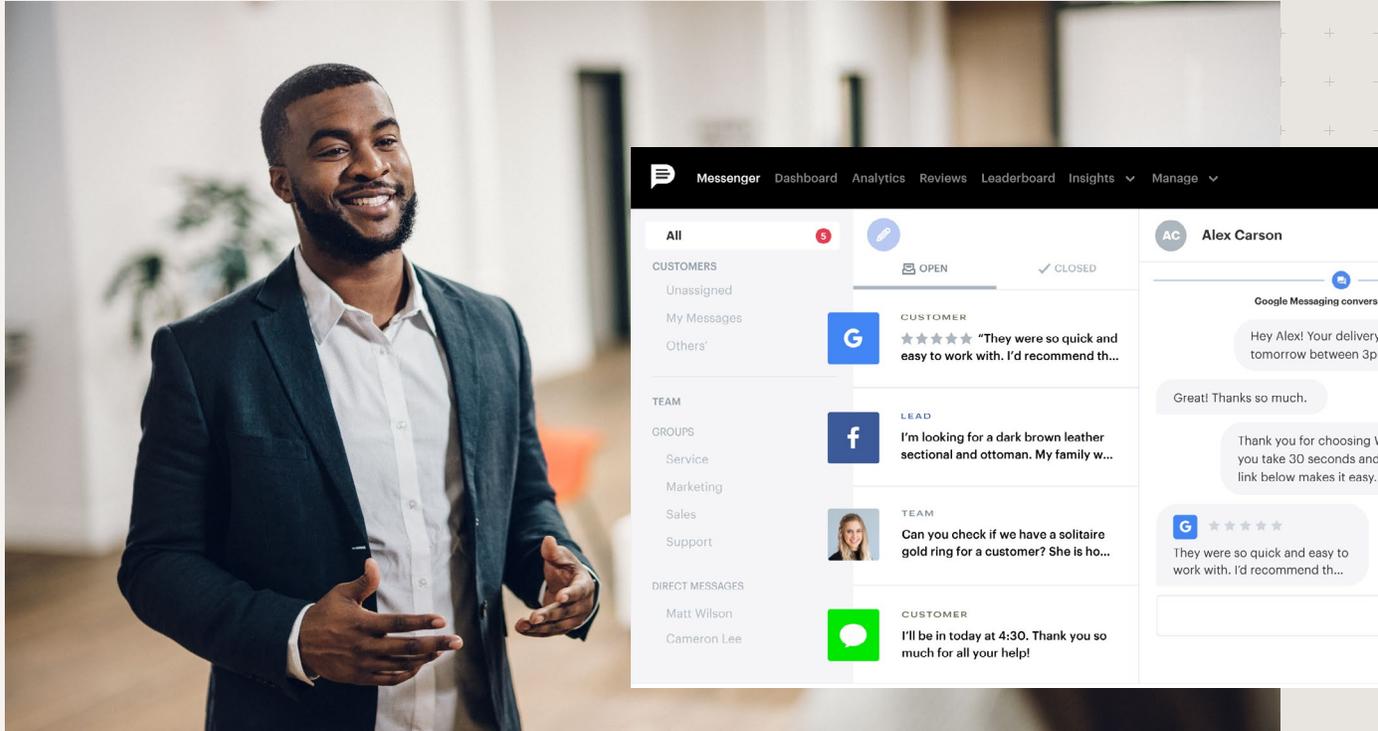




Competing in a Convenience Economy

How to Connect the Online and
Offline Experience in Local Business

INTERACTION MANAGEMENT →



Technology has shifted how people do business and raised the bar on customer expectations. Customers demand convenience as well as seamless online-to-offline experiences—70% of customers say that connected interactions play a crucial role in getting their business.

For local businesses, this means merging the power of the try-and-buy, in-person experience with the type of convenient communication today's customers have grown to expect from online businesses. While the thought of adapting to this change might feel overwhelming, Interaction Management is designed to bridge the gap between the online and offline experience without adding extra work.



Defining Interaction Management

An Interaction Management platform enables businesses with a local presence to communicate conveniently at every touchpoint of the customer journey. Through one dashboard, you can easily engage with leads, customers, and team members—all you have to do is send a quick message. There's no need to hire new staff or pay for a new website. Beyond simplifying communication, Interaction Management empowers your business to:

- 1. Win more leads.**
- 2. Earn repeat customers.**
- 3. Do more as a team.**

Use this playbook to learn how your business can tackle these three goals using modern tools—including leveraging an Interaction Management platform. Focusing on the simple tactics outlined in this playbook will provide your business with a pathway to growth that is convenient and effective for not only your business, but also your customers.



