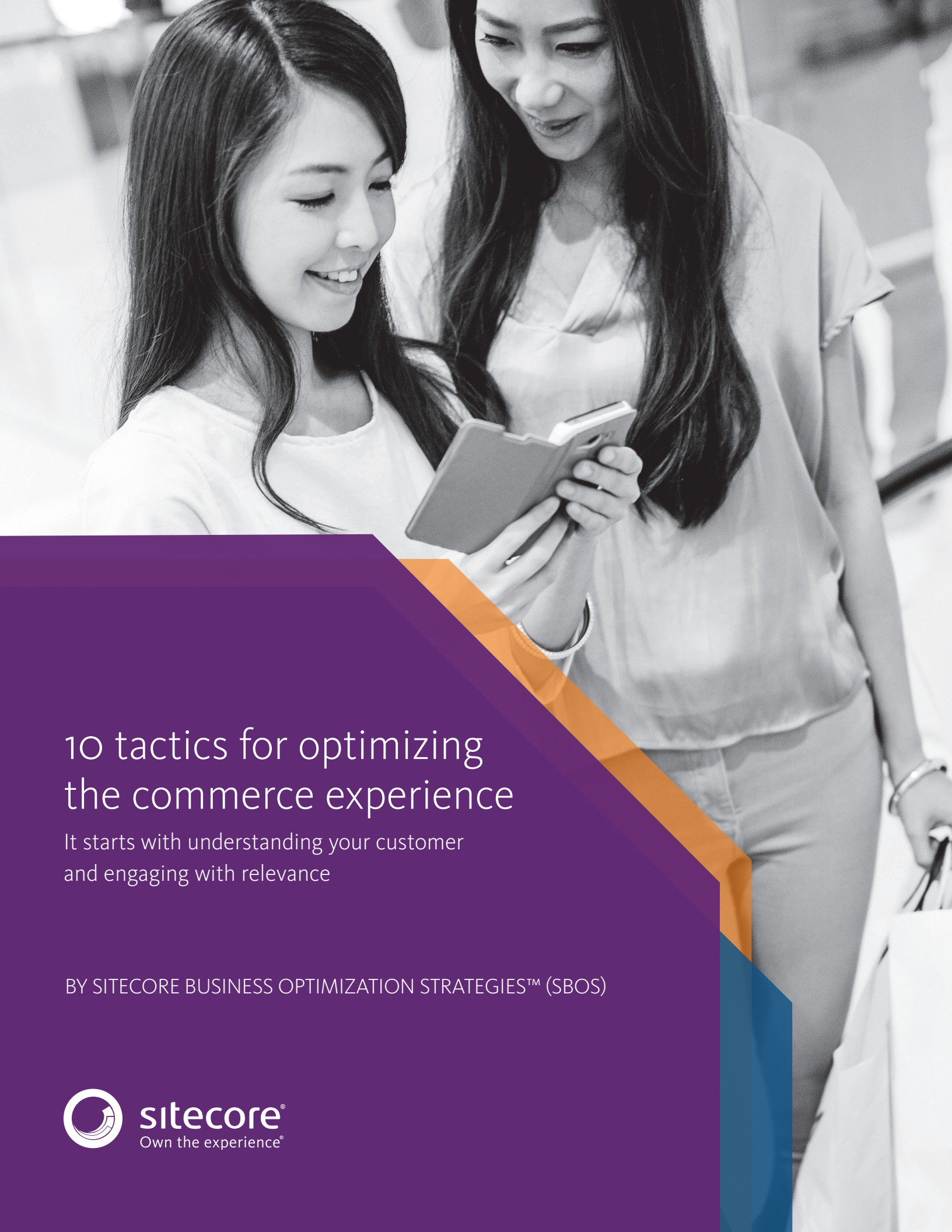


A black and white photograph of two young women with long dark hair, smiling and looking at a smartphone held by the woman on the left. The woman on the right is holding a shopping bag. The image is partially covered by a purple and orange geometric overlay on the bottom left.

10 tactics for optimizing the commerce experience

It starts with understanding your customer
and engaging with relevance

BY SITECORE BUSINESS OPTIMIZATION STRATEGIES™ (SBOS)



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Introduction

We are all consumers, and we all increasingly purchase our products and services digitally. In 2017, Black Friday US online purchases totaled \$5.03 billion, up 16.9% from a year earlier.¹ Cyber Monday desktop sales amounted to \$3.36 billion, up from \$2.67 billion in 2016.² But neither compare with China's November 11, Singles Day, the "anti-Valentine's Day" associated with Alibaba, during which \$25.4 billion in sales were made on Alibaba's Tmall and Taobao websites.³

No one questions the effect e-commerce has had on growing a business, but as more e-tailers and traditional retailers invest in e-commerce, it's important to build relevant experiences that attract long-term engagement (and purchases) over time versus simply focusing on the short-term commerce transaction. That means merchandisers and e-commerce marketers need to think differently about e-commerce—they need to think before and beyond the cart. Those who do will build better relationships with their customers, increase revenues, and raise the bar for competitors.

