Customizing the Shopper Experience

From Our Partner Agencies

With the addition of so many more shoppers to the overall pool, you can expect that many of them are dipping their toe in the water of shopping online.

Taking stock of how they previously shopped at brick & mortar stores, what they expect, and how you can do it better allows for you to shine as not only the expert, but as a convenient way to get customers what they need.

Additionally, with the entrance of more shoppers, it's imperative to give them opportunities to choose their own destiny and **manage their subscriptions** or accounts with you. Deploying a custom checkout flow or customer portal is key to providing them with an exceptional experience to **keep them coming back**.

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Custom checkout flow

The checkout flow can either make or break conversion rates and it needs to be closely monitored in line with the needs of the specific customer. Some key questions to ask are:

1. What does the customer expect in a brick and mortar setting?
2. What are the main concerns/objections when customers buy?

If we have the answer to these questions, mapping out the checkout flow can be made more personal and more effective. One of the ways we've seen this being done is through the use of quiz functionality, like Octane AI's Shoppable Quiz. For brands where the sale in a brick and mortar environment is more consultative (beauty, bikes, suits, furniture) using a quiz can help fulfil this need for guidance. By ensuring that quiz functionality is also supported by a strong helpdesk solution like Gorgias, Shopify brands can make sure potential and current customers are taken care of.

Adam Pearce
CEO at Blend Commerce

The competitive landscape for subscription commerce continues to grow rapidly. The promise of recurring revenue is an exciting opportunity for any entrepreneur. Unfortunately, not all products and all brands should pursue a recurring revenue business model.

Customers are growing impatient when a Subscribe & Save CTA appears in an unexpected place. Instead, consider a dedicated and custom onboarding process that cradles the customer through the subscription program. This can be a terrific opportunity to engage further with the customer, while educating them about the benefits of the product and how to best subscribe.

You are an expert in your product category - tell customers when and how often the average person needs the product. If consumption rate varies based on something like the number of people in the household, then make the onboarding experience interactive with questions that lead to the best suggestion.

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Considering incorporating bundles and build-a-box features into the onboarding experience. Bundling is great for the merchant to help hit order minimums and great for customers to save more when bundling multiple products together. This shifts the discount from subscribing to bundling, which can reduce churn while increasing AOV.

Thomas McCutchen
Founder & CEO at Scoutside
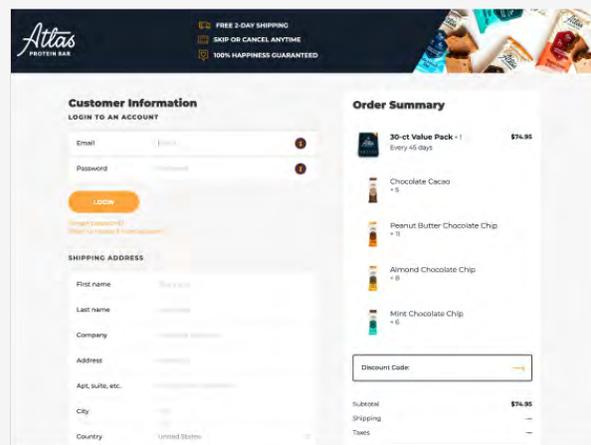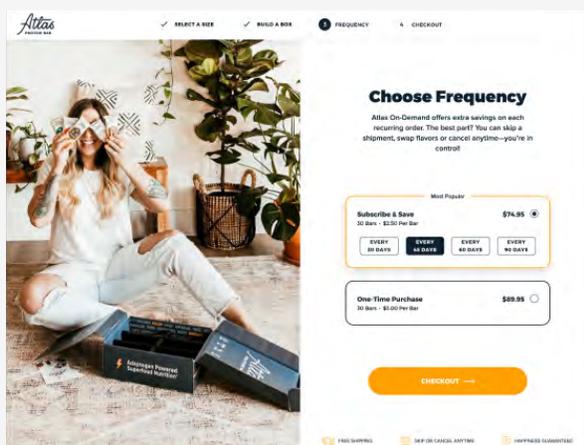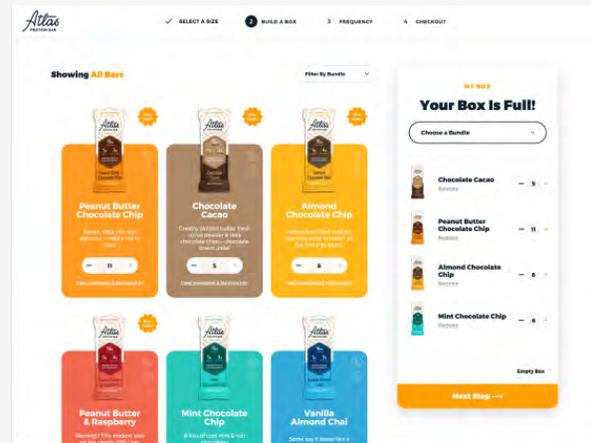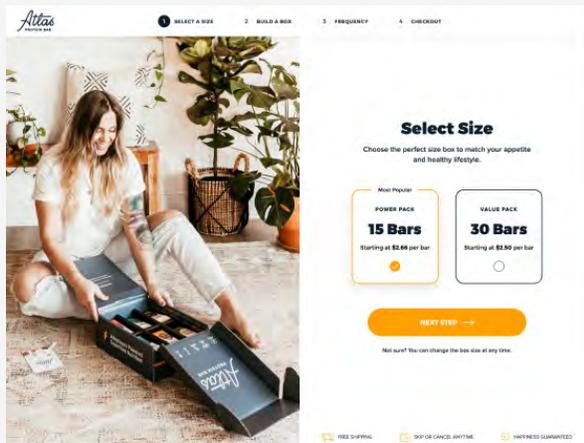
Customizing a check out flow puts the right products in front of your customers. It reduces abandonment rate and engages your users on a deep level. The trick is often balancing technical limitations. On Shopify, even if you're on Plus, the checkout flow cannot be customized. The key is to create a pre-checkout funnel.

We developed Quiz Kit to create a way for merchants to show personalized product recommendations to their customers. If you're a cosmetics company, your users can answer a few questions to find the perfect shade and product for their skin type. For coffee or wine companies, quizzes can tailor a product recommendation based on the user's palette.

Finally, the data quizzes generated can be used to gain valuable customer insights and to continue to refine your checkout flow. Quizzes are an affordable way to create a guided ecommerce experience for your merchants and learn more about them in the process.

