

BEST PRACTICE GUIDE

# Ditch your CX data silos

**5 ways an integrated XM strategy can enhance the digital experience**



# The digital experience has a significant impact on the customer journey

With 36% of online shoppers willing to take their business elsewhere after one bad experience,<sup>1</sup> you can't afford to have less-than-stellar digital touchpoints. But digital is just one piece of the puzzle, and if you're not incorporating digital CX data with feedback from other channels, you're delivering fragmented experiences and missing out on conversion opportunities.

On average, only  
**2.86%**

of e-commerce website visits  
convert into a purchase.<sup>2</sup>



Brands must offer a frictionless cross-channel experience to meet the expectations of today's consumer. If your CX data is siloed across multiple channels and platforms, meeting those expectations will prove difficult, if not impossible.

[So how can you give existing and potential customers the digital experience they expect—and deserve?](#)

This best practice guide shows 5 ways an integrated experience management (XM) strategy helps brands enhance the digital experience for consumers and earn their business in a sea of competitors.

# What's inside

A modern XM solution equips brands with the tools they need to give customers the best digital experience. We'll cover ways to integrate digital into your overall CX strategy, including how to:

1

Measure both solicited + unsolicited feedback

2

Identify conversion opportunities with non-purchaser data

3

Bridge the gap between in-store + online satisfaction

4

Add depth to digital data with DIY surveys

5

Build an enterprise-level strategy with a holistic XM partnership



The future of digital is already here.

## dig·i·tal trans·for·ma·tion

SMG DEFINITION: the process of integrating new, fast, and frequently changing digital technologies into all areas of the business to fundamentally change how you operate and deliver value to customers.

This piece takes an in-depth look at the digital transformation process, outlining 3 trends to adopt now and 5 pitfalls to avoid.



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# 1 Measure both solicited + unsolicited feedback

Every consumer is different—and so is their feedback. Some shoppers don't realize they have anything to say until a survey prompt appears. Others are eager to let you know what they're thinking, whether you give them a designated outlet or not. Actionable, business-changing insights come from a combination of feedback provided by both solicited and unsolicited channels, which is why you need to make both options available across your digital touchpoints.



**In-app feedback**  
The pictures and the sorting options really made it easy to quickly find what I was looking for.  
TOPICS: Speed of Service, Ease of Experience, Ease of Location

**Pop-up survey**  
There is a great selection and quality craftsmanship.  
TOPICS: Quality of Products, Selection of Products

**Online feedback tab**  
I didn't give a highly satisfied rating because sometimes when I log onto the site it recognizes me as a new customer.  
TOPICS: Quality of Products, Service

**Post-purchase feedback**  
Awesome selections and great images.  
TOPICS: Selection of Products

**Pop-up survey**  
It's nice not having to always go into store but it is nice to go into stores for the great sales and service.  
TOPICS: Price