Your mission with commerce is about creating shopping experiences that earn trust—experiences that are helpful, seamless across channels, and empathetic and responsive to consumers' needs and intents in the moment. It's not about showcasing product SKUs and prioritizing recommendations, reviews, and basket functionality. Instead, you must collect and connect information about how prospects and customers

About Sitecore Business Optimization Strategies

Rather than focusing on the technical aspects of implementing and using the Sitecore® Experience Platform™, the Sitecore Business Optimization Strategies team (SBOS™) is a best practices resource that helps establish the digital maturity of your organization and identify where you want to be—and then provides practical plans for getting there.

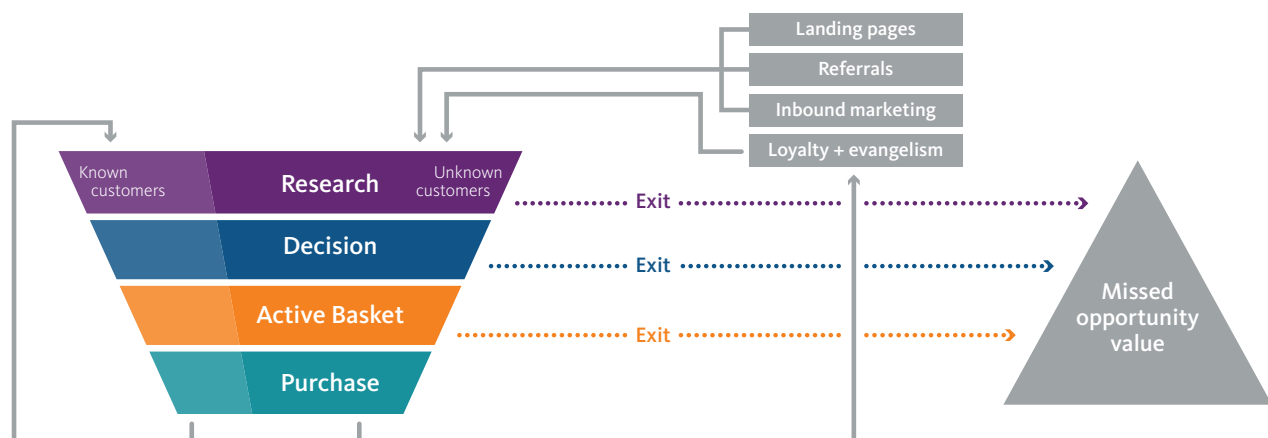
Learn more about [SBOS](#) and drill down into the details of how the team helps customers get results.

are coming to your site, which pages they're browsing, what their implicit and explicit behaviors tell you about their intent, and more.

After all, if your customer is just starting the journey to explore an expensive purchase, the last thing you want to give them is a site full of "buy now" promotions. This paper outlines 10 different well-proven tactics for taking a customer-first approach to optimizing the commerce experience.

The buyer's journey

Personalization tactics can help increase commerce purchases.



¹<https://techcrunch.com/2017/11/24/black-friday-deals-net-640m-in-sales-so-far-mobile-60-of-all-traffic/>

²<https://www.statista.com/statistics/194643/us-e-commerce-spending-on-cyber-monday-since-2005/>

