

salesforce

# How to Jumpstart Growth in Commerce

Ways to Prepare Your Business for What's Next



# Introduction

Customer expectations for convenience, personalization, and service are changing all around us. The global health crisis accelerated ecommerce adoption and digital-first behaviors like never before.

One undeniable truth emerged through the uncertainty: Business will never be the same. Industry leaders understand that in order to live up to new customer standards and adapt to changing market dynamics, their organizations must be agile. It's how businesses will find what's next despite uncertainty.

This guide reveals ways to drive your business forward and reach customers on their terms. Learn about omni-channel experiences and custom cross-channel solutions. Get background on back-end integrations. See how artificial intelligence (AI) can open new revenue streams, attract customers, and build lasting relationships.

**Ready to jumpstart growth for your business?  
Let's get started.**



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Hi, I'm Astro.

I'm here to help you learn  
how you can transform your  
business with Salesforce.



## Build storefronts and custom commerce apps.

It's no longer enough to pull customers into your physical and digital properties. Bring commerce to customers with immersive brand experiences across owned and third-party channels in three ways.

### Consider going headless.

In its simplest form, headless commerce is a separation of the front and back end of a website that allows for rapid personalization and customization. You can use a headless commerce approach to pair your commerce experience with mobile app, in-store, or social media experiences (and a variety of other use cases).

Developers build custom “heads” with the technology of their choice, like React or Angular. They can also integrate into third-party heads with application programming interfaces (APIs) that enable storefront workflows and system integration.

### Marry customization with an out-of-the-box approach.

If your team can't focus on something like headless commerce right now, consider an out-of-the-box blueprint. It combines best practices in site design, merchandising, and technical architecture. This means you can go live quickly with mobile-first site templates, use AI to tailor the customer experience, innovate faster with industry-standard developer tools, and seamlessly integrate third-party solutions for payments, tax, ratings and reviews, and mobile apps.

### Create immersive brand app experiences.

Dedicated mobile apps and progressive web apps bridge the gap between a single commerce experience and lifetime brand loyalty. Quickly and easily build unique branded commerce experiences through dynamic apps that combine personalized customer experiences and AI-powered commerce to surface relevant product recommendations. You can also embed your product catalog into your apps to streamline the path to purchase.





# Connect your back-end systems.

The average enterprise today has 800 applications, yet only 29% are connected.\* Bridge the divide between existing systems with an integration layer that gives you a single view of customer data.

## Connect commerce experiences with APIs.

A prescriptive architecture helps IT teams jumpstart development of new commerce experiences and provides a foundation for faster project delivery. To do this, use an array of APIs and integration templates for services such as inventory, product, customer, order, payment, and notification.

- Out-of-the-box connectors and templates extend storefront capabilities and integrate back-end data sources for speed to market
- Reusable APIs allow IT teams to self-serve for publishing, discovery, and uncovering order history, support tickets, upcoming renewals, and product use
- API protection and security through tokenization, data encryption, and bidirectional synchronization templates ensure real-time data consistency across apps, geographics, business units, and departments

## Reconcile data.

Organizational silos make it difficult to deliver the experiences customers expect. Remove back-end maintenance for multiple databases and friction between system integrations with a

[customer data management and activation platform](#). A CDP uses a single ID that all teams can leverage – sales, marketing, commerce, and service – for a true 360-degree view of every customer. By bridging the divide between data sources, users can solve important business problems and deliver highly personalized, contextually relevant customer experiences across touchpoints



\* MuleSoft Connectivity Benchmark Report, 2021.

# Tailor content and pages to your customers.

When marketers and merchandisers rely on IT to make site changes, it can lead to content backlogs. Delays in updating product content leads to lost mindshare and revenue. When those same business users tailor customer experiences, they're empowered to deliver better results.

### Create reusable components.

Your front-end developers start the process by creating [customized, brand-rich templates](#). They use framework components and a solution toolkit to translate design and business requirements into reusable page components. They can then step back and focus on innovation.

