

The image features three gold foil balloons arranged horizontally to spell out the word 'RAY'. The balloons are set against a background that is split diagonally from the bottom-left to the top-right, with a teal color on the left and a light grey color on the right. The text 'The Ultimate Guide to Meaningful Customer Engagement' is overlaid in white, bold, sans-serif font across the center of the balloons.

# The Ultimate Guide to Meaningful Customer Engagement

## Welcome to the world of engagement!

Every interaction with a customer counts and will directly impact your company's bottom line and market share.

In this era, knowing how to meet customer expectations wherever they are means not only a competitive advantage, but survival.

So where does this leave your company?

Click here to listen to the Audiobook!

Why should I be reading this guide?

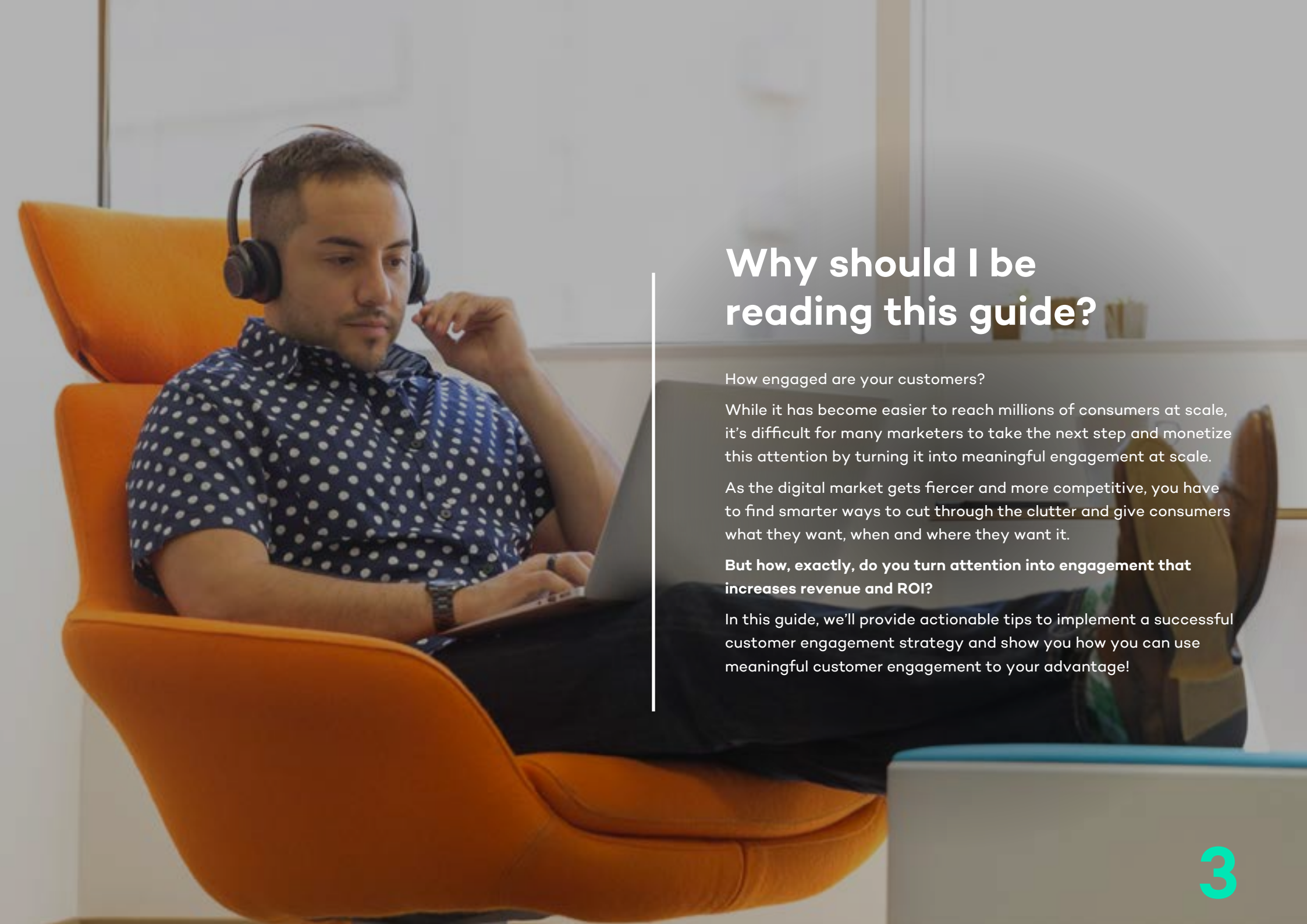
Part 1 The state of customer engagement

Part 2 How you can bridge the engagement gap

Part 3 Game plan: 9 step program

Part 4 Assess yourself

Key areas to focus on



## Why should I be reading this guide?

How engaged are your customers?

While it has become easier to reach millions of consumers at scale, it's difficult for many marketers to take the next step and monetize this attention by turning it into meaningful engagement at scale.

As the digital market gets fiercer and more competitive, you have to find smarter ways to cut through the clutter and give consumers what they want, when and where they want it.

**But how, exactly, do you turn attention into engagement that increases revenue and ROI?**

In this guide, we'll provide actionable tips to implement a successful customer engagement strategy and show you how you can use meaningful customer engagement to your advantage!

“Customer engagement” has become the term du jour heard in executive meetings, agency pitches and marketing presentations around the world. Depending on who you talk to, CEO, CTO, CMO, or CIO, you may get different definitions.

