




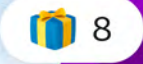
# The 2024 Retail Holiday Planning Guide

There's a lot riding on the holidays – for you and your shoppers. But with data and AI, you can create moments that will keep them loyal all year long.

 **Einstein Recommendation**

Create personalized holiday offers based on shopper's saved wishlists.

[Draft with Einstein](#)



# Contents

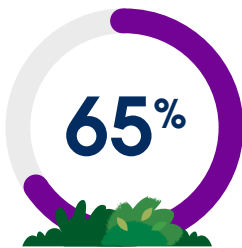
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## Introduction

What are your favorite holiday memories? The first time you received Valentine's Day roses? The duvet you ruined attempting to serve Mother's Day breakfast in bed? Maybe it's the aroma of Thanksgiving dinner as the family gathered around the table or the first sip of champagne as you watched the ball drop at Times Square. Holiday memories are some of the most special we share with family and friends.

That's why shoppers have such high expectations of the holidays, which means they also have high expectations of retailers. And in the last few years, we've seen their expectations continuously changing. Are you keeping up? You need to: [65% of customers expect brands](#) to adapt to their changing wants and needs.



**65% of customers expect brands to adapt to their changing wants and needs.**

[State of the Connected Customer, 6th Edition](#)

No matter what time of year, consumers want a personalized experience with great service, relevant products, and frictionless shopping both online and in person. But with the added stress during peak holiday shopping season – finances, family needs, time constraints – retailers need to make shopping easy and exceptional for consumers. Remember, 84% say [the experience is as important as what they buy](#).

**Shoppers have such high expectations of the holidays, which means they also have high expectations of retailers.**

What's at stake? Shopper loyalty. If you make their holiday memories merry and bright, you can turn holiday shoppers into loyal buyers all year long. Get it wrong? You could lose their business forever. The majority of shoppers say it takes less than [three bad experiences](#) to abandon a brand forever.

The challenge to building memorable shopping experiences during the holidays and beyond is personalizing them and doing that at scale. There are tools – like AI and CRM – that can help you know your customers, and those they're shopping for, like never before. And don't worry. You already have exactly what you need to make this holiday season merry: data. Lots and lots of data.



CHAPTER 1

# 'Tis the season for data.



## 'Tis the season for data.

Is your data holiday-ready? “Ready” means you’ve unlocked and unified trapped data so you have a 360-degree view of your shoppers and business. You’re able to create holistic customer profiles to enable personalized offers at just the right time. And your home office employees and store associates can easily access the data they need to quickly help shoppers find the gifts on their holiday list.

Still, [60% of retailers](#) say they’re not fully able to use data to make decisions. Unlocking, harmonizing, and operationalizing your trusted data is critical to driving personalized experiences and getting the highest lift from consumers during the holiday season and beyond.

[Data is the foundation](#) of accurate, relevant, trusted output, so [preparing your data first is key](#) to any AI-powered holiday initiative you’re planning. Fueling AI with bad data could result in inaccurate output, which in turn could lead to missed opportunities, lost revenue, and compromised shoppers’ trust.

Getting your data house in order will reduce costs, improve efficiency and productivity, and deliver cohesive, personalized brand experiences at every customer interaction. If you can’t do that now, you need a pre-holiday data makeover.

### Prep your data

How do you get your data ready? That’s a detailed subject for [another guide](#). But you’ll definitely need to pull in your IT team.

- The first step is checking if the data is accurate, complete, and relevant to what you want AI to do. This requires data profiling, cleansing, validation, and monitoring.
- Next you’ll organize and index data from siloed sources into one unified platform, which can be done with data extraction, transformation, loading, and harmonization.
- Then you’ll add metadata tags so AI can understand and use the data. This requires data annotation, classification, segmentation, and verification
- Finally, check that your data privacy protocols are rock solid, and build guardrails into your AI, such as forgetting prompts and masking data immediately after an output.

With data ready to go, you can use AI to supercharge marketing, commerce, service, and operations during the busiest time of the year.

No, it’s not a quick and easy lift. But [there are tools](#) and advisors to help you and your IT team: Salesforce [Data Cloud](#) simplifies the process of prepping your data, and if you want to make it even easier? The [Salesforce Professional Services](#) and [Success Plan](#) teams are here to help.

