

## Product sheet



**Expedite & Fresca**  
Multichannel Retail Specialists

# Clienteling

## Building closer customer relationships to boost the bottom line

Gain better customer affinity with your brand, increased spending patterns and customer referral through clienteling.

Clienteling is the discipline of building closer relationships with your customers, resulting in incremental margin on your bottom line. It generally targets specific customers and employees in the first instance, supported by a tool that optimises one-to-one relationships and mobile access to customer data.

It has two positive effects: increased customer satisfaction and, by blueprinting the best practice of your top sales associates so that others can emulate their success, improved productivity.

### Get a 360 degree customer-centric view

Developing a 360 degree customer-centric view requires real purchase and behavioural detail from all of your selling and communication channels. Typically, this is held in a cross-channel Customer Relationship Management (CRM) repository. With this knowledge, you can swiftly and easily develop clienteling programmes that show measureable results, and clearly demonstrate the return on investment (ROI) of your initiative.

The key to success is choosing a Clienteling and CRM solution designed for retail. Only retail-hardened CRM can track all the valuable data intrinsic to your retail business.

By having this customer data to hand, you can focus on retention, reactivation, cross-selling and opportunity selling, which translates to the customer basics of keep them coming, have them coming more often, interest them in more items per visit and compel them to spread the word so that more people are converted and in turn become profitable brand advocates.

### Five steps to a better class of clienteling

There are five key stages to develop a Clienteling Programme:

1. Agree which customers to target, what the criteria and qualifiers are and how to develop specific relationship tiers.
2. Identify key performance identifiers (KPIs) and associated reporting to measure improvements.
3. Provide the tools and processes to enable successful clienteling.
4. Develop a reward and recognise programme for sales associates.
5. Establish a roadmap and company vision for clienteling.

### Build a foundation for repeat business

Clienteling allows your sales team to better manage their customer base. It's all about focused selling and service efforts and ensuring that your sales associates know who your high value customers – and lookalikes – are. Losing one high value customer can be equivalent to losing ten average value customers.

Clienteling enables your sales associates to see their customer's wardrobe, whether purchased online or in-store and to record preferences. It supports the sales associates both in the management and follow-up of their own activities and the activities assigned to them. Customer value month-on-month, black book value and size and sales associate productivity are all part of the Clienteling Dashboard that highlights performance against KPIs.



## The right tool for the job

BT Expedite's Clienteling tool is built using web services and pulls in multichannel CRM data. It has a highly intuitive front end for sales associates and can be shared with the customer, due to its tailored retailer branding. It can run on an iPad or similar tablet device, or most devices with a web browser, and is a highly visual and informative mobile customer solution for sales associates. It will enable you to:

- measure the sales and productivity of sales associates tasked with developing key segments of the customer base
- provide immediate access to customer data for sales associates
- consolidate customer data and re-allocate customers due to employee turnover
- see true customer value and link appropriate services value levels
- have an impressive mobile black book that does the task management and dashboard reporting for you
- prioritise areas so that sales associates know who to focus on, and what impact this has had on customer behaviour
- provide Clienteling targets for sales associates and measure performance against targets.



## Delivering the goods

The Clienteling solution is not just about technology, it's about process and productivity. Understanding who the business sponsor is and the vision for the sales associates in the store is key.

Helping to establish your Clienteling roadmap with associated returns from each of the phases is part and parcel of the service we provide. Our people understand Clienteling at the store and know the difference it can make to customer satisfaction and repeat purchases.

Our approach consists of:

- best practice blueprints to determine processes, and KPIs that are relevant to your business
- our essential mobile black book – Clienteling Fundamentals
- special requirements to make the programme your own, through Clienteling Enhanced
- a phased approach to implementation and project execution.

## Why BT?

BT Expedite and BT Fresca together make up the retail solutions division of BT. We provide products, services and solutions for some of the UK's leading retailers, with expertise across all areas of retail, from e-commerce to supply chains. Our CRM and Loyalty team member sits with our solution specialist colleagues and works on integration points across e-commerce, mobile POS, mobile commerce, Facebook commerce, catalogue, store and customer service.

To find out more about clienteling and our CRM services, contact us on **0870 850 6880** or visit [www.btexpedite.com/clienteling](http://www.btexpedite.com/clienteling)



### Offices worldwide

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