### Put business users in control of updates.

Business users stand up, manage, and tweak the homepage, campaign landing pages, and category landing pages. They turn to a drag-and-drop visual editor and intuitive [content management tools](#) to:

- Create, publish, and reuse content, like product descriptions and banners
- Design, schedule, and publish pages on the fly
- Build pages with reusable components and content without starting from scratch
- Preview changes across any device type, persona, schedule, or locale

### Get ideas to market faster.

Need to improve a product page? Your marketers and merchandisers can write new copy, add it to the page, and enhance it with imagery – no need to wait for help from a developer. You increase your team's efficiency in creating engaging customer experiences by:

- Refining content to continually improve results
- Personalizing content to match customer interests using CRM data
- Reusing content across all customer touchpoints



Get Started With Growth

# Personalize your product recommendations.

Deliver the most relevant commerce experience with AI, which takes commerce data such as customer search behaviors and preferences to deliver personalized customer experiences.

## Surface highly relevant product recommendations.

Brands can recommend specific products to each customer on the product detail page and in reengagement communications (through a “you might also like” functionality). And customers appreciate this: 62% are open to the use of AI to improve their experiences.\*

## Embed AI into search.

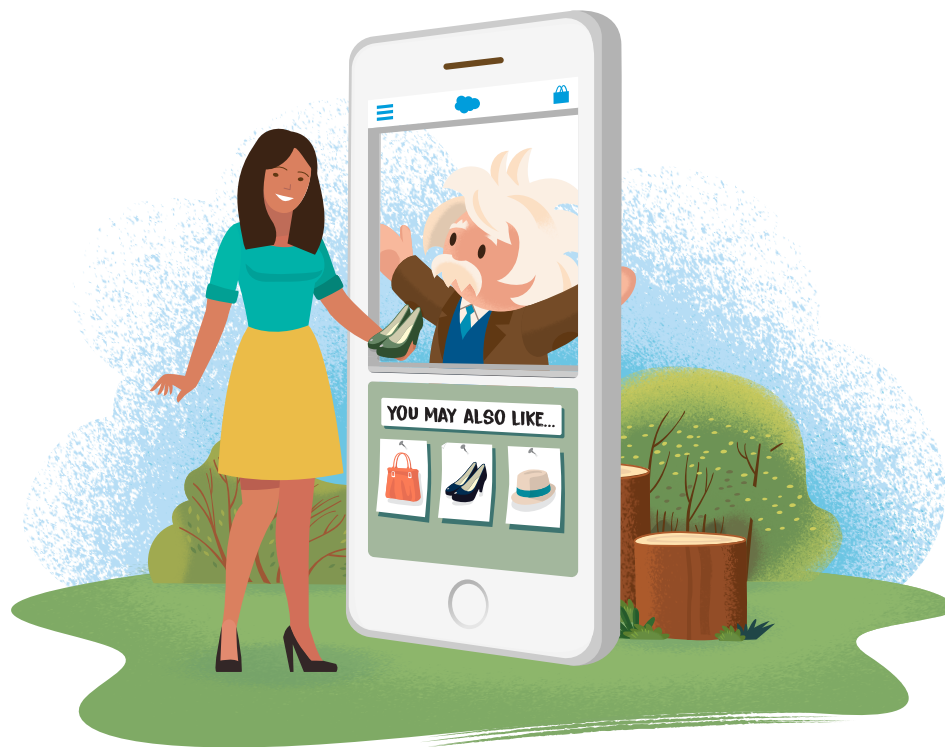
Even if a term is not already in your search dictionary, AI uses synonyms, hypernyms, and search redirects to surface the right products. Predictive sort also customizes the order in which products appear in search and on category pages.

## Automate merchandising.

Improve merchandiser productivity and efficiency with dynamic customer segments, merchandising rules, and product recommendations that optimize customer search – adjusted for intent and product profitability.

## Create relevant product bundles.

Get a granular view into the products typically purchased together to create relevant product bundles that drive AOV.



*"State of the Connected Customer," Salesforce Research, 2021.*

# Digitize sales interactions across B2B buyer touchpoints.

For purchases that require recurring product orders, arm sales reps with a full view of customer interactions, opportunities, and purchase history across channels and analytics. Reps grow business while streamlining the entire purchase process.

## Consolidate customer information.

Give reps access to current customer data and the ability to seamlessly connect to order information, service inquiries, communications, and analytics from a single platform. Reps can view a shared cart and order on behalf of customers.

## Engage through a partner portal.

Empower partners to self-serve for routine orders and to onboard new partners easily. A partner portal also allows manufacturers with large catalogs of off-lease equipment, parts, and supplies to build an online marketplace for dealers and third parties. Field service workers can even leverage it to order parts on behalf of customers.