Once you've unified and secured your data, let the holiday (and AI!) fun begin. You can see how one-time holiday shoppers behave during peak season and how year-round customers change up their spending habits throughout the year. You'll know the days of the year that are special to shoppers. You can identify the months, weeks, and days of peak year-end shopping when they buy the most, when they're buying from someone else, and when they celebrate other special occasions – everything your marketing team needs to create personalized holiday offers.

**“ While we continue to build our digital business, our primary focus has always been on our customers. Salesforce provides us with a deep understanding of each customer’s journey so we can build trusted relationships at scale by delivering the right message, at the right time, in the right place.”**

**HODY CROUCH**  
VP DATA & ANALYTICS, AARON'S

Cleaning up (and unifying) your data makes employees' jobs easier, too. With real-time data and insights about your shoppers, they can deliver holiday cheer in the moment – easily and in the flow of their daily routine – at every touchpoint. So whether shoppers are browsing on your website for gift ideas, picking up a last-minute online order on Christmas Eve, or reaching out to a chatbot for a Boxing Day return, your team has the information it needs at their fingertips so they can deliver it. (A bit like Santa, right?)

And don't forget: Data collected during holiday shopping is the gift that keeps on giving. You can use this new information to drive loyalty and repeat purchases beyond the holiday season.

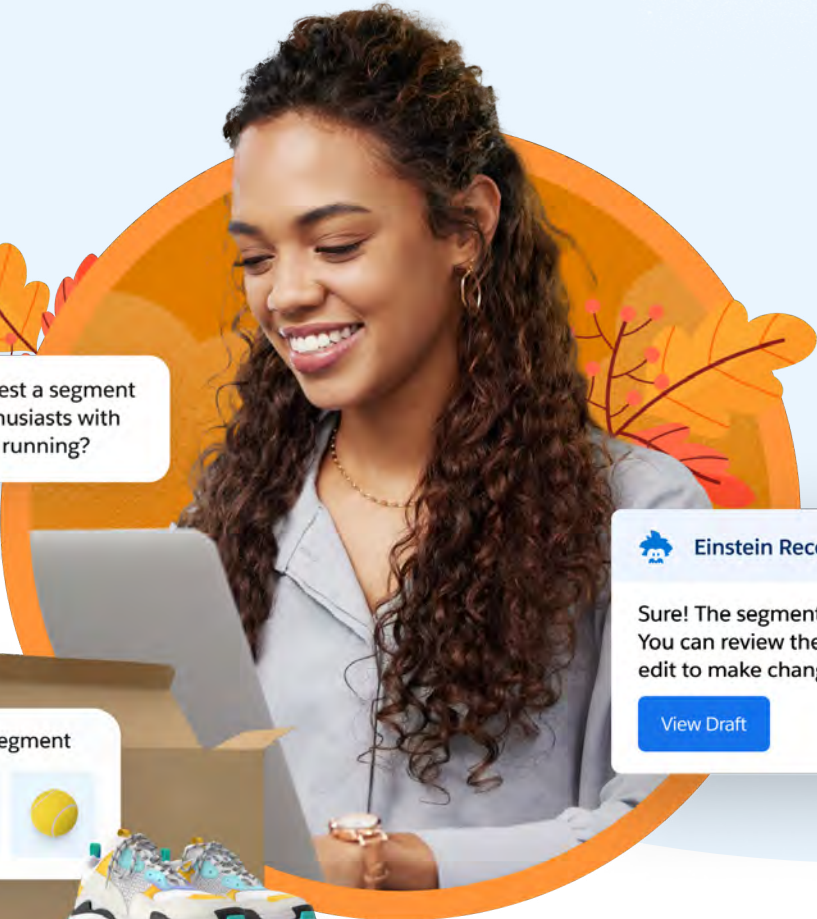



CHAPTER 2

# Offer season's greetings to loyal shoppers first.

Can you suggest a segment of fitness enthusiasts with an affinity for running?

Top items for this segment



 Einstein Recommendation

Sure! The segment draft is ready. You can review the segments and edit to make changes.

[View Draft](#)

## Offer season's greetings to loyal shoppers first.

Start the peak holiday shopping season off right by showing your loyal customers some love. Motivate loyalty program members in early November with relevant and valuable offers they can redeem whenever they are ready to shop. These might include early access to discounts exclusively for program members. Although many say the peak holiday shopping season now starts on Amazon Prime Day in July – and retailers may benefit from a “halo” effect around that day – [our research shows](#) that demand doesn't really spike until Cyber Week.

