

# The JOURNEY OF A GIFT

Optimize Your Customers' Mobile and Online  
Holiday Shopping Experience





'Twas a few months before the holidays,  
and all through the night,  
Clever merchants were prepping,  
their eCommerce websites.



They tested and optimized,  
the best of solutions,  
So don't wait until New Year,  
to start your site optimization resolutions!



## INTRODUCTION

The holiday season is the most wonderful time of the year for merchants. The season accounts for half of all **annual sales** and offers incredible opportunities to engage and delight shoppers as they search for the perfect gifts for their loved ones.

During this high-traffic period, competition is rife, cybercrime is rampant, and shoppers are overwhelmed, busy, and distracted.

To excel, merchants must consider all the stages a product ('the gift') passes through before landing with its recipient. From discovery through to engagement, from checkout to shipping, and from customer service to returns, each stage of the Journey of a Gift offers an opportunity to create a great experience for online shoppers.

*Join us on the Journey of a Gift and learn how Magento's ecosystem can support merchants as they build, enhance, customize, test, and optimize their eCommerce sites ahead of the 2019 holiday season.*



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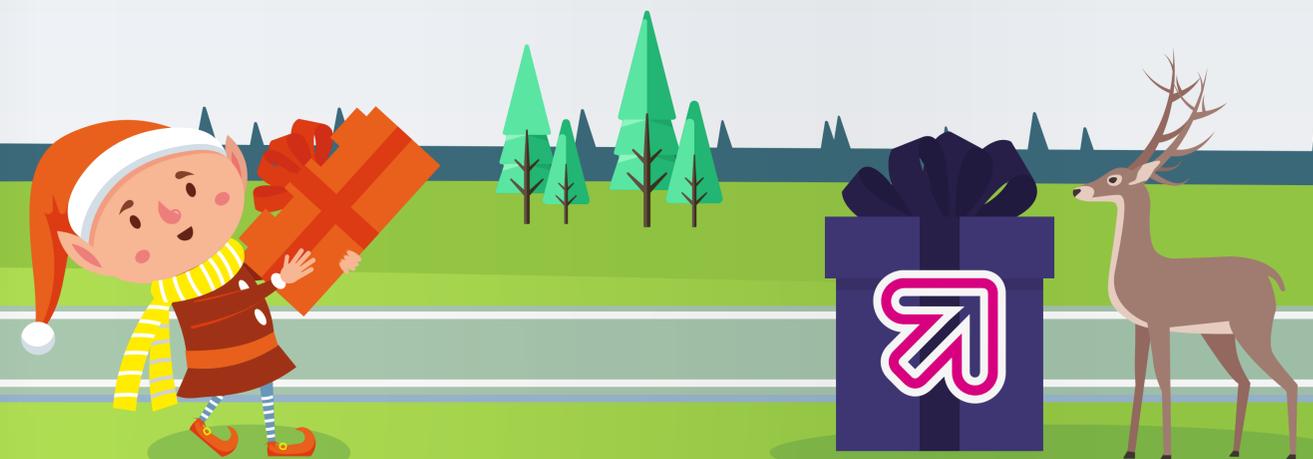
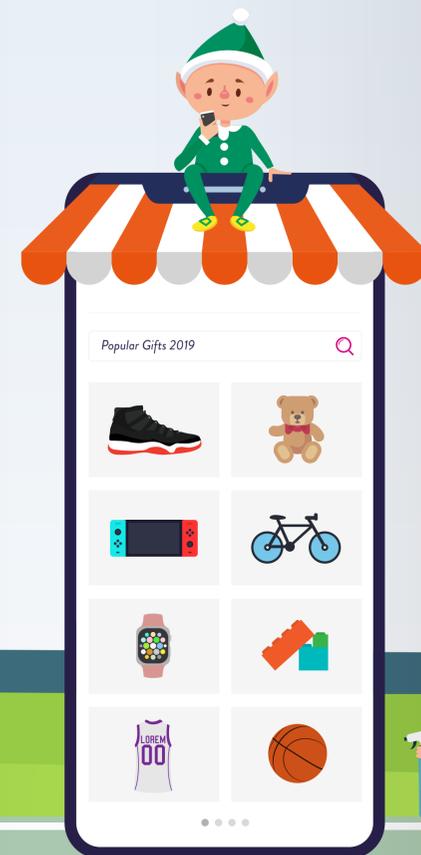
## CHAPTER 1: **DISCOVERY**

Hone in on customers'  
behavior and intent,

Segment users and  
personalize the content,

By Black Friday sites should be  
optimized with care,

Offering perfect gift recommendations for  
Justin, Taylor, and Claire.



## DISCOVERY

## Stand out from the Holiday Crowd.

This holiday season, merchants face massive competition for consumer attention. **Digital marketing experts** estimate that most Americans are exposed to up to 10,000 ads each day.

Interestingly, **bounce rates actually rise** over the holidays—particularly in the US where we see an increase of 12 percent on Thanksgiving and 5.2 percent on Black Friday. This is especially evident on mobile devices, as people scan quickly through pages and sites for the best gift and shopping ideas. **A recent study** found that mobile visitors to online fashion stores only stick around for about 163 seconds (compared to 239 seconds on desktop).

So how do merchants cut through the noise and grab the attention of this year's mobile, savvy shopper? The key is personalization. Nothing says "we get you" like recommendations based on a user's unique attributes. To do this alone would take a lot of time and resources. Thankfully there are intelligent solutions available to help surface those relevant, personal experiences in time for the upcoming holiday season.



*The experience itself has become a key part of the value proposition of any eCommerce business. By actioning the incoming wave of behavioral, contextual, and explicit data signals from site visitors, the holiday season is a prime time for personalization and experiential shopping.*

**Jan Soerensen, General Manager North America, Nosto**



## DISCOVERY

# Make Holiday Magic with Clever Discovery.

During the holiday season, if merchants don't have something relevant to show shoppers within three or four seconds of visiting a site, they risk losing a sale—particularly on mobile devices where screen real estate is limited. To capture attention during this brief window of opportunity, it's important to have a solid discovery strategy. Follow these best practices to make holiday magic this season:

## 1. Adopt Multi-Pronged Discovery Strategies

By analyzing multiple behavioral and contextual customer data sources, as well as business-related data like margin and inventory, merchants can surface relevant products to inspire customers and encourage them to make a purchase. Merchants can use insights from previous browsing history to surface relevant content to shoppers, perhaps reminding them of the perfect gift they browsed last time they visited. They can also use geo-location and browsing history to craft content to appeal to the individual. For example, if a particular toy is trending in New York City, parents of a certain age can be targeted with content related to that must-have toy.

To reinforce shoppers' interests or trigger responses from hesitant shoppers, merchants can adopt strategies like continue shopping recommendations and targeted pop-ups. Targeted pop-ups evoke a fear of missing out and elicit an immediate response from visitors. They also help email service providers (ESPs) orchestrate retargeting campaigns to further reinforce the product message. More recently, some merchants are explicitly offering guided shopping experiences by asking the shopper about their shopping goals and serving up content and experiences to help them meet those goals.



## DISCOVERY

# Make Holiday Magic with Clever Discovery.

## 2. Promote Content-Driven Product Recommendations

Content is still king, although personalization is the crowning glory. To begin, merchants should at least have product recommendations on the homepage and product details page (PDP). These should include alternative and complementary products to ensure buyers are being exposed to all relevant products. Using buyer signals, like brand affinity or discount shopping habits, can help merchants display the right banners on their sites. If a shopper only purchases clothing from a particular brand, they'll be targeted with apparel items from that brand. Or if they only shop sale items, they'll be targeted with the red-tagged discount goods available on the site. Content strategies can be customized for each specific industry. For example, in the cosmetics industry, delivering recommendations at the top of the PDP can be more effective than at the bottom of the page. Replenishment recommendations are effective in the cosmetics and groceries industries as they surface recommendations after a period of time coinciding with a shopper's product running low.

