



# J.D. POWER

## Your Quick Start Checklist for Aligning Your In-Person Customer Experience

The in-person, or retail, customer experience for your organization goes far beyond the interaction between a specific customer and employee. To hit the ground running towards a consistent and optimized customer experience, make sure you're checking the boxes for each of these **5 KEY AREAS** that impact the overall customer experience.



### 1 | THE CUSTOMER

- ☐ Evaluate your current processes and pinpoint areas that need improvement. (Not sure where to start? Check out a few established customer interaction best practices to the right. Are your frontline employees performing these every time?)

#### BEST PRACTICE SNEAK PEEK

**MAKE IT PERSONAL:** When interacting with customers, start with the basics by addressing them by their name. Once you've solved their initial problem, take a moment to ask about their goals. This will give you an opportunity to offer advice or options to ensure they are getting the most out of their experience with your products/services.

**DON'T BE AN ORDER TAKER:** There is a tendency to take orders instead of asking the customer questions to fully understand their needs. Take the time to discover what the customer is trying to do by asking a few whys to really understand the actual need/problem they're looking to address with your product/service.

**END THE INTERACTION PROPERLY:** Recapping the interaction, showing appreciation, and offering contact information is a great way to end a service interaction on a high note.

- ☐ Assess your customer feedback loop and KPIs. If the market changes that have occurred over the past year have impacted your industry, ensure your voice of the customer data is still aligned to retail best practices.
- ☐ Put the customer at the center of your strategy by giving them a virtual seat at the table at your team meetings and employee training. Always take the customer's feedback into account during internal discussions.
- ☐ Use effective and meaningful customer communications to build brand advocacy. Incorporate key customer information into communications to create an optimized, personalized experience that will have your customers becoming your brand champions.



### 2 | THE EMPLOYEE

- ☐ With employee attrition trends continuing to be a significant pain point across the retail landscape, ensure you have outlined steps to reduce this by providing a meaningful work environment to your front-line staff. Make sure your recruiting, onboarding and training have all evolved to mitigate attrition risk within the first 90-days.
- ☐ Arm your frontline with the skills and information needed to provide a consistent and excellent customer experience. Now is the time to establish a cadence of employee training, 1:1s/coaching sessions and "listening lounges" to create an environment of continuous education, improvement and engagement.
- ☐ Set the table for 2023 with a clear set of employee objectives and key results. Often, these are focused on operational KPIs such as sales performance, traffic, inventory turn-over, etc., but make sure you don't forget about the customer experience. Incorporate KPIs such as first contact resolution, greeting, acknowledging tenure/loyalty, and thanking the customer for their business into employee goals. *(Hint: These customer service and satisfaction metrics can be obtained through post interaction VOC research and experience (secret) shopping programs.)*



### 3 | TOOLS & TECHNOLOGY

- ☐ Align the deployment of new tools and technology to frontline staff with proper onboarding and training to ensure both employee and customer success. Start by rolling out new tools and tech across a few markets to gather feedback, make the appropriate adjustments and then rollout across your retail footprint.
- ☐ Ensure the voice-of-the-customer is front and center in your development roadmap decisions. Make sure the end goal of these decisions is to increase efficiency, offload repetitive tasks, empower self-service, and support a frictionless customer experience.
- ☐ Measure the effectiveness of tools/technology deployed through both employee and customer feedback. Use this feedback to inform future staff training, coaching and development decisions.



### 4 | FACILITY & MERCHANDISING

- ☐ Create a welcoming and attractive environment for customers. This includes keeping the store bright, clean and well-organized.
- ☐ Ensure all merchandising displays are current with pricing and product information clearly visible and easy to understand.
- ☐ Where applicable, ensure content is powered on and displayed at all times (TV's, devices).



### 5 | CULTURE & COMMUNITY

- ☐ Deployment and reinforcement of brand/corporate culture at the location-level is critical. Reinforce this through employee training, coaching, and leading by example.
- ☐ Create ties to the communities you serve. Look for ways to connect with and support customers in your local community by supporting local events, hosting live learning sessions for hands-on product education, and creating onsite spaces for customer support that include "tips and tricks" sessions that will help customers get the most value out of their new product or service. For examples, look to Top Performers like Apple's Genius Bar, Starbucks, and Lululemon.

**If you're not sure where you stand or need some support addressing any of these 5 key areas, connect with our Customer Service Advisory team today to ensure you're on the path to customer experience excellence. >>**