### **Many say peak holiday shopping season starts on Prime Day in July, but our research shows demand doesn't really spike again until Cyber Week.**

Since loyalty program members make three times as many annual purchases as non-members, it makes sense to reach out early to get their attention. Just because a consumer is part of your loyalty program, it doesn't mean they're not shopping around. The last few years, consumers have been more price-conscious, often [trading down for less expensive products](#). Reaching out earlier keeps you top of mind so they turn to you before they even check their gift list twice.

Use your loyalty program data to personalize these early-season marketing efforts. Tools like [Salesforce Loyalty Management](#) help you identify behaviors and patterns around what your shoppers buy, as well as if it was part of a loyalty program promotion or other personalized offer. This helps the marketing team create even better-targeted seasonal offers based on shopping history.





“Retailers have so much data at their fingertips,” said Lucy McClelland, Sr. Customer Success Manager, Retail, at Salesforce. “When done well, they can use that data to not only increase revenue, but also build programs that drive customers for life. Once you have your data cleaned and connected, start building out audience segments that group your shoppers together by common behaviors and preferences. Then, use AI tools to create bespoke, hyper-personalized offers that speak to those specific groups’ desires. AI is a great way to scale personalization to your entire customer base so that every shopper gets a white-glove experience.”

**“ AI is a great way to scale personalization to your entire customer base so that every shopper gets a white-glove experience.”**

**LUCY MCCLELLAND**

SR. CUSTOMER SUCCESS MANAGER, RETAIL, AT SALESFORCE

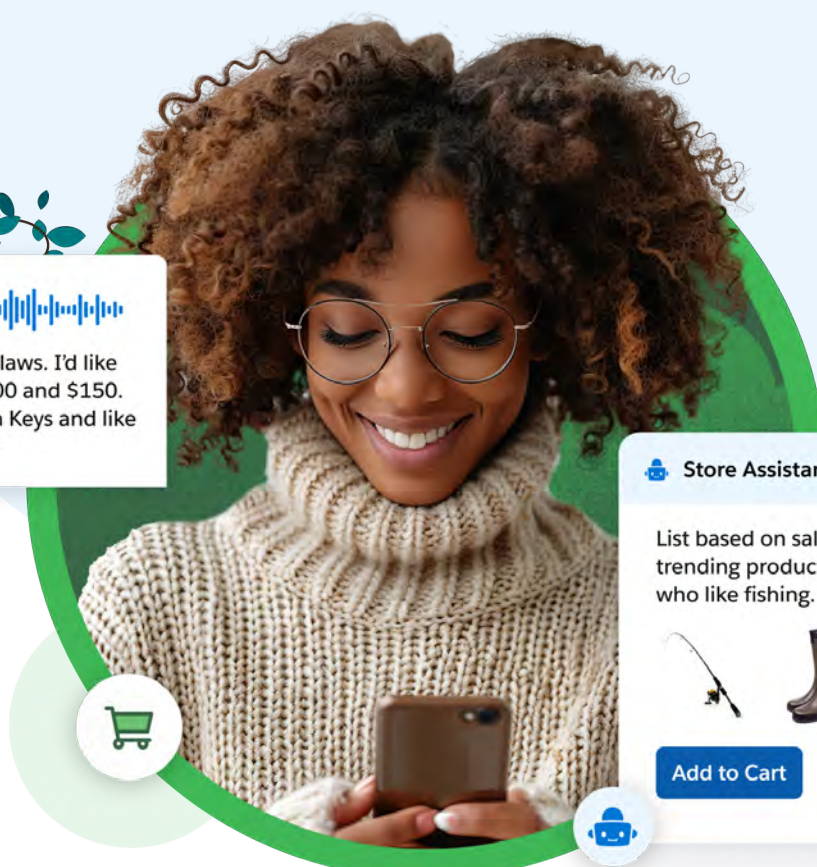
You can use [generative AI](#) for targeted GPT-powered campaigns, including generating segment suggestions and content creation. By analyzing customer profiles, AI can help you create one-of-a-kind experiences for loyal customers way beyond discounted merchandise: Give them access to a hard-to-find gift item, invite them to an in-store or online holiday fashion show, or let them share some eggnog with influencers or company founders.



If you can blend transactional data with even more behavioral data signals, like social comments, wishlist additions, open and abandoned carts, open rates, and media ad views, you’ll build a much richer profile to drive further offers that capture shoppers’ imaginations. Dazzle them early in the season, then cross-sell and upsell as more seasonal merchandise is available. What’s more? These satisfied [shoppers will tell their friends](#), sending more business your way.