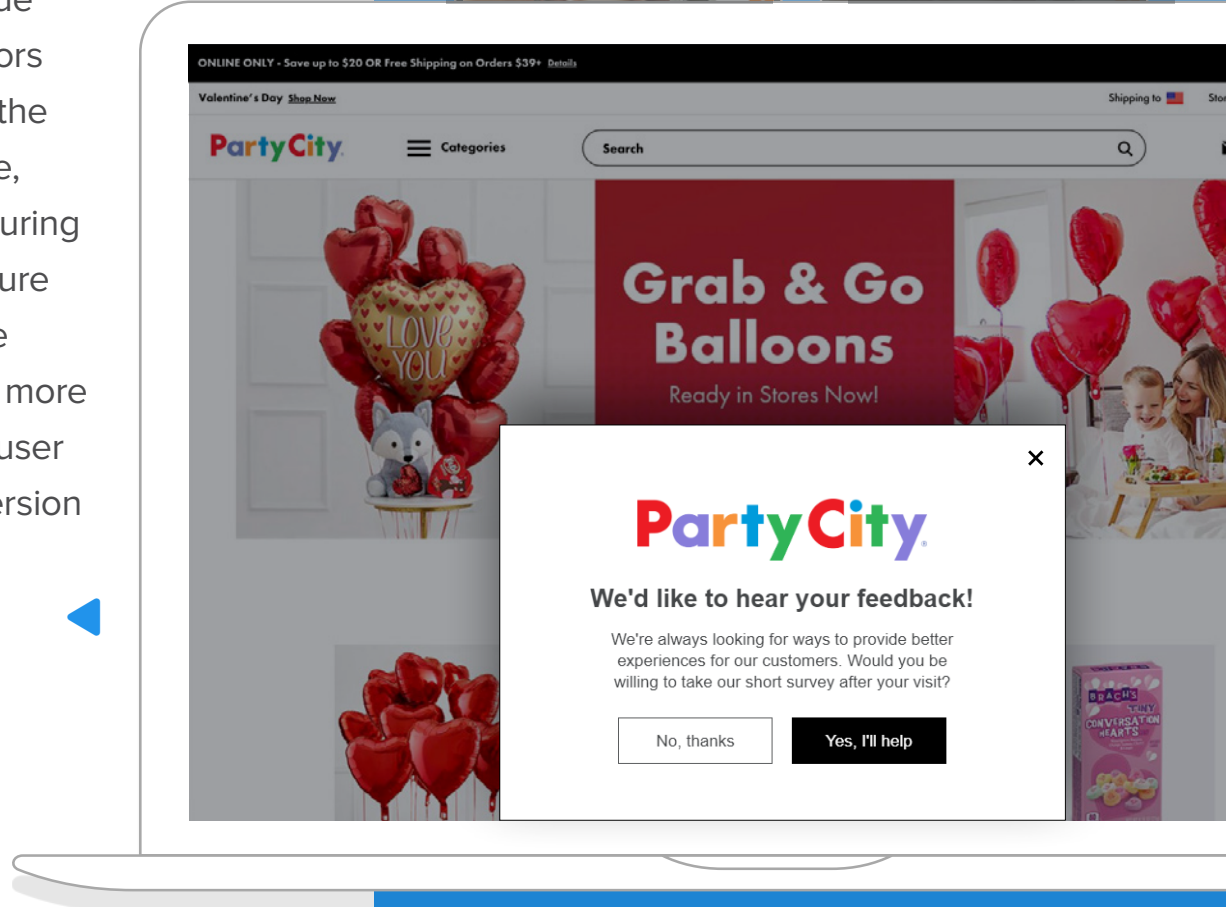
**Conversational feedback**  
I buy my products from the store itself because the online store does not ship to my town.  
TOPICS: Omni-Channel

**Pop-up survey**  
EXCELLENT ONLINE/IN STORE SERVICE ... THE WORKERS ARE WONDERFUL  
TOPICS: Service, Omni-Channel

**Online feedback tab**

## Solicited

Intuitive site-intercept surveys nudge consumers for feedback during various stages of the purchasing or booking process. You can decide which pages or specific behaviors trigger the survey, giving them the opportunity to measure discrete, isolated experiences. By configuring survey invitation criteria to capture feedback at critical points in the digital journey, you can surface more targeted insights and design a user experience optimized for conversion at each step in the purchase decision funnel.



## Unsolicited

An always-on feedback tab gives customers the opportunity to express how they feel about your site, your products, and their experience without a prompt. Maybe it's a loyal, repeat customer mourning a discontinued product—or a first-time user hitting a roadblock while navigating your app. Whether it's positive or negative, unsolicited feedback goes the extra mile to answer the questions you hadn't thought to ask.



### Key takeaway

To design user-friendly digital touchpoints, you need to hear from actual users. Combine solicited + unsolicited feedback to crowdsource your UX improvement areas.



## 2 Identify conversion opportunities with non-purchaser data

As e-commerce gets increasingly competitive, a user-friendly website can be the difference between a brand loyalist making a repeat purchase and a frustrated, lapsed customer turning to your competitor's site. In fact, with the average abandonment rate at nearly 70%, e-commerce sites could be losing up to \$3 billion a year.<sup>3</sup>