³https://en.wikipedia.org/wiki/Singles'_Day

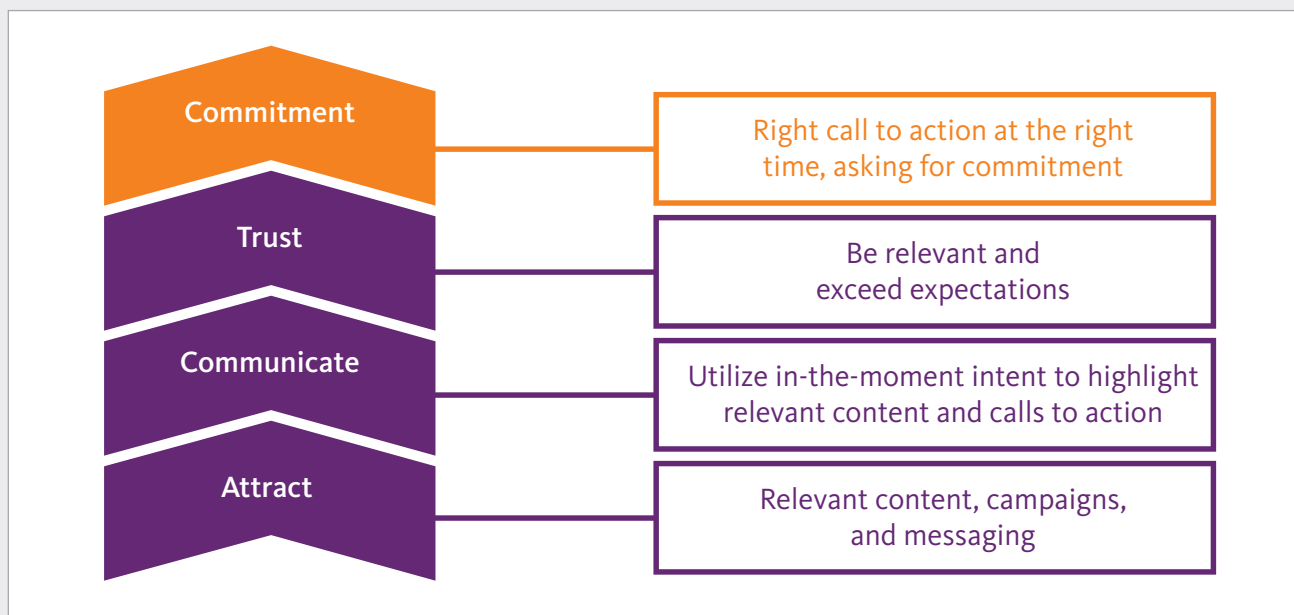
Better personalization

A lot of digital marketers “personalize” emails and, often, web content. But few can offer personalized commerce experiences throughout the customer lifecycle by delivering highly relevant content to individual customers as they cross from channel to channel in real time. That requires collecting customer intelligence and using it to engage visitors across channels even as you learn more about their needs, behavior, and intents.

Building relevant relationships with your customers is a matter of attracting the right audiences. Once they are attracted to your digital properties, the task is to understand their intent and communicate in context (see below), almost like having a conversation with a friend. The more relevant for their needs, the more trust you'll earn—and trust leads to commitment (purchases) and long-term relationships.

There's more than an academic distinction between simple personalization and the more advanced type we discuss here. Consider research conducted by [Vanson Bourne](#) and commissioned by Sitecore. Fifty-one percent of the brands in that global survey said personalization was a high priority—about three in 10 said it's their top priority. Yet 96% of the customers complained about one or more “bad personalization” tactics, like making assumptions based on a single interaction (54%), sending too many messages (54%), relying on out-of-date information (59%), or getting customer details wrong (57%).

Let's take personalization up a couple of notches. To provide truly terrific personalization, you need to know who your customers are, anticipate what they need, give them information that enables them to make better decisions, encourage them to purchase with specific promotions, make shopping more convenient with online-to-offline options, and continue to support and nurture them long after the interaction. And you need to do all that while minimizing any friction during their visits across channels.



For unknown customers in the research and decision mode

This audience category might be the biggest opportunity you have for personalization. Most likely you have many visitors who aren't customers yet but who are coming to your site to research product prices, reviews, specific product details, comparisons, etc.

For visitors in this segment, your task is easy—engage them based on their behavior and build a relationship by marketing to them in context of their interaction history. This “digital dialog” based on visitor behavioral data will help convert this group to customers more effectively than simply pushing product recommendations they may or may not be interested in.

Tactic 1: Understand inbound intent

Visitors come to your site with a specific purpose, whether it's to research a specific product or learn more about your company. The better you use inbound intent to influence the shopping experience, the better you'll engage the visitor and keep them on your site, or convince them to return when they're ready to make a purchase decision.

There are different ways you can personalize based on inbound intent. Assess the intent by reviewing tactics driving visitors to your site most often:

1. Your own inbound marketing activities
2. Referrals from external sites
3. Landing page content consumed

Any marketing activity has a purpose with a message, for a target audience, with a call to action. By reviewing those, you can quickly identify a visitor. For instance, if your Facebook advertising is targeting 30-year-old females and promoting product X, make sure the experience on your site from the Facebook ad is consistent and relevant for that visitor throughout her journey on your site.

Referrals can come from blogs, media sites, social mentions, and so on. If you understand the sites driving those referrals and the audiences they target, you can ensure the page they land on is personalized and relevant.

