

**AN AVAIL INTELLIGENCE WHITEPAPER**

# **Behavioral Merchandising - The Holiday Launch Plan**





## Introduction

The Holiday season – typically starting in early October and accelerating up until the week of Christmas - is for many retailers the most important period of the year. At the same time, it is also a highly competitive period, as competitors launch their most attractive offers and ramp up advertising.

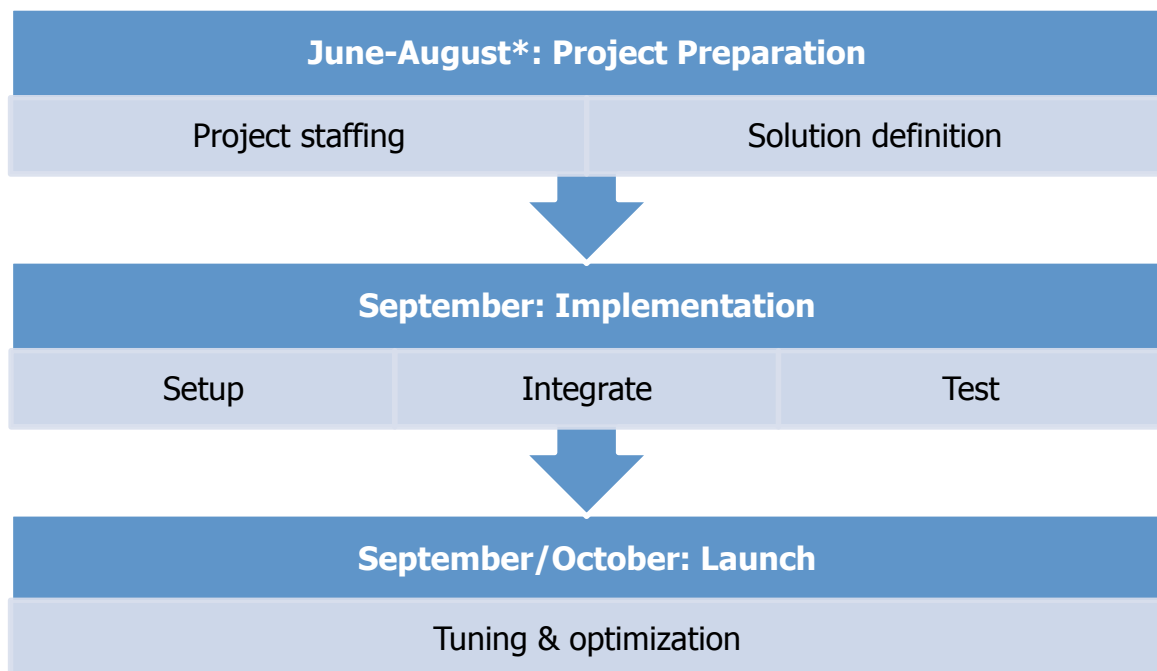
Avail Behavioral Merchandising™ enables retailers to personalize all their merchandising and promote the right products at the right time to each shopper. It is essential for retailers looking to engage Holiday shoppers visiting their site, and stimulate spending with highly relevant, personalized offers.

This document provides a detailed step-by-step plan for how you can launch Avail Behavioral Merchandising™ on your site, in time for the typical Holiday season “lockdown”. Based on Avail’s experience from over 100 successful deployments at online and multi-channel retailers, it addresses

- What resources are needed
- How to structure the deployment project

All in all, it requires 10 man-days or less of effort for your team, in a standardized process fully managed and supported by experienced Avail representatives.

### OVERVIEW – HIGH-LEVEL PROJECT PHASES



\* Depending on the timing of summer vacations in your country and company.



## Resources Needed

### Client Resources

Being designed for maximum automation and a minimum of reliance on the customer's IT organization, deploying and using an Avail solution does not require a lot of client resources. However, we strongly recommend you designate the following roles at the start of the project:

#### Merchandising Manager

Day-to-day owner and user of the Avail solution and primary contact with Avail's Account Manager.