## 3. Build Segmentation Blocks

Segmentation is complex since a merchant's audience can be sliced and diced many different ways, creating a veritable rabbit hole of personalized content. To get started, merchants can take a standardized approach, engineering their sites to comprise five or six predictive segment blocks, each with a different goal. One block could segment and target customers based on lifetime value whereas another could segment and target based on the stage in the customer lifecycle (new customer, returning customer, window shopper, etc.). In this way, merchants can create efficiencies in their content creation while still delivering a relevant, personalized experience to their users. For example, prospects can be targeted with relevant, engaging content, whereas window shoppers can be added to custom audiences on Facebook and Instagram.



## DISCOVERY

# Make Holiday Magic with Clever Discovery.

Add a personal touch to your eCommerce discovery with Nosto's AI-powered personalization platform. To learn more, visit [www.nosto.com](http://www.nosto.com).

## 4. Create a Seamless Experience Across Desktop and Mobile

Personalization is even more important on mobile where merchants have less space to capture customer attention. If a merchant uses two personalization elements on their desktop experience, on the mobile they may use as many as five.

Merchants should also aim for cross-device personalization and continue shopping capabilities to create a seamless experience for users from desktop to tablet to mobile.

### *naughty*

Ignore your data.

Have a one-size-fits-all approach to content.

Forget about the mobile experience.

### *nice*

Gather and analyze behavioral and contextual customer data to understand customer intent.

Add personalized product recommendations and content to capture attention.

Create a seamless experience across desktop and mobile.



## CHAPTER 2: **SITE SEARCH**

To complement your product discovery,  
Make searching your store as easy as can be,

By Cyber Monday shoppers will glide  
through your site,

Discovering the gifts that suit their  
loved ones just right.



## SITE SEARCH

# Make Searching Rewarding.

Imagine for a moment that you've walked into a store to buy some bread. Inside the store, everything is the same color—the walls are beige, the floors are beige, and all the goods are stored in beige drawers. There's no signage anywhere. Finding your bread is going to take a while!

Now, imagine the same scenario, but with helpful signage placed everywhere. Suddenly, finding your bread is easy. Better yet, the organic bread is at eye level and the discounted bread is at the beginning of the aisle. Talk about a great shopping experience. Similarly, with site search, eCommerce merchants have the opportunity to assist their shoppers through intelligent wayfinding. It's well documented that today's consumers are more demanding than ever before, expecting frictionless, personalized, and convenient service from the brands they buy from. In fact, according to a [study by Deloitte](#), the number one reason customers shop online is for convenience. With convenience at the forefront of the online shopper's mind, it's no surprise that self-service options have quickly gained momentum. According to [Forrester](#), more than 70 percent of customers would rather use a self-service tool than human-assisted support. As this trend continues to grow, self-service solutions, like site search and other discovery features, will become a vital part of the merchant toolkit.



*Throughout the holiday season, merchants will likely acquire many new shoppers. An amazing experience is key to convert and retain those shoppers. Summer is a great time to invest in advanced search and discovery which is central to a great experience.*

**Jean-Louis Baffier, Chief Revenue Officer, Algolia**



## SITE SEARCH

# Deliver Powerful Site Search Experiences.

Before a customer can buy online, they need to find what they're looking for—and that all begins with the search and discovery experience. As such, merchants require site search tools that can intelligently produce tailored search results that meet both their brand needs and their customers' desires. Follow these best practices to deliver powerful site search experiences.

## 1. Use Business Relevance to Order Search Results

Every merchant has their own set of KPIs to hit this holiday season—shifting excess stock, hitting aggressive end-of-year sales targets, and so on. Site search can be a powerful ally in reaching those targets. Today's top-of-the-line site search technologies are much more than a point-and-find tool. Merchants can customize these AI-powered technologies to meet their KPIs by taking into account important real-time data such as inventory levels, sales margins, and sales ranks.

By drawing upon such data, merchants can automatically build search results that intelligently incorporate business targets while also producing excellent search experiences for the end customer. Business relevance needs to be a key component in making search results work not only work for the consumer but also for the merchant.



## SITE SEARCH

# Deliver Powerful Site Search Experiences.

## 2. Personalize Site Search Results

Customers expect that brands deliver search results that are intelligently personalized to their unique requirements. As such, merchants should create highly personalized site experiences that not only show customers the items that they're looking for, but also suggest additional items they make like. To create these unique suggestions, brands are relying on advanced site search platforms that can study a customer's browsing and purchase history to produce personalized results. By producing curated results, brands not only deliver a personalized experience but also increase their odds of increasing their sales.

## 3. Enable Voice Search (and New Alternative) Capabilities

The future of site search will be influenced by a combination of new frontier technologies—such as voice, image recognition, artificial intelligence, and machine learning to name a few. Able to deliver intelligent, convenient, and personalized experiences, these new tools will be vital to winning consumer attention. **According to Forrester**, it's those businesses who adopt these emerging technologies who will gain a significant edge over the competition.

Looking specifically at voice search, the popularity of this technology continues to climb and will likely become more prevalent in the site search experience in the next several years. Much more than a mere interactive novelty, what sets voice search apart is its ability to give customers the convenient experience and information they demand without having to lift a finger.



## SITE SEARCH

# Deliver Powerful Site Search Experiences.

Help your customers find what they're looking for with Algolia's fast, reliable, and intelligent site search platform. To learn more, visit [www.algolia.com](http://www.algolia.com).

There are a number of specific voice search devices out on the market today—with Amazon Alexa, Apple Siri, and Google Assistant among the most popular.

While each of these can be used to perform voice searches, merchant websites must be optimized for voice search or merchants will miss out on potential revenue from this type of customer engagement.

Looking to the holiday season ahead, merchants should investigate opportunities to incorporate voice and other new technologies (such as personalization) to further optimize their site experience.

## naughty

Ignore customer demands for a frictionless search experience.

Limit self-service to search while ignoring discovery capabilities.

Fail to include business relevance in the calculation of search results.

## nice

Create a true omnichannel experience across multiple channels.

Personalize search results to give customers a notion of discovery.

Provide a lightning-fast experience that quickly and intelligently responds to queries.



# CHAPTER 3: OMNICHANNEL ENGAGEMENT

Mobile shoppers are distracted  
during the holiday season,  
If you want them to take action, give  
them a good reason.

Join the omnichannel marketing  
revolution,

With an intelligent customer  
engagement solution.



OMNICHANNEL  
ENGAGEMENT

# Build Intelligent Omnichannel Engagement Strategies.

Consumers today expect a seamless, unified experience, no matter where they engage with a brand—whether in-store or on their desktop or mobile devices. An omnichannel customer engagement strategy is no longer a nice-to-have, it's a fundamental requirement to compete during the busy holiday season.

It's good for the bottom line too. **Consumers spend over three times more** when they're engaged with a brand on multiple channels. Brands with strong omnichannel strategies also do better on customer retention, **retaining 89 percent of customers** compared with just 33 percent for those with weak omnichannel strategies. Thankfully technology has evolved to help merchants connect customer data, surface powerful insights, and automate intelligent messages across email, SMS, social, retargeted advertising, mobile, web, live chat, and even offline channels too. However, for many merchants, challenges such as a lack of time, overstretched teams, and hard-to-access data prevent them from unlocking the true power of omnichannel strategies. This results in valuable revenue being left on the table and a missed opportunity to surprise and delight customers.