Jonathan Osborn
Partner & Co-Founder at Presidio Creative

To reduce abandonment at checkout, the customer needs to feel confident they're subscribing to the right products at the right amount and at the right cadence. An effective way to guide customer selections is to ask questions that are intuitive to how they use the product.

For example, ask how many cups of coffee they drink per day versus how many bags of coffee they need per month. Or how many loads of laundry they do per week instead of how many detergent pods they use.

Also, applying ecommerce best practices to the checkout flow is critical. You want to make it as easy, fast, and intuitive as possible. This means creating clear field labels and structures, making it obvious what's required and what's optional, where the discount code goes or what the savings are, and reducing the amount of information a customer needs to manually input – for example leveraging autoformatting and autocomplete functionality for addresses.

This saves critical time, particularly for mobile shoppers, which increases customer satisfaction, as well as conversion rates.

Also, don't make passwords a drag. The Baymard Institute reported that complex and strict password rules can cause up to a nearly 19% checkout-abandonment rate for existing account users when they have trouble signing in.

Lastly, always, always start with shipping before billing, so that customers know total cost (shipping, taxes) and approximate delivery dates before they have to enter a credit card number.

Aaron Quinn
Founder & CEO at eHouse Studio

Main reason is conversion rate. There are tons of things you can customize in the checkout flow to increase your conversion rate. Countdowns to create urgency, curated social proof based on geo-location, 100% satisfaction guarantee badges etc. Upsells, downsells, cross-sells can also help you bump AOV big time , and in turn your ROAS (Return on Ad Spend).

Adena Merabi
Strategic Partnerships at MuteSix

Logically, the checkout process should be the easiest part of the customer funnel. A customer has already found a product that they want and they know that they can get it from you. Yet, it's one of the leakiest parts of the journey. This is largely due to issues around confidence and convenience, both of which can be improved with cart and checkout customization - something that's possible for stores built with Shopify Plus.

For confidence, it's about creating continuity with every other part of the customer journey. It can be unnerving when the checkout doesn't look like it's part of the same website, especially when customers come to input their bank details and home address. Trust and confidence are deal breakers.

For convenience, it's about providing a streamlined, effortless checkout experience without the clutter – for as many different customer need states as possible (e.g. for customers who forget to add an item to their cart, or who want to buy more of a product already in their cart).

This is where you can benefit from using a split testing tool to support the checkout process. We recently implemented a test where we removed unnecessary visual clutter from the checkout and it resulted in a 7% increase in conversion rate, worth an additional £90,000 revenue per year!

**Matt Abbott**
Head of Growth at Swanky

Suzannah Cranwell
New Build Service Team Lead at Swanky

Customization is an essential part of any checkout flow because one size doesn't fit all. Consumers have specific needs, and customizing for nuances increases trust, conversion, and satisfaction.

At Zehner, we see personalization as an opportunity to educate consumers and connect them with the products that fit their lifestyle. For example, a guided purchasing experience reduces friction by pairing products that fit the user's specific needs.
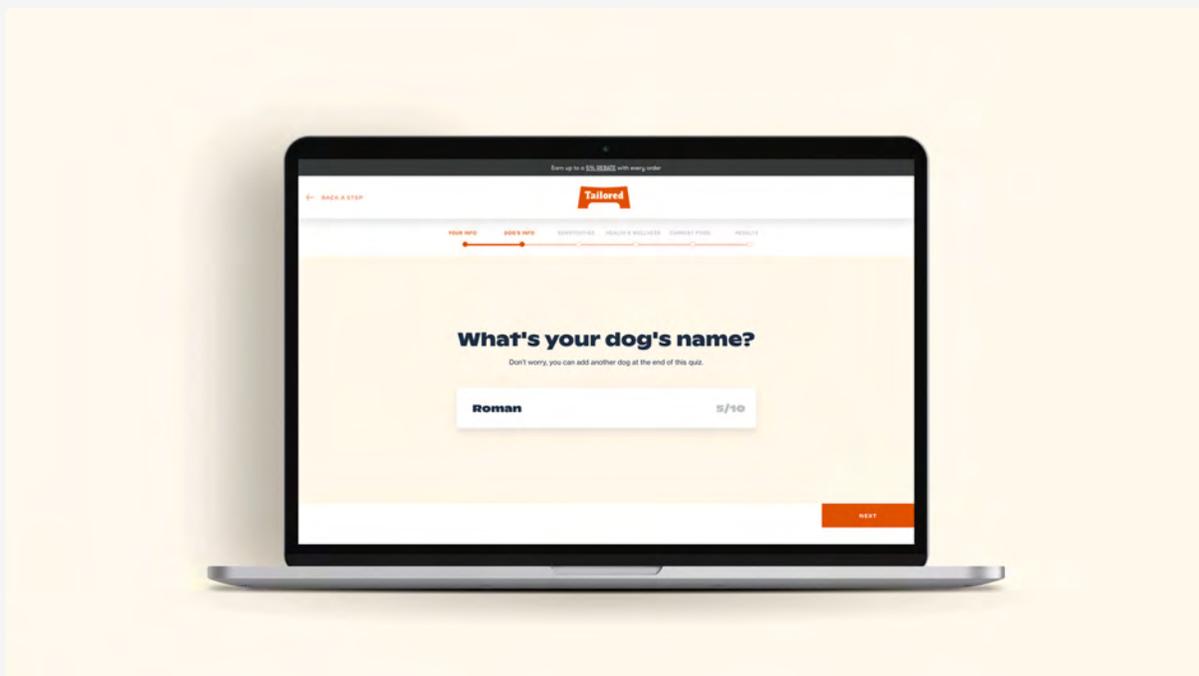
Our work iterating and building a quiz for Tailored, a custom pet food company, allows users to create a custom kibble based on their dog's specific needs. Quizzes provide a trusted option that makes the purchasing decision easier. Quizzes also lend themselves to sustainability and inclusivity as a personalized product that is more likely to meet users' needs.
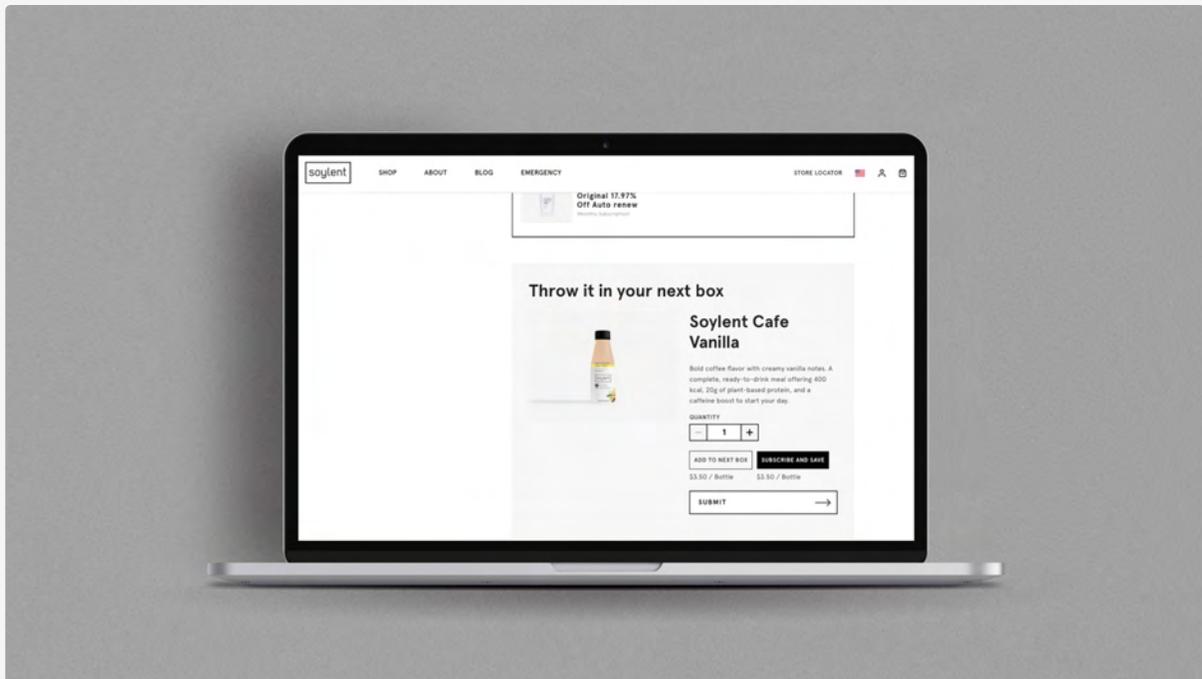
Customization can also provide added value through exclusive pricing. We worked with Soylent to create an option for users to add items to their subscriptions and customized their ReCharge integration to create an on-brand checkout experience.

