

THE COMPLETE GUIDE

TO PREPARE FOR THE ONLINE BUYING RUSH

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The holidays are crucial as an eCommerce seller. This is the time of year when positive customer experience offers opportunities to build your brand, increase revenue, increase customer loyalty, and acquire new and repeat customers. Everything you have worked for to build your business becomes critical during the holidays, when customers are not only buying products for themselves, but for friends and family. Positive holiday experiences will help improve your bottom line 365 days a year.

What's Your Holiday Strategy?

The holiday demand spike presents a perfect opportunity to take your business to the next level—but be sure to think through your strategy from all angles to avoid disappointing your customers at the most critical time of the year. And do it fast—if you're not ready by Thanksgiving, you could miss out on 42% of the holiday budget…and all the non-gift purchases that go along with it. Some key stats to keep in mind as you plan your strategy:

Holiday sales in 2016 increased 4% to \$658.3 billion

- I 54% of people celebrating the holidays begin researching in October or earlier
- I 74% of online shoppers shopped online on Black Friday
- I 36% of online shoppers shopped online on Thanksgiving Day
- I More than 122 million consumers planned to shop online on Cyber Monday, with a quarter of them purchasing from a mobile device

We recommend evaluating holiday initiatives in terms of their impact on Revenue, Cost, and Customer Experience. Here are the initiatives we'll cover in this quide:

	REVENUE	COST	CUSTOMER EXPERIENCE
	-	CO31	COSTOMER EXI ERIENCE
Shipping Service Levels	X		X
Operations		X	X
Marketing	X		x
Gifting	х		x
Post-Christmas	х		X

We'll look at three distinct phases for each of these initiatives:

- I Strategic Decisions you need to make now, and how they will impact your holiday planning
- **Preparations** needed to implement those strategic decisions
- I Specific Actions necessary to execute, measure, and institutionalize your plans

SHIPPING SERVICE LEVELS





Holiday shoppers are sensitive to additional costs such as service levels, potentially impacting your revenue. Having the right delivery time at the right price - or even free - can make the difference between an abandoned cart and an extra item added to meet a free shipping threshold. The holidays offer a good excuse to reconsider what cost and delivery options you make available to customers while maintaining the desired selling margin. Getting this mixture right translates to more sales, higher margins, and an improved experience for your customers - in other words, a merry season for both seller and buyer!

Strategic Decisions

If you haven't evaluated the cost effectiveness of your shipping service levels lately, it's a good idea to do so before the holiday rush. Here are some strategic decisions to consider:

I **Free shipping threshold:** If you currently don't offer free shipping, consider offering it for order values above a threshold. A good rule of thumb is to set the shipping threshold at or slightly higher than your current average order value (AOV). Before implementing this change, model the impact it will have on your profits and determine the uptick in AOV and/or conversion necessary to justify that impact—then if you don't realize the uptick, you can further adjust the threshold or try another model.

I **Flat rate:** If you want to simplify but aren't ready for free shipping, take a look at flat rate, which works best in situations where the majority of orders ship for a relatively low actual cost (\$5–\$17). Again, you'll want to model out the impact to see if it's right for you.

I **Saturday delivery:** Consider offering Saturday delivery as an option for customers at an additional cost—or make it standard as a Christmas gift for your customers. In the latter case, it's wise to calculate the incremental costs and ensure you can absorb them, or recover them elsewhere. You can also consider USPS where Saturday delivery, with no surcharge, is standard. In some instances USPS will even deliver on Sunday—especially relevant for Amazon sellers.

I **Returns:** Free, easy, no-questions-asked returns are becoming the norm in eCommerce and for good reason: according to an article by ReadyCLOUD, approximately a third of products online are returned, proving the proving the importance of a clear return policy. In addition, "over 63% of consumers read the online product returns policy before making a purchase. When return shipping fees are charged, 81% of consumers are less likely to make a future purchase, and 81% of consumers want a convenient returns policy that is hassle-free with no return shipping cost. When free returns are offered, purchases can be increased by up to 357%."

I **Timing:** Think about how you want to articulate—and how boldly you want to commit to—cut-off dates (the last day a customer can order using a given shipping option and expect to get their package on time). The cut-off times published by various carriers are shown below; you will need to pad these with your anticipated order-processing times to ensure you can internally hit the deadlines. We recommend publishing cut-off dates you are comfortable with and then doing whatever it takes to meet them.