*The best omnichannel strategies are data-driven and mobile first. Merchants that can make sense of their data will have the power to personalize engagement campaigns seamlessly across different channels, delivering the right message to the right customer, at the perfect moment in time.*

**Gavin Laugenie, Head Of Strategy and Insight, dotdigital**



OMNICHANNEL  
ENGAGEMENT

# Create Experiences that Transcend Location, Device, and Channel.

Digital eCommerce marketing and engagement strategies are informed, not by merchants, but by today's always-on, mobile hyper-consumer. To nurture and engage these shoppers across all touchpoints in the omnichannel buyer journey, merchants should consider these best practices:

## 1. Start With Data, Not Design

Data is the key to unlocking the value of seamless omnichannel marketing. In a recent user experience study, **merchants scored just 31 percent** for being behavior- or preference-driven. Most simply don't have the data and those that do aren't leveraging it to drive context.

Merchants that have a handle on their data and smart technologies in place to dissect it can run intelligent marketing automation campaigns that will achieve better results—higher conversion rates and increased revenue—in less time. Automation can only feel personal when the data is good.

As well as enabling a more personalized customer experience, good data practices help merchants remain compliant with data regulations like the General Data Protection Regulation (GDPR), and other regional and national regulations.



OMNICHANNEL  
ENGAGEMENT

# Create Experiences that Transcend Location, Device, and Channel.

## 2. Avoid Batch-and-Blast Communications

When merchants use batch-and-blast engagement tactics, they miss an opportunity to positively influence customer perceptions. Instead, these sales-led communications can cause subscribers to take negative actions like unsubscribing or marking emails as junk—**40 percent of shoppers** cite excessive frequency as a reason to categorize emails as spam.

Instead of this spray-and-pray method, merchants should strategically blend editorial content with promotional content and create segmented automated programs across all digital channels to deliver more tailored email experience. Implement a lapsed customer program, removing lapsed contacts from regular campaigns and creating behavior-based rules to determine if the customer should be nurtured down the line or simply let go. Finally, be considerate with campaign volume—particularly for new users. For example, people that subscribe to communications right before the holidays shouldn't receive the myriad of campaigns around Black Friday. Gradually increase the volume once the customer engages with the initial emails.

## 3. Think Mobile First

Mobile eCommerce, or mCommerce, is commonplace and brands are under increasing pressure to adopt a mobile-first approach. **A recent study** found that while merchants are generally creating great user experiences on their mobile sites, this positive experience is being damaged by a poor email experience, especially on mobile. So while the top 10 brands studied scored 84 percent for mobile optimization, the remaining 90 brands scored just 53 percent. It's clear that most companies have some way to go in optimizing the whole user journey across all devices.



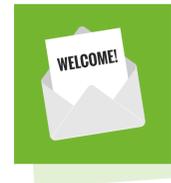
OMNICHANNEL  
ENGAGEMENT

# Create Experiences that Transcend Location, Device, and Channel.

A good starting point is to ensure all omnichannel engagement templates are designed for mobile. Design templates and wireframes that fit the small screen so busy, distracted shoppers don't discard the brand message, whether it be via email, social, retargeted advertising, web, apps, or live chat.

## 4. Up Your Email Game

Email is still one of the most popular marketing channels, delivering a return on investment of **\$39 for every \$1 spent**. For quick email wins, merchants should have the following in place:



Welcome email with a behavior-triggered multistage series. Include a call to action pushing users to a preference center to submit interests and tailor future communications accordingly.



Abandoned cart email(s) that are timely, catchy, and well-designed with advanced personalization tactics to reinforce context. Over half of brands fail to send abandoned cart emails, leaving easy money on the table!



After-sales emails including order confirmation, shipping updates, and review requests. Ensure to include clever cross-sell or upsell recommendations. Over half of brands **fail to send an after-sales review email**, missing an opportunity for valuable user generated content.



OMNICHANNEL  
ENGAGEMENT

# Create Experiences that Transcend Location, Device, and Channel.

Finally, never send emails using a 'Do Not Reply' email address as it gives the perception that the merchant doesn't care.

Email is a two-way channel and merchants can learn a lot from customer responses, even to mass email communications. Look out for replies and put processes in place to enable timely responses.

**Create memorable omnichannel experiences with dotdigital's intelligent customer engagement platform. To learn more, visit [www.dotdigital.com](http://www.dotdigital.com).**

## naughty

Batch and blast the same message to everyone in your database.

Think creative first instead of data first.

Mark emails as 'Do Not Reply'.

## nice

Think mobile first and always start with your data.

Segment and personalize to stand out from the crowd.

Set up welcome and abandon cart programs for quick wins.



## CHAPTER 4: **SECURE PAYMENTS**

Your customers have arrived,  
they've waited all year,  
To buy gifts for their loved ones,  
they hold so dear.

Ensure payments are processed  
as quick as a flash,

With the safest solution to  
protect their hard-earned cash.



## SECURE PAYMENTS

# Deliver Easy and Safe Payment Processing.

Gone are the days where merchants dictated the payment process. Today, consumers are firmly in the payment driver seat and are writing a whole new set of rules about how they want to pay online.

Like almost every other interaction between customers and merchants, payment processing is being redefined by **customer demand for personalization**. In fact, according to **a study by Segment**, 44 percent of consumers say they are likely to repeat their business after a personalized shopping experience.

As a result, today's most progressive merchants are prioritizing payment management as a critical component of their strategic planning. According to the **2018 MRC Global Payments Survey**, over 60 percent of merchants say that their payment management is central to their operations and enables them to remain agile, competitive, and profitable in today's marketplace. Another 64 percent state that the primary reason they add payment methods is to improve the overall customer experience.

As one of the most critical touch points between a merchant and a customer, it's critical that the payment stage leaves a positive impression. For most customers, a positive payment experience consists of a blend of several factors: processing speed, choice of payment form, mobile enabled, and—most importantly—security.



## SECURE PAYMENTS

# Give Them Safe and Seamless Payments.



*Fraud prevention used to mean shutting down sales. Now, an optimal mix of acceptance solutions like tokenization and automated fraud monitoring tools can actually help merchants increase sales and create better customer experiences, enabling a seamless environment for shoppers regardless of whether they are buying online, on a mobile device or in the store.*

**Michele Herron, SVP, Strategy, Marketing and SMB, Visa CyberSource**

The holidays create different challenges for small and large merchants, but at the end of the day both are working towards one goal: closing those sales. Here are a few payment best practices that merchants should follow this holiday season (and beyond):

## 1. Offer Multiple Payment Options—and Keep It Convenient

Like virtually every aspect of online shopping, customers want control over how they pay online. For some customers, that means paying with a credit or debit card, while others prefer withdrawing from a prepaid payment platform. Further, those payment options should be able to be processed fast and easy from a merchant's site. Remember, online shoppers are likely shopping online for convenience—in other words, they don't want to wait in long lines to pay.



## SECURE PAYMENTS

# Give Them Safe and Seamless Payments.

As such, a merchant's payment processing system must be able to get a shopper in and out with their purchase with relative speed. Lastly, keep in mind that today's customers are always on the go—as such, a merchant's site should be optimized to handle mobile payments.

## 2. Turn on Fraud Prevention Tools

According to the [2019 AFP Payments Fraud Survey](#), a record 82 percent of organizations were victims of attempted or successful payments fraud in 2018. With cyber crimes becoming increasingly sophisticated, it's widely estimated that such attacks will persist. For merchants, taking measures to counter such attacks and protect their customer data is essential. Most payment processing platforms on the market today are equipped with a fraud prevention tool. While these vary in complexity, most are designed to, at a minimum, keep customer data safe from breaches. For the holiday season ahead, all merchants should ensure they turn their fraud prevention tool on—it's one small step that can do wonders in protecting customers.

