The Essential In-Store Playbook

5 Tactics for Seamless and Memorable Customer Experiences

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Everyone has a favorite store that meets all their expectations:

the staff are friendly and knowledgeable, the atmosphere is buzzing, and goods are laid out in pleasing and intuitive ways; easy to find and ready to be tested out. It's a place you want to hang out on the weekend or show to friends when they visit town. Stores like this come in all shapes and sizes with vastly different products and customers. So what do they have in common? These stores meet their customer's needs while making them feel special.

The quintessential in-store experience is about nailing a powerful combination of convenience and community. In this playbook, we'll walk through five tactics that will help retailers design physical stores for the modern omnichannel shopper. Providing great customer experiences will drive sales and increase the lifetime value of a brand's customers— transforming them from first-time shoppers to lifelong brand advocates.

If you watched our webinar "The New Standard for In-Store Shopping: Retail Trends and Customer Expectations in 2024", you already know that physical store sales will continue to drive the bulk of retail sales for the next decade: 85.6% of all retail sales dollars come from brick-and-mortar stores, and forecasts show that global brick-and-mortar sales will total $28.9 trillion in 2030.

Customers want flexible shopping options, personalized service, and to experience a brand's products and values in real life. Retailers need to grow their business. They need to provide first-class customer service by empowering their staff with better tools and product knowledge. And they must do all this while continuing to collect information about their customers to provide better marketing communications and tailored service on their next visit. Adding to this complexity, retailers have to apply these improvements across tens to hundreds of store locations, all while managing hundreds of employees.

Physical stores need a refresh in 2024. To meet the omnichannel and experiential demands of the modern shopper, retailers need to:

- **Make it easy:** Remove common pain points for shoppers and bring the best of omnichannel shopping options to the physical store.
- **Make it special:** Make every customer's visit to a store feel personally tailored to their preferences, while empowering staff to focus on customer service.
- **Make it yours:** Find ways to expand your store's offerings, tell your brand story, and create distinct in-store experiences that differentiate your brand from the competition.

Here are five ways to improve the in-store experience and reap the benefits

Table of contents

1. Deliver seamless checkouts 4
2. Make shopping trips more fruitful 6
3. Offer flexible shopping options 7
4. Bring your brand story to life 9
5. Treat every customer like a regular 11

1

Deliver seamless checkouts

Retailers know that checkout is the most critical touchpoint in a store visit. It's not just the moment when a customer pays for their purchase, it's the final impression a customer has of a brand before they leave the store. Long lines, inaccurate pricing, and failed payments can quickly turn a perfect experience into "I'm never shopping here again."

The reason shoppers visit a store is to buy something. And they expect retailers to make it easy. That starts with making sure point of sale (POS) systems are functional and intuitive.

Set up fast, flexible checkouts

A reliable POS system with close to zero downtime is imperative for a store. Waiting for a system to come back online leads to frustrated customers and missed sales. Retailers should explore WiFi and Ethernet solutions for their POS system, which offer better stability and reliability plus wider range and faster data speeds compared to Bluetooth solutions.

Next, provide the ability to check out anywhere in the store. A versatile POS system that offers both countertop and mobile configurations allows store associates to close sales anywhere, be it the checkout counter or the sales floor. This also helps alleviate an uneven customer to sales associate ratio. When sales associates are spread thin around the store, retailers may be missing vital moments to have staff connect with shoppers, help them find what they're looking for, and secure a sale. Mobile POS hardware allows associates to perform a wide variety of tasks like making transactions and checking inventory, while keeping them free and flexible to be where they're needed most.

Increase transparency at checkout

Prioritize investing in POS hardware that clearly displays checkout information to customers to avoid issues post-checkout. Choosing hardware that lets shoppers view their items as they're being scanned can help flag price discrepancies, scanning issues, or missing discounts before the payment is processed. Transparency builds trust between a brand and its customers.

Let them pay their way

Every shopper has a preferred way they like to pay for things. It's important to support a wide range of payment options across retail locations, including all of the popular credit card brands and the ability to tap, swipe, or insert a card's chip, plus digital wallets like Apple Pay and Google Pay.

Consider offering flexible payment options like buy now, pay later (BNPL) to make large purchases more attainable for high-intent in-store shoppers. A study by PYMNTS found that 53% of luxury and specialty store shoppers are highly interested in using installment payments for purchases in store. And shoppers love flexible payment options once they try them; the same study found that 94% of consumers who used BNPL options in the last month said they would use them again at a local retailer's physical store.

Make sure payments are secure

With the rise of fraud, compromises to credit card security, and data breaches, shoppers are becoming more concerned about the security of their payment information. Verify that your company's payment provider is PCI compliant so that you can reassure customers that their data is safe and their payments are encrypted.