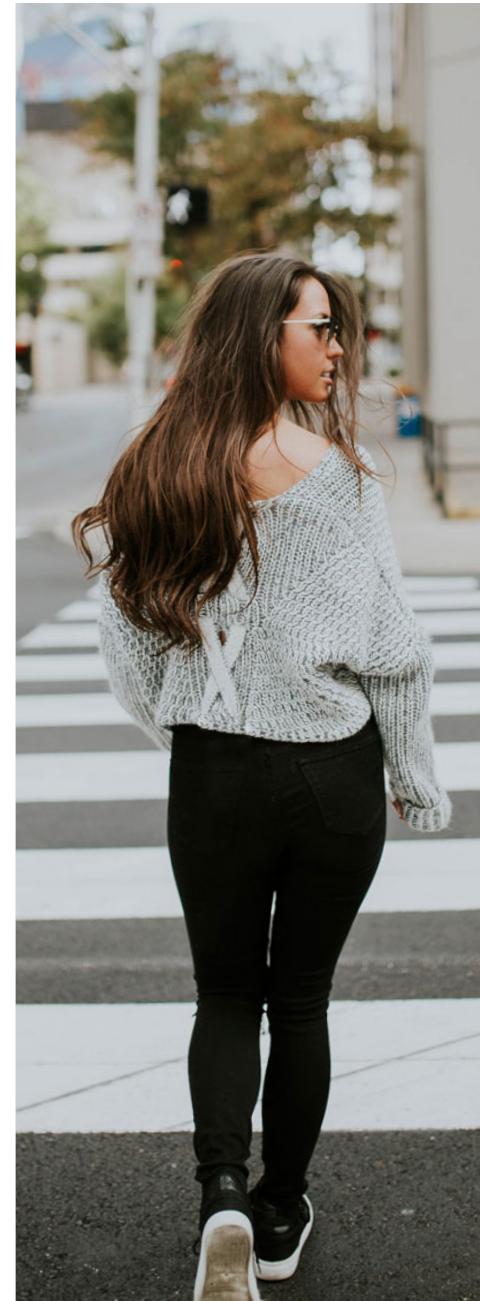
70%

average abandonment rate

\$3B

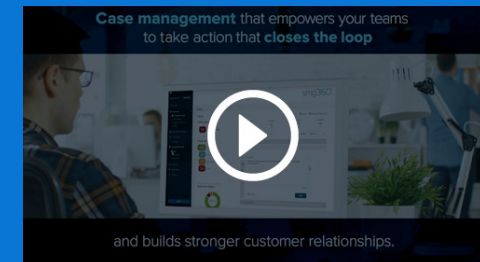
potential yearly loss due to e-commerce abandonment

<sup>3</sup> Baymard Institute, 41 Cart Abandonment Rate Statistics, 2019  
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**Close the loop with customers to improve business outcomes**

84% of customers who are highly satisfied with problem resolution express a high likelihood to return to the business where the issue occurred—meaning issues are actually a really great opportunity to gain customer loyalty.



**WATCH NOW** ▶

To fully understand what makes users ditch your digital touchpoints, implement non-purchaser feedback tools like:



### Case management

Address user issues to earn back their trust. Manage problem resolution workflows through your integrated XM platform to close the loop on customer complaints and prevent repeat problems.



