

Downloadable Customer Retention Strategies Audit

**Before we get started…**

|  |  |
| --- | --- |
| **As a retailer, do you:** | **Cross if applicable:** |
| Truly understand the values, likes, dislikes and shopping expectations of your target consumer? | [ ]  |
| Understand the revenue potential of a repeat customer? | [ ]  |
| Understand the role of product information in keeping customers coming back? | [ ]  |

If you don’t match all the above, we recommend revisiting [this page](https://pimberly.com/customer-retention-strategies/) before moving on.

***Continued next page…***

**Customer service**

|  |  |  |
| --- | --- | --- |
|  | **Cross if applicable:** | **Tools & Technology** |
| Email newsletters - do you regularly update customers on latest personalized offers? | [ ]  | [Mailchimp](https://mailchimp.com/ecommerce-retail-marketing/); [Omnisend](https://www.omnisend.com/); [Mailerlite](https://www.mailerlite.com/); [Dotdigital](https://dotdigital.com/email-marketing/) |
| …what about SMS marketing? | [ ]  | [Attentive](https://www.attentive.com/); [Braze](https://www.braze.com/product/sms?utm_medium=paid-search&utm_source=google&utm_campaign=fy24-emea_sms_marketing_platform_maxconv_test_uk&i_en&utm_content=&utm_term=sms-marketing%7Csms%20marketing%7Cp%7Cg%7Cc%7C%7C608635068609&_bt=608635068609&_bk=sms%20marketing&_bm=p&_bn=g&gad=1&gclid=Cj0KCQjwj_ajBhCqARIsAA37s0x8tigjKKGxoW8FOl0j-mvtptf9aZAbRKX5htaM9fw1LLNJ1qtpQMcaAmRgEALw_wcB); [Omnisend](https://www.omnisend.com/); [Dotdigital](https://dotdigital.com/email-marketing/) |
| Do you provide product education & resources?💡Tip: This includes troubleshooting guides, frequently asked questions (FAQs), or user reviews and ratings. | [ ]  |  |
| Do you offer free shipping? | [ ]  |  |
| Do you utilize AI chatbots?💡Tip: Chatbots provide round-the-clock customer support | [ ]  | [Zendesk](https://www.zendesk.co.uk/lp/nb-chat/?&demoStep=personal); [Certainly](https://certainly.io/); [ada](https://www.ada.cx/industries/ecommerce-chatbot) |
| Can users checkout as a guest? | [ ]  |  |
| Do you offer multiple payment options? (Buy Now Pay Later, Google/Apple Pay) | [ ]  |  |
| Do you offer customer-first returns policy?💡Tip: A transparent and hassle-free returns policy will see trust in your brand sky-rocket | [ ]  |  |

***Continued next page…***

**Optimized product pages**

💡Remember: Accurate, enriched product information provides customers with a clear understanding of what they expect.

Establishing trust is a vital factor in customer retention and driving long-term loyalty.

|  |  |  |
| --- | --- | --- |
|  | **Cross if applicable:** | **Tools & Technology** |
| Do you have clear and compelling product descriptions? | [ ]  | [Pimberly AI](https://pimberly.com/blog/a-look-at-pimberly-ai/) |
| Do you have a range of high-quality product images?💡Tip: Include at least 3-5 high-quality images from different angles. This gives customers a better understanding of a product’s features and details | [ ]  | [Pimberly DAM](https://pimberly.com/digital-asset-management/) |
| Do you have clear sizing information? | [ ]  | [Pimberly Auto Sizing Charts](https://pimberly.com/auto-sizing/) |
| Is delivery information clear and detailed? | [ ]  | [Pimberly PIM](https://pimberly.com/what-is-pim/) |
| Do you include product care instructions? | [ ]  |  |
| Do your product pages have personalized product recommendations? | [ ]  | [Attraqt](https://www.attraqt.com/), [Increasingly](https://www.increasingly.com/) |

***Continued next page…***

**Loyalty schemes**

|  |  |
| --- | --- |
|  | **Cross if applicable:** |
| Have you settled on a scheme type?💡Tip: Unsure which is best for you? Click here to see which is best for you! | Point-based system [ ] Tiered program [ ] Cashback rewards [ ] Subscription system [ ]  |
| Does it include both in-store and online purchases? | [ ]  |
| Is sign-up is easy and accessible? | Online registration [ ] Mobile app registration [ ] In-store [ ]  |

***Continued next page…***

**Customer referral schemes**

Remember💡: This is a great word-of-mouth tactic to get people talking about your products. Encourage users to share referral links or discount codes.

|  |  |  |
| --- | --- | --- |
|  | **Cross if applicable:** | **Tools & Technology** |
|  Do you track key KPIs?💡Tip: Ask yourself ‘what do I want to gain from this scheme?’ | Referral Conversion Rate [ ] Referral Source Tracking [ ] Customer Lifetime Value (CLV) [ ]  |  |
| Do you offer the following incentives? | Discounts/Coupons [ ] Free products [ ] 💡Tip: This is a great way to offload excess stock!Branded merch [ ]  | [Talon One](https://www.talon.one/loyalty) |
| Is your market optimized for your target customer?💡Tip: The copy should illustrate how customers earn rewards. If it’s difficult to read, they won’t bother! | A landing page [ ] Is the messaging clear and easy to understand? [ ]   | [Hemingway Editor](https://hemingwayapp.com/); [Semrush Writing assistant](https://www.semrush.com/kb/814-seo-writing-assistant) |
| Do you promote your loyalty scheme across: | Your eCommerce website [ ] Social media [ ] Email [ ] In-store [ ]  |  |

***Continued next page…***

**Leverage social media**

|  |  |  |
| --- | --- | --- |
|  | **Cross if applicable:** | **Tools & Technology** |
| Do you have allocated resources/people to respond to queries on social media channels?💡Tip: Make sure you always respond and add a personalized touch. Being proactive is key! | [ ]  | [Orlo](https://orlo.tech/the-orlo-platform/); [Hootsuite](https://blog.hootsuite.com/social-media-customer-service/) |
| Do you follow customers back on social channels? | [ ]  |  |
| Is it easy for customers to find you? | Simple username consistent across channels [ ] In store branding is consistent with online [ ]  | [Google Business Profile](https://www.google.com/intl/en_uk/business/) |



**Further reading:**

[Whitepaper: Creating the Perfect Product Detail Page](https://pimberly.com/resources/perfect-product-detail-page/)

[Whitepaper: The Essential Components of a Multi-Channel eCommerce Tech Stack](https://pimberly.com/resources/essential-components-of-a-multi-channel-ecommerce-tech-stack/)

[Blog: 5 Reasons Pimberly PIM is the PIM for Shopify](https://pimberly.com/blog/top-5-reasons-pimberly-is-the-best-pim-for-shopify-plus/)

[Blog: How to Reduce Product Returns](https://pimberly.com/blog/reducing-returns/)

[Blog: Fashion Omnichannel Guide: Drive Sales Online & In-Store](https://pimberly.com/blog/fashion-omnichannel-guide-drive-sales-online-in-store/)

[Downloadable Resource: Amazon SEO Product Template](https://pimberly.com/resources/amazon-seo-product-template/)