## Find New Customers

# Go direct-to-consumer.

Customers are increasingly prioritizing digital channels to purchase goods and services. In fact, [more than half](#) of customers intend to purchase when they visit a manufacturer's website. If your business does not already have an ecommerce site, take these steps to go direct-to-consumer (D2C).

### Communicate with channel partners.

Before launching your D2C channels, communicate with your existing distribution partners early in the process. This can actually open the door to new ways of working together, from reimagining channel management strategies to creating new partnerships.

### Create your D2C strategy.

Use your existing B2B strategy to inform your [D2C approach](#). Establish a market development fund. Create a special product line on your site with exclusive access for partners. Provide exclusive discounts to items with the suggested retail price (SRP). Use content to serve partners, such as a store finder and detailed product information that can help consumers shopping in stores.

### Differentiate your experience.

Consider your D2C channel as your brand hub. Fill it with detailed product descriptions, how-to content, and even trending social photos. Create a regular cadence of high-quality content across channels as well, including social, email, and SMS. Personalize the experience with AI to surface relevant products and content.

### Update operations for D2C sales.

Outsource parts of the supply chain to handle individual shipments and consumer inquiries. Or, work with third-party fulfillment partners to update existing infrastructure and operations to handle individual orders. Leverage relationships with shipping carriers to get discounts on last-mile delivery costs.



One of the best things you can do when you go D2C is to go deep on your brand. Focus on all of the education and information shoppers need to make their purchase decisions.



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## Find New Customers

# Connect B2B commerce and sales.

Stay-at-home orders propelled B2B companies to consider digital channels in lieu of face-to-face interactions. If sales reps cannot meet with customers in-person, help them find what they need online with B2B commerce capabilities.

### Provide a personalized experience.

Use [B2B commerce](#) to make it easy for customers to buy online with a personalized, authenticated site. Within the site, buyers can see custom product sets, price lists, and predictive recommendations.

### Make recurring orders seamless.

Only 15% of B2B buyers want to [speak to a salesperson](#) when repurchasing the same product or service. With a partner portal, buyers complete an order in just a few clicks. Flexible payment and shipping options enable customers to decide when, where, and how they receive their orders, including shipping different quantities to different locations or on different dates.

### Drive collaboration.

With a shared view, companies and partners collaborate with insights that shape joint business plans. For example, a consumer goods company can provide promotional marketing materials and directions to local partners. If buyers have questions, they can access chatbots or knowledge articles within their personalized portal. For more complex issues, they can still connect with a service agent.





## Find New Customers

# Optimize advertising throughout the customer lifecycle.

Commerce insights power customer-centric, omni-channel strategies that drive acquisition and conversion. Make the most out of advertising based on past purchases, preferences, and behaviors.

### Acquire new audiences.

Drive personalized advertising at scale based on previous browsing and purchasing data, and create lookalike audiences on Facebook and Google. These audiences are based on criteria from your best customers, such as frequency of purchase, longest-term relationship, or highest dollars spent.

### Engage existing customers.

Nurture existing customers with targeted ads that drive conversion and reengage them if they haven't purchased in awhile. Tailor messaging to ensure ads are relevant with respect to past purchases, and upsell and cross-sell when appropriate.

### Optimize ad spend.

Improve both your return on advertising spend (ROAS) and the customer experience by delivering ads only when they're relevant. Suppress ads to audiences who have already purchased, have open service cases, or are irrelevant for a given campaign.



# Boost engagement by going beyond transactions.

A great customer experience is more than a smooth purchase. Customers also engage with companies on site to find deeper product information or specs, get validation about a product from a community of die-hard fans, or sign up for rewards or loyalty points. Each of these touchpoints keeps customers engaged and drives additional sales.

### Deliver engaging experiences.

When you create digital opportunities to engage beyond the transaction, you position your business as a go-to destination for customers. The key is building a rich digital experience that's relevant to your products. For example, a grocer would build engagement opportunities around food, like a blog with recipes or a community of avid home-cooks sharing ideas.