CHAPTER 3


# Make commerce cozy and conversational with AI.






 

I need a gift for my in-laws. I'd like to spend between \$100 and \$150. They live in the Florida Keys and like fishing. Can you help?



 **Store Assistant**

List based on sales data of trending products for people who like fishing.

[Add to Cart](#) [See Next](#)

## Make commerce cozy and conversational with AI.

Generative AI is an [ongoing force in ecommerce](#). In fact, [82% of commerce organizations](#) that have implemented AI saw moderate to major improvements in the customer experience. Your team can use AI to create personalized product descriptions, promotions, product feeds, and [conversational commerce](#) experiences that reach shoppers on their terms. With [generative AI](#), retailers can interact with customers in ways that feel increasingly convenient and uniquely tailored – across all channels, from [social media](#) to chatbot sessions.

AI is fast becoming shoppers' entry point for engaging with you digitally and even in stores. Our research shows 54% of shoppers are interested in using generative AI for gift ideas. And the vast majority of consumers have engaged with AI in some way over the past year. In fact, [17% of orders](#) in November and December of 2023 were influenced by AI, totaling \$199 billion in sales. In Cyber Week alone, seven days of online sales generated \$51 billion worldwide through AI.

### Our research shows 54% of shoppers are interested in using generative AI for gift ideas.

This holiday season, AI-powered site search will evolve and expand, and retailers need to level up their digital channels to optimize it. While only 7% of holiday traffic uses site search, it has an outsized impact on driving conversion, with 18.5% of holiday orders coming from these shoppers. And the conversion rate on a search is 5.5% compared to the overall conversion rate of 2.1% during the holidays. Is your AI-powered search ready?

You can take your search up a notch this year by adding visual search – let shoppers search for products using images instead of text. To make it even easier to turn browsers into buyers, you can add voice search, which offers a hands-free approach that will be popular with the growing number of mobile-first shoppers.



**24% of shoppers have used voice assistants to make a purchase.**

[The Connected Shoppers Report](#)



Most importantly, optimize your conversational search capabilities. Conversational commerce, large language models, and natural language processing have changed the gift-giving game (especially when it comes to hard-to-shop-for relatives). Instead of aimlessly browsing product listing pages, shoppers can now use generative AI to drive their search. A customer might prompt a chatbot, “I’m looking for a gift for my in-laws. I’d like to spend between \$100 and \$150. They live in the Florida Keys and like fishing.”

Conversational search lets online shoppers ask questions in the everyday language they would use if talking to an in-store associate. Rather than using defined commands, shoppers can [enter \(or ask\) complete queries](#) with detail and context. Conversational search makes online shoppers feel like they are asking a friend’s opinion over a mug of hot chocolate. It offers a much better shopping experience because it results in more accurate and personalized responses, improves product discovery, and increases shopper satisfaction.

## Getting the conversation started

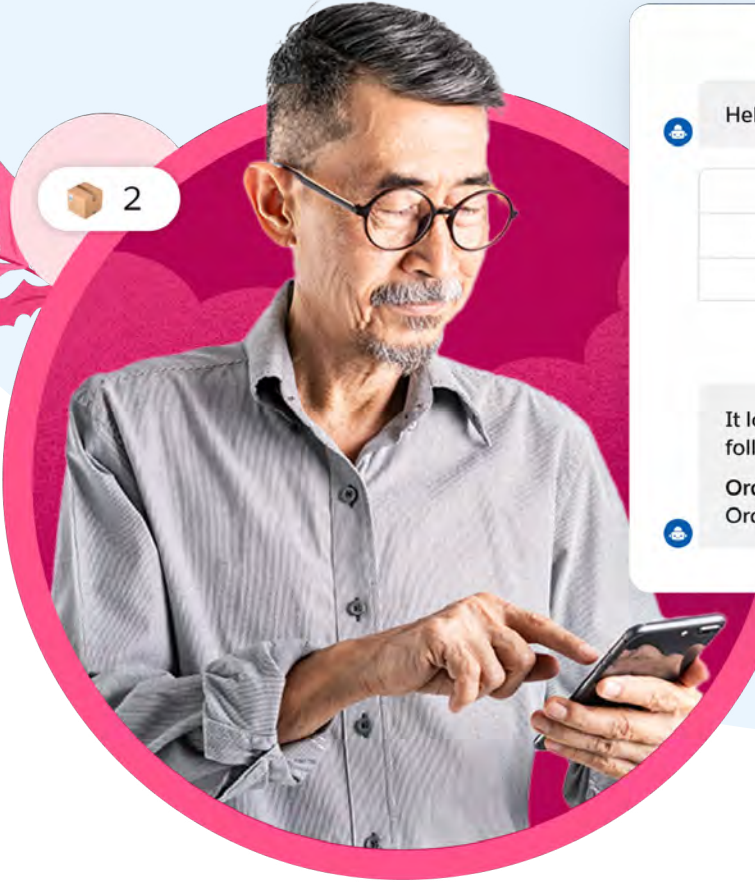
How can you improve your AI-powered search this holiday season?

