

The Essential



# Direct-to-Consumer Customer Service Personalization Guide



As a D2C brand, your website is the lifeblood of your company. It's where your customers go to learn who you are, buy your products, and get their questions answered.

With all customer interactions happening virtually, connecting your agents to your customers during the online shopping experience is often what makes the difference between good brands and the great ones. In fact, the more personal your online shopping experience, the better.

**Here are 5  
ways to get  
personal with  
customers to  
drive more  
revenue.**



# 01. Make getting help easier

Modern consumers expect to be able to start a conversation with an agent over text, move to the phone, and then follow up with an email. And as they move from one channel to the next, they want one seamless conversation—without having to repeat themselves.

As we move into a more modern world, customers will also expect you to be on the channels they use every day. Making sure your customers can reach out to you on typical channels like email and phone is necessary, but making sure they can reach out on more modern channels like live-chat, text and social are becoming equally as important.



## ACTION TIP

**Try proactively communicating with customers in your live-chat feature. When a customer is stalled on a page or looks like they might need your assistance, reach out to them and get their questions answered or help guide them to purchase.**

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**Everything an agent needs is right there in front of them. They can see a customer's orders pulled right in from Shopify. They can see what a customer's lifetime value is. They can cancel an order. The usability as an agent is 100% better with Gladly.**

**Katrina Donohue**

Customer Experience Manager

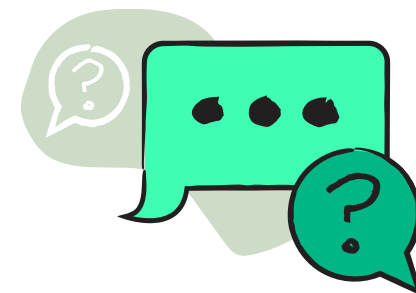
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## 02. Show them you know them

Personalized service matters more than ever before. In fact, it is nearly four times more important to consumers than personalized marketing according to our [2020 Customer Expectations Report](#). Making sure your customer service agents are set up for success will be key to ensuring your customers feel known at every step of their interaction with you.

Agents that have the ability to greet your customers by name across every channel, know exactly what your customer was looking at on your site before reaching out, and never have to ask again for a customer's order number will help deliver top notch personalized customer service for your brand. The more context your agents have, the less repeat and recap the customer needs to go through!



### ACTION TIP

**Try asking your customers about previous items they ordered, how they like them, and if they'd want a discount on a newer model of an item they regularly purchase. This can help to create those special moments that show your customers you care.**

### 03.

# Spend some extra time

A great experience is worth it to consumers. A whopping eight of ten people will go out of their way to spend more money with the brands they love.

Gone are the old ideas of quickly trying to resolve a customer's issue to move onto the next. It's now important to consult with your customers as long as it makes sense—especially if they are looking for your advice on what to buy.

If you know who a customer is and what their preferences are, you'll have an easier time guiding them to a purchase. Having a record of certain styles, cuts, flavors, etc. can be used to suggest items they may not know about. Taking the extra time with a valued customer can make a huge difference in revenue generation and overall customer satisfaction.



#### ACTION TIP

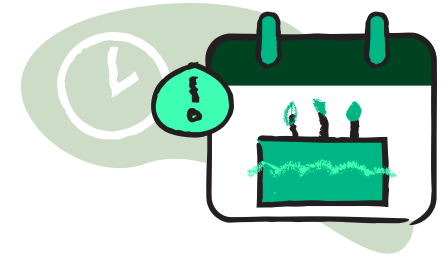
**Try popping up a chat box with a customer that may be casually browsing your site and ask them if you can help. Or see if they'd like to see the new model of the boots they may have bought last season. Putting your trusted advisor hat on and going into consulting mode can work wonders in making your customers feel like you care.**

## 04. Keep track of the small things

When chatting with a potential customer, keep track of the small details during your conversation. Adding these details to your customers profile can be a great way to surprise and delight your customers in the future.



Remember, it's the small details that make your customers fall in love with your brand!



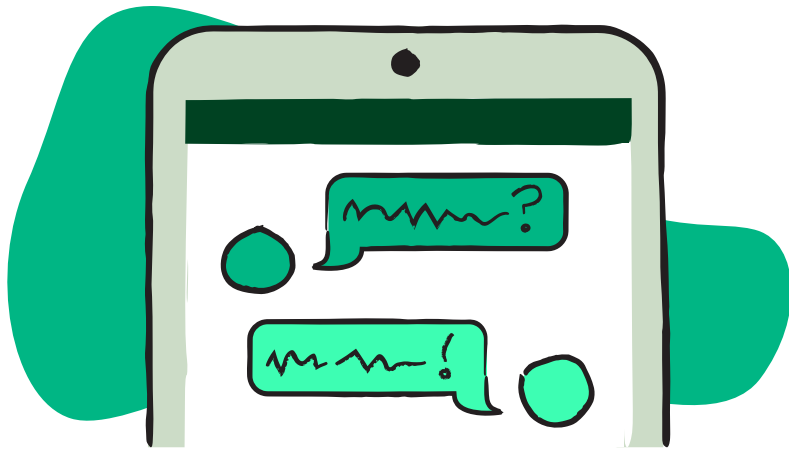
### ACTION TIP

**Try making a note if a customer mentions something about purchasing an item for their kid's birthday coming up next week. Set a reminder for when their child's birthday is so that a year from now you can reach out with a small offer or note wishing their child a happy birthday.**



## 05. Follow up proactively

If you help a customer resolve an issue or make a purchase decision, they were hesitant about, set a reminder to reach back out in a week to see how it went. Proactive follow-ups like this can create loyal customers who view you as so much more than a product or service for the long-term.



These moments can make a big difference in letting your customer know you care!

### ACTION TIP

**Did you help someone book a flight to Hawaii two months from now? Shoot them text asking how the tan went after they get back.**

**Did you help someone with an exchange for the perfect outfit their big upcoming work event? Drop them a text asking if they got any compliments from their co-workers on the color choice.**



**77% of customers in our recent Customer Expectations Report said they would recommend a brand to friends and family if they provided a more personalized experience.**

**And more than half would recommend the company on social media or review sites.**

**It's no question that personalized experiences create brand evangelists. Luckily there are many ways to continuously use personalization to drive more sales to your D2C brand.**

[SEE A DEMO](#)



**+ Gladly**