Here are a few ways you can engage customers:

- **Personalized content:** Create a blog and then use CRM data to connect customers to related content that interests them
- **Loyalty programs:** Give customers an incentive to shop with you and encourage them to share their passion for your products with friends.
- **Community forums:** Let your customers connect with each other, share the products they love, and generate buzz
- **VIP extras:** Offer (or charge for access to) extras like exclusive online events, content, or personalized delivery options
- **Post-purchase pluses:** Make it easy to schedule delivery, get personalized product training, access deeper product-specific manuals or information, or register a warranty

### Put it all together into a portal.

That sounds daunting – if you have to build it from scratch. You're a commerce company, not a media site, right? Consider a portal with [out-of-box components](#) and low-code and no-code ways to stand up multiple new digital experiences fast.



# Enhance communication with collaborative commerce.

In our private lives, open communication is a sign of a healthy relationship. The same should be true at work, especially when it comes to customer interactions, connecting with partners and stakeholders, and rolling out products and promotions. Enter collaborative commerce: the idea that businesses can leverage new technology and platforms to become more efficient and improve collaboration. For example, an agile communication tool like Slack makes collaboration easier and helps you proactively meet customer needs.

### Bring your cross-functional team into the same channel.

Your commerce team works across the business to ensure that product launches, promotions, and site changes all run smoothly. Bringing that collaboration online allows teams to plan, pivot, and execute faster. Say goodbye to disjointed email threads and searching through multiple platforms to find the information you need. The same is true for international projects – Slack offers a quick, efficient way for a region or global team to disseminate information. The ease of collaboration could help you shorten innovation cycles and grow sales faster.

### Personalize customer interactions quickly and at scale.

With collaborative commerce, businesses can share recommendations, answer questions, or respond to requests for quotes in real time with AI. This will enable you to differentiate your brand by making customer interactions more personal. In a crowded, noisy market, personalized communication is one of the best ways to make your brand stand out.

### Get updates and make data-driven decisions fast.

When you're managing a commerce site, effectively harnessing data can be the difference between empty carts and large orders.

With collaborative commerce, business notifications are pushed to you automatically – you don't have to seek them out. For example, Slack can pull together insights from [Salesforce Commerce Cloud](#) and all of your other systems (such as ERP, CMS, payments, and analytics). Now, your team can optimize conversion and improve bounce rates, fast – even during high-traffic periods.



# Grow your business market by market.

International expansion is a key growth driver. In fact, global ecommerce sales is forecast to grow by 50 percent over the next four years, reaching about \$7.4 trillion by 2025.\* To implement a successful global strategy, start small and understand exactly how, where, and why you want to expand.

### Determine the markets primed for growth.

- **Set targets:** Look deep into country targets for population size, technology stability and penetration (particularly mobile and logistics infrastructure), and geopolitical considerations
- **Consider current brand awareness:** If your brand is relatively unknown, factor in the cost, time, and effort to build it up
- **Prioritize targets:** Search for consumers abroad who already know your brand. Dig into web tracking data, uncovering the countries where people browse your site

### Start small and fill in the gaps.

Once you've identified your target markets, select a small number of strategic, high-potential growth countries. Fill in remaining markets with a verified third-party international fulfillment service.

### Create local instances quickly and easily.

A commerce solution with multisite functionality can help you easily create and manage local site instances. You'll also be able to deploy localized marketing and initiate global content strategies. A bonus: Shortened development time gives more opportunity for testing.

### Localize by market.

Poor translation is the number one hindrance to conversion on foreign sites. Ensure proper translation – even when it's your own language. A “sweater” in the U.S. is a “jumper” in the U.K. Account for differences in address format and checkout and payment preferences as well.

Some countries may start end-of-season sales earlier. Adjust existing campaigns to each local market, and consider creating separate product photography featuring local models or up-close product shots for an extra layer of authenticity.

### Leverage existing partners.

Look within your ecosystem to determine if existing partners have international subsidiaries, such as a payment gateway in Europe that also supports payments in Latin America. Ensure partners meet local requirements, too – like a CMS that accounts for special language characters for German and Chinese customers.



\* *Ecommerce sales worldwide from 2014 to 2025*, Statista 2021.

## Drive Customer Engagement

# Drive higher cart size and conversion with personalized emails.

Access to commerce data enables marketers to use customer insights and behaviors in their email strategies. This in turn makes it possible to stand out in every inbox with personalized, attention-grabbing emails.