## 3. Keep an Eye on Fraud Thresholds

The holidays usually result in purchase spikes that exceed a merchant's normal volumes. While this is great news for the bottom line, merchant's should be aware that these peaks will likely exceed fraud detection amounts. As such, merchants may want to increase their fraud threshold during the holidays—or simply keep this in mind when fraud alerts come in.



## SECURE PAYMENTS

# Give Them Safe and Seamless Payments.

Keep your customer data safe and secure these holidays with **CyberSource | A Visa Solution**. To learn more about this payment management platform, visit [www.cybersource.com](http://www.cybersource.com).

## 4. Test Payment Processing Capacity

Large payment volumes, while great, also put enormous pressure on a merchant's payment processing platform.

Well before the holidays, merchants are advised to run high-volume payment test scenarios to ensure their platform is equipped to handle the extra load. After all, peak season is no time to discover that a platform isn't up to the job.

*naughty*

Limit your payment form options.

Forget to check payment processing thresholds before the holidays.

Don't plan and test payment capacity well before the holidays.

*nice*

Offer multiple payment options (don't forget about mobile!)

Remember to turn on the payment platform's fraud tool.

Test payment processing capacity to ensure your site can handle the increased order volume.



## CHAPTER 5: FRAUD PREVENTION

As you pause to relax with  
family and friends,

For cybercriminals, the work  
never ends,

Secure your site and block all  
fake buyers,

Allowing real customers to shop  
to their hearts' desires.



## FRAUD PREVENTION

# Don't Let the Cyber Grinch Steal the Holiday Cheer.

Along with the convenience that online shopping provides, there is also the associated risk—digital channels increase the likelihood of fraud if they are not managed effectively. Fraud is detrimental, not just to the consumer, but to the industry as a whole. For every \$1 stolen by order fraud, **merchants lose another \$3** to lost labor, lost productivity, and chargeback penalties.

Chargeback penalties are particularly concerning. Statistically, **over half of all chargebacks occur** due to transactions not being authorized by the customer—usually the result of credit card fraud. These fees vary from \$25-100 and, if a merchant starts seeing a high number of chargebacks, they might be determined “high risk” by a payments provider, resulting in even more expensive chargeback fees.

Efforts to mitigate the risk of fraud are necessary but they're also costly—online merchants spend **an average of 8 percent** of their annual revenue on preventing and managing fraud. Lengthy manual reviews are time-consuming and can often be ineffective in reducing overall fraud. Traditional services and solutions are problematic too—managed services often have long implementation times that allow fraud to persist longer and insured fraud solutions often take control of decisions out of a merchant's hands, potentially leading to lost revenue and a bad customer experience.

As traffic volume increases over the busiest shopping season of the year, so too do instances of cybercrime. Merchants face the conundrum of having to protect their customers from fraudulent transactions while also ensuring that genuine customer transactions are not blocked in the process.



## FRAUD PREVENTION

# Identify and Stop Fraudulent Traffic.



*The holidays bring waves of traffic and increases in fraud attacks. Enterprise-level fraud protection is now attainable and scalable for platform merchants of any size.*

**Adam Rogas, CEO, NS8**



Preventing fraudulent orders saves merchants both the cost of lost product and the cost of potential chargeback fees from payments providers. However, there is a delicate balancing act between managing fraudulent orders and maintaining a great shopping experience for genuine customers. Follow these steps to be fraud-ready this holiday season:

## 1. Don't Wait—Go After Fraudulent Traffic Aggressively

Merchants shouldn't wait until the checkout funnel to start monitoring for fraud. Instead, they can begin scoring users as soon as they enter the website. A good practice is to score users on the session level from the time a user enters the site to the time they leave or become inactive (approximately a 30-minute duration).



## FRAUD PREVENTION

# Identify and Stop Fraudulent Traffic.

Signals that identify fraudulent traffic to a merchant's site can be categorized into three buckets: behavioral signals, technology signals, and purchase signals:



**Behavioral Signals:** Are they acting like a human? Is their mouse moving? Are the sensors in their phone moving like a human would? Are they acting like your profiled "good customers"?



**Technology Signals:** Are they using a masking technology to hide their identity? What is their IP address? Are they based in a data center? What cookies do they have? What was their referral source?



**Purchase Signals:** Is the IP address that the visitor is coming from generating more transactions than usual? Are billing and shipping addresses the same? Are they purchasing unusual combinations of items?

Collecting data on the eCommerce site is half the battle. Merchants that start collecting data immediately will have more intelligence to inform them about potential fraud. Remember, it's not any one thing that flags a fraudulent visitor but a combination of several factors. The more data merchants have, the more confident they can be about blocking real fraudulent transactions.



## FRAUD PREVENTION

# Identify and Stop Fraudulent Traffic.

## 2. Let Real Customers Through

If merchants use a fully automated fraud protection solution, good orders can get caught up with the bad. For example, some fraud prevention systems block orders because billing and shipping addresses are mismatched. While this can be a sign of fraudulent orders, during the holiday season it can simply mean that someone is sending a gift to a distant loved one directly from the merchant.

When genuine customers have their transactions declined by a merchant, they are less likely to return. As a result, along with the initial lost sale, future revenue opportunities are also impacted. To avoid this, merchants should adopt a fraud solution that combines the benefits of automation with the value of human oversight. Modern fraud solutions can help merchants understand their genuine customers. Assisted with actionable intelligence, merchants can make a sensible judgment calls, focus their attention on the small number of orders that need extra consideration, approve more orders with confidence, and avoid costly false declines.

## 3. Implement a Strategy to Fight Ad Fraud

Over one third of advertising budgets are stolen by fraud. Cybercriminals employ thousands of bots to click on merchants' ads and use up advertising spend. Click farms are even sneakier than bots as fraudsters employ real users to click on the ads. Since these users are real people, their activity can be harder to spot.



## FRAUD PREVENTION

## Identify and Stop Fraudulent Traffic.

Stop cyber fraud from ruining your holiday retail season with NS8's full suite of cyber protection tools. To learn more, visit [www.ns8.com](http://www.ns8.com).

However, merchants can implement ad fraud protection features to identify fraudulent traffic from low-quality ad impressions.

In this way, merchants can eliminate bots from retargeting campaigns, effectively improving site traffic quality and redirecting valuable retargeting dollars toward real human customers during peak online shopping periods.

### naughty

Ignore signals that you're being targeted by fraud (your site being blacklisted, etc.).

Use an aggressive fraud prevention solution that falsely declines legitimate buyers.

Block transactions automatically.

### nice

Understand what good customers look like—and let them through.

Combine automated and manual reviews and have a process in place to assess higher volumes of orders.

Have an ad fraud strategy in place.



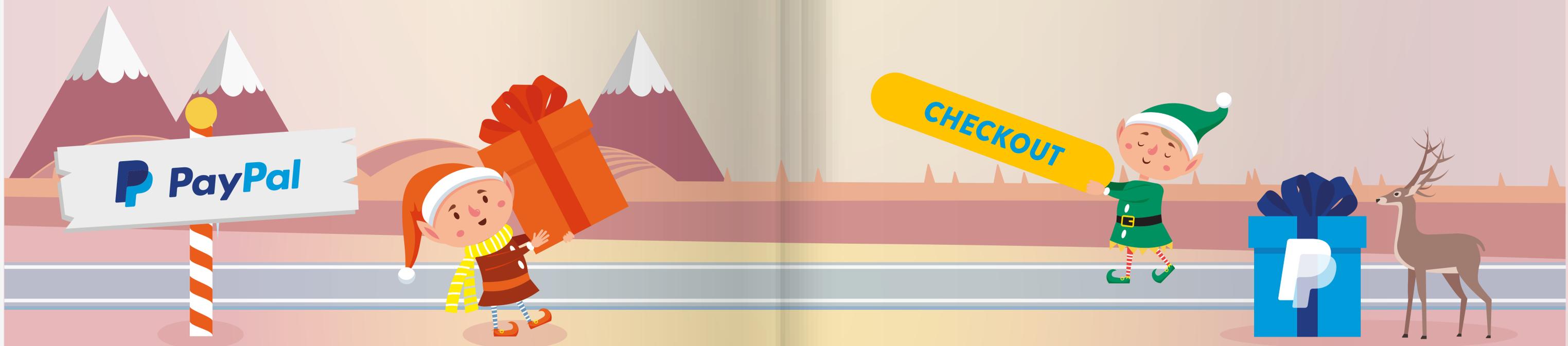
## CHAPTER 6: CHECKOUT AND CREDIT

Time is closing in on the upcoming holiday bash,

Shoppers browse their mobiles for outfits that will make a splash.