01.

How to Win More Leads

Winning leads is crucial for businesses of all kinds. But to win more leads, you need to open the door for convenient customer interactions. This can be done in three steps:

Step 1: Be where your customers are.

Step 2: Show up on the top of their search.

Step 3: Seamlessly convert leads into customers.



Step 1: Be Where Your Customers Are

Local businesses have an upperhand when it comes to SEO. Simply managing your presence and reputation on a few sites will allow you to show up at the top of search results. These days, that starts with optimizing your presence on Google and Facebook. Then do the same on relevant industry-specific channels (like TripAdvisor, Thumbtack, or DealerRater), and implement a few website best practices to ensure your online presence is just as significant and impactful as it is in-person and offline.

How to Optimize Your Google Presence

Google is one of the most powerful search engines in the arena. Listing your business with Google can tremendously increase your chances of getting on the Google MAP pack and help you attract new customers.



Every business wants more customers, and the way customers reach out to businesses is through Google.

Blake Peterson, Peterson Chiropractic

- **Create a Google My Business account.**

To start, you'll need to sign in with an existing Google account or create a new email that's specific to your business. Once you've signed in, enter your business' name and Google will double check to make sure it's not already registered.



If it's already on the list, that's no problem—you'll have the option to request ownership. If it's not on the list, keep filling out the information fields. Be sure to include your business location and opt into showing up on Google Maps. This feature will allow people to find you and leave a review.

- **Manage business locations.**

If you have multiple locations, you'll include them at this step. You want to make sure those get on your customers' radar, too.

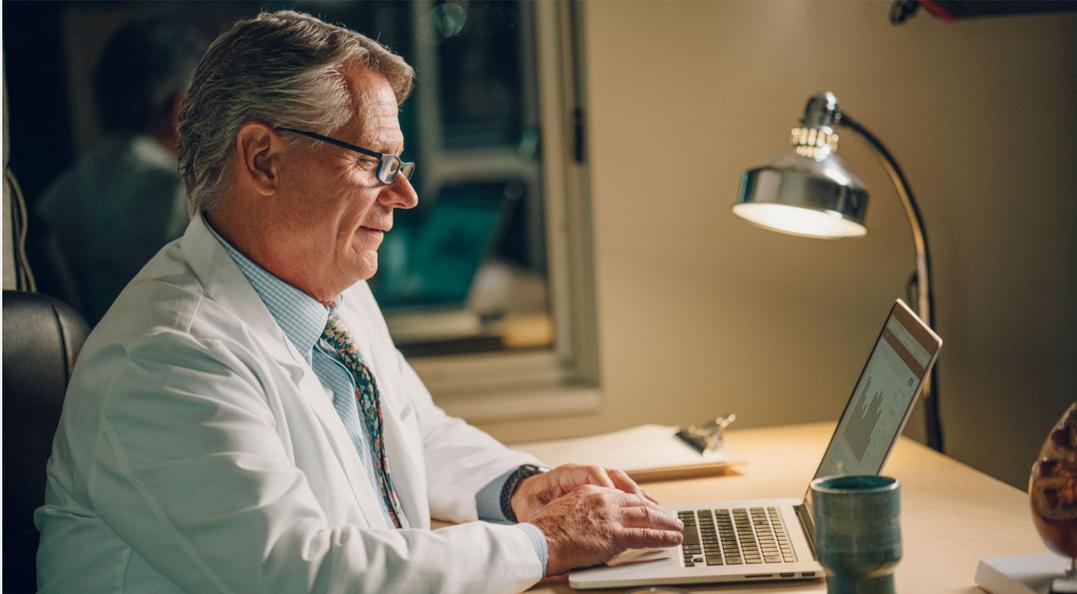
- **Proof your business information on Google Maps.**

Check that your business information is current and correct on Google Maps. If not, you can easily update it in your Google My Business account. From there, click on the *Info* tab and edit the information as you need to. If your business has multiple locations, you can update those as well—click on the site you want to edit.



- **Categorize your business.**

Your category matters. It can help put you on the map and make it even easier for customers to find you. In your Google My Business account, click the *Info* tab. Select the open field underneath your name (see: pencil symbol). You can select a primary category and subcategories if your business has multiple category types. Know that you can't create new categories. You want to be as specific as possible about the service you provide.