- Continue to train and update your AI model on the latest trends, customer preferences, and product information.
- Use advanced natural language processing so your AI can understand complex requests.
- Optimize your AI for voice and visual search by improving accuracy, speed and relevance in understanding voice requests and analyzing visual search.
- Implement [real-time inventory updates](#) so shoppers know immediately if a product is out of stock.
- Think about what the [mobile user](#) needs and optimize your AI model for interacting with those on-the-go shoppers.



CHAPTER 4

# Make service more helpful than a team of elves.



Chat started at 2:57PM

Hello, how can I help you?

Recent Orders

Find Item in Store

Transfer To Agent

Recent Orders

It looks like you have the following order:

Order #: 00044193  
Ordered August 9, 2024

## Make service more helpful than a team of elves.

We all know how important the customer service experience is to shoppers: [94% say good customer service](#) makes them more likely to buy again. With stress levels and financial strain often running high during the holidays, a positive customer service experience could win you a loyal customer for life.

But [shoppers say their worst retail experience](#) is poor customer service – scoring higher than out-of-stock merchandise, poor return policies, and long checkout lines. Shoppers always want their issues resolved easily and friction-free, but never more than during the busy holiday season. A bad experience, whether in-store or online, costs time, causes frustration, and damages a retailer’s reputation. Don’t be the reason a shopper becomes a Grinch.

For years, many retailers have worked to transform the customer service experience – for both shoppers and agents – with more headcount, better training, and self-service options. Now, retailers are seeing a higher cost to serve. They are looking for ways to [drive incremental productivity out of service resources](#) while talent requirements for agents are driving overall service costs up.

“For many of our retail customers, they’re looking for ways to increase productivity and revenue without hurting the customer experience,” says McClelland. “That’s why it’s important to create a great customer service strategy that balances easy self-service experiences with hands-on support, when needed.”

**“ It’s important to create a great customer service strategy that balances easy self-service experiences with hands-on support when needed.”**

**LUCY MCCLELLAND**

SR. CUSTOMER SUCCESS MANAGER, RETAIL, AT SALESFORCE



This holiday season, retailers are poised to turn customer service into trusted advisors. By [combining generative AI and comprehensive customer profiles](#), retailers can offer automated services to shoppers including “Where’s my order?” searches, lists of stores with specific products available, and other services like verifying extended store hours. You also can use your data for GPT-powered responses, fast problem-solving, personalized interactions, concierge service, and proactive recommendations. This gives agents and associates more time to really serve customers – offering exchange suggestions, gift recommendations, and other advice, as well as managing returns.

And it’s not just about empowering live contact center agents and in-store associates. Retailers are [using AI to humanize service](#) via digital channels like text and messaging. Intelligent chatbots, AI-assisted replies, shopper concierge and live chat, appointment scheduling, and video support can all be made more engaging by using AI to enhance the experience.

“The most loyal customer can be turned away by a negative customer service experience,” said McClelland. “That’s why it’s important to provide a simple, intuitive, and fast support experience that gives your customers the option to self-serve or get help from a human agent, depending on the complexity of their issue. With technology like Salesforce Data Cloud and Service Cloud, retailers can easily create these great support experiences – fully grounded in their own data and AI models.”

With your unified data platform, you can use the power of [AI to offer self-service](#) options to shoppers who prefer to solve the problem themselves. You can make chatbots respond in natural language, humanizing the customer service experience at every touchpoint. And when agents or store associates engage with shoppers, they can pull up that customer’s profile to see how they can enhance the service experience. This resolves issues faster, makes it easier for [customer service](#) representatives to cross-sell and upsell, and makes them goodwill ambassadors who drive shopper loyalty through memorable service experiences.




