

# The eCommerce BFCM Planning Guide

2024 Edition



# Introduction

Welcome to the 2024 BFCM Sales Planning Guide! As we approach one of the most critical periods in the e-commerce calendar—Black Friday and Cyber Monday (BFCM)—it's more important than ever to be fully prepared. For top e-commerce businesses, the holiday sales period can account for up to 50% of their annual revenue, making it a key driver for growth. Getting this right is crucial to maximizing your success.

That's why we've put together this playbook—packed with insights and strategies we've developed from working with hundreds of high-growth e-commerce brands. You'll learn from the best in the industry, gaining access to proven tactics that will help you stand out, deliver exceptional customer experiences, and thrive during the holiday rush.

In this edition, we'll dive into actionable strategies to enhance your omnichannel customer experience, embrace AI-powered tools, and adopt proactive engagement tactics that will not only boost your sales but also strengthen customer loyalty long after the holiday season ends. Whether you're aiming to streamline post-purchase support or preparing your team for the influx of holiday shoppers, this guide covers the must-have insights and techniques you need for a successful 2024 BFCM.

Get ready to unlock the tools, trends, and best practices that will set you up for a record-breaking holiday sales season!

1. Omnichannel CX
2. Proactive Customer Engagement
3. Post-Purchase Loyalty
4. Getting Your Team Ready

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# 1. Implement a Fully Omnichannel Customer Experience

Today's customers hop between mobile, desktop, and social media like it's second nature, and they expect your brand to keep up.

They might browse on Instagram, chat on your website, and make their final purchase on a desktop—all while expecting the same smooth experience across every channel. That's why, in 2024, delivering a seamless, omnichannel customer experience is no longer just a "nice-to-have." It's your ticket to standing out in the crowded holiday rush.

Here's how to get your customer support ready for the omnichannel complexity of 2024's holiday season.

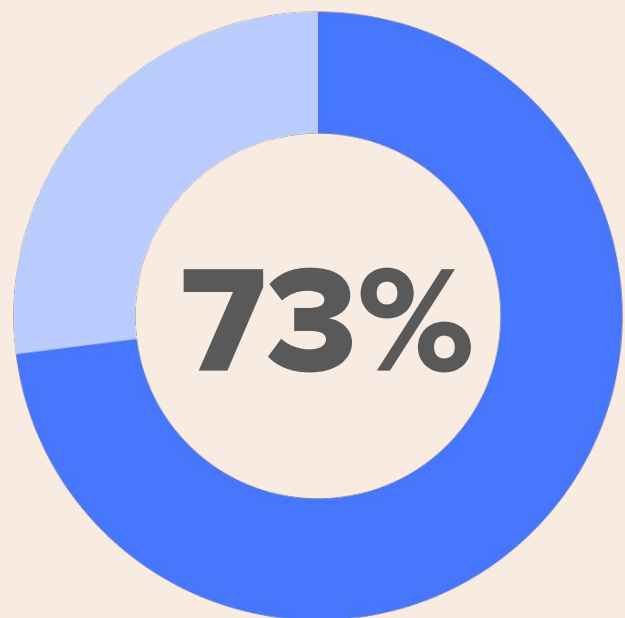
## What is different in 2024?

Consumers are no longer sticking to one shopping method.

Think of a typical customer: they ask a question on Instagram, follow up through email, and complete their purchase using live chat on your website. They expect every touchpoint to be seamless and connected.

Now, imagine the frustration when that same customer has to repeat their query to different support agents across different platforms. 60% of shoppers say that having to repeat themselves multiple times is their biggest customer service frustration.

Avoiding that pain point and delivering a smooth experience, no matter the channel, is what will set your brand apart and keep your holiday shoppers happy.



*of shoppers use multiple channels to discover, research, and buy products—and this number is only growing.*

# How to Nail Omnichannel Support This Holiday Season

## 1. Unify Every Customer Touchpoint

Start by integrating every platform your customers use—email, social media, live chat, SMS, phone—into one unified system. Tools like Zendesk and Freshdesk allow your team to see every interaction in one place, no matter where the conversation began. This way, no one has to ask, “What was your order number again?” because all the info is already there.