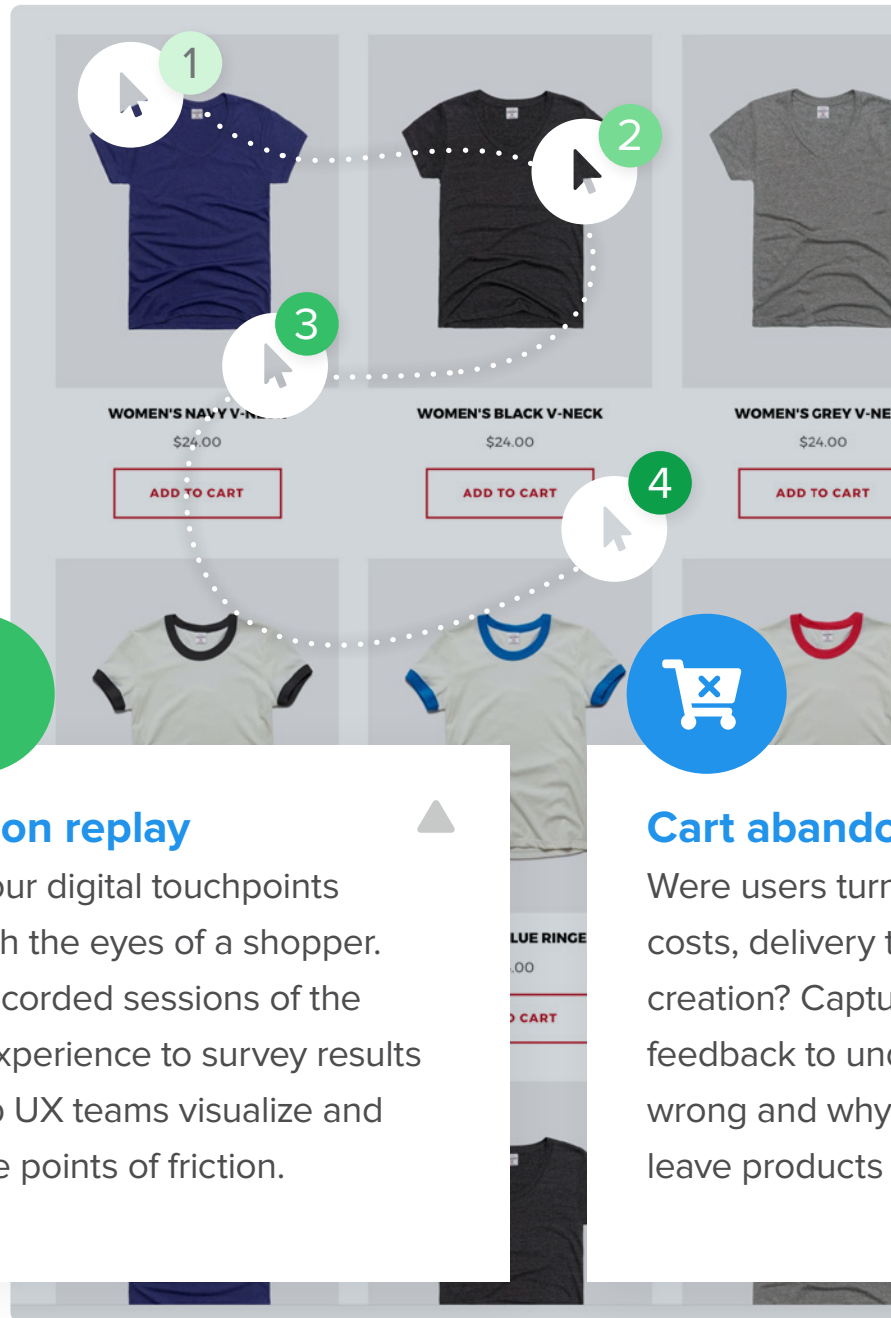
### Session replay

See your digital touchpoints through the eyes of a shopper. Link recorded sessions of the user experience to survey results to help UX teams visualize and resolve points of friction.



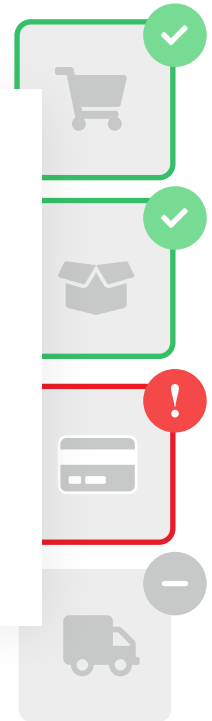
### Cart abandonment surveys

Were users turned off by shipping costs, delivery timelines, or account creation? Capture non-purchaser feedback to understand what went wrong and why shoppers chose to leave products behind.



## Key takeaway

Pinpoint where customers are not converting—and why. Take advantage of the tools that let you see where the digital experience is lacking and use those insights to increase conversion.



## IN-PRACTICE EXAMPLE

# Provide a digital experience that delivers on expectations beyond the point of purchase

### SITUATION

With Amazon making 2-day delivery seem commonplace, a national retailer knew they needed a cost-effective way to influence customers' rising expectations for online order fulfillment.

### INSIGHT

Post-fulfillment CX data revealed **Timeliness of Receiving Order** as the top driver for Overall Satisfaction — and Timeliness scores were 21 pts higher when shipping and delivery information was communicated effectively. While speeding up fulfillment processes would require significant investment, the client decided to take immediate action by revisiting customer communications.

### ACTION

Tested estimated delivery windows instead of a specific delivery date.

### RESULTS

+4<sup>ppts</sup> Timeliness of Receiving Orders  
+6% Online sales (+ increased conversion rates)





# 3

## Bridge the gap between in-store + online satisfaction

With 73% of consumers using multiple channels during their shopping journey,<sup>4</sup> buyers have high expectations for every touchpoint — but recent data shows Overall Satisfaction for online purchasers at 24 points below that of in-store customers.