HOLIDAY SHIPPING CUT-OFF DATES



Preparations

Once you've decided on changes to your shipping service levels, you'll need to make some or all of the following preparations:

I **Selling platform:** Explain your new or updated shipping options in the appropriate sections of your online store(s) and code any needed computational rules into your selling platform. Calculate your comfortable "order by, for delivery by" deadlines for each shipping service level and include them, at a minimum, on your homepage, cart, and checkout pages. Remember that items with special shipping requirements may have special order-by dates, and stock-outs can render on-time delivery impossible, so include the appropriate disclaimers and consider revisiting your safety stock levels for high-demand items.

I **Shipping platform:** Update your shipping rules to reflect the new model to ensure proper carrier selection and shipping label generation.

I **Shipping operations:** Ensure your shipping workflow is updated to reflect any impact on picking, packing, packaging, labeling, etc. For example, if more packages will be shipped USPS, an end of day USPS Scan Form might be required. It's a good idea to monitor your order processing time closely as you approach your published "order by" cut-off deadlines to minimize the risk of missing any dates. It's also a good idea to have a contingency plan in case something goes horribly awry and you end up shipping gifts that won't arrive in time. If you are rolling out free returns for the first time, be sure your operations are set up to process the anticipated increase in volume.

I **Monitoring**: Set up reporting through your shipping and selling platforms to monitor the success of your new shipping options against the models you built in the strategy phase.

Specific Actions

If possible, pick a low traffic day well ahead of the holiday season to go live with the new shipping option model. Then, as the new model is used by customers:

I **Monitor business case metrics:** Use your selling platform analytics and reporting functions to monitor the business case-related metrics (AOV, conversion) you anticipated improving as a result of this initiative.

I **Monitor shipping metrics:** Use your shipping platform analytics and reporting functions to monitor metrics related to the effectiveness and customer experience of the new model, such as on-time delivery, Saturday shipments, Saturday deliveries, free returns, etc.

OPERATIONS





Operations are the backbone of your shipping function—and therefore your entire eCommerce business. Optimizing your workspace layout, processes, inventory, printing/packing materials, equipment, and staff for the holiday season can all help lower costs. Beyond that, smooth-running shipping operations ensure your orders are accurate, packages are packed efficiently and attractively, and that they arrive in your customers' hands on time—all of which makes for a great customer experience. As an added bonus, well-planned operations will help your employees have a happy holiday!

Strategic Decisions

With the holidays accounting for up to 40% of a merchant's annual sales, now is the absolute worst time of year to find out that your shipping operation is not up to the task of delivering all the gifts your customers order; as evidence of this, major retailers are hiring tens of thousands of temporary

holiday workers, and UPS alone is hiring an additional 95,000 seasonal workers to gear up for the demand, per http://bit.ly/ups-holiday. It's time to think strategically about your operations, especially in these areas.

I **Supply chain:** Can you get enough product from your suppliers to fulfill your anticipated holiday demand increase? To answer this, review last year's demand/out-of-stock data, products shaping up to be popular this season, and anticipated impact of other initiatives (e.g., free shipping) on demand. If you do not have an inventory management system, it may be beneficial to begin looking now. If your shipping solution offers inventory management, make sure everything is set up correctly before the holidays. If you're not already optimizing your inventory management, now is the time to put something in place to help you automate inventory, simplify bundles, and manage purchasing. You'll want to make sure everything is set up before the holiday rush really hits. Your shipping solution should ideally incorporate inventory management.

I **Physical space:** How much room do you need to store the planned increase in inventory to meet holiday demand? How much space do you need to accommodate your holiday staff, equipment, boxes, supplies and inventory?

Equipment, people, and workflow: These are tied together. Is your equipment adequate to handle the increased throughput necessary to meet holiday demand? Can you tweak the process or layout to raise capacity? How does hiring more people impact equipment and workflow? For example, do you need more scales or printers?

I **Technology:** Is your shipping solution up to the task? Can you benefit from using advanced features like shipping rules, predictive analytics and automation? You might consider innovative approaches to daily decision-making such as ShippingEasy's InstantLabel and Buy & Print. Reach out to your shipping solution for help in configuring more advanced options before the rush hits you.