## 2. Centralize Customer Data

Make sure your support team isn't scrambling to find information. Use a Customer Data Platform (CDP) or CRM system to gather all customer interactions into one place. If a shopper reaches out through live chat, then follows up on Instagram, your team should be able to pick up right where they left off. No repeats, just a smooth, connected conversation.

## 3. Prepare for High-Traffic Channels

Some channels will naturally be busier during the holidays—especially social media and live chat. Look at last year's data to see which platforms had the most traffic, and staff up accordingly. For instance, Black Friday might see a spike in live chat queries, while post-purchase inquiries could surge on email. By preparing for these trends, you can respond quickly and keep customers happy, even during the busiest times.

## 4. Empower Shoppers with Self-Service

Did you know that 70% of customers prefer to solve their own issues before reaching out for help? During the holiday rush, this can be a huge advantage. Make sure your FAQ section, knowledge base, and self-service portal are easy to find on both desktop and mobile. Whether it's checking return policies or tracking an order, giving customers the tools to solve their own problems will reduce the pressure on your support team and keep your customers happy.

## Key Metrics for Omnichannel Success

- **First Response Time (FRT):** How quickly does your team respond across different channels? Customers expect faster replies on live chat and social media than email.
- **Customer Satisfaction Score (CSAT):** After each interaction, send a quick survey to measure customer satisfaction. This helps you identify which channels are performing well and where improvements are needed.
- **Resolution Rate:** Measure how many issues get resolved in the first interaction. A high resolution rate means your omnichannel support is delivering results.

## 2. Get Proactive with Customer Engagement

The holiday shopping season is fast and frantic. Waiting for customers to reach out with questions or problems can leave your e-commerce business scrambling, especially during peak periods like Black Friday and Cyber Monday (BFCM). That's why proactive customer engagement is a game-changer. It's all about anticipating your customers' needs before they even realize they need help, and in 2024, this strategy is essential for delivering standout customer service and maintaining your sanity!

By connecting with customers before they have to ask, you can cut down on support tickets, boost satisfaction, and build loyalty that lasts beyond the holidays. Here's how to master proactive customer engagement to ensure your holiday season runs smoothly.

### Why Proactive Engagement is Non-Negotiable in 2024

In today's world, customer expectations are higher than ever. They expect you to be one step ahead. Proactively solving problems not only eases the load on your support team during the holiday rush, but it also creates a seamless shopping experience for your customers.

Did you know that 81% of customers prefer to resolve their own issues rather than wait for a support agent? And 68% are more likely to stay loyal to a brand that proactively reaches out. Getting ahead of their needs leads to happier customers, fewer headaches, and ultimately, more sales.



# Top Tactics for Proactive Engagement

## 1. Personalized Product Recommendations

With so many options, customers can easily get overwhelmed. Make their lives easier (and increase your sales) by offering personalized product recommendations based on their past behavior. Personalization not only enhances the shopping experience but also prevents pre-sale inquiries like, “Will this work with what I bought last time?”

- Tap into data from previous holiday seasons to send personalized gift guides that speak directly to each customer’s preferences.
- Leverage AI tools to suggest complementary products during checkout, like offering gift-wrapping or matching accessories.

## 2. Answer FAQs Before They’re Asked

Every year, the same questions come flooding in: “What’s your return policy?” “How fast is shipping?” “Can I pay in installments?” Address these concerns upfront with a well-crafted FAQ section or knowledge base tailored to holiday shopping.

- Review your previous holiday seasons to identify the most common questions and preemptively answer them in a dedicated holiday FAQ on your site.
- Make sure your support agents, chatbots, and self-service tools point customers to these resources quickly, allowing them to resolve their own issues.



### 3. Pre-Sale Support via Live Chat

Time is money during the holidays, and customers don't have much of either. Offering proactive live chat can eliminate last-minute hesitations and keep your conversion rates high.

- Use live chat pop-ups when customers linger on product pages or at checkout to offer assistance with any last-minute questions.
- Integrate AI chatbots to handle routine inquiries, like checking stock or shipping times, and leave more complex queries to your live agents.

### 4. Proactive Shipping Updates

One of the biggest pain points for holiday shoppers is shipping delays. Take the guesswork out of the equation by proactively offering automated updates on order status, shipping, and delivery times. This keeps customers informed and reduces the number of "Where's my order?" inquiries.