## customer engagement

*noun*

the degree of intensity of the interaction and emotional connection between your company and your customer, sentiments which strongly influence their buying decisions.

Consumers are given multiple opportunities to interact with a variety brands each day – it’s the way they choose to interact that engagement is concerned with.

Whenever somebody visits your company website, looks at your social media posts, or walks into your store, they choose to engage with your brand. The importance of choice is what makes customer engagement a fascinating and challenging issue for marketers.

It’s no surprise that, according to eMarketer, engagement is now the top business objective for 59% of North American marketing professionals - beating other objectives like increasing conversions or growing revenue.

# Part 1

## The State of Customer Engagement

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- The value of meaningful customer engagement
- When do people want to engage with your company?
- Reality check: Why you shouldn't look the other way

# The value of meaningful customer engagement

Technology has made consumers feel entitled. They now expect nothing less than personal and meaningful engagement. They seek and favor brands that are able to connect and forge personal relationships with them.

In fact, 84% of consumers say being treated like a person, not a number, is very important to winning their business.

79%

only consider brands that show they understand and care about 'me'.  
(Wunderman)

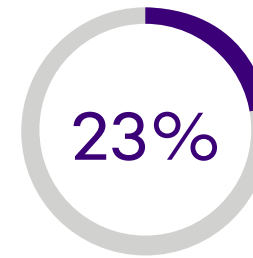
70%

of buying experiences are based on how customers feel they're being understood.  
(McKinsey)

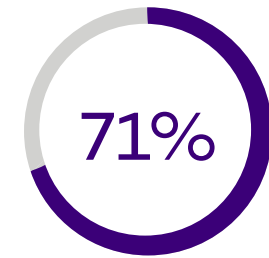
79%

of customers expect their interactions with brands to be personalized.  
(Marketo)

Studies show that customers choose companies that provide better search experiences and customer engagement. A well-executed customer engagement strategy can have a major impact on customer loyalty and promote your brand's growth.



premium in terms of share of wallet, profitability, revenue, and relationship growth



recommendation and referral rate



more likely to experience a churn rate of less than 10%

# Reality check

So yes, customer engagement is vital. Committing to customer engagement is less of a choice than you think.

Dismal customer engagement can cost you a lot of money and your business reputation.

Typically when brands fail to engage well, customer satisfaction decreases and customers go elsewhere.

Bad customer engagement



- Revenue
- Brand loyalty
- Purchase
- Referrals
- Cross-sell
- Retention

Being dedicated to customer engagement doesn't just matter in the race to grow and acquire new business. As a matter of fact, engaged customers are the gift that keep on giving.

They are less sensitive to price, more likely to make repeat purchases, more willing to give you valuable feedback, and inclined to recruit more advocates.

**The customer-centric focus isn't going anywhere, which is why meaningful, digital engagement is critical for building relationships and ensuring profitability in the years to come.**

# When do people want to engage with your company?

Consumers typically seek to engage with brands during the following three stages of the customer journey:

## Exploration

**64%**

**of consumers engage with a company to learn about its products and services.**

To avoid losing prospects in this stage, you need to listen to what every individual wants and needs and then engage with them to provide an individualized experience

## Purchase

**74%**

**of consumers engage with brands in order to purchase.**

Delivering highly-relevant, assistive and informative search experiences will not only increase a consumer's purchase confidence but also help you re-engage them when they are ready to buy.

## Support

**51%**

**of consumers seek to engage with companies for support after the purchase.**

This may include reporting a problem or asking for guidance.

Providing meaningful engagement in this stage is no less important than during exploration or purchase. It will significantly affect loyalty and advocacy, and enable you to develop and maintain long lasting relationships with customers.



The question is, how should you engage with consumers in ways that will be most meaningful and create the most value for the customer and your business?



# Part 2

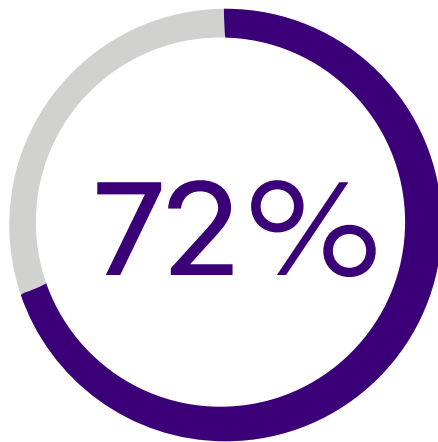
## Bridging the Engagement Gap

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- What do consumers expect when they engage with your company?
- The 5 rules of customer engagement

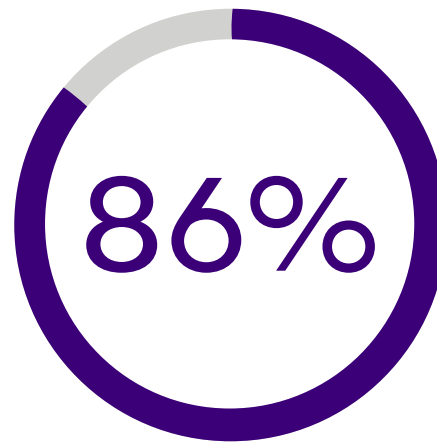
# What do consumers expect when they engage with your company?

A deeper understanding of consumers and their expectations is vital in order to deliver meaningful, engaging search experiences. Zoovu recently conducted research on what consumers want from brands they engage with. The consumer study, titled [Humanizing Digital 2020](#), revealed 3 key consumer expectations.