### Track behavioral data.

Capture brand affinity and build customer profiles based on product views, carts, and purchases. Allow 30 days for data tracking to build effectively personalized profiles. Then add product identifiers through daily catalog updates.

### Embed AI.

Turn on AI to learn from every click, tap, view, search, and purchase for the most relevant email campaigns.

- Create a welcome email series with top-selling products tailored to the customer based on similar user profiles
- Suggest complementary products based on what's left behind in a customer's abandoned cart
- Deploy post-purchase emails with relevant new products – repeat buyers often make their second purchase soon after their first

### Track results.

Run reports on click-through rates, conversion rates, and generated revenue – as well as your recommendation performance – to evolve your email strategy.





## Drive Customer Engagement

# Target customers with coupon redemptions.

Coupon redemptions are integral to driving sales and awareness, but they also unlock hidden customer insights. Tailor coupon incentives based on behavior and continuously evolve your segmentation strategy with commerce data.

### Set up your coupon campaign.

Define a single code, upload a series of them, or generate a random series using your commerce solution. Once generated and assigned, push codes to your email marketing campaign.

### Analyze data for your next campaign.

Your coupon redemption data provides crucial insights for future campaigns. Extract location and purchase history and add these customers to your upcoming campaign for personalized, targeted offers that drive gross merchandise volume and improved margins.

### Refine your segmentation strategy.

Revise and create personalized customer segments with customer data. If, for example, there are geolocation trends in a customer's purchase behavior, you can incorporate that into a geotargeted campaign with a target price point and product showcase.





## Drive Customer Engagement

# Automate transactional emails.

Customers prioritize transactional emails – receipts, confirmations, and account or password resets. Take advantage of this attention with a cohesive, personalized experience that drives engagement and incremental revenue.

### **Prioritize information with best practices in mind.**

Deliver an easily digestible email that tells customers exactly what they need to know in plain language. Start with the most important information at the top so customers don't have to work to find what they need. Complement text with a minimalist design featuring sections, headings, and bullet points.

### **Include product recommendations secondarily.**

Use product recommendations as helpful, secondary information to what the customer is requesting, including relevant items or content that would benefit them. But personalize these emails sparingly: Receipts and account confirmations are a good start.

### **Send emails from the same platform.**

Different messaging platforms for promotional and transactional emails often result in disjointed messages. Send emails from the same platform to easily map out and follow the entire customer journey, get full reporting metrics, and identify customer patterns. For example, you can learn if engagement with promotional emails peaks just before transactional emails are sent.



## Turn Engagement Into Conversions

# Enable cross-channel conversational commerce.

Customers use an average of 10 channels to engage with brands, and [conversational commerce](#) lets customers converse and transact in the digital channels they use every day. Implement this across channels through messaging apps (like Facebook Messenger) for immediate, always-on support.

### Offer more personalized assistance across channels.

Guide customers to purchase, answer questions, provide product recommendations, and help place an order. Agents can provide concierge-level support, accessing information such as recent orders and preferences to engage, cross-sell, or upsell additional items from within various messaging channels.

### Mix chatbots, automated messaging, and live support.

Bots scale support to answer simple questions like “What is my order status?” and “How do I reset my password?” When bots can’t address a specific question, they can escalate the case to a live agent by collecting and qualifying shopper information to reduce handle time. Customers never have to give their information more than once and the case is resolved in the same chat.



Turn Engagement Into Conversions

## Drive B2B commerce sales with seamless marketing.

Keep the lines of communication open with B2B customers and ensure they know about relevant offers and promotions.

### Create targeted nurture campaigns.

Develop and deploy nurture campaigns with targeted upsell and cross-sell emails that increase recurring revenue while driving loyalty and repeat purchases. Continue the purchase cadence with order reminder notifications when it's time to restock or replenish products.

### Alert sales teams to buyer activity.

Give sales reps real-time alerts on recent activity across your commerce site to ensure they are armed with the most recent information to provide a personalized experience.

### Send order reminder notifications.

Your customers are often making repeat orders at the same time every month with the same needs. Send timely reminders for them and enable quick reordering to simplify their experience and drive ongoing loyalty.



# Give customers a great payment experience.

When the ecommerce payment process takes too long or gets too confusing, customers abandon their carts and go elsewhere to shop. It can be a challenge to stay current as consumers gain new ways to pay. But with the right technology, brands can respond flexibly to changing consumer needs and expectations. These tips will help your brand keep up.