I **Downstream:** What are the implications of your increased sales goals on your carriers? How much additional volume will they need to handle? Do increased sales qualify you for better rates? More pick-ups? Free supplies? Do you need to complete end of day forms as a result of the additional shipments?

Preparations

Specific operational preparations flow from these strategic decision areas:

I **Supply chain:** Be sure your purchase orders reflect increased product inventory needs, and that your suppliers can fulfill them on time; otherwise, it may be time to find backup suppliers or substitute products.

I **Physical space:** Increased space needs can often be met by taking a hard look at your floor layout and shelving configuration, but if there just isn't room to handle higher holiday inventory levels, you may need to find supplemental space to lease, or—if workable—temporary solutions such as portable storage units.

I **Equipment, people, and workflow:** The most common piece of equipment needed to increase eCommerce shipping throughput is an additional scale, which is relatively inexpensive to acquire; remember that it needs to be integrated into your workflow and shipping solution. If you anticipate needing more people, now is the time to determine how they will fit into the workflow (you may consider a partial or full additional shift, adding weekend workdays or overtime), and the time needed to hire and train them.

I **Technology:** If you are concerned about your shipping solution's ability to support your operations, now might be the right time to explore other solutions and get set-up. Ask questions about onboarding and configuration to better understand the switching costs involved. If you're a ShippingEasy customer, contact us to learn more about the features you can use to help ensure a smooth holiday.

I **Downstream:** Look at your overall anticipated volumes and talk to your carrier reps; see if using an exclusive carrier might lower your overall costs, or if there are other changes you can make, including more efficient packaging to avoid dimensional weight charges, higher use of free packaging, or more liberal use of flat rate packaging. At the very least, be sure your carrier(s) is/are aware of your anticipated increased volumes and that they are planning to provide adequate pickup capacity.

I **Returns:** In addition to all the stats supporting free returns in the Shipping Service Level section, keep in mind returns typically increase by 15% during the holidays. On average, 20%-40% of consumers will return a purchase, with percentages rising to as high as 50%. Be operationally

20-40% of consumers will return at least one gift

prepared; ensure your return processes are clear to customers visiting your online store and are clearly explained on your packing slip, internally clearly defined from end to end, and running smoothly to handle the extra workload in your return-processing facility. You might want to include a return label in gift orders to leave a positive impression with potential future customers. Consider scan-based returns where the label can be printed but a charge is not applied unless and until it is scanned.

Specific Actions

The kinds of operational changes we recommend are seldom executed without a hitch, so be sure to stress-test any new initiatives you can before the orders start flowing in. Once you're into holiday order time and running

the operations, keep a close eye on the reality of demand and operations versus your predictions, and adjust where possible when your operational changes fall short.

OTHER AREAS TO WATCH:

I **Leveraging return data:** You might be able to gain insights from return data flowing through your shipping solution on what kind of products shouldn't be promoted, or should be made exceptions to the return policy; you might even spot trends that underlie return policy abuse and address them.

Changes to your physical space, staffing levels/work shifts, inbound inventory purchases, and volume-related carrier changes will likely need to be rolled back when seasonal demand slows down

I Winding down holiday-specific changes: While some of the operational changes we suggest should provide benefits throughout the year, many will need to be adjusted at the end of the holiday season. For example, changes to your physical space, staffing levels/work shifts, inbound inventory purchases, and volume-related carrier changes will likely need to be rolled back when seasonal demand slows down. Refer to the Post-Christmas section for more information on this topic.

I **Taking a holistic view:** Keep in mind that most of the operational initiatives we've discussed influence one another, so if a new process fails to deliver the expected efficiencies, look at whether you can address the shortcoming by adding people or equipment, or reconfiguring the space.

MARKETING





The holiday season is the most marketing-intensive time of the year, but your shipping function gives you unique opportunities to target both existing and prospective customers at the most critical stage in their journey: when they put their hands on your product.

Strategic Decisions

Here are the shipping-related marketing opportunities you can consider this holiday season:

I **Increase brand awareness:** Take advantage of increased package visibility to advertise your brand. Do the math on whether custom, branded boxes are worth the extra cost versus generic or carrier-supplied free boxes. In the case of odd-sized items subject to dimensional weight, they might be. Regardless of the box you use, you can inexpensively and easily feature your brand with adhesive stickers and on packing tape and packing slips.