53%

of luxury and specialty store shoppers are highly interested in using installment payments for in-store purchases.

Source: PYMNTS

2

Make shopping trips more fruitful

Shoppers want efficient and fruitful store visits. Aside from successfully paying for an item, shoppers expect products to be available for purchase, for information about the store to be up to date, and to take care of inconveniences like returns or exchanges face to face. In short, if a customer is making the trek to a store, they want to accomplish what they set out to do. By being aware of the touchpoints that modern shoppers use, such as a retailer's website, online search, and social media, brands can make their in-store experience more productive and deliver better customer service.

First, retailers should make sure that their store hours are accurate and accessible on their company's website and via online listings, such as Google Maps. These will be the first ports of call when shoppers are researching a store—keep them current. Next, keep the in-store stock of every retail location up to date online. A survey by Publicis Sapient found that 71% of respondents checked retailer inventory online before visiting a brick-and-mortar store.

This also ties in to returns and exchanges, something that 48% of global consumers prefer to do in-store. While returns and exchanges come with their own logistical challenges, especially for large retailers with hundreds of stores spanning large geographic distances, the ability to accept items purchased online or from other locations provides a huge benefit to customers, and also allows a retailer to return items to circulation for future sales.

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of respondents checked retailer inventory online before visiting a brick-and-mortar store.

Source: Publicis Sapient

3

Offer flexible shopping options

Every customer has different shopping preferences. They want to fit shopping into their busy lives, not the other way around. Providing the widest possible range of fulfillment options will make a retailer's store—and business—more attractive to a wider audience. The key to offering these flexible shopping options is running a business on a unified commerce platform that seamlessly connects hundreds of retail stores and inventory locations (like warehouses). When an online store and retail locations don't talk and stores aren't connected, a business won't be able to offer convenient fulfillment options that are fast becoming an expectation.

Having unified inventory management unlocks the following flexible shopping options that customers want:

BOPIS (Buy online, pickup in store)

Shoppers choosing to buy products online and pick up in store has exploded in popularity since the pandemic: 64% of shoppers globally say they currently use or would like to use buy online and pick up in store, while a study by Deloitte found that 44% percent of consumers are willing to pay a premium to pick up on the same day instead of waiting for delivery. Research has shown that many customer shopping journeys start online before moving to the store. Enabling BOPIS helps close these sales. It's also a great opportunity to drive traffic to a store, which can then lead to further browsing and upsell opportunities at pickup.

Endless aisles

Endless aisles, also known as 'ship to customer' or 'ship from store', is a way to order and ship products to a customer's home when the item is out of stock at the store. This is a crucial feature for retailers to ensure they don't miss a sale simply because the product isn't in stock. And sure, it's a big challenge for retailers—but it's a bigger opportunity with the right technology. Mckinsey found that ship-from-store could account for up to 50% of physical store volume in the next few years.

There's many real-life scenarios for this feature. A customer may want a particular product but the variant, like color or size, is out of stock. Out-of-town shoppers could have an item shipped to their home if they don't want to lug it around all day or they're not able to fit it in their luggage. This is also a great way for customers to send gifts to recipients who live out of town.

Having a POS platform that can not only place ship-to-home orders, but can also streamline order fulfillment, shipping, and customer communications is key to making endless aisle workflows seamless for staff as well as customers.

Curbside pickup

While curbside pickup isn't feasible for all retailers, the data shows that being able to drive up and go is a big selling point for consumers. On average, more than 20% of online shoppers order items for curbside pickup. It's worth investing in this service if it makes sense for a business.

Same-day delivery

This is another "added bonus" fulfillment option that can surprise and delight customers and build goodwill for the brand. Retailers will need to weigh the cost/benefit of an expensive service like this, though partnering with third-party shipping companies can reduce costs and streamline operations.

4

Bring your brand story to life

Digital advertising continues to get more expensive. Retailers are rightly turning to their retail locations as owned marketing channels for acquiring new customers and growing brand loyalty.

But standing out in a noisy market requires more than simply offering the convenient shopping experiences we covered earlier. Today's consumers also want to connect with the brands they shop with in real life, and on a personal level–60% think it's important that a retailer's brand values align with their personal values. A report from Faire details how Gen-Z finds that "brick and mortar shopping is also seen as a space for 'meaningful connection,' whether that's connecting to a retailer's narrative or with a wider shared community around a store or brand."

Let's take a closer look at some ways for retailers to bring their brand to life for their customers.

Experiential

Customers want to try products in real life. This is one of the most basic functions of a physical store and one of the greatest advantages they have over ecommerce competitors: Deloitte found that 82% of customers want to touch and feel a product before they decide to buy it.