**80%** in-store purchase conversion rate of shoppers who are highly satisfied with the digital experience—nearly triple the rate of less-than-satisfied consumers.<sup>5</sup>



### What you need to know about cross-channel shoppers

Stop worrying about e-commerce channels and start optimizing them. Learn what 16,000 consumers had to say about their omnichannel shopping habits after a trip to a brick-and-mortar retailer.



[GET THE REPORT ►](#)

<sup>4+5</sup> SMG, 3 things every retailer needs to know about cross-channel shoppers, 2018  
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An integrated CX platform that shows digital and in-store data side-by-side provides the insights needed to bridge the satisfaction gap, and helps you:

### 1 Discover what influences channel preferences

Are guests using your app to avoid the drive-thru before work? Do customers shop online for large furniture, but in-store for accent pieces? Cross-channel data details what drives shoppers to each channel during their purchasing journey.

### 2 Identify common themes in customer feedback

Did both online and in-store guests mention payment issues in their feedback? Multi-source text analytics can decipher recurring product mentions, trends, and sentiment across touchpoints to identify emerging systemic issues—and triggered alerts can help you resolve problems as they arise.

### 3 Personalize their experience by merging purchase data

Use what your brand already knows about customers to enhance their omnichannel experience. Base rewards off favorite menu items, automatically suggest the fitness instructor they book most frequently, or add a personalized “Recommended for You” section to your homepage.



### Key takeaway

Customers won't settle for a disjointed cross-channel experience—and neither should you. Pair feedback data with personalization technology to ensure your brand is offering a seamless experience across every point of interaction.

## IN-PRACTICE EXAMPLE

# How one pet store chain aligned the online + offline experience to consistently meet customer expectations

### SITUATION

After an e-commerce survey showed the website wasn't living up to in-store expectations, the brand used customer feedback to guide a digital refresh

### INSIGHT

Helpfulness of Product Descriptions was a top driver for Overall Satisfaction, and text analytics showed that in-store visitors valued the advice and help received from associates

### ACTION

The brand expanded product descriptions to include key features and benefits, added pet care videos and guides, and took a fun, friendly approach to the website

### RESULTS



Uptick in traffic

Increased purchase conversion rates





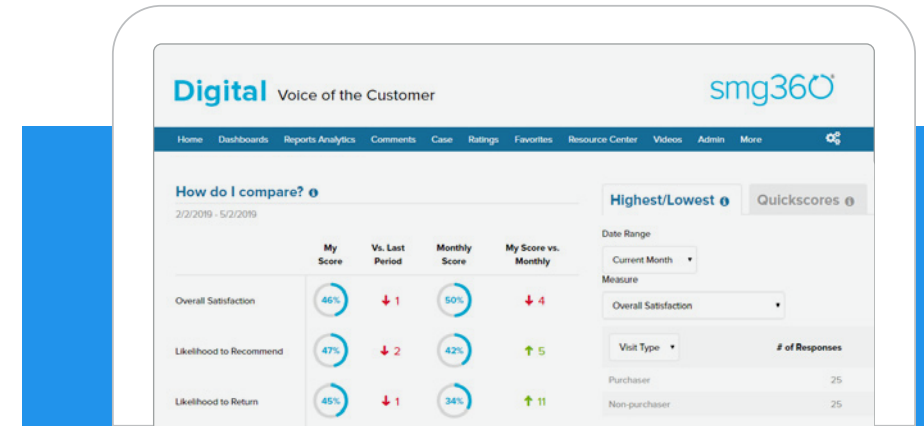
# 4 Add depth to digital data with DIY surveys

Sometimes, you plan for increased traffic—whether it’s discount deals on holidays, retail anniversary sales, or health awareness months, special promotions attract swarms of customers, both new and repeat. Other times, it’s unexpected—are customers going crazy over a specific item that’s been on the menu for years? Is your team confused by a spike in online bookings for dental cleanings? That’s where self-service surveys come into play.

Self-service technology allows brands to create and trigger specialized surveys, separate from their standard invitation methods. With intuitive DIY survey capabilities, you can:

- ▶ Edit questions on the fly or choose from a pre-approved question bank
- ▶ Build logic paths to prompt drill-down questions based on prior responses
- ▶ Take an iterative approach to testing + assessing conversion strategy tactics

*Self-service technology coming to smg360® in Q3 2020*



A strong XM partner can consult on digital best practices—but ultimately, you know your brand better than anyone. DIY surveys help you take a more agile approach to getting timely feedback on the questions that matter most to you.

