How to Use Your Website for Holiday Marketing, Gift Guides, & Wish Lists

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House Keeping

- All attendees are in listen-only mode

- For any questions during the presentation, use the 'Questions' pane on your GoToWebinar panel.
    - 'Questions' pane is not just for questions
    - Suggestions or methods that work for you? Please share!

- This webinar is being recorded.

- Switching between the Powerpoint and live demo.

Today's Topics:

1. IC & IL Tools for Gift Guides & Marketing
    a. Reports-New Customer Info, Sales Report, Sales Report by SKU
    b. Wishlists-New features for IC
    c. Discount coupons
2. Other IC & IL Features for Holiday Prep
    a. Curbside Pickup, Delivery
    b. Updating shipping rates
    c. Gift wrap, gift cards & gift card payment, online gift codes, subscriptions
3. E-Commerce Checklist
    a. Site speed, Google Analytics, Google My Business, Social media, calls to action
4. Q&A

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IC & IL Tools For Gift Guides & Marketing Plans

- Select reports for data collection
  - New customer report, Sales report, Sales Report by SKU

- Wishlists
  - New features for IC
  - How to tie to holiday marketing & gift guides

- Discount coupons
  - Now available on IndieLite
  - Utilize for holiday guides or marketing plans

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Reports

New Customer Report

- Provides Insight into new customers who ordered on your site for the first time, from March 1st, 2020 onward.
- To get to this report, navigate to Store > Reports > Customer reports > New Customer Report.
- Covered in more detail in the Order Processing 201 webinar.

Sales Report

- Provides sales insight into orders within a specific date range.
- Accessible via Store > Reports > Sales Report

Sales Report by SKU

- Helpful in identifying number of sales, other related information for a specific title or SKU.
- Accessible via Store > Reports > Sales Report by SKU

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Reports For Holiday Season

- Consider data from your site with info from POS for:
  - Customer segmentation
  - Developing or distributing gift guides, digitally or physically.
  - Building themed book lists on your site for the season, titles to promote
  - Trends across particular groups of customers

- Allows you to do more targeted and authentic marketing, such as tailoring e-mail lists.

- Keep in mind: higher volume of first-time users who purchased from IndieCommerce and IndieLite sites over past few months
  - Important to include these orders in your data to build and nurture relationships with them. Their data may only exist on your site.

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Wishlists
(IC & IL)

- Allows authenticated users to create wishlists of books and other products offered by your store. Wishlists can be shared with friends and family, who can then make purchases with your store, making it perfect for the holiday season.

- IndieCommerce: Single and Multiple Wishlists. Stores are encouraged to have multiple wishlists enabled.
- IndieLite: Single wishlists, one per authenticated user.

- We have a few new quality-of-life features for wishlists that either are available or coming in the next few weeks for IndieCommerce stores.

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Wishlists - New Features for IC

Available Now:

- Create wishlist on behalf of customers.
- Filter option for wishlists.
- Optimization of CSV download for large wishlists.
    - File name has been updated to include date; file contains the title and other header fields

Coming Soon:

- Mailing address for wishlists (single & multiple).
- Customers will be able to delete their wishlists.

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Creating Wishlist for Customer
(IC Only)

- Store > Customers > Wishlists > Create a wishlist

- Similar to creating order on behalf of customer.
  - Can search for existing customers by first or last name, email, or username
  - Create an account for customer to then create the wishlist.

- Creating wishlist requires creating the account for the customer; check 'Email account details to customer' to send account info to them.

- Be sure to name the wish list to make it easy to find.

- If site uses single wishlists and a customer already *has* a wishlist, cannot create another.

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Mailing Address for Wishlists
(IC Only)

- Customer can add a mailing address to wishlist and select it to be the delivery address for items ordered from that list.

- When purchasing from a wishlist with this setting enabled, that address prefills at checkout.

- Not possible to edit the address if all of the items on the order are from the same wishlist.

- If one or more items from the same wishlist are on the order with items *not* on the wishlist, the address prefills but can be edited.

- If there are items from multiple wishlists in the order, the delivery address at checkout will be blank.

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Wishlist Instructions Page
(IC & IL)

- Create a page on your site that outlines the different functions and settings available for wishlists.

- Helpful if partnering with local businesses or community organizations looking to utilize the wishlist feature but good for regular customers too.

- Link to this page in the resources section of this presentation.

Live Demo

Wishlists for Holiday Season

- Encourage the use of wishlists in newsletters or other promotions, or on social media.
  - Some might not know this feature exists for your store!

- New mailing address setting helps ensure info is correct; makes gift purchases or community outreach uses easier.