How to Optimize Your Facebook Presence

Facebook isn't just a social network. It's also a discovery resource for your customers. Customers frequently turn to Facebook to find new products or services. Of customers who went searching for new items or businesses, over 70% of customers found new products through a Facebook Business page.



The new way to market is you have to have a great presence online."

Ted Byrt, State Farm Insurance

- **Sign up or log in to your personal Facebook account.**

To sign up for a Facebook Business page, you'll need a personal account. So if you don't already have one for yourself, you'll need to create one.

Your personal information won't be tied to the business page or on display



for your customers to see—Facebook uses your personal account to connect to the page administrator responsibilities.

Avoid making a personal account for your business. Facebook’s Business page has a wide variety of tools that help you show up in customer searches, which you’ll lose out on if you make a personal account for your business.

- **Create a business page.**

Once you’ve opened a personal account, you’re ready to create a free Facebook Business page. Just click on the menu button. Click *Page* from the dropdown. Then choose the type of business page you want to create. Then hit *Get Started*.

- **Add relevant business information.**

Your page name should be the same as your business name. Keep the name consistent between channels. Doing so makes it more likely for your business to pop up in a customer’s search. Next, you’ll want to add a category that describes the services or goods you offer. You won’t be able to create a new one, so choose the most applicable existing category. From there, you’ll add contact and location information and hours.

- **Add descriptions, photos, and videos.**

In place of actual in-person experiences, these details help paint a picture for customers who are deciding whether or not they should contact you. Avoid uploading blurry photos as they can be a bit of a turn off for customers. After all, you want customers to know who you are and what you do. Blurry photos or videos don’t give your business the justice it deserves.



- **Create a Facebook call-to-action.**

A call-to-action helps convert customers from ‘just browsing’ to ‘book me an appointment now.’ Facebook allows you to create a call-to-action (CTA) that redirects the customer from the Facebook Business page to your website or a phone call.

How to Choose Other Channels

There’s more to life than just Google and Facebook. And you’ve got plenty of options. But half the battle is knowing where you should list your business. To start, you want to make sure you list your business on industry-specific sites. This step increases your chances of showing up at the top of a customer search and getting chosen.

Your industry will have specific sites that are important to have a presence on. Here are some examples of important sites:

- **Hospitality**
 - TripAdvisor
 - Citysearch
- **Home Services**
 - Home Advisor
 - Angie’s List
 - Yellow Pages
 - HVAC.com
 - Extreme Wrench
 - GuildQuality
 - Thumbtack
- **Healthcare**
 - HealthGrades
 - DentistDirectory
 - Vitals





As you start to identify other channels you'd like to post your business on, ask yourself:

- *Where are my competitors listed?*
- *How frequently are customers interacting with businesses on this channel? Hourly, daily, weekly?*
- *Can customers leave reviews or share their experiences?*

By answering these questions, you can readily pinpoint what channels are most beneficial to helping your business be visible.

How to Make Your Website Easy to Navigate

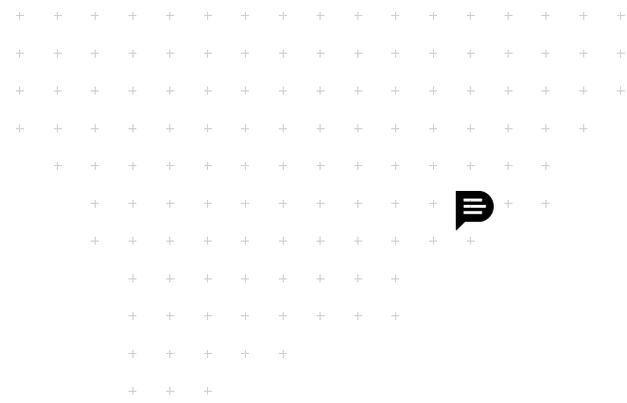
You don't have to be a digital marketing whiz (or hire one) to have a functional, easy-to-understand website. That said, there are a few ways you can enhance your website and make it easy for customers to navigate.

- **Keep it simple.**

You want to keep your website as simple as possible. Customers need to get a quick and clear understanding of what your business does, where your business is located, and how to best reach you. Excessive graphics or images can confuse customers—and nearly 95% of customer first-impressions are design-driven. Don't let an overwhelming website layout be the reason why you lose out on leads.