Using their favorite payment option, they complete the transaction,

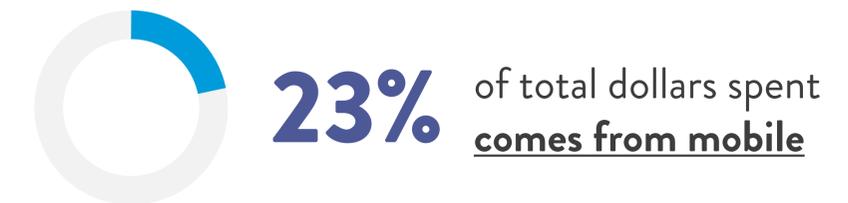
The check out is so easy—one click with zero distractions.



## CHECKOUT AND CREDIT

# Remove Barriers to Purchase and Close the mCommerce Gap.

Customers are looking for frictionless experiences when buying online, particularly on mobile devices. They're spending more of their time on mobile than on any other device, yet that additional time is not resulting in increased revenue for merchants.



So why does this conversion gap exist? One theory is that by taking an experience designed for a desktop, keyboard, and mouse and squeezing the content onto a much smaller screen produces a poor experience—especially at the checkout stage. This results in consumers abandoning their mobile shopping journey and switching to a different device to start the process from scratch.

Responsive design adjusts layouts and images to the user's screen size but basic concepts of commerce continue to fall flat on a small screen. However, with more and more merchants adopting a mobile-first approach to design, times are changing. Merchants are finding ways to conduct multivariate feature testing and optimization to help close this conversion gap. Optimizing the checkout experience is a must for all merchants. Merchants that can remove distractions and points of friction from the critical checkout funnel will see increased conversion rates and revenue per visitor.



## CHECKOUT AND CREDIT

# Express Checkout, Venmo, and Credit are on Everyone's Wishlists.



*Traditionally, the mobile checkout experience is underwhelming. With the increased traffic coming from mobile, merchants should address this by reducing distractions and offering users one-click payment options using the payment methods of their choice.*

**Brandy Sweetnam, Director, Product Management, PayPal**



By offering flexible payment options, seamless checkout buttons, and credit options for more expensive purchases, merchants can remove barriers to purchase this holiday season. Here are some best practices to get started:

## 1. Optimize Payment Options by Form Factor

Customers are looking for fast and seamless experiences when buying online—especially on mobile. The critical checkout funnel is the area that merchants should place the highest priority. Mobile shopping has the highest cart abandonment compared to tablet and desktop shopping with **86 percent of mobile shoppers bailing** during the checkout phase. By simplifying and minimizing the number of manual steps a customer must take to complete the payment, merchants can address this missed opportunity and close more revenue from mobile. Merchants should continuously test and optimize payment options across various device types, since customer behavior changes from desktop to mobile and there are multiple variables that can affect the conversion rates across form factor.



## CHECKOUT AND CREDIT

# Express Checkout, Venmo, and Credit Are on Everyone's Wishlists.

Continuous multivariate testing can deliver a **9 to 15 percent lift** in mobile and desktop revenue for smart merchants.

## 2. Offer Payment Options by Geography and Demographic

By offering payment options that suit different consumer preferences across various regions, merchants can further reduce barriers to purchase. For example, **Venmo** is a popular payment option in the US. Millennials love it as they can use stored dollars and cards to pay for goods, it's a more convenient option for mobile shopping (with direct purchases through Instagram, etc.), and they can split payments with friends and family members. Making Venmo available to US shoppers would deliver a delightful experience this holiday season, helping shoppers to purchase gifts while sharing the cost burden with family and friends. Preferred payment options will vary across geography and demographic so it's important to test and optimize desktop and mobile sites to ensure the very best options are available to serve a merchant's global and diverse market and support cross-border shopping.

## 3. Have a Clean User Interface to Reduce Distractions

In order to reduce distractions for buyers, particularly on mobile, merchants must do more with less. Smart payment buttons and express checkout options help merchants deliver a more streamlined user interface for consumers which reduces checkout noise and speeds up the purchasing transaction. Merchants should try to use the most up-to-date eCommerce platform to avoid glitches. They should also test button placement on all device types, across eCommerce site pages, ensuring that they have the same look and feel. Smart payment buttons deliver dynamic payment options, ensure buttons are always up-to-date, and help merchants to track valuable customer insights.



## CHECKOUT AND CREDIT

# Express Checkout, Venmo, and Credit are on Everyone's Wishlists.

## 4. Offer Consumer Financing if Average Order Value is Over \$99

Merchants can offer consumer financing (credit options) to help shoppers meet their shopping goals and alleviate high credit card usage at a time of year when money is tightest and card limits are maxed out. Credit options in the checkout funnel offer shoppers another way to buy. It can help ease the burden for shoppers, postponing payments to later in the year when money is not as tight. For merchants, this can also lead to higher conversion rates on big ticket items during the holidays.

## 5. Capture and Convert Top of Funnel for Mobile Purchases

Merchants can add express checkout to shopping carts and product details pages for faster, friction-free transactions on desktop and mobile, anywhere around the world. By offering additional features like one-touch payment options, merchants can convert top of funnel shoppers faster, particularly on mobile, with a seamless checkout experience that takes seconds.



*During the holiday season, it's even more difficult to compete for the attention of busy, distracted buyers. The key to success is continuous testing and optimization of the checkout funnel to ensure any points of friction are removed and every element is contributing to a seamless shopping experience.*

**Rob Long, Engineering Evangelist, PayPal**



## CHECKOUT AND CREDIT

# Express Checkout, Venmo, and Credit are on Everyone's Wishlists.

There's still plenty of time to set up and test express checkout, credit, and smart payment features ahead of the holiday season so you can boost your average order value and conversion rates.

Give your customers the miracle of speedy checkouts and consumer financing. To learn more, visit [www.paypal.com](http://www.paypal.com).

## naughty

Deliver the same checkout experience for every user and every device type.

Offer only one payment method.

Don't test or optimize the checkout funnel.

## nice

Have consumer financing available if Average Order Value is over \$99.

Enhance the mobile checkout experience and let users choose their payment method.

Reduce distractions and have a clean UI, especially for mobile shoppers.



## CHAPTER 7: **SHIPPING**

Smooth out your shipping  
processing so gifts can go, go, go!

Dashing like reindeer through  
new-fallen snow.

Filling your customers  
with deep amaze,

Ensuring last minute gifts arrive  
for the holidays.



## SHIPPING

# Great Shipping Equals Great Conversions.

The rise of eCommerce has, unsurprisingly, led to remarkable growth in global parcel shipments, with some estimates forecasting global parcel volumes to **surpass the 100 billion mark in 2020**. As the physical link between a merchant's store and a customer's home, shipping and delivery play a vital role in the creation of a memorable customer experience.

But even before those parcels reach a customer's door, shipping and delivery are essential at every stage of the customer journey. Shipping and delivery options play a huge role in a customer's decision-making process—they'll often select one merchant over another based on shipping information. Customers expect **convenience** in virtually every aspect of their eCommerce experiences—and that also extends to shipping.