- Set up triggered email notifications at key points in the delivery journey, like when the order is confirmed, shipped, and out for delivery.
- Use SMS or push notifications for real-time updates, especially during time-sensitive promotions like flash sales.

### 5. Resolve Post-Purchase Issues Before They Escalate

The post-purchase period is a critical time for customer satisfaction. Follow up with your customers to address any issues, such as shipping delays or product concerns, before they blow up.

- Send post-purchase check-ins through email or quick surveys to ensure customers are happy with their products and to ask if they need any further assistance.
- Be proactive about returns, exchanges, or delays. If a product is delayed or out of stock, offer alternatives like store credit or expedited shipping.





# The Tools You Need for Proactive Engagement

To execute a proactive engagement strategy that truly works, you'll need the right tech:

- **CRM Software:** Use a customer relationship management tool to track interactions and deliver personalized follow-ups.
- **AI-Powered Chatbots:** Automate responses to common questions and offer proactive support based on customer behavior.
- **Email Automation:** Platforms like Klaviyo or Mailchimp can streamline shipping updates, personalized recommendations, and satisfaction surveys.
- **Live Chat:** Tools like Intercom or Live Chat help you reach customers in real time, reducing cart abandonment and increasing conversions.

## Key Metrics for Proactive Customer Engagement

You'll know your proactive engagement strategy is paying off by tracking these key metrics:

- **Ticket Volume Reduction:** Fewer tickets mean your proactive efforts (like FAQs and live chat) are resolving issues before they require manual intervention.
- **Customer Satisfaction (CSAT) and Net Promoter Score (NPS):** Use surveys to gauge whether your proactive outreach is enhancing the overall customer experience.
- **Cart Abandonment Rate:** Keep an eye on how proactive chat or support pop-ups impact abandoned carts.
- **Repeat Purchase Rate:** Track whether personalized recommendations and follow-ups are driving customers to return for more.

# 3. Turn Post-Purchase into a Loyalty Booster

The holiday season isn't just about raking in sales—it's also the peak period for returns and exchanges. While returns may seem like a hassle, they're actually a critical part of the customer journey, not just a side issue. How you handle them can make or break your customers' trust and loyalty.

In fact, 67% of shoppers check your return policy before they buy, and nearly 80% say they're more likely to shop again if the return process is simple and easy. In 2024, optimizing your returns and exchanges process won't just save you headaches—it'll build lasting customer relationships.

## Why the Return Process Matters More Than Ever

These days, the post-purchase experience is just as important as the sale itself. Shoppers want to know that if something goes wrong—whether it's the wrong size, color, or a damaged product—they can resolve it quickly and painlessly. A seamless return process not only eases customer frustration but also boosts satisfaction and drives repeat business.

With 30% of all online purchases getting returned (compared to just 8% for brick-and-mortar), handling returns efficiently during the holiday rush is crucial. If your process is clunky, it can lead to negative reviews and lost customers. But if it's smooth? You've just earned yourself a loyal customer for life.



# How to Optimize Your Returns & Exchanges Process

## 1. Create a Crystal-Clear Return Policy

A well-crafted return policy is the foundation of a smooth returns process. If your policy is vague or complicated, customers might abandon their carts or avoid your brand altogether. On the other hand, a transparent and customer-friendly return policy reassures shoppers that they're in good hands.

- **Highlight Deadlines:** Clearly state return deadlines (e.g., "Returns accepted within 30 days of delivery"), and consider extending this window during the holiday season to accommodate early gift buyers. A generous return policy, like extending returns until the end of January, shows your commitment to customer satisfaction.
- **Break Down the Process:** Make sure your return process is straightforward. Give customers clear instructions on how to initiate a return, whether they'll need a prepaid return label, and how refunds or exchanges will be handled.
- **Be Upfront About Costs:** If there are any fees involved, such as shipping costs for returns, let customers know upfront. Offering free returns (if feasible) can be a powerful incentive to buy.

## 2. Automate for Speed and Efficiency

Manually handling returns during the holiday rush? That's a recipe for disaster. Automation is your best friend when it comes to scaling the returns process without sacrificing quality.