Time to allocate – 1.5 days

- 1xhalf-day startup workshop
- 1xhalf-day training
- Availability during QA prior to launch
- 1xhalf-day post-launch workshop

#### Software Developer

Responsible for integrating the Avail solution with the e-commerce site(s). Must be able to program Javascript, HTML and integration modules for the e-commerce platform used. Tasks can be split across multiple developers, but this is normally not necessary.

Time to allocate – 6 days

- 1xhalf-day training
- Approx. 1 week development per site
- Availability during QA prior to launch
- 1xhalf-day post-launch workshop

#### Project Sponsors

In addition, we recommend that the managers responsible for the sales revenue and profit at the online business (e.g. e-Commerce Director) and technical platform (e.g. IT Manager) act as project sponsors and take an active part in the strategic aspects, i.e., the initial solution definition workshop and the regular merchandising optimization workshops.

Time to allocate – 1 day

- 1xhalf-day startup workshop
- 1xhalf-day post-launch workshop

## Avail Resources

### Avail Account Manager

Avail Account Managers act as the primary point of contact for the customer, and the interface between the customer and all relevant parts of the Avail organization.

- Allocates resources from the rest of Avail to serve the customer as needed
- Manages the deployment project from start-up until the launch is completed successfully
- Maintains the ongoing customer relationship with client stakeholders, reporting results on how the Avail solution is performing and proactively proposes improvements
- Responsible for customer results and general satisfaction

### Avail Client Services Representative

Avail Client Services representatives specialize in deployment, integration and day-to-day use of the Avail product:

- Provides technical support, training and tools to help the customer or its partner (e.g. web agency) deploy the Avail solution
- Trains customer staff in using the Avail Control Panel and other parts of the product at launch, and on-demand
- Provides ongoing technical support and help through Avail's helpdesk

### Avail Client Success Representative

Avail Client Success representatives are online merchandising experts focused on ensuring that customers are able to maximize the return on their Avail solution.

- Designs the merchandising strategy and implementation plan together with customer
- Performs post-launch benchmarking and performance tuning of the solution
- Conducts regular merchandising optimization workshops together with customer
- Researches and spreads best practices on using the Avail solution



# Deployment Project – step by step

## 1. Project Preparation (June – August\*)

*\* As vacation planning varies between countries, this should be done at the earliest possible timing.*

### Project Planning

- Who: Client Project Sponsors, Avail Account Manager
- For how long: 1 hour
- What: After signing the contract, Client and Avail to agree on
  - High-level project timeline and scope
  - Resources and staffing

### Solution Definition Workshop

- Who: Client Project Sponsors, Client Merchandising Manager, Avail Client Success representative
- For how long: 2-4 hour workshop
- What: Client stakeholders to discuss and agree on the following
  - What are the objectives for implementing Avail (increasing conversion rates by x%, increasing average order values by y%, minimizing time spent on maintaining up- and cross selling recommendations currently handled manually, etc)
  - Which pages to apply merchandising to and what strategy to apply for each page (social recommendations vs. topsellers and whether any results need to be filtered)
  - Where on the different pages should the recommendations be displayed, under what heading/copy ("people who bought this...", etc)
- Deliverable: Document summarizing how and in what way the Avail solution is to be implemented for each site/channel – provided by Avail.



## 2. Implementation (September)

### Technical startup meeting

- Who: Client Software Developer, Client IT Manager, Avail Client Services representative
- For how long: 1 hour
- What: Client IT staff to understand
  - How the Avail solution works
  - What data it needs
  - How it is integrated onto the website
- Deliverable:
  - Integration documentation provided by Avail
  - Confirmation from client IT staff that they have understood integration procedure.