I **Increase new customer acquisition:** During the holidays your customers are giving you tons of information about other potential target customers—the people they are buying gifts for on your site. Consider marketing to these gift recipients by targeting them with promotions and social media invitations on your packing slips. Most shipping solutions will allow you to customize a holiday packing slip expressly for this purpose.

I Increase repeat purchases and loyalty: According to UPS http://bit.ly/UPSPulse, 48% of shoppers considered guaranteed delivery dates an important factor in checking out. Likewise, research shows that on-time delivery is a major factor in repeat purchases, so make sure your operations and partnerships are set up to achieve it. But also take advantage of delivery-related communication opportunities, like sending purchasers and/or recipients frequent status updates and post-order follow-ups. Consider including promotions with these messages to encourage repeat purchases.

I **Turn returns into opportunities:** We've discussed in detail the potential benefits and considerations of free returns in the Shipping Service Levels and Operations sections. From a marketing perspective—whatever your return policies and charges—think about the potential of running win-back campaigns on customers who return. You could, for example, issue a credit to the customer's account equal to the amount they paid for return shipping as a reason to come back. It is the rare person that likes to leave money on the table.

Preparations

To take advantage of any of these opportunities, here's what you need to do to gear up:

I **Brand awareness:** To go with branded materials of any kind, they will require some design effort, followed by sourcing. The good news is the design efforts and print turnaround times for such materials are usually quick and this is one part of your holiday checklist you can accomplish very early in the season.

I **New customer acquisition:** If you are promoting to gift recipients, you have several additional decisions to make: through what channel? When? With what message? Will you offer a new-customer discount? On what? Treat these sorts of initiatives as full blown campaigns, allocating them appropriate resources.



I Repeat purchases and loyalty: Just like campaigning to gift recipients, post-purchase updates and related promotions should be treated as a campaign. Most importantly, sweeten instead of spoil any surprises by giving the purchaser complete control over notifications—and defaulting to notifying only the purchaser, not the recipient. Then come up with a plan for how you will use post-purchase communication opportunities to

Adding promotional messages and special offers directly to the packing slip or gift receipt will limit additional costs while maximizing exposure

provide a great experience and drive repeat business. Printed materials you already intend to include in each package are the ideal starting point. Adding promotional messages and special offers directly to the packing slip or gift receipt will limit additional costs while maximizing exposure. Leveraging what already exists is a good starting point.

I **Returns:** If your strategy includes running return-related campaigns, be sure to have these ready before the returns start flowing in. Plan for who you will target, what promotion(s) you'll offer, and how you'll implement those promotions (e.g., a one-time coupon code). You'll want to ensure data on target customers for these promotions flows from your shipping platform to your campaign platform, and that the promotions are set up in your selling platform.

Specific Actions

Once your holiday marketing strategy is set, your planned campaigns are set up, and materials are ordered, the main actions required are to execute the plans and monitor their results. The success of campaign

activities targeted at gift recipients, repeat purchasers, and customers who return items should be straightforward to measure using standard campaign management techniques and tools. As with any campaign, it's important to monitor the data to be sure these campaigns are contributing to your goals.

GIFTING





Did you know that the thrill of opening a holiday gift may have originated in 200 BC? If your eCommerce business isn't tapping into this ancient human practice, it's time to start! There are enormous opportunities to benefit both customer experience and your business associated with providing gift wrapping throughout the year—but especially at this time of year.

Strategic Decisions

Here are the main decisions you need to make regarding your gift option(s) strategy:

I **Wrapping options:** Beyond the binary decision of whether to offer wrapping and gift notes, you need to determine who on your team is the best wrapper (it's got to look pretty!), how many wrapping options to offer, the operational implications of offering them, whether and how much you should charge for wrapping or whether to use them as a threshold purchase incentive. At a minimum, offering gift notes is essential to capture holiday sentiments and identify the gift giver to the recipient.

I **Shipping options:** You can also make your customers' lives easier (and increase your conversion rates and average order size) by allowing multiple shipping addresses for different items in the same order—and allowing different gift options to be chosen for each address. Make sure your selling platform can accommodate these options before you finalize your decision.