In-person retail gives customers the opportunity to experience a company's products in real life and for staff to add color and anecdotes that customers can't find online. Many retailers are leaning into technology like augmented reality or customer displays in order to engage shoppers further. That said, as exciting and novel as these technologies are, they also come with their own high costs and resources.

Remember that 'experiential' doesn't have to mean mind-blowing interior design and cutting-edge technology. Simple experiences that let customers play with, try on, and interact with products can be just as engaging for customers. Brands should be thoughtful about how they design their in-store experiences. What will bring their customers inspiration and answer their questions?

60%

of consumers think it's important that a retailer's brand values align with their personal values.

Source: Oracle

Empowering staff with technology

Working in retail is a tough job. It takes soft skills like communication and empathy, robust knowledge of products and trends, and technical knowledge of hardware and software. Finding ways to make staff's jobs easier will allow them to focus on providing great in-person customer service. As businesses scale, it becomes harder to ensure that large, distributed teams of staff have the product knowledge and confidence to represent products to the best of their abilities.

To help, turn staff into product experts with tools that provide training, selling assistance, and easy-to-find product information. Choosing point of sale software that supports product descriptions and metafields can equip staff with the information they need, when they need it.

In-store exclusives

Exclusive products and events pique the interest of new customers and drive brand loyalty for regulars. Explore offering exclusive product lines only available in store to motivate store visits and make customers feel they're experiencing something they couldn't find online.

Offering in-store services can bring in new revenue streams and opportunities to showcase a brand and its values. Repairs can extend a product's value and showcase the brand's commitment to eco-friendly practices: 73% of consumers are willing to pay more for products branded as environmentally sustainable, up from 50% in 2022.

In-store classes and workshops are great ways for customers to learn how to get the most out of their products, building authentic connection and trust in the process. Going a step further, explore opportunities for value-added services that fit a brand's identity, like monogramming services for a clothing company or providing ear piercing at a jewelry store.

Lastly, ambitious growth goals for a business don't have to be at odds with the ability to contribute to and be a part of the local communities where retail stores are located. Create space for local businesses to run pop-ups in stores, or partner with smaller brands to demonstrate how the business is contributing to the vibrancy of the community. These partnerships can be mutually beneficial—a survey by Hubspot found that 52% of consumers say a product being made by a small business makes them more likely to purchase.

5

Treat every customer like a regular

Let's say a retailer is now offering seamless checkouts, catering to the modern-day shopping journeys that span online and in store, offering the flexible shopping options customers want, and winning them over in store with distinct experiences that are unique to their brand. Now, it's time to nurture these customer relationships by equipping stores with the tools to capture customer information and keep them coming back.

Customer data capture

Physical stores give retailers a leg-up over pure-play ecommerce sites with opportunities to enroll customers in marketing communications at checkout or while chatting with a salesperson. With the phasing out of third-party cookies, more privacy laws going into effect, and scrutiny being paid to the handling of customer data, being able to collect first-party information in transparent, efficient ways will be essential for brands. Stores allow retailers to evaluate customer interactions, collect their sentiments for market research, and study touchpoints in their shopping journey.

Clienteling tools for staff

Knowing a customer's purchase history, preferences, and lifetime value can help associates personalize their shopping trip and provide that extra layer of customer service. This can be tricky for a retailer to implement at scale, especially when it has thousands of customers visiting multiple retail locations every day. The solution? Retailers should invest in software that allows them to set up unified customer profiles and keep tabs on what makes their customers happy. Other features to explore include email carts, which allow staff to email a digital shopping cart to customers who need a bit more time to consider a purchase, and appointment scheduling, which allow customers to book one-on-one consultations with sales associates.

Membership programs and subscriptions

Loyalty programs such as memberships and subscriptions not only incentivize customers to stick with a brand (and in the case of subscriptions, generate another revenue stream), but they also create a relationship layer that allows for enrolling customers in marketing communications. And making customers feel special doesn't always have to mean offers and incentives; thoughtful birthday messages, early access to new items, or member exclusives can make loyal customers feel just as rewarded.

Looking towards the future

Even with the continued rise of ecommerce and uncertain economic headwinds for consumers, retailers would be wise to lean into the power of their physical stores now more than ever. Business leaders can approach their store strategy with the '3 M's' in mind:

- **Make it easy** for customers by removing common shopping pain points
- **Make it special** for shoppers by focusing on personalization and service
- **Make it yours** by letting your brand's identity and values shine through

Stores are revenue drivers, marketing channels, and omnichannel fulfillment centers all in one—and they're one of the most effective ways for retail businesses to increase the lifetime value of customers. The bottom line is, with the right technology and strategy, retailers can deliver a positive and memorable experience for every customer that walks through the door.

Want to learn how Shopify POS can help you deliver innovative customer experiences at your retail locations?

Talk to sales

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