## Trust

of online shoppers in the US, UK and Germany said that being able to trust their favorite retailer or brand is their highest-ranking concern.



## Assistance and support

of consumers said it was important for brands to provide expert advice and personalized recommendations about their products and services.



## Frictionless experiences

More than half of US shoppers have abandoned a purchase because it was too difficult to find or decide on a product.

# The 5 rules of customer engagement

Success in engagement is all about making customer interactions across channels more personal and more human.

Let's look at the five key elements to masterful customer engagement.



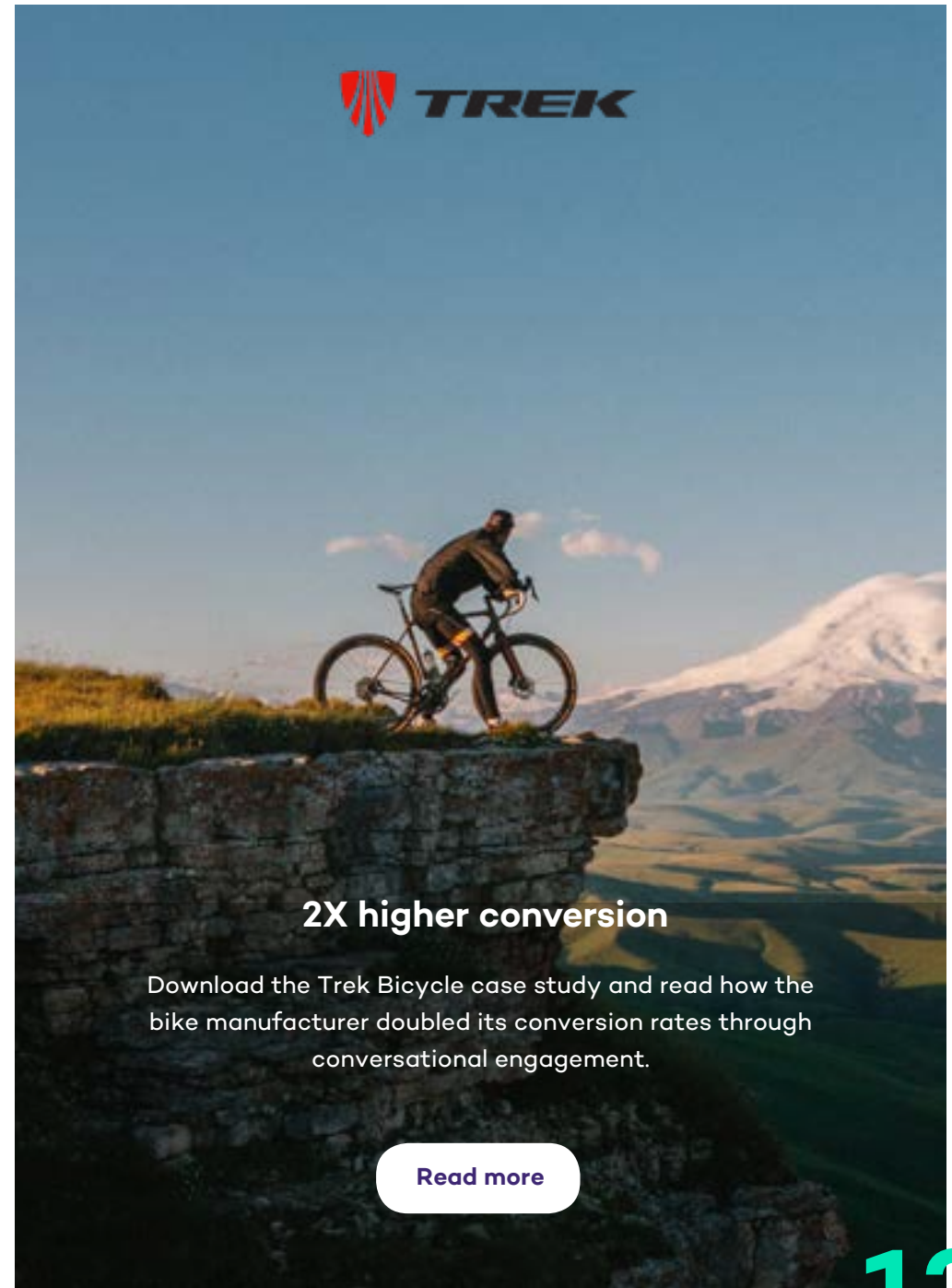
# 1. Be human, authentic and conversational

## Listen and ask the right questions

While methods of communication are constantly changing, humans are not –they still have a need to be treated like an individual.

Conversations are at the heart of successful engagement strategies. Instead of displaying static, impersonal product listings and expecting consumers to find their way around, be proactive and offer them a helping hand by engaging them in a 1:1 conversation.

- Enable conversational, human-friendly engagement search experiences on your digital channels
- Be ready to ask questions –ones that show the customer that you see them as individual and are interested in helping them get the best possible product for their needs
- By dropping the jargon and speaking to customers in a clear way, you can come off as an authority in your field while remaining relatable
- Provide individual decision support to help consumers find what they want

The image shows a cyclist in silhouette riding a mountain bike on the edge of a stone cliff. The background features a vast landscape with rolling hills and a large, snow-capped mountain under a clear blue sky. The Trek logo is positioned in the top right corner of the image area.

**TREK**

**2X higher conversion**

Download the Trek Bicycle case study and read how the bike manufacturer doubled its conversion rates through conversational engagement.