Your landing pages for organic search traffic can also be used to better understand what the visitor might have searched for and optimize the experience on your site accordingly.

Effort using this tactic: Low

Tactic 2: Implicit browsing behavior

Once you have visitors on your site, follow their browsing behavior—what content are they consuming? Is it mostly high-level product categories or are they looking at specific products? Are they looking at product reviews, or are they skimming different offers and coupons?

Profiling the visitor based on site interest, using your high-level navigation categories, quickly helps you identify the visitor's interest and classify the buying stage (just browsing, researching, ready to purchase). If it's a methodical visitor looking at the nitty-gritty details like tech specifications, pictures uploaded by other customers, and so forth, they're likely ready to purchase and should be rewarded with personalized offers or promotions. If they're visiting product category pages, with how-to-buy guides, they're likely just browsing or researching and could benefit from either more product category content or suggestions of top-selling products in that category.

Effort using this tactic: Low

Tactic 3: Propensity to buy

Over time, you learn which site activities produce a purchase, and you can score visitors based on those high-value activities. For instance, if visitors are looking at product details, watching product videos, reading reviews, adding items to their baskets, it's likely they should receive a high score. Based on the scoring, you can easily segment your visitors into three groups:

- Cold (low score and low propensity to buy)
- Warm (medium score and medium propensity to buy)
- Hot (high score and high propensity to buy)

For visitors scoring cold, rather than pushing specific products, focus on using implicit browsing behavior to build a more relevant experience for them so that you earn their trust. For visitors scoring warm, suggest product categories and how-to-buy content, rather than specific products. If you have a methodical visitor, you'll want to push meaty content—

e.g., an article comparing the pros and cons of leather hiking boots vs. nylon fabric boots, which can help better engage them. For visitors scoring hot, it makes sense to promote specific products and focus on getting them to buy.

You can also score your known contacts with this approach and re-target using social platforms. If you have a team of support agents using chat to engage visitors, help them prioritize who to connect with first using the scoring system.

*Effort using this tactic: **Medium***

Tactic 4: Integrate content and commerce

If your marketing platform integrates content management with e-commerce functionality, then understanding visitors' topical interests can help you personalize their experience with appropriate commerce content (e.g., specific SKUs or product categories), and vice versa.

Tight integration between content and commerce delivers an experience that makes it easier for the spontaneous visitor to transact. For example, a blog post may also contain a relevant product and a button to “add to cart.”

That is something you can't do without blending content and commerce systems. Otherwise, they would need to go to a disconnected e-commerce site to add anything to the basket. By integrating content and commerce, you can increase order conversions.

*Effort using this tactic: **Low***

For returning existing customers

You'll have more information about existing customers—they are a known contact and have likely already bought from you—so you have more insights on which to personalize their experience.

This information can help you ensure every offer is new. There's nothing worse than highlighting the same bicycle at a discount that the visitor bought two days ago. Treat existing customers with empathy—deliver what will be most relevant for them—and continue to strengthen the relationship.

Tactic 5: Onboarding customers for the best experience

You won the customer, they bought your products or services, and now they are returning to one of your digital properties. This is your chance to exceed their expectations and help them get the best possible experience with the products purchased.

Personalize part of their experience with content relevant to the product they purchased—like guides to getting started correctly, maintenance schedules, advanced feature tutorials. Doing this not only shows them you know them and helps them on their journey—it also helps them get the most out of your products so they can share their great experiences with peers.

Onboarding customers based on product purchases has a time dependency. Based on what you are selling, you want to use the first weeks after purchase to highlight getting-started content, but as time passes, you would shift to different content based on typical customer needs at various stages of ownership.

*Effort using this tactic: **Medium***

Tactic 6: Profiling with past purchases

With existing customers who are returning to your site, you have an advantage. As they have bought from you before, you have a great opportunity to close more sales.

Use their past orders to better understand what product categories they are interested in and use that to segment them for the next personalized experience. For instance, if you sell sporting goods, a man who bought soccer shoes might have a higher propensity to also buy a soccer jersey than an ice hockey stick. Surface related products and content that align with the category of products that reflect past purchases.

*Effort using this tactic: **Medium***

For active baskets

Congratulations! Your visitor has placed a product in their shopping basket. All your focus should be directed to getting them to complete the order.

You can use intelligence about the basket contents to optimize the experience and maintain focus on completing check out. If the visitor steps away from the basket, make sure what they see is relevant to products in their basket.

Tactic 7: Trust messages

For any visitor with an active basket, your number one focus is to get them to transact with as big a basket as possible.