Most importantly, guided purchasing enables merchants to continue learning about their users and the products they're looking for. Through these learnings, brands can retarget and customize their content to specific audiences.

Mick McCarthy
Chief Design Officer at Zehner

Certainly there are some "standards" that all consumers expect when they go through the checkout flow, but in many cases, merchants are underutilizing this opportunity in three areas:

Average Order Value

This may be as simple as a Recommended Products section or an opportunity to offer an exclusive item you're beta testing.

Customer Experience

Some checkout flows don't meet your specific customers' needs right out of the box and should be customized to offer a better experience.
For example, if a customer is checking out with the Dizzy Gizzy Lash Set, are they being prompted/reminded to purchase the necessary eyelash glue? It'll be a bad customer experience when it arrives and they can't use it. Don't make it difficult for the customer to know what to do, especially if they're new to you or your product.

Reporting

Whether it's analytics, accounting, or some other type of reporting, merchants can and should customize the checkout process to properly collect the information they need.

Pour More's checkout process was riddled with friction points when they came to us, mostly surrounding the UX journey:

• It lacked some information customers needed to make an informed decision

• Core functionality was broken in several areas, forcing redundant movements (or in some cases, throwing the customer out of the checkout journey entirely)

• Navigation was unintuitive

● Cross-sells were not personalized to the individual customer's journey, resulting in unrelated product recommendations that made the customer feel as if they weren't understood

The Pour More team hadn't had the opportunity to consider customization, but it was hurting them from a brand perspective, customer experience standpoint, and likely played a significant role in abandoned carts and conversion rates.

To solve these problems, we visually re-designed the site pages and fixed the functionality issues, which tweaked the customer journey and created a smooth, seamless user experience.

Z
Founder at Tako Agency
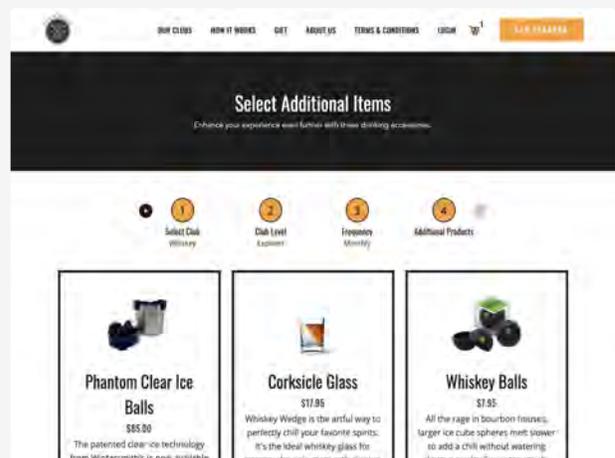
Often merchants do not give equal attention to every step of the customer buying journey. Typically, merchants are fixated on the first steps of the journey. Marketing messages are customized, and there is a focus on the homepage, collections, and product pages. There might be some callouts on the cart page, and then it typically stops and it is not reinforced during the checkout process. That effort needs to be translated to customizing or optimizing the checkout experience.

First thing, checkout should not contain a lot of noise - it should clearly highlight and guide the customer to finish the purchase. A clean, sleek look is important with slight messaging and features that make it easier for the customer. A customer must not be distracted from completing the checkout process. This applies to mobile and desktop.

Payment Options

To minimize friction, it is important to provide multiple checkout options. Along with allowing users to checkout with traditional credit card options, merchants that add additional checkout options typically see a conversion rate lift by providing more options:

● **PayPal** - This is still an extremely popular option among customers. Most of our merchants that we work with process 15% to 30% of all transactions via PayPal. After a merchant adds PayPal as a payment option, typically they experience a 20% to 30% conversion rate lift.

PayPal has done a great job over the years to build a reputation of security and trust with online consumers. Having PayPal as an option, a merchant can carry that trust over to their brand, especially with first-time purchasers.

• **Accelerated (Express) Checkout Options** - Google Pay, Apple Pay, ShopPay makes the checkout that much easier. Think about someone watching TV and browsing a website, coming to the payment screen and they are ready to pay, but their wallet is in a different room. They may think - I'll buy it later and never come back again.