CHAPTER 5

# Help employees work holiday miracles.




 8

 Einstein Recommendation

Send the following inventory based on data reported for the 2023 holiday season to store #3

[Send Inventory](#)

Thank you, just in time 





## Help employees work holiday miracles.

Peak holiday shopping season is the busiest time of year for in-store associates and home office employees. Store associates are juggling priorities among checking out, fulfilling orders, managing returns, providing service, and staffing social media.

And back at corporate headquarters, it's busier than Santa's workshop. Teams are busy dealing with suppliers, distribution, and logistics to make sure stores have what they need to meet shoppers' demand. In addition, they're keeping an eye on the technology to prevent or fix unexpected snafus. They're also checking on the performance of marketing campaigns, customer service, and operations, ready to quickly adjust the plan as necessary. There's not even time for a sugar-cookie break!

During this busy season, it's essential that the home office and stores share information and stay connected. But just 20% of customer-facing employees say their company is providing technology that enables efficient collaboration. Outdated tech is the top internal challenge preventing company growth, and [it can result in high employee turnover](#). AI can help (we hear even the North Pole is AI-powered this year).

### **Outdated tech is the top internal challenge preventing company growth, and it can result in high employee turnover.**

In stores, this means providing tools and technology when and where store teams need it. AI paired with data helps associates serve customers more efficiently. Static store roles, inefficient processes, poor training, and disconnected systems deliver anxiety for customers and store teams. But giving associates the tools they need helps them offer informed and connected customer service and frees them from manual, monotonous tasks. Enabling [mPOS](#), self-checkout, and mobile checkout tools could lighten the store associates' lift and improve the customer experience at the same time.

At the home office, HQ teams supporting these stores must provide excellent, meaningful support without causing headaches for operators. How can you help? Digitize store operations, and streamline communications between corporate and stores. You can make it happen with intuitive onboarding, incentives, and training tools that can be used anywhere to drive employee satisfaction and loyalty. Instead of losing valuable workers at your busiest time of the year, think about automating store processes and providing visibility into performance with easy-to-use store dashboards.

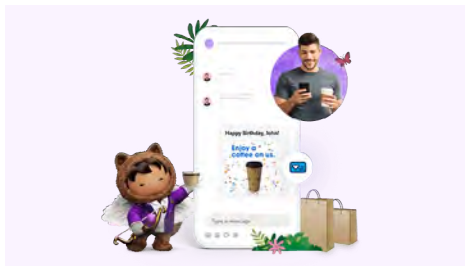
Deliver some holiday cheer this season by blending technology and operations to enable your associates, team leaders, and HQ employees to do their best work. They'll feel accomplished and satisfied because they're contributing to the bottom line. More importantly, lightening their load means they can take time to enjoy the holidays, too. You ask a lot of your employees, so give them what they need to make peak holiday shopping season more manageable.



## Conclusion: Make merry-happy-everything happen this year.

How can you make all the holidays special for your customers (and employees) this year? Make shopping easy, personalized, and engaging. Use what you know about your shoppers – and trust us, you know a LOT.

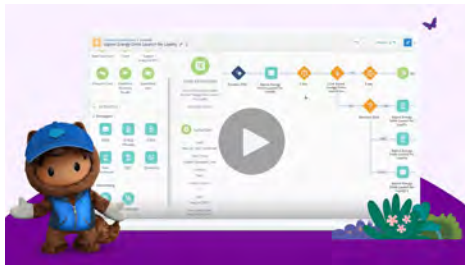
Mine your data to find out what tops their holiday lists, then use AI and other tools to serve up offers, rewards, discounts, and experiences that will help them make special moments for their families. If you do, you can be sure they'll come back, even after the tinsel is trashed. Why? Because with all that new holiday data you've collected, you'll gain insights that will drive shopping moments all year long, from football-watch parties to Easter egg rolls, from Fourth of July picnics to spooktacular Halloween bashes.



### GUIDE

## From Predictable to Personalized: Rethinking the Loyalty Experience

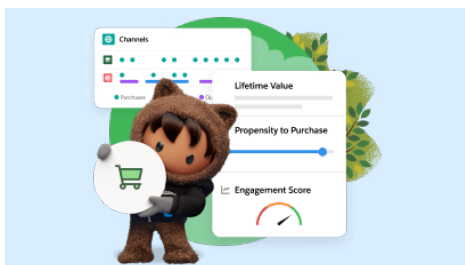
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## Salesforce for Retail

WATCH THE DEMO >



### GUIDE

## The Data Intelligence Guide for Commerce

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