- For IC stores, if you don't already, consider offering multiple wishlists. Users can track multiple lists for different purposes.

- If your store works with community organizations or schools that use wishlists, consider the role your store plays.

  - If applicable, link wishlists in marketing or promotional material to encourage giving back.

  - On the other hand, may be more appropriate to simply be the platform; for some, wishlists are a tool provided via the site but promoting those wishlists is not possible for myriad of reasons.

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Wishlist Functionality

	IndieCommerce	IndieLite
Single Wishlist	✓	✓
Multiple Wishlists	✓	✗
Wishlist Report	✓	✗
Filter Options	✓	✗
Delivery Address	✓	✗
Creating wishlists on behalf of customers	✓	✗
Customers can delete own wishlists	✗	✗

Discount Coupons
(IC & IL)

- Discount Coupons allow stores to provide discounts to customers.

  - IL sites have limited features and settings.

- Can restrict Discount Coupon codes, allowing for use within a specific date range, on specific products, on orders with a specific minimum amount, etc.

- Can generate link that includes the coupon code, allowing it to apply automatically.

- Coupon codes are trackable via the Coupon usage report via Store > Reports > Coupon usage report.

  - Will show the orders that used a specific coupon code, how much value the coupon had, how many uses, etc.

- Webinars included in resources links.

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Discount Coupons for Holiday

- In tandem with website customer data, you could create a coupon for:

  - New customers who purchased from you between March and August.

  - Other customer segments, such as longtime customers, customers that are part of a membership program, or readers of specific genres.

  - Gift guides, depending on their role for your store.

- Consider ways to bring customers into the site this season. Creating unique codes to different segments gives customers an incentive to return and allows your store to reward customers in different ways.

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Coupon Functionality

	IndieCommerce	IndieLite
Create discount coupons	✔	Limited scenarios
Coupon usage report	✔	✔
Create coupons in bulk	✔	✔
Restrict by date	✔	✔
Access to general settings	✔	✖
Make coupons apply automatically	✔	✖
Sending coupons automatically	✔	✖

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Other IC & IL Features for Holiday Preparation

- Curbside Pickup, Delivery
  - Customers remain interested in contactless pickup or delivery options.

- Updating shipping rates
  - USPS temporary rate increase October 18th, 2020.

- Gift wrap, gift cards, gift card payment, online gift codes, and subscriptions
  - Additional offerings that are possible through your site.

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Curbside Pickup
(IC & IL)

- May want to consider curbside pickup option or a local delivery option; customers continue to be interested in contactless pickup options.

- For IC sites, can set up curbside with the Pick-Up Options pane in Checkout settings at Store > Configuration > Checkout. Full steps in the resources section.

  - With this method, customers don't need a delivery address and go right to payment method. For stores with multiple outlets, customers still have to select their store, same as store pick-up.

  - Will need to enable the In-Store Pickup option in your Shipping Quotes; these two are tied together and unless that shipping quote is enabled, the pick-up options pane will not display.

- IndieLite stores can only change language for the In-Store Pickup shipping option.

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Delivery by Zip Code
(IC & IL)

- For IC stores that want to offer local delivery, can set up a shipping quote at Store > Configuration > Shipping quotes with conditions to limit this option to a set of zip codes.

- Keep in mind: every unique zip code will need to be its own condition. The more conditions on your shipping quotes, the longer it takes for checkout to load; we recommend no more than 7 zip codes.

  - IndieLite stores *do not* have access to conditions; if you'd like to set up a delivery shipping option on your IL site, write to us at staff@bookweb.org and we'll help set it up for you.

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Shipping Rates
(IC & IL)

- Recent temporary rate increase with USPS as of October 18th; may want to adjust shipping rates on site.
  - While we cannot advise on specific rates, we encourage stores to examine costs of shipping and determine if change is needed.

- Can edit shipping rates at Store > Configuration > Shipping quotes, click 'edit' to the right of whichever quote you want to update, and adjust your rate accordingly.
  - Base price is starting price for shipping costs; default product shipping rate is the price per item.

Live Demo

Gift Wrapping
(IC only)

- Custom Checkout Pane #2: allows for multiple options at checkout, often used for free gift wrap options. However, this pane does not allow you to charge the customer.

- To charge for gift wrap: create custom product with its own product class, add attributes and options for different choices. Link that product in a block that you can then limit to only the cart and checkout pages.
  - Customers would have to leave checkout to add the gift wrap to their cart but this provides more control over the options offered.