If accelerated checkout options are available and they have one of the aforementioned payments set up on their device, the conversion can take place without any friction. Express checkout options also greatly impact conversion rates among new and returning customers. We tested different merchants across different verticals and found that Accelerated Payments increase desktop conversion by ~10% and mobile by ~25%.
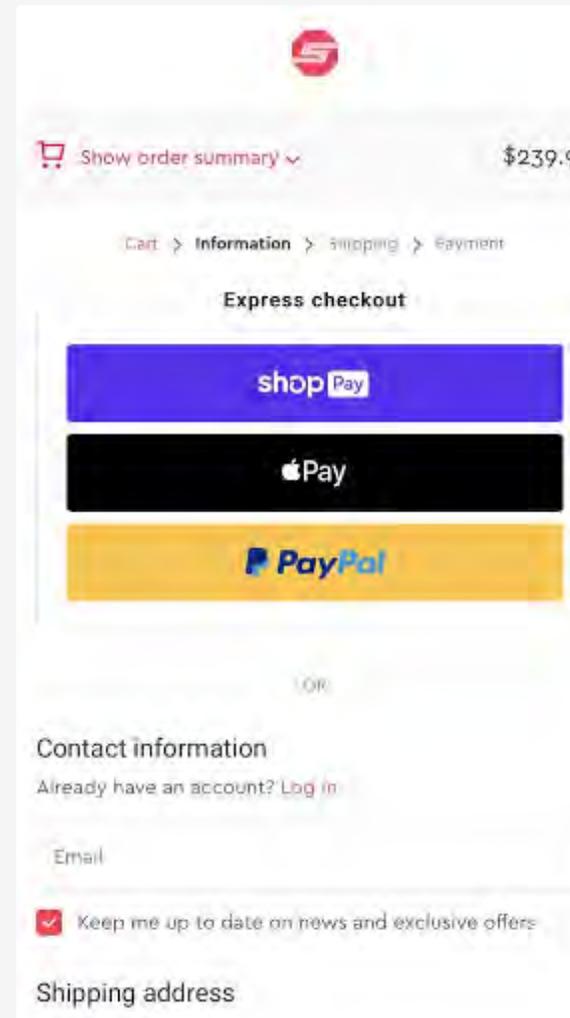
• **Monthly Payments** - In the last handful of years, monthly payment options have made an impact within the ecosystem. Providers like Klarna, Sezzle, SplitIt, and Affirm provide merchants the ability to offer payment options on purchases. Shop now and pay later payment providers have different models - Sezzle charges a merchant a small percentage fee, where Affirm finances the purchase for the customer. Our testing has shown that monthly payments have a great impact on conversion rates and AOV. Conversion rate improvements of ~15% and AOV increase of ~25%.

Amer Grozdanic
Co-founder & CEO at Praella

Personalized check-out flows help ensure that a customer is purchasing the right product and maximizing their experience. Rather than going for the quick purchase, it's important for merchants to think long-term and get the right products in the right people's hands to maximize repeat purchase behavior and LTV. We have to assume the average consumer has a short attention span and may be slower to process information about a product or an offer than we are (as digital marketers).

When experiences are simplified and you remove part of the decision making process it will generally result in stronger results. Guiding a prospect through the buying journey can improve conversion rates, assist a brand in collecting more data, and deepen the consumer's initial connection with the brand.

The caveat is that a poorly executed quiz or guided shopping experience can lead to more friction. So these need to be implemented carefully. Our preference is generally to test these experiences off of the main site with segmented landing pages. Then, once we gather data, we A/B test and implement sitewide if it's clearly an improvement. We have seen brands tank their conversion rates by implementing a sophisticated quiz flow on a homepage. It's important to test!

While these guided shopping experiences can help, it's also important to remember that your product detail pages can really reduce friction. A few quick fixes include:

Subscription Terms - Be transparent with how your subscription offering is structured and make it easily accessible. A lot of folks are jaded by bad subscription experiences and need the reassurance that there is nothing sneaky going on.

Social Proof - Utilize multiple sections on the PDP that have social proof elements; e.g., customer reviews (not just at the bottom), UGC content, press hits, testimonials from influencers or "experts," etc.

Visual Descriptions - Many of our clients have hefty paragraphs on their PDPs that explain the products. Written sections should be simplified down to more visual elements that can be quickly understood.

Ingredients/Nutrition - If you're selling a food, beverage, or wellness product it's important to have the ingredients and nutritional information front and center. Ideally this is just a visual of the label, which consumers are accustomed to reading and can quickly scan.

Lastly, one of the easier and more cost effective ways to start guiding prospective customers into a purchase is to use unique landing pages. For example, with Super Coffee, we had different bundles built out for various target personas. Depending on the target customer for our campaign, we sent someone to a standalone landing page (no navigation) and pushed them to buy one specific offering.

These types of funnels can be a great way to drive prospective customers into a targeted product without investing into a full quiz experience.

**Pierson Krass**
Founder & Managing Partner at Lunar Solar

The 'checkout completed' screen is often the last great chance you have to impart your brand values or any valuable information to your customers. After all, this is the last moment to interact with a highly engaged user. This is a great opportunity to address common questions from customers, let them know what to expect with their order, collect feedback, or ask them (perhaps with an incentive!) to do something for your brand like tell a friend or share on social media.

Furthermore, a customized checkout flow can build confidence with your customers if it is intuitive, well designed, and fits with the rest of the site aesthetic. Assuming you are in a good spot with the latter, the way to 'level up' your checkout is to decide on your priorities for this last moment of customer engagement. Here are a few tried-and-true strategies:

Leave them feeling confident about next steps! Adding a visual design element that quickly and succinctly shows the next steps is a great method. Be sure to answer the "What happens next?" question. That gives peace of mind to your customer and saves your customer service team from answering the same concerns over and over.

Ask a question or brief survey—keyword, brief! While adding a survey question such as "How was your website experience?" might be helpful to your team internally, it isn't wildly captivating or intriguing for a customer. Consider questions that will get them excited for the future such as "What product should we release next?" or "Who should we collaborate with this year?" etc. A leading question that hints at something exciting is a great way to heighten post-checkout engagement.