### Think of ecommerce and payments as one journey.

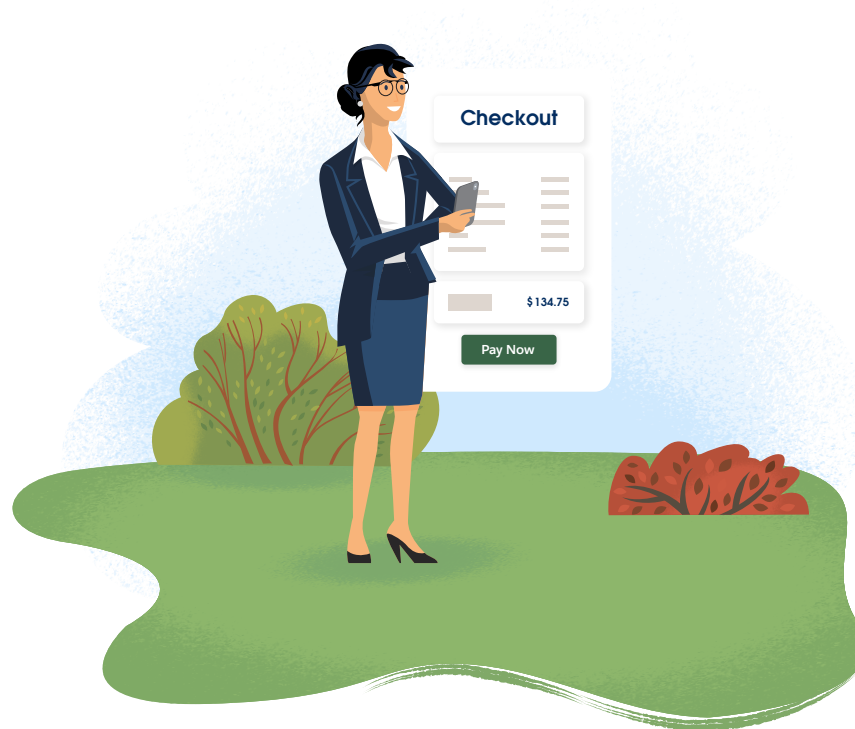
While payment is often the last step in the customer journey, brands need to think about how it affects the whole process. Depending on your brand's offerings, you might consider integrating things like mobile wallets or buy now, pay later (BNPL) options into the customer journey. Business users also need to have important metrics across commerce and payments, and generate reports and dashboards around them easily. For example, if abandoned cart metrics suddenly increase in a specific part of the world, commerce teams can investigate what's going wrong during the checkout process and determine the right path forward.

### Adapt quickly to new ecommerce payment preferences.

Customers' payment preferences evolve. Companies need to be agile and embrace digital solutions that help them stay current as new technologies emerge. Make sure your commerce platform makes it easy to provide new payment types. As new payment options gain popularity, they need to integrate with the platform and quickly become operational.

### Fight fraud.

As commerce goes increasingly digital, bad actors follow the money. Strong fraud detection that can accurately target malicious activity without hampering legitimate purchases is essential. Machine learning goes a long way toward preventing fraud. Once new scams are detected, similar attempts are also flagged. The right payment solutions mine data to constantly improve their fraud detection and prevention.





## Turn Engagement Into Conversions

# Win back abandoned carts.

When a customer adds items to their cart but navigates away from your site, abandoned cart journeys recapture attention and encourage purchase. Implement a cross-channel journey to increase the likelihood of conversion and minimize lost sales.

### Create a multi-touch cadence.

Start small with an email and follow up with a push message if there's no response. Try a social ad if still unresponsive.

### Compare online and in-store data.

If you have brick-and-mortar locations, customers may complete their purchase in-store. Reconcile in-store data with online data frequently to remove customers from an abandoned cart journey.

### Personalize the experience.

Personalize your subject line and preheader with the recipient's first name and include the specific items left in their cart in the body of the email. Drive incremental engagement and revenue with recommended products based on what's in their cart and seasonal offers (for example, free shipping) as well.