Gift Cards & Gift Card Payment (IC & IL)

- Gift cards are a versatile offering, especially during the holidays.
  - We have a feature for IC and IL that creates a gift card product for you to customize and sell on your site.

- Be sure to have a gift card product available and a gift card payment method.
  - For IC, we recommend Custom Checkout Pane 1, which allows customers to enter their gift card number but also supply an additional payment method, should the gift card not cover the order total.

- IndieLite stores can *sell* gift cards but *cannot take gift cards at checkout.*
  - Customers will have to place their gift card numbers in the order comments and the card will need to be redeemed and managed at the store.

- Givex integration, if you use Givex for your store gift cards or use their e-gift cards.

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If you need any of the above enabled/aren't sure, write staff@bookweb.org!

Online Gift Code
(IC only)

- Online Only Gift Codes are digital gift codes that can be purchased and emailed to someone to use on the site.

- Gift code is purchased for a specified amount with a message to the recipient and the intended email address; when the order is marked 'Payment Received', a code is automatically generated and emailed to the recipient.

  - Online gift codes can be used on the site for anything except e-books and audiobooks. Uses the 'Online Only Gift Code' payment method; customer enters the code, checks the balance, and if order total is greater than the code's balance, will be asked for credit card info for the remaining total.

- Can also be generated in bulk and balances can be managed directly on your IC site.

Subscription Services
(IC sites on own credit card processor)

- For IndieCommerce stores on their own credit card processor, able to do recurring billing for subscription services.

  - Only for IndieCommerce stores that have moved to their own Authorize.net account.

  - IndieLite stores do not have this capability.

- If the order for the subscription is in Payment Received status, can go into the credit card terminal via the 'Re-Authorize CC' button, and charge the customer again.

  - Since on store's own credit card processor, store is paid when the batch settles, even if it's an old order.

- Authorize.net has Recurring Billing option.

  - If interested, we recommend reaching out to Authorize.net for more information.

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IC & IL E-Commerce Checklist

1. Site Speed

2. Google Analytics

3. Google My Business

4. Social Media links, previews, feeds

5. Clear calls to action and a clear checkout process

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Site Speed

- Site needs to load quickly; otherwise, visitors may bounce (leave the site).

- Speed Tests: https://gtmetrix.com/, https://developers.google.com/speed/pagespeed/insights/

- Whenever you update your homepage, check to see how fast it loads compared to before you made the change.

- For IC sites that utilize JCarousels: may run into site speed issues. This design feature loads every single title onto the page, which takes precious time.
  - Depends on how many books are in the book lists that feed the carousel
  - How many of those carousels are on a single page.

- We recommend no more than 20 books in a carousel to cut down on loading time and keep loading speeds quick and consistent.
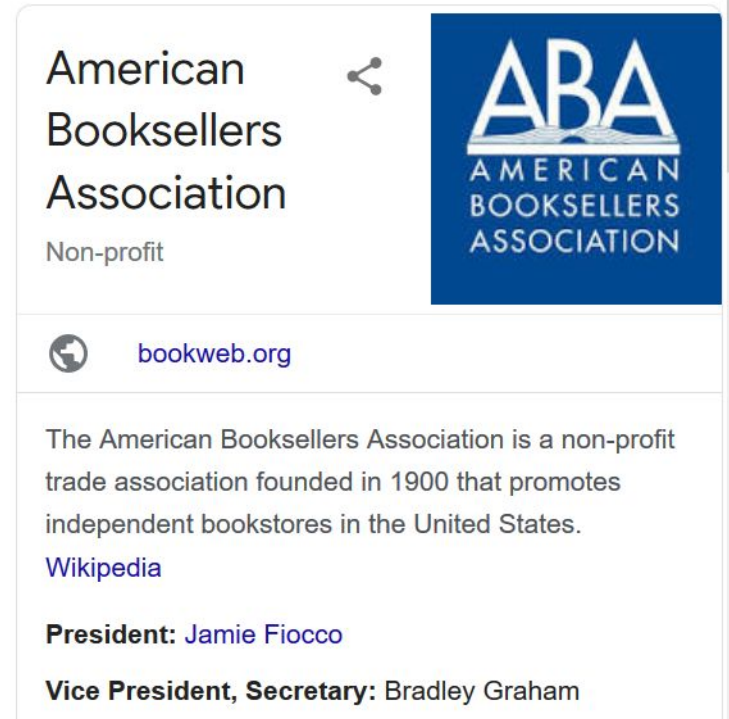
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Google Analytics

- Google Analytics: free analytics service used to track multiple metrics:
  - Realtime customer behavior, audience/customer demographics, site speed, and the flow of traffic through the site.