Deliver a simple and clear CTA (call to action). This can be something like adding social media share buttons or links to leave a review with Google or Yelp. This would also be a great place to promote any loyalty programs and remind the customer of all the benefits they will enjoy by being a subscriber.
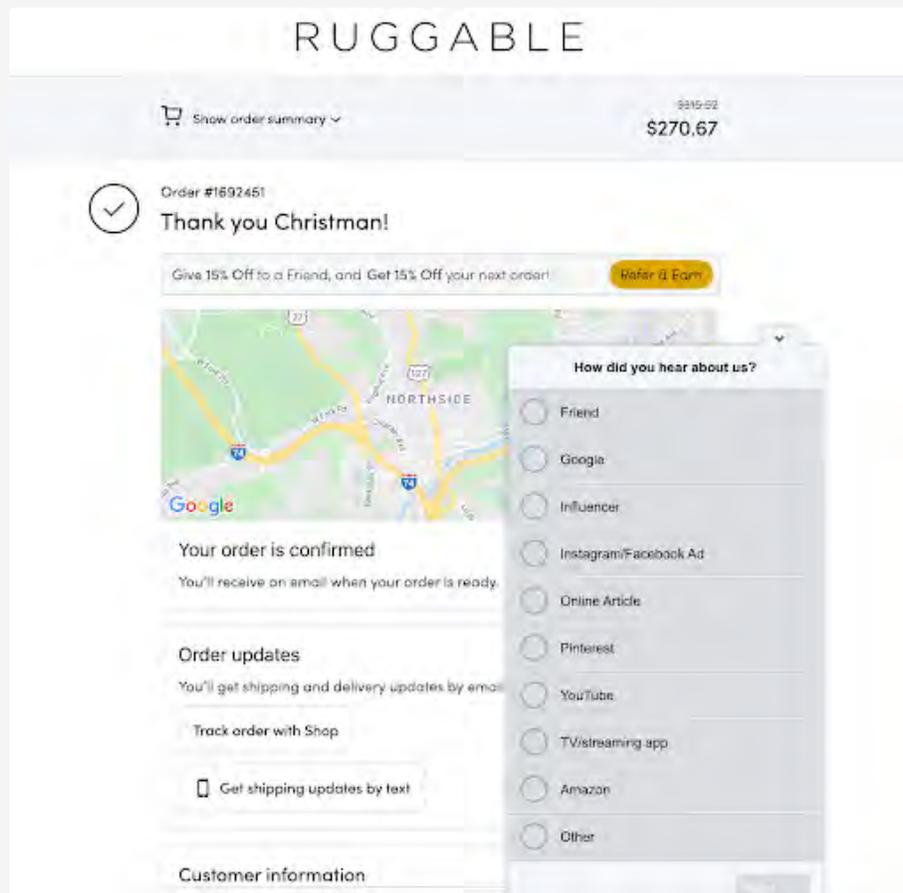
In this screenshot, we see a custom thank-you page from Ruggable. There is an optional survey that can be expanded at the bottom, a clear CTA to continue engaging with the brand (Refer a friend and both get 15% off) and clearly defined next steps (e.g. "You'll receive an email when your order is ready." as well as options to get more notifications).

Tate Lucas
CEO at DotDash.io

Customer Portal

In the world of automation, more and more consumers want to fully manage their subscription without the input of customer service. From the comfort of their home without waiting in the queue they can add new products to arrive with subscription, change the date of delivery, modify contact information, and these are just a few options available in Customer Portal.

It creates the customer's personal space in the store. In the future, the Customer Portal will be more important than the home page, and act as the business card of the store as users seek for an excellent and exclusive experience. It could be a space to educate customers as well as upsell products and fully optimized can be a front-page for recurring customers.

Adam Pearce
CEO at Blend Commerce

An easy to use and on brand customer portal is critical to the success of a subscription program. The customer portal should not be an afterthought. It should be an extension of the brand. Subscribers are the most valuable customer group for a subscription based merchant. A lot of time and research goes into reducing churn in effort to keep customers as subscribers for as long as possible.

Engagement is a key indicator of the health of a subscriber - the more engaged a customer is with a brand, the longer they will remain a customer. For many subscribers, the customer may spend 90% of their lifetime interacting with the brand from inside the customer portal. It should be incredibly intuitive, easy to use and add value to the overall subscription experience.

By definition, you have already earned the customers trust with the brand because they have already purchased the product. The customer portal no longer needs to overly convince the customer to shop. It should help the customer make updates quickly and efficiently through one or two click actions.

In addition to intuitive subscription management, the customer portal presents a great opportunity to create unique interactions and value added benefits for subscribers. You can present gated content only available to subscribers, such as exercise routines, recipes, messages from the founder, influencer and celebrities.

Deeply integrate a robust loyalty program into the customer portal so points earned and ways to redeem are front of mind, keeping the subscriber engaged and excited. Present early access to new or limited release products, giving subscribers first dibs on highly sought after products. By definition subscribers are your most loyal and valuable customers, don't forget to treat them that way.

Thomas McCutchen
Founder & CEO at Scoutside

Customer Portals are the sole location for users to update their subscription. Novum, a Customer Portal theme, in particular has unique layouts and is more engaging that the standard subscription setup. Tasks like viewing your upcoming orders, managing the order type, and cancelling your order can all be set through the Customer Portal. Ease of use of the Customer Portal also reduces the burden on your Customer Support team who is the last line of defence in managing a merchant's subscriptions.

Jonathan Osborn
Partner & Co-Founder at Presidio Creative

McKinsey research shows that only 55% of consumers who consider a subscription actually sign up, and then more than a third cancel in less than three months. To reduce churn and grow customer lifetime value, brands need to give customers choice: the power to customize their subscriptions.

The concepts of "subscription" and "customize" are sort of at odds with each other – we rely on the consistency of a subscription that delivers that carton of chocolate protein powder every 30 days, but also want it to conform to changes in our lives or our preferences.

For example, maybe you didn't feel like using protein powder every day last month, or you had to travel, so you don't need more protein powder this month. Tools like a customer portal, SMS/texting and maybe even voice speakers in the future can enable that flexibility and convenience, allowing customers to not only skip a shipment, but tweak the delivery timing ("snooze" or "ship now") or swap out flavors or models.

Enabling different options not only brings value to the customer and keeps them subscribing longer, it also helps brands glean new insights into the health of a subscription program. How many customers skip or pause, and when? How many people are leaving after the first purchase to just get the discount? Which options keep customers in the program longer? The story becomes much more nuanced and you have more levers to pull to optimize your subscription program.

Aaron Quinn
Founder & CEO at eHouse Studio

BVA has worked with ReCharge to reinvent Customer Portal experiences and technology. Inspired by our work on the deodorant brand Native (P&G), ReCharge now offers the same theme engine out-of-the-box in order to get you started with subscriptions.