### Test content and the time emails are sent.

While it's tempting to deploy the email immediately, test the initial send time, as well as the time between touchpoints, to find the sweet spot for customers. You can also test which content to include, such as price or ratings and reviews. Consider adding interactive elements like GIFs or carousels as well to keep content fresh.



# Improve your order and fulfillment process.

Customers want to stay in the driver's seat even after they hit the buy button. Ensure the post-purchase process is seamless and keeps customers informed every step of the way.

## **Provide flexibility.**

Give customers the ability to check their order status, cancel an order, choose a preferred shipping and payment method, and initiate self-service returns. Provide options that align with every customer's lifestyle and display them clearly on the product and checkout pages.

## **Power workflows with an order management (OM) system.**

OM has historically been associated with what happens after the buy button to process orders. Next-generation OM, however, powers easy extensibility, modern microservices, and custom visual workflows,

integrating all customer-facing systems that impact the post-purchase experience. Supply chain workflows help service teams manage order fulfillment, payment capture, invoice creation, and real-time inventory. Service reps can even place orders on behalf of customers.

## **Make self-service easy.**

Keep customers in the loop with order status and notifications through SMS and email. If they need to change shipping details, they should be able to easily connect to a chatbot to find out how.

## **Keep live agents on standby.**

If a service request requires escalation to a live agent, chatbots collect necessary customer information and serve it to the rep. This allows agents to provide personalized service and get to a resolution quickly.





# Bridge physical and digital experiences.

What happens after the “buy button” makes or breaks the customer experience, now more than ever as customers seek convenient options for delivery and pickup. Bridge the divide between physical and digital experiences to get products to customers on their terms.

### Implement customer-first order management.

Order management is the connective tissue between commerce and service. Built on top of a unified commerce platform, [customer-first order management](#) aggregates customer and product data for a 360-degree view that streamlines the post-purchase process. Here's how it works:

- Use APIs to connect operations (such as ERPs, CRM, and POS) to expose order, return, and inventory data
- Integrate with third-party vendors, such as tax, shipping, warehouse management, and payment
- Seamlessly connect commerce and service instances so agents can assist customers with order status, store or pickup options, changing or cancelling an order, or exchanging an item

### Connect physical and digital experiences.

Keep inventory in your physical locations for local customers and offer safe, easy and convenient pickup options, such as curbside pickup or [buy online, pick up in-store \(BOPIS\)](#). Brands that offered BOPIS grew digital revenue by 27% in Q1 2020.\*

Follow these best practices for a seamless purchase and pickup experience:

- Clearly explain how your program works on the checkout page
- Send updates to customers and an alert once the order is ready for pickup. Include instructions with the type of identification needed, store details, directions, and a support number
- Have an associate on standby to fulfill online orders quickly
- Set a dedicated area for pickup of online orders with clear signage

### Empower customers across channels.

Post-purchase service doesn't have to be disconnected or disappointing. Give customers the ability to check order status, get updates on their preferred channels, and modify or cancel orders. Chatbots and AI automate self-service processes or connect with a live agent directly to assist customers.



\* Q1 Salesforce Shopping Index, 2020.

# Empower your agents to order on behalf of customers.

“Where is my order?” used to be the top reason customers made contact, but with self-service, bots, and digital capabilities, agents can focus on high-touch customer calls. Drive revenue by empowering agents with the ability to place orders, add coupons, or even suggest additional items to upsell and cross-sell on behalf of customers.

### Connect commerce with service.

Eliminate the “swivel chair” by integrating commerce data into your service console. When a customer reaches out, an agent provides a seamless and personalized experience with customer information, order history, and other applicable order details all on one screen.

### Add an “order on behalf of” capability.

When a customer is purchasing a technical or costly product, they may reach out for direct support. Agents can resolve any issues through a single view of customer information and initiate an order by launching a dedicated storefront. Agents add items to the cart, complete the transaction for the customer, and close the case – or they can turn the cart back to the customer to complete their own purchase.

### Use AI for relevant upsell and cross-sell opportunities.

From one console, agents can suggest additional items relevant to the customer, resulting in more complete orders and higher gross merchandise volume.



# Start your transformation.

Now that you've seen all of the ways you can achieve transformational growth, prioritize where your commerce team can start. Find out more about the technology that powers these seamless, personalized experiences that drive growth.



Looking for more commerce insights to drive growth? [Get tips](#), guides, and how-tos curated just for you.

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