- We encourage members to set up GA on their IC or IL sites in order to track traffic, behavior, and other information.

- If you don't already have Google Analytics set up, our Help Document is linked in the resources section of this presentation along with several webinars.

Google My Business

- Google My Business allows your bookstore to show in search results when people are searching your business via Google or Google Maps.

- Increase in 'Available Near Me' searches, important for reaching local customers who might not already know you.

- May have to claim your page if you haven't already, but doing so allows you to control the information that shows here.

Also have a webinar on this linked in the resources.

American Booksellers Association

Non-profit

ABA AMERICAN BOOKSELLERS ASSOCIATION

bookweb.org

The American Booksellers Association is a non-profit trade association founded in 1900 that promotes independent bookstores in the United States.
Wikipedia

President: Jamie Fiocco

Vice President, Secretary: Bradley Graham

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Social Media

- Social media allows you to reach your customers directly and engage with them in new ways. Facebook, Instagram, Twitter are the big ones.

- Make sure the social accounts you use have clear links or linked icons on your site.

- Where applicable, sharing website links in content to drive traffic to your site.

- Help Documentation is available on the resources page of this presentation.

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Calls to Action

- Call to Action: a button, banner, graphic, or text on a site meant to prompt the user to click it and continue through the site via a specific path.

    - Action-Oriented: 'Buy', 'Register', 'Sign-Up'
    - Visually apparent: Stand out from rest of site, located in easy to find spots
    - Brief: A few words to grab attention and lead through to next step

- Clear, direct, and makes website navigation and feature functions easier.

- This applies to your checkout process as well; be sure the cart and checkout links are located in an easy to spot place on the site.

Closing Thoughts…

- Consider partnering with other local businesses or organization. Is there capacity to provide space digitally using your site?

- Integrate marketing efforts; have similar content and messaging throughout the channels you use to communicate with customers. This includes your website, social media, email, and other ways you reach customers.
  - Helps create an authentic but consistent message in an engaging manner.

- If thinking about holiday content, what are you promoting and *why* are you promoting it?

  - Sales and order volume are important but so are relationships with customers; continue to build that credibility and trust through your offerings.

  - A 'Year In Review' approach might work better for gift guides or newsletters, depending on your needs.

  - Create a holiday content calendar to keep track of your ideas, themes, and efforts; it'll provide a tool to review a few months down the road.

Questions?

Resources for IC/IL

Reports: https://www.bookweb.org/indiecommerce/reports

Wish Lists: https://www.bookweb.org/indiecommerce/wishlists-gift-registries

Discount Coupons: IndieCommerce: https://www.bookweb.org/indiecommerce/discount-coupons

IndieLite: https://www.bookweb.org/indielite/discount-coupons

Curbside Pickup: https://www.bookweb.org/indiecommerce/curbside-pickup-option,

Video:https://www.bookweb.org/indiecommerce/creating-curbside-pickup-option

Shipping Methods: https://www.bookweb.org/indiecommerce/shipping-methods

Gift Wrap/Custom Checkout Pane: https://www.bookweb.org/indiecommerce/custom-checkout-panes

Gift Wrap/Custom Product: https://www.bookweb.org/indiecommerce/custom-products-0

Gift cards: https://www.bookweb.org/indiecommerce/gift-cards

Online Gift Codes: https://www.bookweb.org/indiecommerce/online-gift-codes

Subscription: https://www.bookweb.org/indiecommerce/membership-subscriptions

General Website Best Practices: https://www.bookweb.org/indiecommerce/website-best-practices

Site Speed Tests: GT Metrix: https://gtmetrix.com/, Google: https://developers.google.com/speed/pagespeed/insights/

Google Analytics: https://www.bookweb.org/indiecommerce/google-analytics

Social Media: https://www.bookweb.org/indiecommerce/social-media

Sample Site Pages:

Creating Wish Lists:
https://icsample20.d7.indiebound.com/creating-wish-lists

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Related Webinars

Order Processing 201 (new customer report):
https://www.bookweb.org/indiecommerce/indiecommerce-order-processing-201

Discount Coupons:
Part 1: https://www.bookweb.org/indiecommerce/discount-coupons-part-1
Part 2: https://www.bookweb.org/indiecommerce/discount-coupons-part-2

Google Analytics for E-Commerce: https://www.bookweb.org/indiecommerce/google-analytics-e-commerce

Google Analytics: https://www.bookweb.org/indiecommerce/google-analytics-0

Google My Business: https://youtu.be/A1Q15wfxREc?t=482 (also has Google Analytics info)

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