The customer portal is a tool for customers who have already subscribed, and thus it should be thought of as a tool to target two primary metrics:

1) Subscription Average Order Value (AOV)
2) Customer Churn
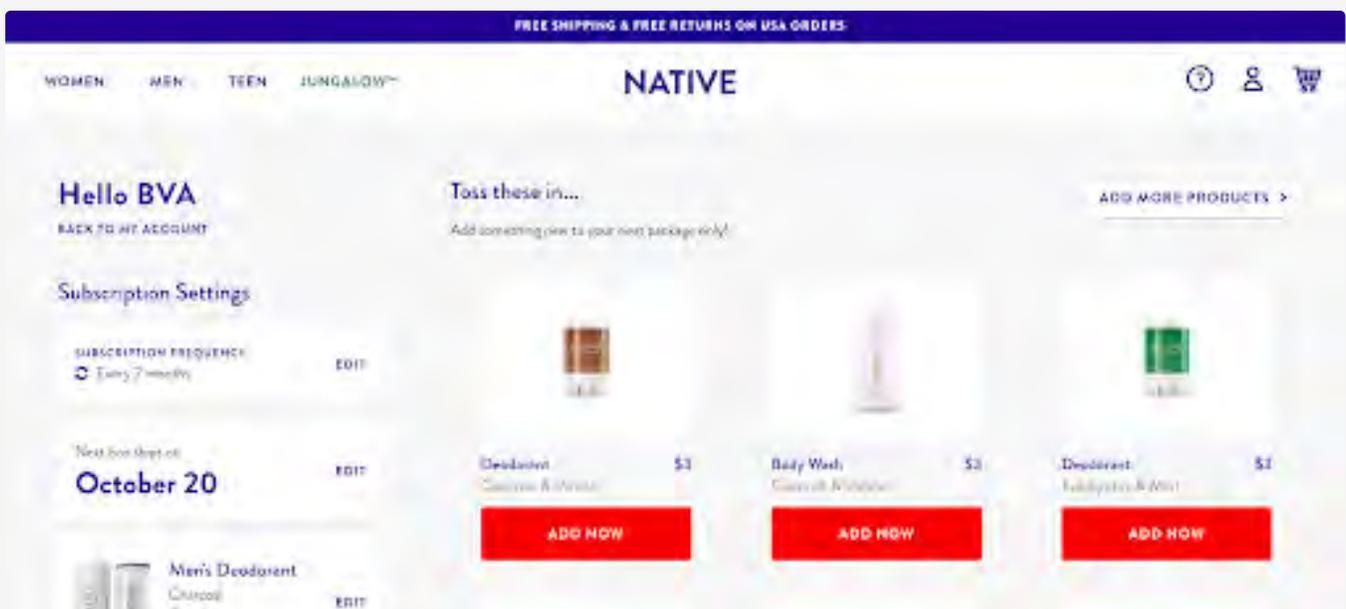
By improving AOV or reducing churn, we will have a net positive effect on CLV. For new subscription businesses, the goal is to have a customer portal that allows for self-service subscription editing. This will reduce the amount of time dealing with customer service requests and thus lower costs.

For advanced subscription businesses, our clients are curating special content, reserving exclusive products, and creating unique discounts that are all accessible only via the customer portal. All of these efforts are focused on increasing the value of the subscription for the customer, which will subsequently increase AOV and decrease churn.

Your subscription users will continuously interact with the customer portal (when they sign-up, check, update, or cancel their subscription), which is why it's worth the investment. Creating a seamless and user-friendly experience is essential to acquire and retain these subscribers.

Recharge's cancellation options are an incredibly important part of the customer portal. This creates a rare touchpoint where customers can give you feedback on their experience. A makeup brand might find that a certain product does not go well with oily skin, and a coffee brand might find a certain roast is too bitter for their customer's palette.

Native even uses the "I'd rather buy in store" option to direct their customers to the closest retail store with Native products. This type of creativity in your cancellation flow earns loyalty and trust from your customers.
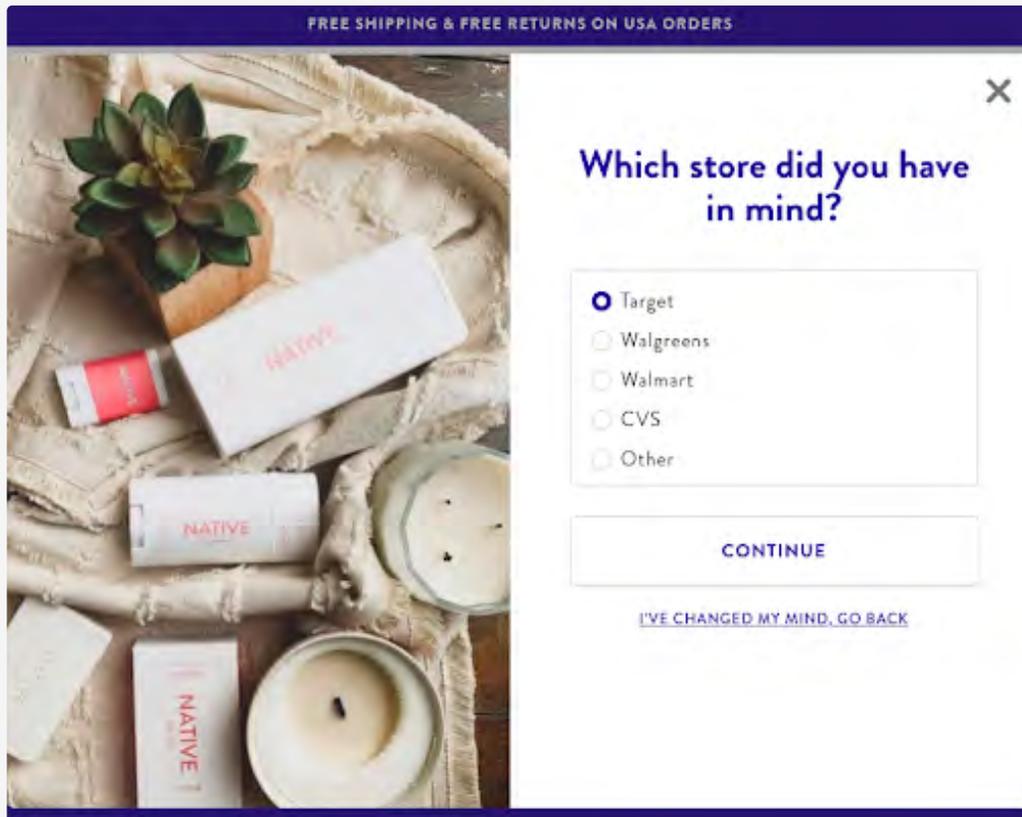
One of the other basic rules of subscriptions: the more customers interact with your portal, the more insight we can gather on their behavior. Based on this insight and your goals, you can customize the customer portal to fit your customer's preferences This is an ongoing effort but one that will show results. It's important to pinpoint tactics that help your brand increase adoption, frequency, AOV, CLV, and reduce churn so you can understand what is or isn't working and adjust accordingly.

