions:

Questions to ask

Q: What benefits can we expect to see from clienteling?

There are big sales opportunities to be had with the right clienteling solution. Not only will you empower sales associates with expert product knowledge & styling tools, but you'll also provide them with a host of actionable insights about customers. This will improve customer conversion, basket size and LTV - after all, when treated to personalised shopping experiences, customers don't just stay loyal, but transact with bigger baskets too.

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

Q: How can we measure the success of your clienteling tool?

One of the simplest ways to measure the impact of clienteling is to run a proof-of-concept in a group of trial stores. That way, you can compares KPIs between stores with and without clienteling. Also, look at how customer-specific KPIs (such as purchase frequency and basket size) change if they have been served with the help of a clienteling tool.

Q: Do you have a reporting dashboard - and who has access to this?

As with any digital investment, it's important to see how the business is benefiting from your chosen clienteling tool. With this in mind, look for a vendor that can either easily export the raw usage data or provide a full reporting dashboard on pre-agreed KPIs. These insights should be made available to both HQ and stores. As a next step, ask if your vendor can integrate with transaction data from e-com and POS to surface insights on how clienteling is directly contributing to sales & conversion.

6 Proven Successes

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

It's easy for vendors to sell the Clienteling 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.

Questions to ask

Q: Do you have any independent accreditations for your customer service, products, or innovation?

Awards serve as an important independent benchmark for performance. When evaluating vendors, look out for whether they've been recognised or shortlisted for delivering best-in-class service.

Q: How can we be sure the solution will be suitable for us?

Seek out a provider that services other similar customers, and as a final thought, look for a clienteling solution that provides a proof of concept phase for you to "test" Clienteling in a small number of stores, and a modular approach to scale up features at the right time for your business.

> Request examples of ease and speed of deployment, as well as examples of business value being derived

Q: How will you protect our customer data?

A strong clienteling provider will maintain key certifications, including GDPR and PCI DSS compliance as well as ISO 27001 certifications for security - a copy of your provider's certifications should be made available upon request. Irrespective of whether you're looking to engage with customers in-store, online, or remotely, your vendor should ensure that all customer data remains completely secure and cannot be compromised.

Clienteling Vendor Spotlight

MERCAUX

Mercaux's Clienteling Solution helps retailers achieve a single customer view across all channels, deliver a highly personalised in-store and remote shopping experience, while also improving brand loyalty. Their solution integrates with a retailer's existing technology stack, so there is no need to replatform, enabling retailers to go live in a matter of weeks. The solution also provides the option to facilitate remote selling.

Personalised Customer Experience   **Capture In-Store Behavioural Data**   **Facilitate Remote Selling from Store**

Ready to see Mercaux's Clienteling Solution in Action?

Mercaux is 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 Alshaya 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 **Clienteling Solution overview PDF here**.

[Let's Talk]

> "
> **Sales associates have been empowered by Mercaux's Clienteling Solution to offer a highly personalised and seamless service that is improving customer loyalty — we've been very impressed by it.**
> "
>
> Fashion Retailer