[Read more](#)

## 2. Be understanding and always learning

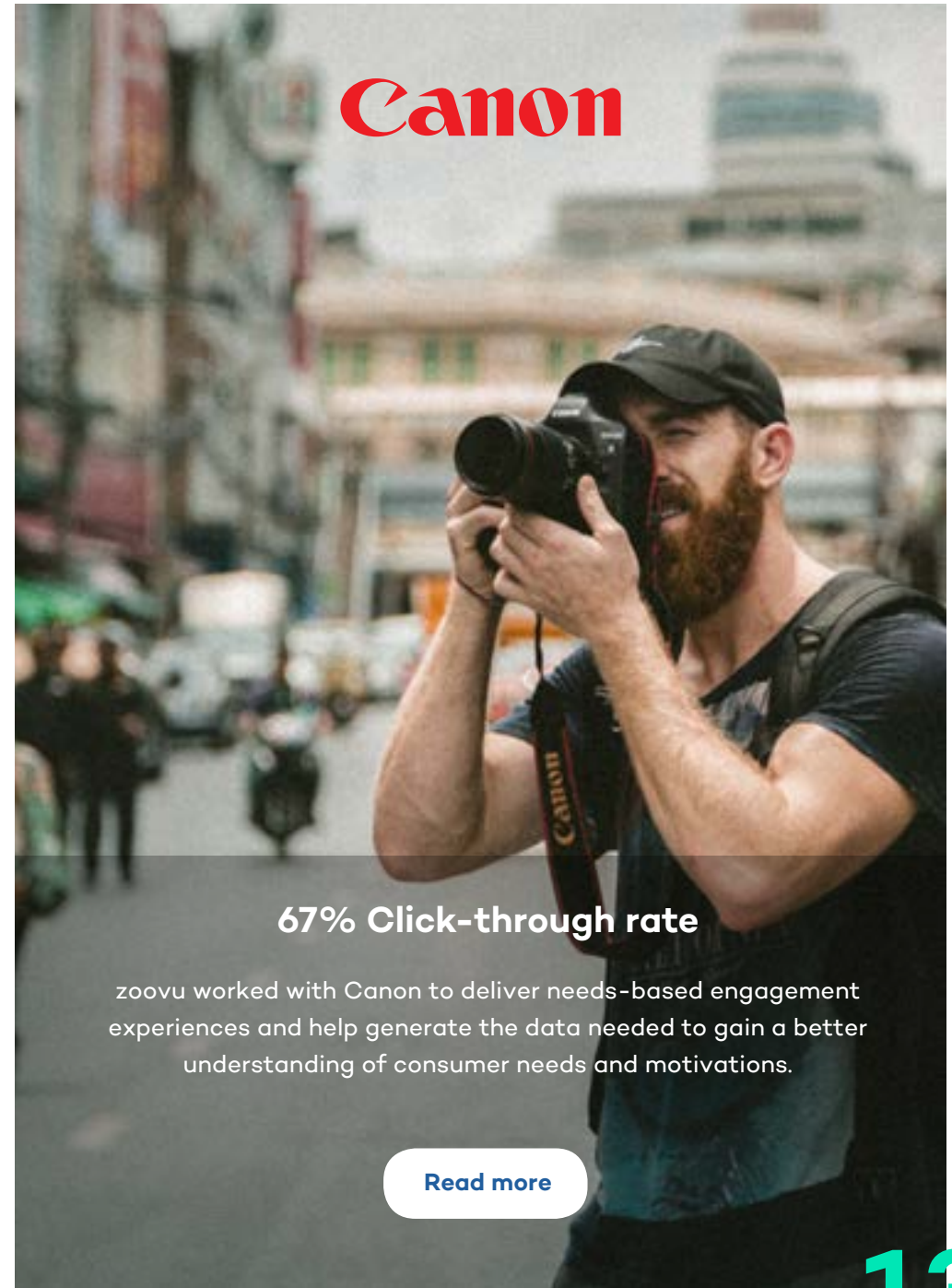
### Analytics is your customer's voice

In the digital space, everyone who visits your online platforms generates thousands if not millions of data points that can provide clarity into customer intent and preferences.

By combining demographic data (who), behavioral data (what) and explicit data (why) you will be able to gain a fuller picture of your customers.

This is why brands are evolving beyond basic demographic information and sales history towards a far more detailed customer understanding. Doing so enables you to make every customer engagement experience meaningful, personal, and enjoyable.

- Ensure that you capture and store data that helps you understand your customers' wider needs
- Ask questions to learn more about their lifestyle and what they like, and use the knowledge to create relevant and engaging messaging
- Analyze the data to identify customer segments and build personas that focus on motivations as one key dimension



**Canon**

**67% Click-through rate**

zoovu worked with Canon to deliver needs-based engagement experiences and help generate the data needed to gain a better understanding of consumer needs and motivations.

[Read more](#)

Once you understand customer motives, you can more easily answer the questions that are necessary to build effective engagement around them:

- Who are my customers?  
(customer segments)
- What are they interested in?  
(motivations, customer needs profiles)
- How and when should we engage them?  
(offer, product, message, content, script)
- Where should we engage?  
(media and channel)



### 3. Be relevant and personal

#### Solve the 'I want' moment

In the 'I want' moment, consumers will start the process of discovery, looking for immediate, personalized information that is relevant to them and helps guide their journey. It's the most critical moment if you want to play a role in a customer's purchase decision journey.

Failing to engage when they need support and assistance can quickly terminate their journey with you or, worse, lead them to an alluring detour to competitors.