- **Return Management Systems (RMS):** Tools like Returnly or Loop can manage return requests, generate return labels, and update customers on their return status. RMS systems integrate with your e-commerce platform, making it easy for customers to initiate and track returns.
- **Automated Updates:** Keep customers informed every step of the way—use automated emails or SMS to confirm their return, process refunds, or let them know when their exchange item is on the way. This reduces anxiety and cuts down on "Where's my return?" inquiries.

### 3. Make the Process Easy for Customers

The simpler your return process, the more trust you build with your customers. On the flip side, a complicated return process will leave a sour taste and send shoppers running to your competitors.

- **Prepaid Return Labels:** Provide prepaid return labels in the original shipment, or offer an easy way for customers to print one. Let them drop off returns at convenient locations, like UPS or FedEx, to make the process as smooth as possible.
- **Self-Service Returns:** Give customers the power to handle returns themselves without contacting customer service. A self-service return portal lets them generate return labels, choose a return reason, and decide whether they want a refund, store credit, or an exchange.

### 4. Use Returns as a Chance to Re-Engage

Returns don't have to be a negative. They're an opportunity to reconnect with your customers and turn an issue into a positive experience.

- **Offer Incentives:** When customers initiate a return, offer alternatives like store credit or an incentive to exchange instead of refunding. This helps you keep the sale while keeping the customer engaged.
- **Personalized Follow-Ups:** After processing a return, send a follow-up email thanking the customer for their purchase and asking for feedback. You can also recommend alternative products based on their shopping history. A simple "Sorry it didn't work out, but here's something else we think you'll love" can go a long way toward rebuilding goodwill.

## 5. Prepare for the Holiday Rush

With the influx of holiday returns, you need a team and strategy ready to handle it. Train seasonal staff to manage returns efficiently, or outsource the process to specialists who can handle the volume.

- **Analyze Past Data:** Use data from previous holiday seasons to forecast return volumes and adjust staffing accordingly. Understanding why items are being returned can also help you prevent future issues.
- **Outsource if Necessary:** If managing returns in-house isn't feasible, consider working with a third-party logistics (3PL) provider to handle everything from receiving returns to restocking or recycling items.

### Key Metrics

- **Return Rate:** Track how many products are being returned compared to your sales. If returns spike, you might have a product issue or misaligned expectations.
- **Refund Processing Time:** Fast refunds (within 5-7 business days) are key to keeping customers happy.
- **Customer Satisfaction:** Use post-return surveys to gauge customer satisfaction and identify areas for improvement.
- **Repeat Purchase Rate After Returns:** A well-handled return should lead to more sales. Track how many customers come back to make another purchase after returning an item.

# 4. Get Your Team Ready

The holiday season is a whirlwind for e-commerce, with a flood of customer inquiries, tighter deadlines, and increased pressure on your operations.

To handle the surge effectively, it's essential to have your team fully prepared and equipped. Instead of focusing on burnout, shift the conversation to ensuring your team is ready to excel—with the right tools, training, and strategies to maintain performance under pressure.

## Why Preparing Your Team Is Critical

When your support team is stretched thin, it affects the entire customer experience—slower response times, less thorough interactions, and ultimately, frustrated customers.

In fact, 33% of contact center leaders say that high turnover and burnout are top challenges during peak seasons . But with proactive planning and smart strategies, you can set your team up for success without compromising on service quality or well-being.



# Strategies to Set Your Team Up for Success

## 1. Pre-Season Workforce Planning

Before the holiday rush kicks off, make sure you've properly staffed and resourced your team. Preparing in advance ensures everyone knows their role and is ready to handle the expected surge in inquiries.

- **Accurate Forecasting:** Review data from past holiday seasons to predict this year's support ticket volume. Understanding patterns helps ensure you have the right number of agents ready, preventing overwork.
- **Seasonal Staffing:** If your forecasts indicate a significant increase in inquiries, hire seasonal staff early. Bringing them onboard before the rush allows time for thorough training so everyone can hit the ground running. Consider starting this process well ahead, as it takes about 36 to 42 days to hire and train new employees.

## 2. Cross-Training for Flexibility

Cross-training your team allows you to distribute tasks efficiently and adapt to surges in demand. A well-rounded team can pivot between tasks, ensuring no single area gets overwhelmed.