A survey from a previous holiday shopping season found that **56 percent** of consumers were disappointed with retailers due to difficulties with shipping. For merchants, therefore, presenting clear shipping and delivery information presents an enormous conversion opportunity. To take advantage, however, merchants need to think 'before the cart' and find creative ways to communicate their shipping information the very moment a customer lands in their store.



*Delivery is the new black. Shipping and delivery play a crucial role in a merchant's success—make sure you offer fast shipping to address those needs.*

**Leendert van Delft, Global Vice-President Sales Programs and Digital Marketing at DHL Express**



## SHIPPING

# Give the Gift of Great Shipping.

Customers demand **personalization throughout their buying journey**. Unsurprisingly, those expectations also extend to shipping. Merchants can meet personalization expectations by offering a shipping experience that's memorable, transparent, and easy. For the upcoming holiday season, keep the following in mind:

## 1. Communicate Shipping Information... Everywhere

Shipping and delivery dates are vital pieces of information during the holiday shopping season. Those dates, and how well a brand communicates them, can often be the make or break between a customer's decision to buy with a merchant or to go somewhere else—**91 percent of consumers** will leave an online retail site if fast and free shipping is not offered. As such, it's those merchants that demonstrate an understanding of this customer challenge and respond with transparent shipping and delivery information are more likely to win the race.

Starting early in the season, add a 'ship-by' calendar to the homepage. Remember that customers may be located anywhere in the world so it's important to add a geo-locate feature to the calendar so that shipping dates can be tailored to a customer's location. Beyond the homepage, be sure to communicate shipping and delivery information throughout the site, in banners and in the checkout section, so customers will clearly know when their purchase will arrive before buying. Remember, the more clear the shipping information, the more likely shoppers will travel through to a final sale. Don't forget to carry out these same steps on the mobile interface!



## SHIPPING

# Give the Gift of Great Shipping.

## 2. Build Global Deliveries into Your Holiday Shipping Strategy

One of the most attractive features of eCommerce is its ability to open sales to a global audience. No longer are merchants bound by bricks-and-mortar limitations—with online stores, merchants are now free to reach customers in unlimited global locations. In fact, an estimated **1.8 billion people around the world bought goods online** in 2018. Further, an impressive **100 billion packages** are estimated to be shipped around the globe by 2020 with eCommerce sales expected to act as a key driver of that growth. For merchants, gaining access to this growing global online market represents exciting potential for increased revenue.

With this in mind, it's important to remember that the holiday season is a global event — and not just a festivity limited to Christian holidays. As such, merchants should be prepared to handle peak delivery volumes everywhere in the world — including the Middle East and Africa. By preparing to ship anywhere, merchants can not only win those coveted sales but also a loyal international following.

## 3. Design Delivery Packaging That's Creative and Fun

Festive wrapping is virtually synonymous with gift-giving during the holidays. But who says creative wrapping should be limited to gifts between family and friends? As the physical touch point between a merchant and their customers, delivery items present an excellent opportunity to help merchants stand out. So these holidays, skip the standard delivery boxes and create custom packaging that's themed to the holiday season.



## SHIPPING

## Give the Gift of Great Shipping.

Surprise your customers with customized shipping and delivery these holidays. To learn more, visit [www.dhl.com](http://www.dhl.com).

While creativity should be at the forefront, remember to keep the design aligned with the overall brand messaging. And for added ‘wow’, go that extra mile and add a hand-written note to the customer.

Little touches like these provide a human connection between a brand and customers and can go a long way in building customer loyalty.

### naughty

Forget to share shipping and delivery details at checkout.

Provide unclear details about shipping fees and delivery times.

Limit shipping options to one or two choices.

### nice

Showcase shipping information (including ‘ship before’ dates) on the homepage and throughout site.

Remember that the holiday season is a global event—be prepared to ship everywhere in the world.

Get creative with festive packaging.



## CHAPTER 8: **CUSTOMER SERVICE**

*The customer experience doesn't end  
after the gift is shipped,*

*Customer service is an opportunity  
to drive a customer engagement lift,*

*So don't treat your customers  
to a Silent Night,*

*Provide omnichannel customer  
service to surprise and delight.*



## CUSTOMER SERVICE

# Offer a Personal Touch Throughout the Buyer's Journey.

Large amounts of shoppers are now buying online from merchants all over the world—which means the eCommerce store could be the first (and only) impression a shopper has of a merchant. These days, where competition for buyer attention has never been higher, it's those brands that can deliver smooth and highly personalized shopping experiences that stand to outshine their competitors.

In fact, according to a study by Segment, many consumers even say they would be willing to spend more money on brands that deliver personalized experiences. Despite this however, a majority of consumers cite a persisting lack of personalization in online buying—**with some 71 percent expressing frustration** when receiving an impersonal buying experience. For savvy merchants, delivering that personalized touch will be a major competitive advantage this holiday season—and customer service plays a leading role in this.

Not too long ago, customer service was largely thought of as a business operation whose sole purpose was to aid customers in need of a helping hand—typically supporting phone-based inquiries to large call centers.

These days, however, customer service has evolved into a sophisticated omnichannel operation whose purpose is not only to solve customer problems but also to help educate and nurture through a variety of communication tools such as phone support, chat, messaging apps, and a variety of **self-service** functions. And the purpose of this omnichannel approach is to give customers an experience that's seamless and tailored to their needs.



## CUSTOMER SERVICE

# Stand Out with Omnichannel Customer Support.



*In a Zendesk Research survey, our team found that ticket volume can increase as much as 42% over the holidays. Mature enterprise businesses that provide support to consumers tend to have the highest volume of requests, the lowest Customer Satisfaction (CSAT), and slowest response times. With this year's busy season coming up fast, it's a good time to make sure your support business is ready. I recommend businesses nail down the metrics that truly matter before things get too busy.*

**Tom Keiser, Chief Operating Officer at Zendesk**

So, what does delivering omnichannel customer support actually look like? Follow these best practices to get started:

## 1. Eliminate Data Silos with a Single-Source Support Solution

According to recent research, nearly 70 percent of consumers expect support teams to collaborate so that they don't have to repeat themselves. Another 89 percent of customers get frustrated when they have to repeat information to multiple service representatives. Unfortunately, most customer service solutions on the market today deliver a combination of manual tools to manage customer interactions—a general email, spreadsheets, non-integrated phone system, and a variety of other tools that don't talk to each other.



## CUSTOMER SERVICE

# Stand Out with Omnichannel Customer Support.

While each portion of information is helpful, the disjointed nature of these disparate channels result in siloed customer data, content, and information—making it virtually impossible to create the sort of seamless and personalized experience customers are after. To eliminate these siloes, merchants should look for a customer experience tool where everyone on their team—from support to sales—can easily manage and share customer conversations across multiple channels and device types.

## 2. Look for Opportunities to Proactively Engage Customers

Support shouldn't just start the moment a customer has a problem. One of the most powerful ways to build brand loyalty is through proactive customer support. Proactive customer support can be thought of as any bit of help a merchant offers a customer—even before they ask for it. Of course, technology plays a big role in these proactive measures. Most recently, merchants are turning to AI-enabled support tools to help them uncover customer signals that indicate opportunities for proactive support. Automation plays a role here too. For example, when a merchant emails a customer to let them know exactly when their parcel has shipped before they even have to ask or when a brand lets a customer know when their favorite shampoo is back in stock. All of this boils down to knowing what customers want and expect and then proactively delivering it.

## 3. Be Available Across Multiple Channels

To win customer loyalty, brands need to meet a multitude of customer expectations—including being available to talk to customers when and how they want.