- Meet consumers in their moments of need with useful and relevant information that inspires, delights and even surprises them
- Aim to be your customer's trusted advisor and go-to source who guides them on their journey
- Engage with your customers on their level without coming off as patronizing or insincere
- Involve customers in a relationship which seems both personal and genuine



**KitchenAid**

**25% increase in click-to-buy conversions**

Whirlpool's KitchenAid offers a digital assistant for stand mixers. With straightforward questions that are phrased in a way that shoppers can immediately relate to, the assistant understands what excites them and matches them up with the perfect appliance.

[Read more](#)

## 4. Be easy-going

### Let customers be their own heroes

Many consumers prefer not to directly deal with members of your company. Don't force them to.

In fact, a study by Forrester revealed that 72% of customers preferred self-service to picking up the phone.

Self-service and a simplified experience need to become a big part of your engagement strategy if you want to effectively cater to customer expectations.

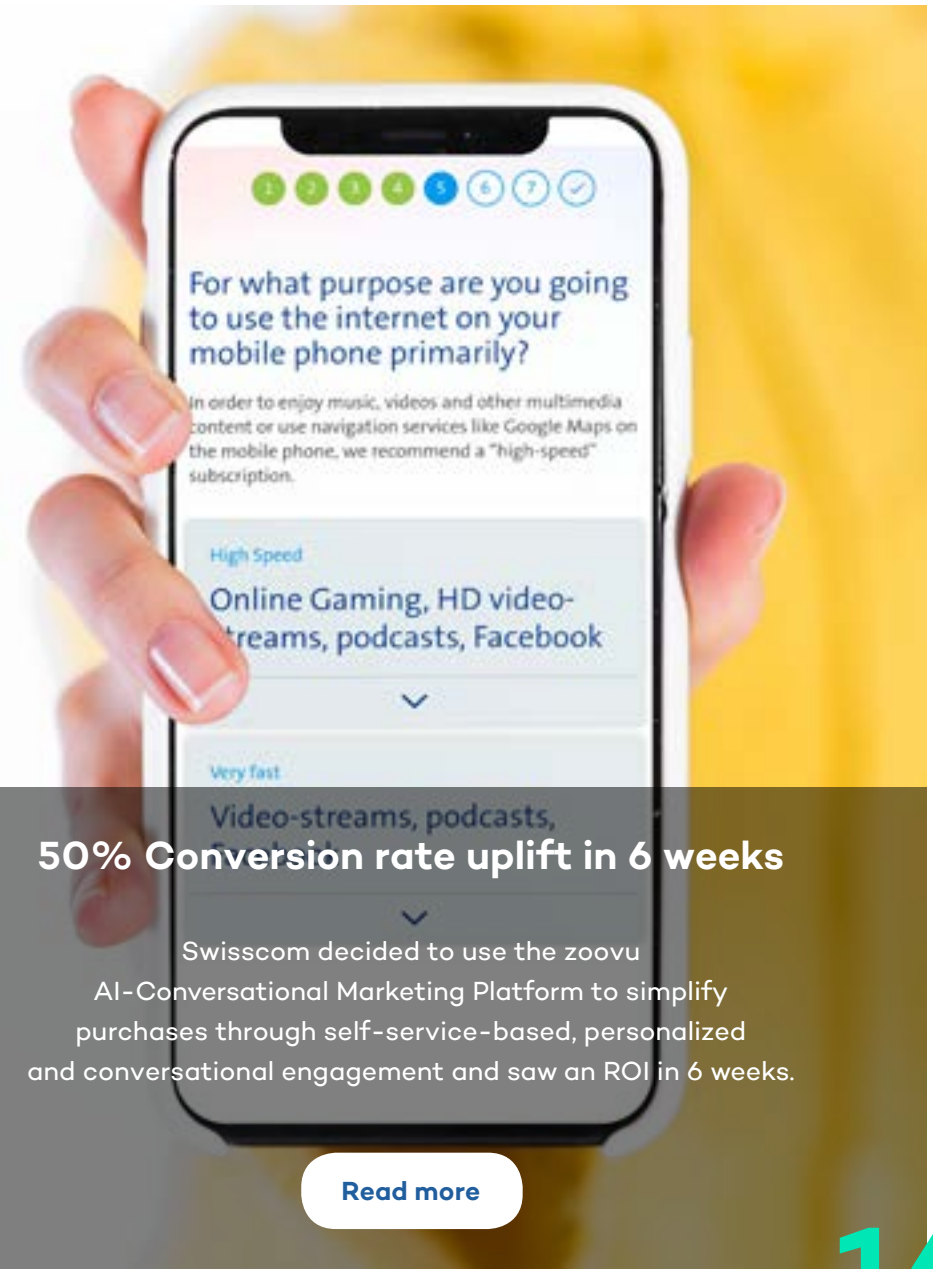
Customers feel good when given a chance to be their own hero and shape their own journey. In this age of independence, self-reliance and entrepreneurialism, self-service is a game-changing disruptor.

- **Make self-service an effortless time-saver:**

Great self-service connects the customer with the product or answer they need fast with a minimal number of clicks and steps required.

- **Make self-service an option, but not the only option:**

A good self-service strategy should enhance and not replace assisted service. There are situations when customers will want to speak to someone who can assist them, answer their questions or walk them through a process.



**50% Conversion rate uplift in 6 weeks**

Swisscom decided to use the zoovu AI-Conversational Marketing Platform to simplify purchases through self-service-based, personalized and conversational engagement and saw an ROI in 6 weeks.