### Export & upload of data to Avail

- Who: Client Software Developer, Avail Client Services representative
- For how long: 0.5-2 days of work
- What: Client Software Developer to do necessary (scheduling of) data export and uploads of order history (transaction data) for cold-start of Avail solution optional data such as product data (price, color, margin, etc), category data (which products belong to what categories), and valid products (products allowed to be recommended)
- Deliverable: Avail solution populated with data and verified by Avail Client Services representative.

### Design-in on web-pages

- Who: Client Software Developer, Avail Client Services representative
- For how long: 0.5-2 days of work
- What: Create redesigned web pages with
  - "space and layout" for showing the Avail recommendations, in accordance with deliverable from pre-study workshop with client stakeholders.
  - Avail-code for requesting recommendations from Avail
  - Avail-code for logging purchases and other behavioral data on the fly
- Deliverable: Code for client's web-pages exist in versions with 'room and logic' for requesting and displaying Avail recommendations, in Q&A environment - preferably fed with live behavioral data from live site.



## Product Training

- Who: Client Software Developer, Client Merchandising Manager, Avail Client Services representative
- For how long: 1-2 hours
- What:
  - Avail representative to train Client Merchandising Manager and Client Software Developer on the Avail Control Panel
- Deliverable:
  - Client Merchandising Manager knows how to use Avail Control Panel.

## Testing & Quality Assurance

- Who: Client Merchandising Manager, Client Software Developer, Avail Client Services representative
- For how long: 0.5-2 days
- What:
  - Client Merchandising Manager to see the recommendations live on client staging site (or in simulation interface in Control Panel if no staging site exists)
  - Client Merchandising Manager to have tested setting up rules & filters, and seeing and understanding the effects it has on recommendations.
  - Avail Client Services to perform quality assurance review of solution
- Deliverable:
  - Avail Client Services to signoff on quality assurance review
  - Client Merchandising Manager to sign-off for launch.



### 3. Launch (late September / early October)

#### Live deployment, Launch

- Who: Client Software Developer
- For how long: 1-2 hours
- What:
  - Move new web pages and related code to "live", now showing Avail recommendations
  - Client Project Sponsors announce the launch to the client organization.
- Deliverable: Client live with Avail recommendations in accordance with agreement from Solution Definition phase, and client organization aware of the fact and the expected results to be achieved.

#### Post-launch optimization workshop

- Who: Client Project Sponsors, Client Software Developer, Client Merchandising Manager, Avail Account Manager, Avail Client Success representative, Avail Client Services representative
- For how long: 2-4 hours
- What: 4-6 weeks after launch, verify the results and quality of Avail merchandising
  - Agree on any modifications / tunings to be made
  - Agree on plan for regular follow-up web meetings (2-4 times per year)
- Deliverable: Client and Avail satisfied with quality and results from Avail Behavioral Merchandising solution.



# Ongoing Activities

## Solution Monitoring

### Monitoring & maintenance - weekly

- Who: Client Merchandising Manager
- For how long: 1-2 hours per week
- What: Client Merchandising Manager to log in to Avail Control Panel to
  - Monitor and analyze results
  - Update any manual recommendations, as needed
  - Update rules and schedule A/B tests to evaluate their impact, as needed
- Deliverable:
  - Merchandising Manager satisfied that results are progressing according to plan
  - Status reports (monthly) by Avail Account Manager

## Merchandising Optimization

### Merchandising optimization workshops – quarterly to yearly

- Who: Client Project Sponsors, Client Software Developer, Client Merchandising Manager, Avail Account Manager, Avail Client Success representative, Avail Client Services representative
- For how long: 2-4 hours
- What: Analyze the results and quality of Avail solution:
  - Avail Client Success representative to share merchandising best practices and insights
  - Agreement on any modifications / tunings to be made
  - Agreement on roadmap for longer-term expansions or overhauls
- Deliverables:
  - Client and Avail satisfied with quality and results from Avail solution.
  - Updated solution roadmap