## CUSTOMER SERVICE

# Stand Out with Omnichannel Customer Support.

Get your customer service in holiday shape with Zendesk's full suite of digital support tools. Learn more at [www.zendesk.com](http://www.zendesk.com).

These days, “when and how” means being available on the channel that’s most convenient to a customer, such as by phone, email, text message, live chat, social media and more.

Keep in mind, channel preferences will vary from customer to customer, so it’s important teams are trained and available to communicate across a good selection of channels. Further, these channels should be connected, through a central customer support dashboard and connected CRM systems, to ensure the entire support team has a complete view of the customer regardless of which channel they’re using.

## naughty

Provide limited channels for your customers to reach you.

Make it difficult for customers to find how to reach you.

Fail to give your agents the right tools to provide a helping hand to customers.

## nice

Remember that excellent customer service isn’t a single stage—it crosses the entire customer journey.

Invest in your self-help and FAQ resources to boost self-service.

Use data to help create tailored customer experiences and proactive outreach.



## CHAPTER 9: **RETURNS AND EXCHANGES**

Sometimes the gift's journey  
is all done in vain,

The wrong size, bad color, or  
just two gifts the same!

Be ready to help your  
customers, far and near,

Exchange and return gifts,  
before the New Year.



## RETURNS &amp; EXCHANGES

# Returns Happen. Make the Experience Enjoyable.

According to a study by the National Retail Federation, **the majority (58 percent)** of holiday shoppers plan on returning or exchanging unwanted gifts.

Returns can be detrimental to merchants when managed incorrectly—at pre-purchase, a bad returns policy can kill conversion rates; at post-purchase, a bad returns process can deplete margins and increase customer churn (85 percent of customers are unlikely to shop again if the returns process is inconvenient). Returns are the new normal and the returns experience shouldn't be ignored by merchants—in fact, it should be treated with as much reverence as any other stage in the buyer journey.

With the right approach, returns can actually become a competitive advantage. Savvy merchants can use technology and service partners to create efficiencies in the returns process and seize an opportunity to drive more sales and increase customer satisfaction and loyalty. By offering a beautiful returns experience, merchants can stand out from the crowd, delight new and existing customers, and build customer loyalty during the busiest time of year.



*Offering one-click exchanges for in-person returns will be a game changer this holiday. It gives shoppers what they want quickly, and enables merchants to secure the sale.*

**David Sobie, CEO and Co-Founder of Happy Returns**



## RETURNS &amp; EXCHANGES

# Build Better Returns and Exchange Processes to Increase Profits.

**In a recent study**, almost three quarters of shoppers said that returning a purchase was the least favorite part of the online shopping experience. Smart merchants can turn this around with a delightful returns experience that helps shoppers while delivering incremental revenue to the business. Some best practices to consider include:

## 1. Offer Easy and Convenient Return Options

Easy return options encourage shoppers to commit to a purchase and allow them to shop guilt-free. During the holidays, this is particularly true since shoppers are uncertain if their gift purchases will hit the mark. It's no wonder then, that over **two-thirds of shoppers check** an online store's return policy before making a purchase and **85 percent** are more likely to purchase if they're confident of a smooth returns process.

Ensure return and exchange options are clear, understandable, and straightforward. By simply including a banner on the home page or product details page, merchants can impact conversion rate positively.

## 2. Implement an Efficient Reverse Logistics Process

eCommerce return rates are **three to four times higher** than rates for brick-and-mortar stores. But this is not a bad thing. Look at the fashion industry, for example. In fashion, eCommerce is **outpacing in-store sales** as shoppers use their homes as their own personal fitting rooms. As a result, returns are simply part of the shopping experience for fashion shoppers.



## RETURNS &amp; EXCHANGES

# Build Better Returns and Exchange Processes to Increase Profits.

Don't 'punish' these repeat returners—they could be the most profitable customers. Instead, merchants should have processes in place for shipping and restocking logistics so returned items can be back on the shelves and ready to sell again as quickly as possible. Returns costs can be reduced dramatically by leveraging a third-party to gain economies of scale. Workflows can be baked right into the eCommerce platform so customers can have a fast and familiar way to process returns.

### 3. Remove Unnecessary Friction from the Returns Experience

A world-class brand experience requires a fast and easy return solution, regardless of whether it is online or in store. By delivering an experience that allows for free returns, immediate refunds, no printing, and no packaging, merchants can increase customer satisfaction and retention, and even boost incremental sales. Merchants can consider a partner, such as Happy Returns, that enables a network of 400+ Return Bars nationwide to remove the friction associated with packing and shipping to create an even better experience for customers.

### 4. Drive Incremental Revenue Through Returns

A great returns policy can actually help drive more revenue—over three-quarters of shoppers say they're **likely to purchase something else** while making an exchange or return and 62 percent **would buy again** from a brand offering free returns or exchanges. Ensure shoppers have an opportunity to exchange or redeem store credit for returns—not all customers want, or expect, a cash refund.



## RETURNS &amp; EXCHANGES

# Build Better Returns and Exchange Processes to Increase Profits.

Win over customers by delivering return and exchange experiences that are simple and easy. Learn how Happy Returns's fully-branded online return and exchange service can help at [www.happyreturns.com](http://www.happyreturns.com).

A Journal of Marketing study found that customers who received free shipping on returns actually increased their purchases over the next two years by an incredible **58 to 357 percent**.

Put email automation in place to contact shoppers about relevant products or deals related to their return and drive incremental revenue in the future.

## naughty

Provide only one return option.

Make returns complex and costly to the consumer.

“Punish” repeat returners—serial returners could be your most profitable customers.

## nice

Provide customers plenty of return and exchange options—for example, customers prefer to return and exchange in-person.

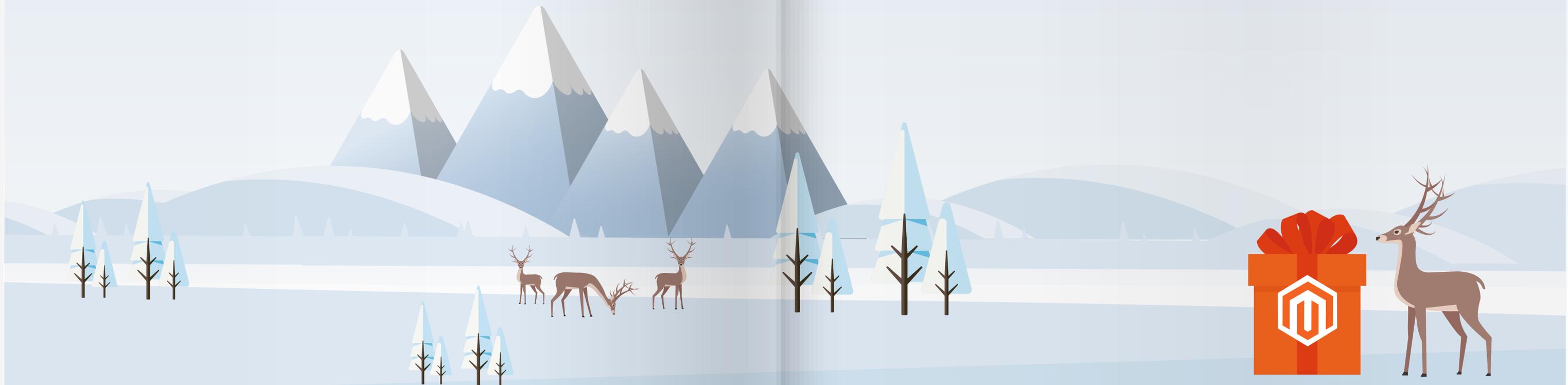
Optimize your reverse logistics process.

Remove unnecessary friction from the returns experience.