[Read more](#)



# 5. Be bold

## Leverage technology to scale digital engagement

With speed, convenience and the “human touch” being the cornerstones of modern commerce, you need to keep innovating.

55% of younger respondents wanted to explore new ways to interact, like chatbots and virtual assistants.

Fueled by the increasing amount of engagement channels and personal data, plus changing customer expectations, artificial intelligence (AI) and machine learning are becoming more important. They allow you to scale engagement with billions of people and devices every day without increasing cost.

### Solutions that leverage AI and machine learning help you

- deliver the right interactions at the right moment and in the right way
- engage customers based on a deep and accurate understanding of their interests and wants
- predict the best-performing content or product recommendation for each audience to drive engagement, conversions and sales
- serve up audience insights, so you can better understand who your customers are, what they expect and measure the business impact
- make the optimization of engagement experiences more economical

# Part 3

## Game Plan

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- 9 tips to implement a sound customer engagement strategy

We've laid out 9 tips to help you develop a customer engagement strategy which satisfies your customers' expectations.



## Tip 1

### Task your leadership with centering the organization on the customer and their needs

A great engagement strategy starts at the top. Your leadership team needs to create a vision for the entire company. The CEO is responsible for making customer-centric values a priority for the organization and senior managers must equip their teams to reinforce these values.

Customer engagement is also no longer solely the concern marketing teams -it's a holistic, company-wide endeavor that needs to be taken seriously.

**88%** of companies that are engagement leaders have created a position responsible for customer engagement in the last 12 months

## Tip 2

### Define KPI's and metrics to measure your customer engagement success

Customer engagement is the emotional connection a customer has with a brand. But, how do you measure customer engagement? Better yet, how do you measure engagement in a way that connects to revenue and demonstrates commercial and customer value?

To get an understanding of how well you're engaging customers (engagement metrics) and how this translates into business success (effectiveness metrics), you should ensure that you're able to track these key metrics.

# Engagement metrics

Metric	Purpose
Session length	The amount of time consumers spend on your site. In general, longer session durations signify engaging content and information. There's a caveat: a longer time spent on your hours page could simply reflect a distracted user. Make sure to check not only session durations, but also where that time is being spent.
Session frequency	Shows how often visitors are returning. It's an indicator of how valuable and sticky your brand engagement and experience are.
New vs. Returning Customers	If shoppers are returning to your site, it's a good sign that they are getting closer to a purchase, and that your site is valuable. If the number of returning visitors is low, consider refining retargeting efforts and ensure that returning customers see new value at each visit.
Guest checkout rates	If you're selling products or services directly from your website, what proportion of your sales are made through a 'guest' account? A high guest checkout rate suggests that users don't feel any urge to join your community or engage with you in the long run.

PART 1

PART 2

PART 3

PART 4

## Effectiveness metrics

Metric	Purpose
Customer retention	One of the most important metrics to pay attention to – simply put, whether customers feel any loyalty to your brand. If you're continually improving customer engagement, you should see a gradual but significant decrease in churn and increase in retention.
Customer lifetime value	The average amount a customer spends during their relationship with your brand. Engaged customers are more loyal customers and drive repeat business and thus, a higher customer lifetime value (CLV).
Conversion rate	The percentage of people who arrive on your site who go on to become paying customers. It shows you how well you are matching visitors with ideal products.
Average order value	Your average order value (AOV) represents the average amount that each customer spends with you. An engaged customer understands your product benefits. Not only will they shop with you more often, they are also willing to pay a higher price point or purchase more items when they shop with you.
Purchase frequency	A higher purchase frequency is both a result of the increased loyalty customers will feel towards your brand, and of you engaging the customer with relevant, timely offers, leading to more frequent sales.
Net promoter score	A way to measure how likely a customer is to recommend your service to someone else. A 2017 report by Temkin group found that customers who give you a 9 or 10 rating are four times more likely to re-purchase and seven times more likely to try new offerings from your company.

PART 1

PART 2

PART 3

PART 4

## Tip 3

# Put your customer at the heart and center of everything you do

Consumers today love brands that treat them as individuals and value their time and business. Your content and messages need to be relevant. Your responses need to be instant. And you need to make the right offers at the right time.

Prioritize understanding your different audience segments and build engagement strategies around their preferences.

Are your processes designed with the customer in mind, or the product?

To create a consistent engagement experience, start with the customer and work backwards.

Answering these questions will help you identify any weaknesses in your customer engagement practices:

- What common problems cause delays?
- What are possible points of friction?
- What do customers struggle with most?
- What stops customers from making purchase decisions?
- How are you tackling choice overload and choice complexity?
- How can customer receive immediate support and assistance in real-time when needed?

## Tip 4

### Leverage technology to preserve a human touch

While consumers enjoy convenient shopping experiences and a greater choice of products evidence suggests they feel detached from genuine relationships.

Find a middle ground between offering convenience through digital technologies while preserving a human touch.

There are countless ways to humanize digital engagement – from using friendly, conversational copy in emails to harnessing AI-driven conversational chatbots and digital assistants.

**64%** of US consumers feel companies have lost touch with the human element of customer experience

(PwC, 2018)

## Tip 5

### Get creative with data-driven personalization

Most brands know by now that personalization is important – the challenge is enabling authentic and relevant engagement.

Gather data that helps you understand your customer's wider needs, and harness technology to create relevant search experiences around that.