- ***Include the name of your business.***

It's an easy step to forget. Make sure your business' name is front and center for customers to see. You want them to remember who they're talking to when they do call.



– ***Describe what you do.***

Write a short description of *what* your business does. This helps customers quickly decide whether or not your business offers the services or products they need. For example:

Alva's All-Hours Plumbing is a full-service drain and plumbing provider for residential locations in Salt Lake City, Utah.

This description tells the customer what you do, who you are, and where you service. If they have additional questions, they can reach out to you.

– ***Add business locations.***

In the past year, Google has seen a 500% rise in 'near me' searches. Be sure to include the location of your business. It'll help customers decide whether or not you're the best business for them.

– ***Make it easy to reach out to you.***

Should a customer have a question about your services and want to take the conversation offline, you need to be easy to reach. To achieve this, we recommend including your phone number and adding our Webchat functionality to your website. Webchat allows you to field leads through your website and take them offline over text messaging, giving customers the convenient experience they expect.

– ***Stick to one CTA.***

Multiple CTAs can overwhelm your customers, so stick to one CTA. Make sure the CTA is easy to understand and contains an action word. We suggest placing the CTA near a description of what you do. Doing



so allows customers to follow up about a specific service or product offering without having to click around the website.

– ***Lean on white space.***

White space is the unmarked areas or negative space between graphics and type. Don't overload your customers with sandwiched graphics, images, and text. White space between text, images, and headlines can help your customers avoid what's called 'analysis paralysis.'

– ***Be sure to include photos and videos.***

Photos help provide context for customers and can help boost your search engine optimization (SEO) ranking.

• **Do a little SEO.**

Implementing SEO-related changes can feel pretty intimidating and unattainable. After all, large-scale corporations have entire departments dedicated to boosting their SEO standing. But SEO for local businesses is easier to implement and achieve than you might think.

– ***Make sure customers leave reviews.***

You can't rely on reviews from two years ago to float your business' reputation. Research shows that up-to-date reviews account for 10% of a search engine's algorithm results, so you want to make sure your customers are leaving reviews after they've done business with you. More on reviews on pages 24-25.



– ***Keep your information consistent.***

Inconsistent information can offset all the hard work you put into gaining an SEO standing. Mismatched information bits, like two different business names or various addresses, can confuse search engines and impact how they rank you in a search result. Additionally, it can puzzle your customers and make them lose interest.

– ***Optimize Google My Business and Facebook Business pages.***

Facebook and Google are big drivers for local businesses. Make sure you update these pages with any (and all) information-related changes, as well as current photos or videos of the services you provide.

– ***Manage and claim local listings or online business directories.***

Maintain control of your information—be sure to claim and periodically update your business on local listings. This helps you show up in search results when customers go looking for you.



Step 2: Show Up on Top in Search

You know your business is great—but potential customers may not. And who do potential customers trust the most? Other customers. Nearly 88% of customers trust online reviews as they would a personal recommendation.

How to Boost Your Online Reputation

Reviews help build confidence. Review frequency, quantity, and rating can and will help you show up on top when customers are searching. Most customers (90% of them) read reviews about your business before they visit a location.



We were making hundreds of customers a day happy and satisfied but we weren't getting any reviews."

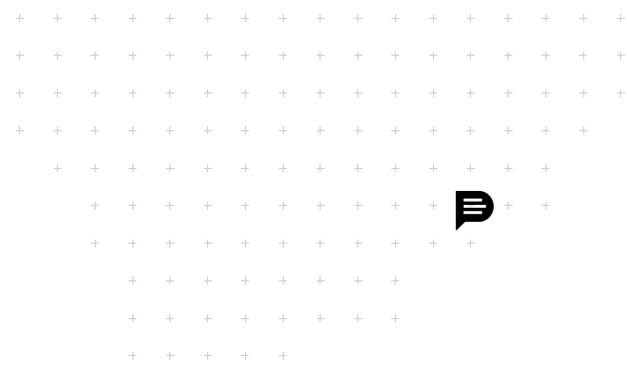
Michael Lindsey, Bill Smith Electronics & Appliances

- **Collect customer reviews.**

You want customers to leave a review about their experience with your business. Unfortunately, for most local businesses, it's the unhappy customers who wind up leaving reviews. So instead of falling victim to a negative rating, you can take back control of your reputation by:

- ***Using a text-to-reviews product.***

With Podium's Reviews product, you can send customers a review invite via text and consistently collect reviews. This tool enables your



customers to leave a review quickly and easily, which reduces friction for the customer and gets you a higher response rate. Just remember, you want to ask customers to leave a review sooner rather than later.