Sean Glass
Senior Strategist at BVA

Getting that first sale to a new customer is critical for any business, but we know that selling to a new customer is many times more difficult than selling to an existing customer. We might not traditionally think about upsells and new sales as relevant to subscription businesses since our customer is already committed to repeated purchasing, but we could argue that there is even more opportunity for that reason!

This is where the customer portal comes into its own. At its most basic, a great portal provides visibility and control to the customer, so they can feel confident and happy that their subscription is running to plan and easy to manage. Increased satisfaction and control reduces the likelihood of cancellations.

But we can go a lot further. Using ReCharge's Theme Engine for example, we can enable customers to instantly add one-off product purchases to their next subscription delivery. For example, a subscription razor brand could allow customers to add balms and other pampering products to their next subscription delivery with a single click. Providing this functionality through a portal will drive up revenue per customer and reduce subscription churn.

Matt Abbott
Head of Growth at Swanky

Suzannah Cranwell
New Build Service Team Lead at Swanky

An optimized customer portal is essential for increasing AOV and LTV because it gives users complete control over their subscriptions. Providing users with the tools to manage their subscriptions is a foundational element of good UX. Accessing information like their tracking numbers, order history, and managing when their order arrives empowers users to problem-solve independently.

Customer portals provide an opportunity for brands to build relationships with their consumers through exclusivity. The customer portal can be optimized to provide relevant content, limited time offers, and showcase new products.

The customer portal should provide a seamless way for users to manage their accounts. A customer portal should empower users to manage their subscriptions without having to email or call customer service.

Giving users the power to problem-solve on their own optimizes your overall business strategy. For instance, when a customer can pause their subscription, the brand has an opportunity to understand the customer's needs, build trust, and ultimately re-engage rather than acquiring a new customer.

Mick McCarthy
Chief Design Officer at Zehner

The Customer Portal is the area of your site that active subscribers are most likely to visit--more than your actual site, in fact--which makes it a critical location for nurturing the relationship!

Customizing the Portal to meet your unique needs is the easiest way to make the most of this space. Here's how that unique touch makes a difference:

Brand Consistency

Brand consistency throughout the customer journey, even post-purchase, is critical. A web page that departs from your brand's overall look and feel (like a standard out-of-the-box portal) interrupts continuity.

At best, that interruption will cause brief confusion for customers who have been interacting with your brand. ("Wait, where am I now?") At worst, it could instill a sense of mistrust about the security of their Portal. ("Is this legit...?") A branded portal will reflect your store's colors, logos, and more, ensuring a streamlined visual experience.

Empowered Customers

Customers want to be able to manage their subscriptions and products. Life is not linear, and the ability to stop, skip, resume, or change the interval of a subscription ensures that customer needs are being met at the right time, every time. Maximum customization here should also include the ability to swap and add items easily.

Having to contact support for something as simple as changing shipment intervals or adding products is annoying for customers on-the-go--not to mention a crummy use of customer service resources. Give the power to the people and watch the magic happen!

Loss Prevention + Data Collection

While we're on the subject of subscription changes, wouldn't it be great to have a chance to recapture a customer who's about to cancel? Ta-dah! A customized portal can give the merchant an opportunity to change their mind (by offering a discount or other incentive to stay).

If they're determined to cancel, put a positive spin on it by gathering data to help you prevent such cancellations in the future. A simple "Would you mind telling us why you're canceling?" multiple choice question can provide valuable insight.

Upselling & Cross-selling

Well, hello again, our old friend. Most subscribers visiting their customer portal are in "maintenance mode," but with a little clever design and development, you can nudge them into "purchasing" mode. Successful merchants know that an optimized portal can be leveraged to upsell (show customers things they never knew they needed…but now they really, really do), introduce new offerings (one-time add-ons, or additional subscriptions), and educate customers about promotions or how to use different products.
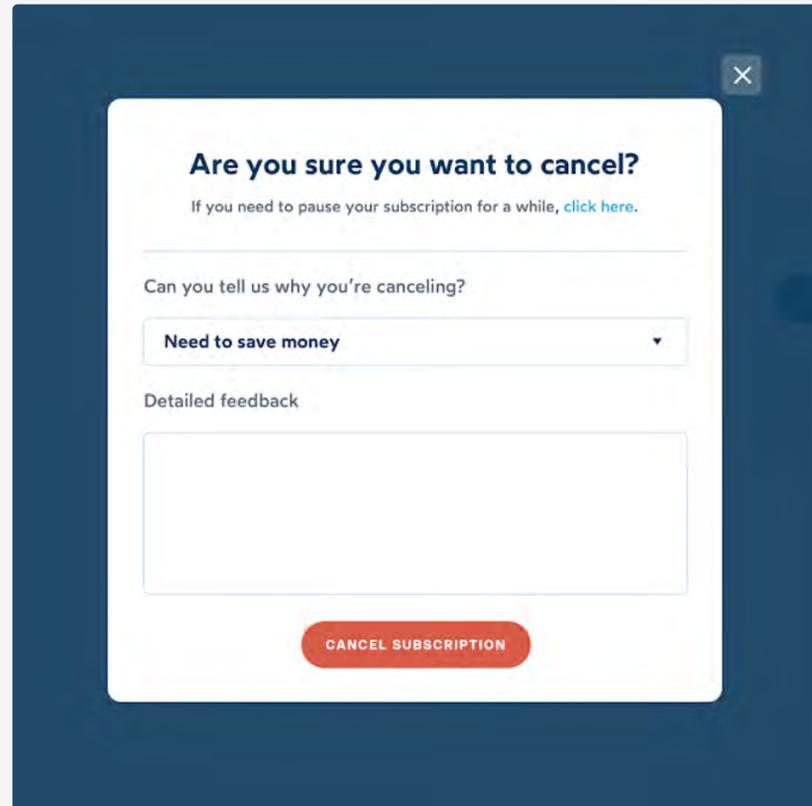
Relationship Building

If you have an active blog (or a few pieces of cornerstone content), why not include links to those in the Portal? Give the subscriber an opportunity to interact with you in a different way. Whether your blog is set up to inform or entertain (or both!), there's value to be had there. Help them see it, and encourage them to spend more time with you.

Z
Founder at Tako Agency

Customer Portals are one of the most underutilized areas of an ecommerce brand. Most merchants allow their customers to do the minimum - view orders, possibly update their billing information. But, it is much more than that.