# CREATING A SEAMLESS JOURNEY

As we come to the end of the Journey of a Gift, let's reflect on a theme that has been constant throughout our journey:  
**The Customer Experience.**



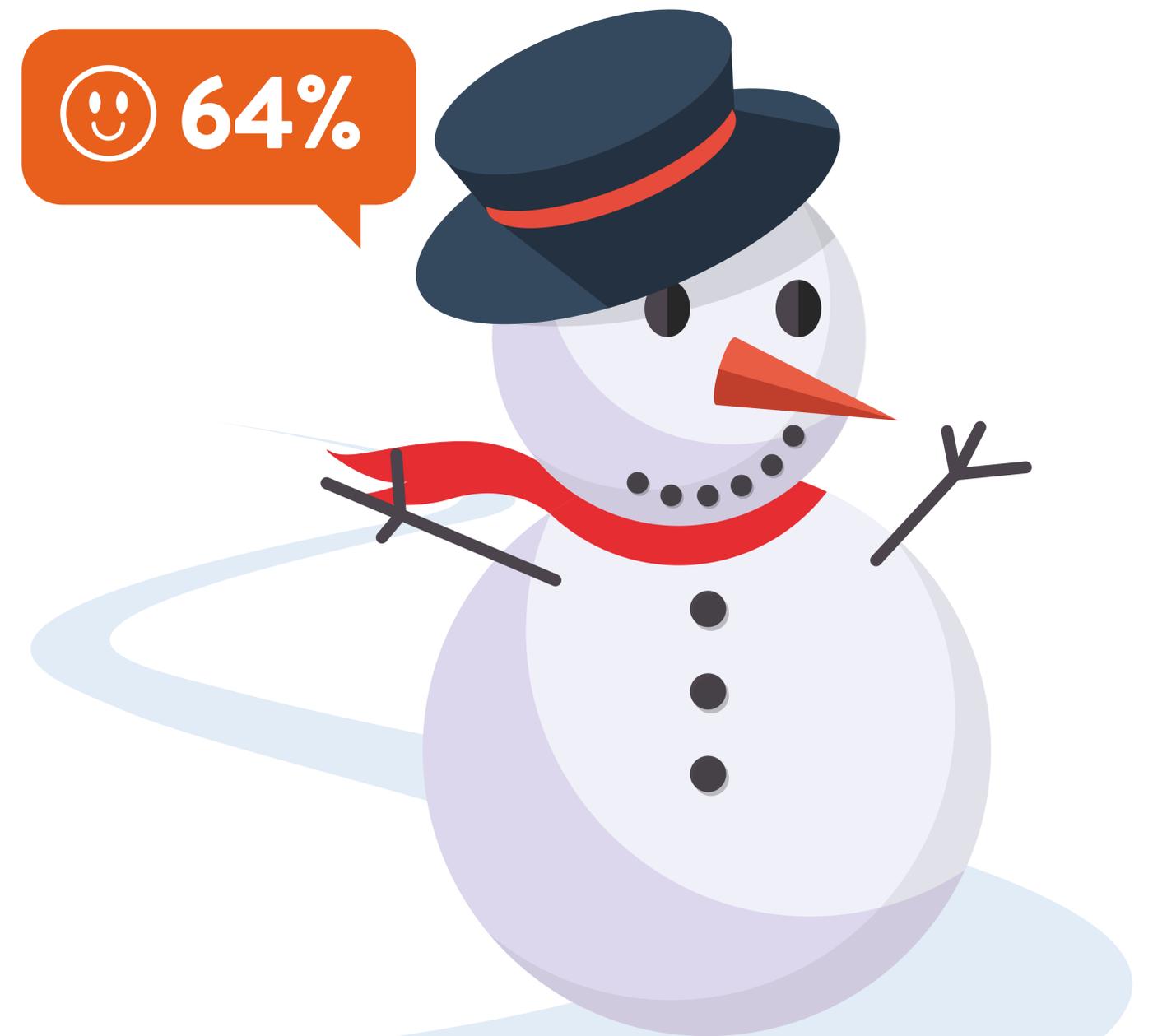
## Creating a Seamless Journey.

We are living in an era where data and technology are enabling personalization on a massive scale. Shoppers expect merchants to predict and fulfill their requirements in the same way that their Netflix account does—seamlessly across channels and device types.

In fact, according to Gartner, **64 percent of people** find the customer experience to be more important than price when it comes to making a purchasing decision.

Magento, along with its global ecosystem of implementation partners and a vast marketplace of extensions, can help merchants deliver this seamless experience and bring the eCommerce vision to life.

Merchants can act now to put their best foot forward this holiday season. With rich out-of-the-box features, an unrivaled ability to customize, and seamless third-party integrations, merchants can enhance and optimize each stage of the Journey of a Gift, and maximize revenue.



# 9 Key Tips to Stay Off the Naughty List.

To summarize the Journey of a Gift, we've created this useful chart featuring the pitfalls to watch for and the best practices to adopt ahead of the 2019 holiday season.

Contact Magento to prepare your site for the most wonderful time of the year!



	<i>naughty</i>	<i>nice</i>
<b>Discovery</b>	Have a one-size-fits-all approach to content and forget about the mobile experience.	Gather and analyze behavioral and contextual customer data to gain an understanding of customer intent for personalizing across channels and device types.
<b>Site Search</b>	Limit self-service to search and fail to include business relevance in the calculation of search results.	Personalize search results and provide a responsive experience that quickly and intelligently responds to queries.
<b>Omnichannel Engagement</b>	Batch and blast the same message to everyone in your database.	Think mobile first and always start with your data to segment, personalize to stand out from the crowd.
<b>Payments</b>	Don't plan and test payment capacity well before the holidays.	Offer multiple secure payment options and don't forget about the mobile experience.
<b>Fraud Prevention</b>	Have an overly aggressive fraud prevention solution that falsely declines legitimate buyers.	Understand what good customers look like and combine automated and manual reviews.
<b>Checkout and Credit</b>	Deliver the same checkout experience for every user regardless of behaviour or device type.	Enhance the mobile checkout experience, let users choose their payment method, and offer consumer financing if average order value is over \$99.
<b>Shipping</b>	Provide unclear details about shipping fees and delivery times and limit shipping options to one or two choices.	Showcase shipping information (including 'ship before' dates) on the homepage and throughout site and get creative with festive packaging.
<b>Customer Service</b>	Provide limited channels for your customers to reach you on.	Remember that excellent customer service isn't a single stage—it crosses the entire customer journey. Use data to create tailored customer experiences throughout that customer service journey.
<b>Returns</b>	Make returns complex and costly to the consumer.	Use returns to drive incremental sales and increase customer satisfaction. Remove unnecessary friction from the returns process and consider opting into a network of 400+ Return Bars for a seamless omnichannel returns experience.

# About Magento

Magento, an Adobe company, is a leading provider of commerce innovation to merchants and brands across B2C and B2B industries and was named a leader in the 2018 Gartner Magic Quadrant for Digital Commerce. In addition to its flagship digital commerce platform, Magento boasts a strong portfolio of omnichannel solutions that empower merchants to successfully integrate digital and physical shopping experiences. Magento is the #1 provider to the Internet Retailer Top 1000, the B2B 300 and the Top 500 Guides for Europe and Latin America. Magento is supported by a vast global network of solution and technology partners, a highly active global developer community and the largest eCommerce marketplace for extensions available for download on the Magento Marketplace.

More information can be found at [www.magento.com](http://www.magento.com).



*Together, Magento and our ecosystem partners are creating next generation shopping experiences to help merchants attract busy, on-the-go shoppers over the holiday season. We are laser-focused on mobile—and our seamless integrations and progressive web apps are poised to radically evolve how consumers utilize their devices for shopping.*



**Peter Sheldon, Senior Director, Commerce Strategy, Adobe**