I **Gift recipient information:** When someone sends your product as a gift, they're giving you a gift—the contact information of a potential new customer and one that probably has an affinity for your merchandise. Think strategically about campaigns you can set up to target these new prospects based on what you know about them: how can you use your knowledge of the gift giver's buying history? The recipient's geographic location? The gift they received, and the time they received it?

I **Gift item pricing:** In most cases, your purchaser will not want the line-item pricing included in your packing slip or anywhere the gift recipient might see it. You will want to make sure that your packing slips can be customized to exclude this information. In addition, most purchasers will expect their message to the gift recipient to make its way into the box. Update your packing slip options to include the gift notes from your selling platform by mapping the correct field.

Preparations

Prepare to execute your gifting strategy by considering:

I **Wrapping options:** If you're going to offer wrapping, your biggest preparation is selecting a wrapping process; will you use pre-sized wrapping envelopes? Do custom wrapping? How will you set up the wrapping operation and workspace? Is training needed? Equally important are the associated software requirements; any wrapping and note options you offer will need to be reflected in your selling platform's user experience. Your shipping platform rules will likewise need to be updated to print notes, and possibly to flag or otherwise indicate packages to be wrapped. Finally, remember to order any needed materials like gift wrap, boxes, tape, and ribbon and have them in stock before you deploy the online functionality.



I **Shipping options:** Supporting multiple shipping addresses on top of wrapping options will add to the checkout process for purchasers, so be sure to keep the options in your selling platform's online experience clean and easy to understand. You'll also need to make significant changes to your shipping platform rules to handle the multiple addresses, and to potentially determine optimal carriers for each shipment. Finally, you need to evaluate packaging materials in the context of your wrapping process—there might be opportunities to save on shipping and/or speed up the process if you, for example, switch from free carrier materials to custom packages.

I **Gift recipient information:** If you want to target gift recipients, first be absolutely certain your Terms & Conditions cover this use of customer-supplied information (talk to your lawyer). Then you will need to design the data flow from your commerce system into your campaign management system and set up the campaigns.

Specific Actions

When it comes time to execute, consider:

I **Wrapping options:** Monitor customer selection of wrapping and note options to see if they are in line with your expectations; if not, consider adjusting the user experience and/or pricing. You'll want to monitor the operational aspects too, to ensure the right reorder cadence for materials and that the wrapping process isn't causing delays.

I **Shipping options:** If you've changed packaging or carriers, keep an eye on on-time delivery performance to ensure the new choices are working. If you're seeing consistent errors with multiple shipping addresses you may want to ensure the user experience is clear.

I **Gift recipient information:** Keep in mind that a gift recipient might not open a gift until the actual holiday arrives—so don't risk ruining the surprise by sending marketing materials that give it away before the holiday!

I **Returns:** It's wise to keep an eye on the correlation of your return rate to all gifting options. If gift returns are higher than non-gift returns you may want to revisit gift wrap pricing as a potential way to make up for the associated cost increase.

POST-CHRISTMAS





Traditionally retailers consider the bookends of holiday shopping to be Black Friday and Christmas Eve. There's no doubt Thanksgiving weekend kicks off the shopping season with 74% of people shopping online for Black Friday according to the National Retail Federation. However, Christmas no longer marks the end of the season. A study showed that 48% of holiday shoppers planned "to shop - both browsing and buying - retailers' after-Christmas sales."

Strategic Decisions

There are a few strategic post-Christmas decisions you can start contemplating now:

I When your holiday initiatives will "end": While Christmas drives a significant amount of holiday shopping behavior, you probably have customers who celebrate other year-transition holidays (Kwanzaa runs through January 1 of the New Year, for example), and some folks prefer to simply celebrate the new year. Consider all the options when determining how long you'll offer temporary holiday services, packaging or pricing.

I Making holiday-related changes permanent: Which changes—e.g., shipping service level/cost, operations, marketing, and gifting—will you consider making permanent after the holidays? This is a strategic decision you can evaluate now and make final after holiday purchasing behavior peaks.

I **Specific post-holiday initiatives:** There are a number of additional specific, incremental initiatives you should be thinking about now and preparing for as holiday traffic slows down; see the following Preparations section for details.

Preparations

Here are the preparations you need to be thinking about between now and the end of the holiday season:

I When holiday initiatives will "end": Plan to ramp down special holiday material purchases, reconfigure your workspace or give up extra warehouse space if necessary, and reduce temporary holiday staff or shifts.