## Key takeaway

Dig deeper into purchasing and non-purchasing behavior in real time. Incorporate self-service survey options for a quick turnaround on additional, specific feedback that adds more depth to digital consumer data.

# 5 Build an enterprise-level strategy with a holistic XM partnership

Advanced feedback collection, integrated reporting, and DIY survey capabilities are crucial to a modern digital XM program—but the high-tech platforms that offer these capabilities can be overwhelming without guidance. Aggregating all your channel data into one platform is a great place to start, but it still takes a lot of brainpower to put those datasets into dialogue that leads to business-changing results.

<sup>6</sup> Business Insider, Almost 70% of US consumers use BOPIS, 2019  
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# 85%

of shoppers say they've made an additional in-store purchase when picking up a BOPIS order.<sup>6</sup>



When you pair the platform with professional services and a dedicated team of CX pros, crucial insights are never out of reach.

By choosing an XM partner that can support measurement strategies across all touchpoints, brands are more likely to benefit from:

- ▶ Consistent survey scales + key performance metrics across listening posts
- ▶ Sampling methodologies that avoid over-surveying customers
- ▶ Ongoing analysis + insight support that covers the end-to-end customer journey

A collaborative account management team should understand your program goals and empower you to reach them by offloading daily administrative tasks, leveraging best practices, and building and maintaining a best-in-class program.

### **Key takeaway**

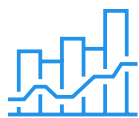
You don't have to go it alone. Choose an experienced, hands-on partner that can collaborate on every aspect of your overarching XM strategy and prioritize your brand's success.



## INTERACTIVE

# ROI calculator

At this point, you're fully aware of how important the digital experience is to brands. But it can be hard to comprehend what exactly a digital CX platform can do for your bottom line—especially one that's fully integrated alongside other touchpoint data. This calculator illustrates the return on investment brands can experience with a new approach to their XM strategy.



For an in-depth analysis on how our integrated digital XM solution can boost your conversion rates and revenue, [contact us](#) for more information.

### 1 ENTER YOUR INFORMATION

Average # of website visits per month	Average transaction amount
<input type="text"/>	<input type="text"/>
Average website conversion %	What if I increase conversion by x%?
<input type="text"/>	<input type="text"/>

2 **Show results**

reset

ESTIMATED CURRENT  
E-COMMERCE REVENUE

**FORECASTED**  
INCREASE IN REVENUE

**FORECASTED**  
TOTAL REVENUE

+

=

MONTHLY

MONTHLY

MONTHLY

+

=

ANNUALLY

ANNUALLY

ANNUALLY

▽  
COMPARED TO  
INDUSTRY AVERAGE:

# One XM platform charts direct paths to improvement

Forrester predicts U.S. consumers will spend more than \$915 billion online by 2023.<sup>7</sup> Attempting to oversee digital CX with a single-channel solution adds yet another silo to your data and another program to your XM stack.

The easiest way to interpret and act on consumer behavior across all touchpoints?

**A multi-channel XM platform.**



<sup>7</sup> Forrester, The New Paradigm of Retail, 2019

# Optimize your digital XM strategy with this action plan

Here's your checklist for integrating important digital data with more traditional feedback—providing a better opportunity to measure, act, and adapt at the speed of today's cross-channel consumers.

- Collect solicited + unsolicited feedback across website, mobile, + fulfillment experiences
- Identify conversion opportunities by collecting + analyzing non-purchaser data
- Bridge the gap between in-store + online satisfaction with integrated, cross-channel reporting
- Dig deeper into unique digital feedback with optimized, self-service surveys
- Uncover business-changing insights with the support of top-notch professional services

Don't fragment the customer experience by siloing your digital feedback—get all your data in one place with smg360®.

To learn more about our digital XM solution, **request a demo** at [smg.com/contactus](https://www.smg.com/contactus).

## About Service Management Group

SMG inspires experiences that improve people's lives. We are a catalyst for change, providing actionable customer, patient, and employee insights that boost loyalty and drive business outcomes. Our unique model puts a dual focus on platform technology and professional services—making it easier to collect, analyze, and share feedback and behavioral data across the enterprise. To learn more about our customer experience management, employee experience, and brand research solutions, visit [www.smg.com](https://www.smg.com).

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