If a visitor with an active basket browses some of your high-level (or non-product-related) pages, then personalize those pages with “trust messages” related to you as an e-tailer (great customer quotes about your service or speed of shipping) or related to the products in the basket (e.g., positive reviews).

If the visitor with an active basket browses product-related pages, then focus personalization on up- and cross-selling, perhaps by offering free shipping if they buy more or browse related products. Use your commerce promotion engine to set specific logic to personalize and optimize order value and completion.

*Effort using this tactic: **Low***

Tactic 8: Related products (based on promotions or location)

Use the information about products in the basket to highlight promotions for related products, like important accessories or products that buyers of that product would typically have a strong preference for.

Related products can be displayed in the basket, but the key is to make it easy to add related products without requiring the user to exit the basket.

Related products can also be used to personalize the experience for returning visitors who may have just bought, or for use as a topic in an email nurture.

*Effort using this tactic: **Low***

For missed sales opportunities

The visitor may not have completed the purchase, but that doesn't mean you lost them as a potential customer. After all, they showed interest in your products by adding them to the basket. Use this as an opportunity to re-engage them, as this is a valuable segment with a higher propensity to buy than a first-time visitor.

Tactic 9: Abandoned cart

You were so close, and yet the visitor exited without buying your products.

Everything is not lost yet. If it's a known contact, send an email to get them back (and into the basket) again, or use re-targeting, but make sure the re-targeting has a time limit as well as collects real-time data. You don't want to market to someone who has already bought before seeing your ad.

*Effort using this tactic: **Low***

Tactic 10: Profiling by product views

If someone makes an effort to look at a specific product, they most likely have an interest in the product or at least the product category. Use your visitors' product views (single or multiple) to better define or classify their product interest, and use this to surface personalized product or product category benefits. Your objective is to get them back and motivate them to add the product to the basket.

You can use additional insights, such as implicit browsing behavior and propensity to buy, to be more tailored in the personalization. For instance, if they have a low propensity to buy, don't focus on the purchase; instead, focus on getting an email address (might be a call to action for a product alert). If they have a high propensity to buy, you can focus more on closing the sale for the products in which they have shown highest interest.

*Effort using this tactic: **Medium***

Bonus! Tactic 11: Continuous optimization

Anything you do is an opportunity to learn and get better in creating the right experiences for your visitors, which is why you should always be testing.

Testing is well proven and will help you increase revenues. There are many elements you should be testing, and as you get more confident with testing, there are different levels of how you should be testing—from simple A/B to multi-variant testing.

Start testing with the quick wins:

- Test different calls to action to find out which are best for getting the visitors to complete an order.
- Test the flow of the basket: e.g., how can you optimize the cart experience and minimize abandoned carts?
- Test key landing pages. What are the right elements, copy, placement, colors, and so on? Would a product review be better than not showing a review? Should you highlight shipping?
- Test the layout of key impact pages (typical home page, product category pages, etc.)—which layout helps you sell more?
- If you have important SEO pages, as well as key impact pages, make sure to automatically test any editorial change to these. This could be changing an image, the headline, the copy, etc. Automating your editorial tests helps you ensure that all changes are helping to grow your business results.

Effort using this tactic: **Low**

Conclusion

There you have it—10 (plus a bonus) tactics for how you can personalize the commerce experience for your visitors. If you're interested in finding out how other companies have used Sitecore® technology to personalize the experience, click through to the [Dow Chemical](#) case study. Dow kicked off a Contextual Product Information (CPI) initiative, aiming to simplify product information management internally while making Dow products infinitely more discoverable to web visitors.

Let's talk

Every tactic we've talked about in this paper stems from developments we've included in Sitecore Experience Commerce 9™, a modern, cloud-enabled platform that integrates content and commerce and delivers a personalized shopping experience before, during, and after each transaction.

Reach out to us via:

- Email: sitecore.net/contact-us
- Phone: [sitecore.net/phone](tel:sitecore.net/phone)
- Chat: sitecore.net/chat
- Or [request a demo here](#)

If you need further help with Sitecore Experience Commerce 9, visit [Sitecore Documentation](#), give your account manager a call, or check out [Sitecore training](#) to book an online or in-person training session.

About Sitecore

Sitecore is the global leader in experience management software that combines content management, commerce, and customer insights. The Sitecore Experience Cloud™ empowers marketers to deliver personalized content in real time and at scale across every channel—before, during, and after a sale. More than 5,200 brands—including American Express, Carnival Cruise Lines, Dow Chemical, and L'Oréal—have trusted Sitecore to deliver the personalized interactions that delight audiences, build loyalty, and drive revenue.