I Making holiday-related changes permanent: If you are making any changes permanent, there will almost certainly be implications for your materials, purchasing, staffing, and operations. Determine what long-term changes will be needed as soon as the decisions are made.

Returns: If you changed your return policy to make it more liberal, take a careful look at the impact on your conversion rates and costs to see if they are feasible to maintain long-term. It may be worthwhile to be prepared to keep free returns running for a few months after the holiday season to see and measure any positive influence on repeat orders they may have.

I **Deal-driven consumers:** Offline retailers have taught shoppers to expect deals the day after Christmas—so consumers are trained to wait. Be ready with promotions and campaigns.

I **Personal wish lists:** The gifts that didn't show up under the tree represent an opportunity for you, especially if customers keep customer wish lists on your site. Consider campaigns and promotions to help them get everything they expected—even if they have to buy it themselves!

The gifts that didn't show up under the tree represent an opportunity for you

I **Clearly marked "Sale" section:** Post-holiday shoppers can be myopically focused on getting a deal. Make sure some part of your inventory is marked down and prominently promoted to capture the attention of these deal seekers.

I **Retargeting:** If your technology platform supports it, target shoppers who viewed (but didn't buy) items before the holidays with any markdowns you make available on those items (or even with special promotions) to entice them back.

I **New Season's merchandise:** Be sure to satisfy the consumer segment (especially new customers acquired during the holiday season) interested in new merchandise by featuring it at full price.

Here are the post-Christmas-related actions you'll need to consider:

Specific Actions

I After holiday initiatives actually "end": For initiatives that you wind down at the end of the season, check out performance metrics to see

how you did. Did your shipping service level or gifting change actually increase AOV or conversion? By how much? How many new customers did you acquire through gift recipient campaigns? Keep these performance figures in mind as you plan for next holiday season—or decide if you should make any changes permanent.

I Making holiday-related changes permanent: You can look at holiday-period performance data to help you decide what changes to make permanent, as well as to set up a monitoring plan going forward to ensure that those changes remain a net-positive for your business (and adjust or revert as necessary).

I **Post-holiday-specific promotions and campaigns:** Keep an eye on the performance of any of the initiatives you roll out to take advantage of post-holiday opportunities related to gift cards, wish lists, new items, etc., in order to apply mid-stream tweaks and determine whether they are worth trying next year.



HOW SHIPPINGEASY CAN HELP

ShippingEasy is the premier shipping platform for eCommerce retailers. Whether you ship 5 packages per month or 50,000, we can help improve your customer experience and increase your ROI on shipping operations through our industry-leading suite of capabilities, which include:

I Access to the lowest USPS rates available—up to a 46% discount to normal rates

I Integration with all major eCommerce platforms, shopping carts, marketplaces, and carriers

I Support for multiple stores and fulfillment locations, international selling, offline orders, and returns processing

I Support for real time or batch order synchronization with selling platform (order download and status updates)

I Predictive analytics teach the machine to recognize shipping patterns and make shipping decisions with your approval

I World class support with full set-up and configuration included, plus ongoing help from 7am-7pm CST I Inventory Management and Customer Management - Free to try for 30 days

To learn more, request a demo, or sign up for a free trial visit www.shippingeasy.com, or give us a ring at 1-855-202-2275.

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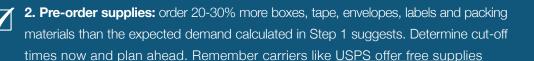


Holiday Shipping Prep Guide: 7 MUST DO'S











3. Recruit part-time staff: determine whether additional staff or hours will be required to pick, pack and ship the order volume estimated in Step 1. Decide on whether to hire, extend existing employee hours or enlist friends and family.



4.Order an extra scale: if Step 3 suggests you need more people, do you require an additional scale or workstation to maximize throughput?



5. Optimize carrier selections: Start with the holiday timelines you plan to offer your customers and then do a thorough rate and delivery comparison.



6. Invest in automation: break old copy/paste and manual habits. Ask your shipping solution to help you set up:

A. Product catalog **B.** Shipping rules **C.** Saved packages



V

7. Calculate turnaround times: become obsessed with order turnaround time. Find the right report and/or metrics to calculate the % of orders shipped same day and share it with your team.



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