Great dashboards can assist with customer service and also help with retention. When we worked with Doggie Lawn, along with the team we created a strategy and a user experience that drive purpose. It allows users to manage everything about their account - from changing frequency to upgrading or downgrading plans, etc.

The custom portal also improves customer retention. In the case of Doggie Lawn, they have listened to their subscribers and learned that sometimes dogs tend to dig the lawn or even bite it. So, they create a solution for it, and when a Subscriber (who does not know the solution exists) tries to cancel, they are offered the opportunity to keep their subscription and get the solution, the anti-dig kit for free.

Amer Grozdanic
Co-founder & CEO at Praella
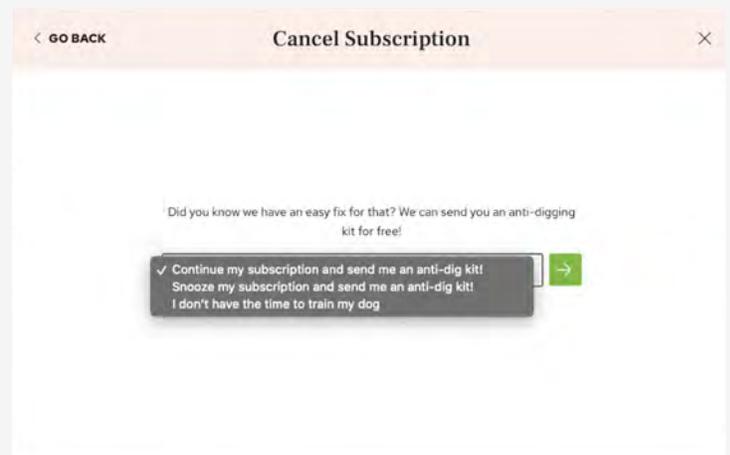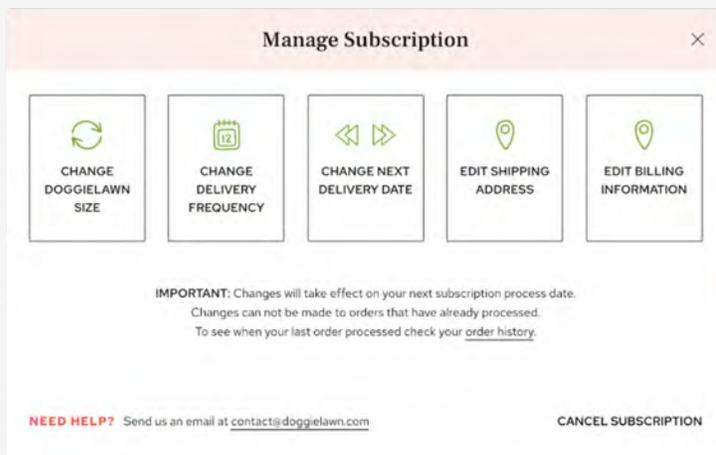
The Customer Portal is the storefront for a customer's post purchase needs. When it comes to subscriptions, customer retention is one of the most critical aspects to the health of your business. By optimizing the portal to be a seamless experience, customers are supported with actions that are familiar and intuitive.

Making it easy and clear for someone to manage their subscription reduces churn. And making your cross-sells and upsells easily available and clear helps increase activations.

An example of this is when we redid a Customer Portal for one of our health and wellness clients in August. We designed and built a custom theme to clean up the portal based on customer feedback and best practices we've used in similar projects. By increasing visibility into the main post purchase actions while simplifying the user experience, brand advocacy was built and we saw measurable improvements to KPIs. The following are the improvements we observed following the implementation:

- Churn Rate down 10%
- Recurring Revenue* up 31%
- Refunds down 14%

*Note that this is also a function of an increased marketing focus on pushing prospective customers into subscription. With a better experience there was more confidence across the team in the subscription offerings.

Beyond the revenue impact, every touch point with a brand should reinforce key aspects of the brand. Having a poorly designed Customer Portal reflects just as badly on a brand as a buggy website, lackluster social presence, etc.
While the incremental improvements are exciting, not having an optimized Customer Portal can be risky.

If subscription management isn't intuitive you can provide a negative experience that results in negative word-of-mouth and strain on your customer service team. Ultimately the damage that could be done to your business by not taking this seriously is an even more compelling argument to invest in your Customer Portal versus the KPI improvements you can make with optimization.

Pierson Krass
Founder & Managing Partner at Lunar Solar

Let's be honest, the most profitable customers are the loyal ones who continue to make repeat purchases. Most brands find that remarketing to this group yields a much higher conversion rate compared to acquiring new customers altogether. With that in mind, it is smart to ensure that the existing customer base maintains their confidence and interest in your brand.

Sharing useful content is a good step, but let's not forget about the intangible impression that customers leave with after visiting your website (e.g. Was it fast, well designed, simple to use?).

As with any ecommerce platform, a pain-free checkout experience is essential, but for subscription-based businesses, the 'customer portal' is an additional platform that can either make or break your customer experience.

Instead of going directly to your homepage and starting a new search, existing customers will often start with the customer portal when making additional purchases. They would also go here when seeking help, or to get information about order status or progress. It is an order checkout page on steroids. To keep this group happy, confident, and excited—we will want to make sure our customer portals knock a few things out of the park:

• **Consistent branding.** This includes visual design, language choices and ensuring the design maintains its integrity across all major browsers.

• **Speed.** The portal page is snappy and fast on desktop and mobile

• **Clear CTA's.** The 'common tasks' such as viewing billing history, updating subscriptions, updating information and contacting support are clear and visible.

• **Bonus!** You have an area for exclusive offers or information just for your subscribers

By ensuring your portal meets the above best practices, you are helping foster more confidence in your brand and likely saving your customer service team a world of headaches and time; thus, money.

Tate Lucas
CEO at DotDash.io

Here's the gist

Elements like custom checkout flows and customer portals are key to your success in working with a wide variety of customers. Giving them the flexibility and autonomy to work with you in the ways they want to allow for a sense of partnership and ownership, rather than just a one-off transaction. Pair that with **building a strong community**, and **providing them with options**, your store is set up for long-term, loyal customers.

Explore the rest of the Powerful & Profitable Subscriptions series to gain insights from 12 different agencies on a variety of topics: from building a community, to scalability, and everything in between.

Thank you to our partners

We're thrilled to collaborate with the most successful and fastest-growing agencies in commerce to create this playbook. If you're interested in contacting one of our partner agencies, please use the links below.

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