- **Multi-Channel Support:** Equip your team to handle customer inquiries across various channels—email, chat, phone, or social media. This flexibility helps balance workloads and ensures that no channel becomes a bottleneck.
- **Skill Development:** Provide continuous training in areas like product knowledge, advanced troubleshooting, and customer communication. The more empowered your team is, the quicker they can resolve issues, which reduces their overall workload.

### 3. Leverage Technology for Smarter Support

Let technology do some of the heavy lifting. By automating repetitive tasks, you allow your team to focus on more complex or high-priority issues, improving efficiency and reducing stress.

- **AI Chatbots & Self-Service Tools:** Use AI-driven chatbots and a comprehensive FAQ page to handle common inquiries, like order status or shipping details. This frees up your agents to focus on more personalized interactions.
- **Automated Ticket Management:** Tools that automatically triage and assign tickets based on priority or agent capacity ensure that inquiries are handled efficiently and no single agent is overloaded.

### 4. Rotating Shifts and Adequate Time-Off

Balancing work and rest is critical to maintaining high performance.

- **Shift Rotation:** Implement rotating shifts that allow your team members to recharge without leaving critical coverage gaps. Ensure that no one is working excessive hours or handling the busiest shifts all the time.
- **Time-Off Policies:** Encourage your team to take regular breaks/vacation time. A well-rested team performs better, and employees who feel valued and supported are more likely to deliver great service.

### 5. Foster a Positive and Supportive Work Environment

A motivated team is an effective team. Cultivating a positive, supportive environment will help your employees stay engaged, even during the busiest times.

- **Open Communication:** Make sure your team feels comfortable sharing their workload concerns and stress levels. Regular check-ins allow you to identify and address any issues before they impact performance.
- **Recognition and Rewards:** Show appreciation for your team's hard work. Whether it's public recognition, small rewards, or team-building activities, a little acknowledgment goes a long way in keeping morale high during stressful times.



## Consider Outsourcing for Additional Support

If your forecasts predict more demand than your internal team can handle, outsourcing part of your customer support can provide flexibility. It allows you to scale up without overwhelming your core team.

- **24/7 Support:** Outsourcing partners like Influx can provide round-the-clock support, ensuring your customers are covered without stretching your internal resources .
- **Burst Coverage:** Use outsourcing for burst coverage on high-demand days like Black Friday or Cyber Monday. Pre-trained external agents can handle the volume spike, letting your team focus on maintaining quality service.

### Key Metrics

To ensure your team is performing at its best without being overwhelmed, track these key metrics:

- **Average Handle Time (AHT):** Keep an eye on how long agents take to resolve issues. If AHT starts increasing, it could indicate your team is overloaded.
- **First Response Time (FRT):** Monitor how quickly customers are getting responses. Slower response times may signal that your team needs additional support or resources.
- **Employee Satisfaction:** Regularly check in with your team to gauge their happiness and stress levels. Happy employees are more engaged and productive.
- **Ticket Escalation Rate:** A high number of escalations could indicate that frontline agents need more support or training to handle complex inquiries.

By equipping your team with the right tools, training, and support, you'll ensure they're ready to thrive during the holiday rush—not just survive it. A well-prepared team means faster response times, higher customer satisfaction, and a smoother holiday season for everyone involved.

# Conclusion

As the holiday season approaches, preparing your e-commerce business for the surge is more than just stocking up on inventory and setting up promotions—it's about creating a seamless, enjoyable shopping experience from start to finish. By focusing on proactive customer engagement, optimizing your returns process, and ensuring your internal teams are ready for action, you'll not only survive the holiday rush—you'll thrive in it.

Taking a strategic approach now will pay off in more ways than one: happier customers, smoother operations, and a team that's equipped to deliver exceptional service without feeling overwhelmed. From planning ahead to leveraging the right technology and outsourcing when needed, these steps will set you up for success in 2024 and beyond.

Remember, the holiday season isn't just a time to maximize sales—it's a golden opportunity to build long-term loyalty, boost customer satisfaction, and strengthen your brand's reputation. By staying proactive, adaptable, and customer-focused, you'll position your business for continued success long after the holiday lights come down. Now's the time to take the reins, get your team ready, and deliver a holiday shopping experience your customers won't forget.



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## Need to extend your support capacity for the holiday season?

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