Companies that can creatively act on insights will be the front-runners in customer engagement in the coming years.

**54%** of Gen Y respondents were interested in a service that detects how they're feeling and sends them surprise offers based on mood.



## Tip 6

### Bring the entire workforce on board

Disengaged employees create disengaged customers. To deliver the best possible customer engagement, every employee needs to be aware of the part they play.

Your team is your main asset when it comes to earning customer engagement through sensational experiences.

Involve the workforce in discussions around customer engagement in order to instill a strong sense of belief in the mission.

It's also critical to consider how you empower employees to deliver great engagement.

While technology, data and insights can support customer engagement, in many cases, it is people who deliver them. Ensure that team members have the tools, training and logistical freedom to serve customers rapidly and proactively without going far up the chain of command.

## Tip 7

### Make innovation a company practice

Customer engagement today is an on-going journey in which your organization needs to be continually improving. In order to keep up with the competition – and ideally, stay ahead of them – it's vital to regularly look for new ways to innovate.

- Are there new technologies that could improve how you engage with customers?
- Can you train your staff to add additional value to customer interactions?

To succeed at customer engagement, your organization should make innovation a core competency.

## Tip 8

### Create an enterprise architecture that's aligned with your goals

Some of the biggest challenges in improving customer engagement are legacy structures and systems. As your organization adapts to more customer-centric ways of working, you may struggle with siloed departments and poorly-integrated IT systems.

Encourage your senior management teams to be bold and adopt a business and IT architecture that's suitable for your goals.

With continuous adaptation to the customer now a priority, your business may benefit from cloud-based IT systems. Their ability to roll out new features rapidly will make it easier for your organization to optimize its interactions with customers.

## Tip 9

### Use the right technology

The top challenge in customer engagement today is related to technology – satisfaction levels with current tools levels ranges from around 49-57%, leaving a lot of room for improvement. Companies commonly face issues such as:

- Tool complexity giving users a steep learning curve
- A lack of tools leaving employees with inferior capabilities
- Tools that can't be managed or integrated with other technologies

Focus on technology options that can help with key engagement goals, whilst also being practical for your team.

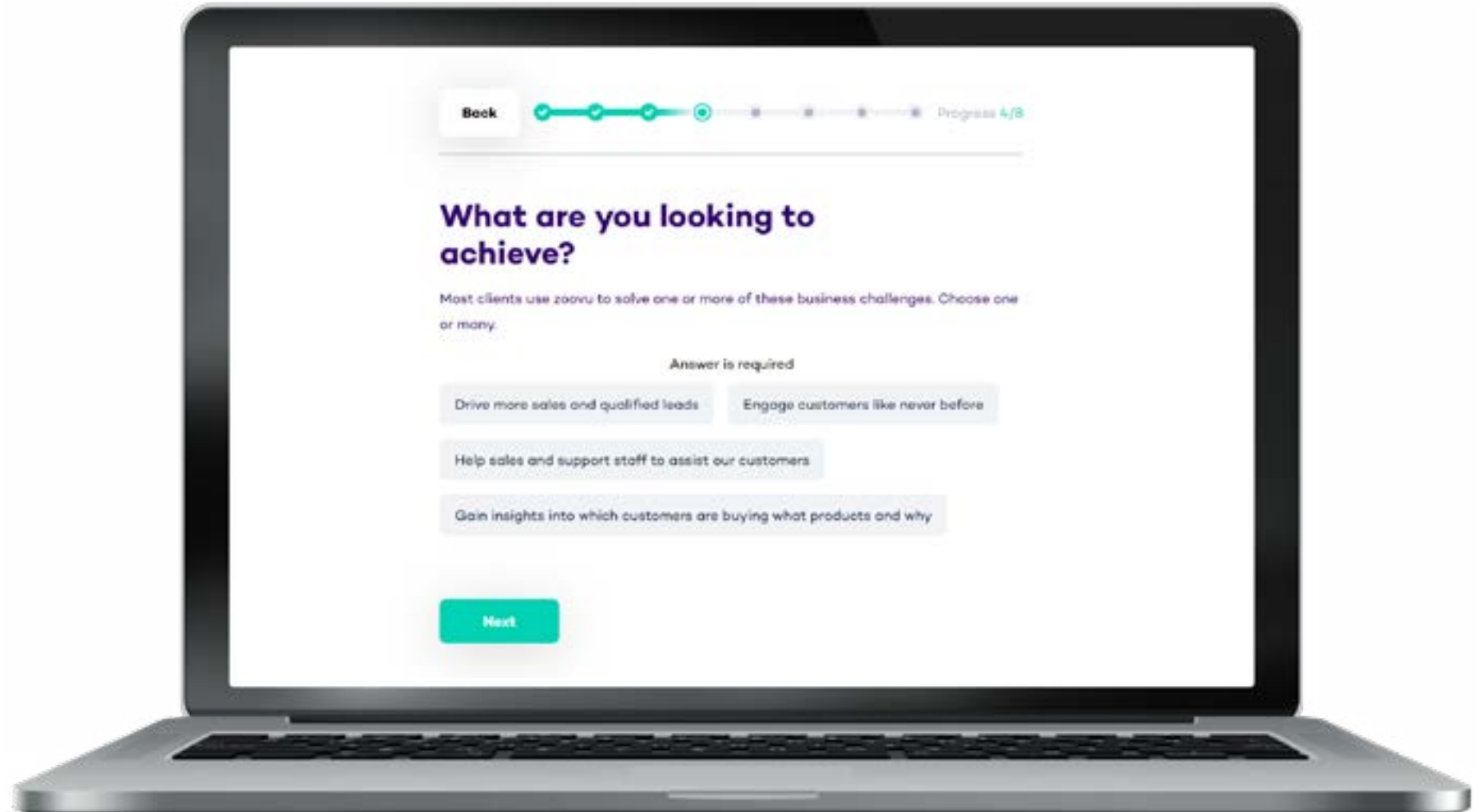
# Part 4

## Assess yourself

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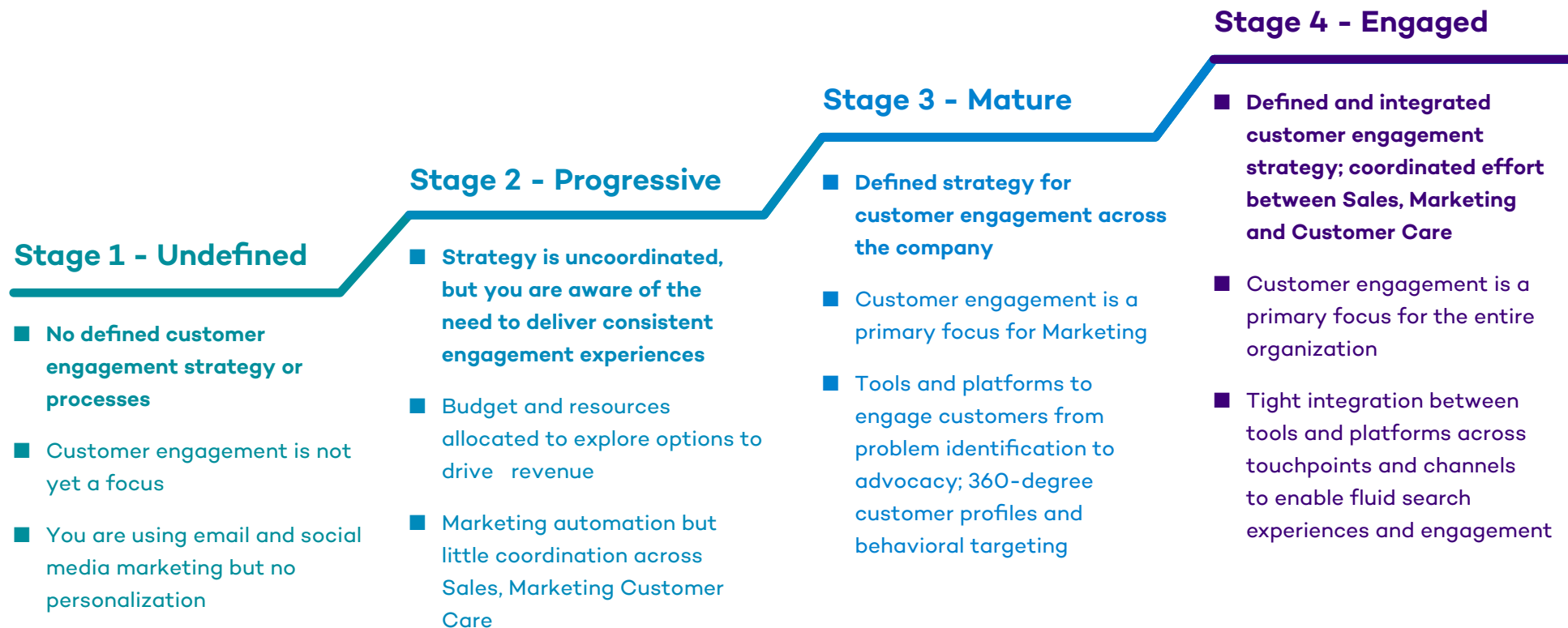
- Assessment quiz
- Customer engagement maturity model

Answer a few questions and find out how Zoovu can help you.  
<https://zoovu.com/pricing>



# Stages in the Customer Engagement Maturity Model

Because customer engagement involves many different moving parts of an organization, the practice of improving it may seem daunting. You can benefit from taking a structured, linear approach that allows you to start small and scale quickly.



# Conclusion

Customer Engagement is a huge area of interest today, and a subject that countless marketers are talking about.

One thing above all is clear: Meaningful customer engagement provides incredible opportunity for brands. Those organizations that are willing to provide value and put the customer first will rise above the rest. To conclude, we highlight some of the key areas you should focus on:

- 1** Create an effortless experience —understand customers, and use this knowledge to deliver the right level of personalized service every time.
- 2** Make it easy to engage —offer a range of ways for customers to contact your organization to provide flexibility and meet the demands of a diverse customer base.
- 3** Go the extra mile —creating memorable search experiences can pay off and be rewarded by brand champions telling friends and family, engaging on social media and writing positive reviews.



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## About Zoovu

Zoovu is the ultimate AI-driven conversational search platform helping customers find the things they're looking for by having a conversation. We turn every search into a conversation that leads to a fruitful shopping experience for the customer, the brand, and the retailer!

More than 2,500 brands and retailers use Zoovu to have conversations that convert including Amazon, Coty, Whirlpool and Canon. Zoovu operates worldwide in 500+ product categories, across all languages. See more at: [www.zoovu.com](http://www.zoovu.com)



[Learn more](#)



## The fastest-growing brands and retailers trust Zoovu

Whirlpool

amazon

KitchenAid

Microsoft

flaconi

Canon

IR  
Ingersoll Rand

sky

Miele

KELTY

MORCCOIL

KeyBank