– ***Asking in-person first, then sending an invite.***

You need to ask customers for a review while you have their attention in person. Doing so increases the chances of a customer filling out the review request.

– ***Sending a follow-up.***

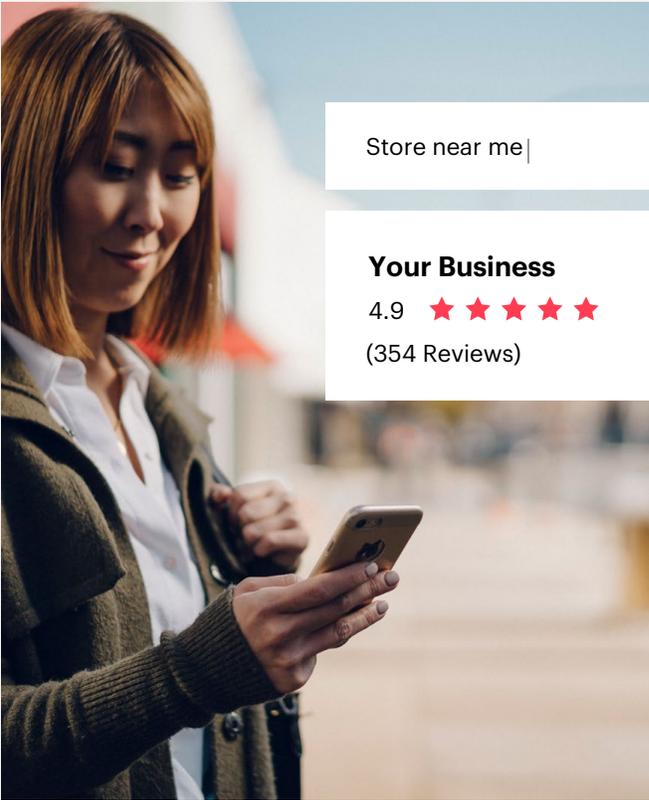
Don't be afraid to send a follow-up should a customer dilly-dally on sharing a review. Through Podium's interaction platform, you'll be able to monitor the invitation status, retrieve the original text message sent to the customer, and ping them with a follow-up.

– ***Responding to all reviews in a timely fashion.***

It's crucial that you respond quickly to negative and positive reviews alike. Providing a response to a positive review highlights how much you appreciate existing customers—which can help you gain new customers, too. And remember to always take the high road. After all, your business and its reputation are on display.

– ***Setting employee incentives to gather reviews.***

The more reviews you can get, the better your rating can become—especially if you're actively getting feedback from customers and applying it to your business strategy. Podium's platform allows you to



track the number of reviews invites an employee sends, so you can set incentives accordingly. Alternatively, rather than rely on employees to press *Enter*, you can automate review invites based on specific events or triggers, allowing you to streamline next steps and reduce time spent on manual tasks.

- **Go the extra mile for customers.**

Boosting your online reputation doesn't stop at reviews. By going the extra mile for customers, you increase the likelihood that they'll refer you to friends. Additionally, it allows you to remedy any negative experiences, which can help offset low review ratings and show customers you're willing to compensate.

- **Interact with customers who have left reviews.**

Whether a customer has left you a negative or positive review, you need to interact with all customer reviews. For positive reviews, be sure to thank the customer for their business. For negative reviews you'll want to



offer long-lasting solutions that encourage them to come back. Sincere apologies, complementary services or comping their purchase are ways you can offset negative experiences. It's never a good idea to reply defensively or dismiss someone's experience. Let your other reviews speak for themselves.

Step 3: Convert Website Visitors

Imagine this—a customer made it to your website. They've read the Google reviews and checked out what you have to offer. They know they want to purchase something. But before they do, there's an essential question they need to be answered.

How do you make it easy for them to reach you and ask this question?

Offer an Obvious Next Step

All call-to-actions on your website or business page need to be crystal clear. Whether it's a "Get a Free Quote Today!" or "Schedule an Appointment," your customers need to know what to do to engage with your business. CTAs should be easy-to-read, bright, and actionable. We suggest sticking to one CTA with the end goal of conversion.

How to Make Connecting with Your Business a No-Brainer

As a local business, there's only so much time and money you can put into making a website. But if you had to strip back everything else and only focus



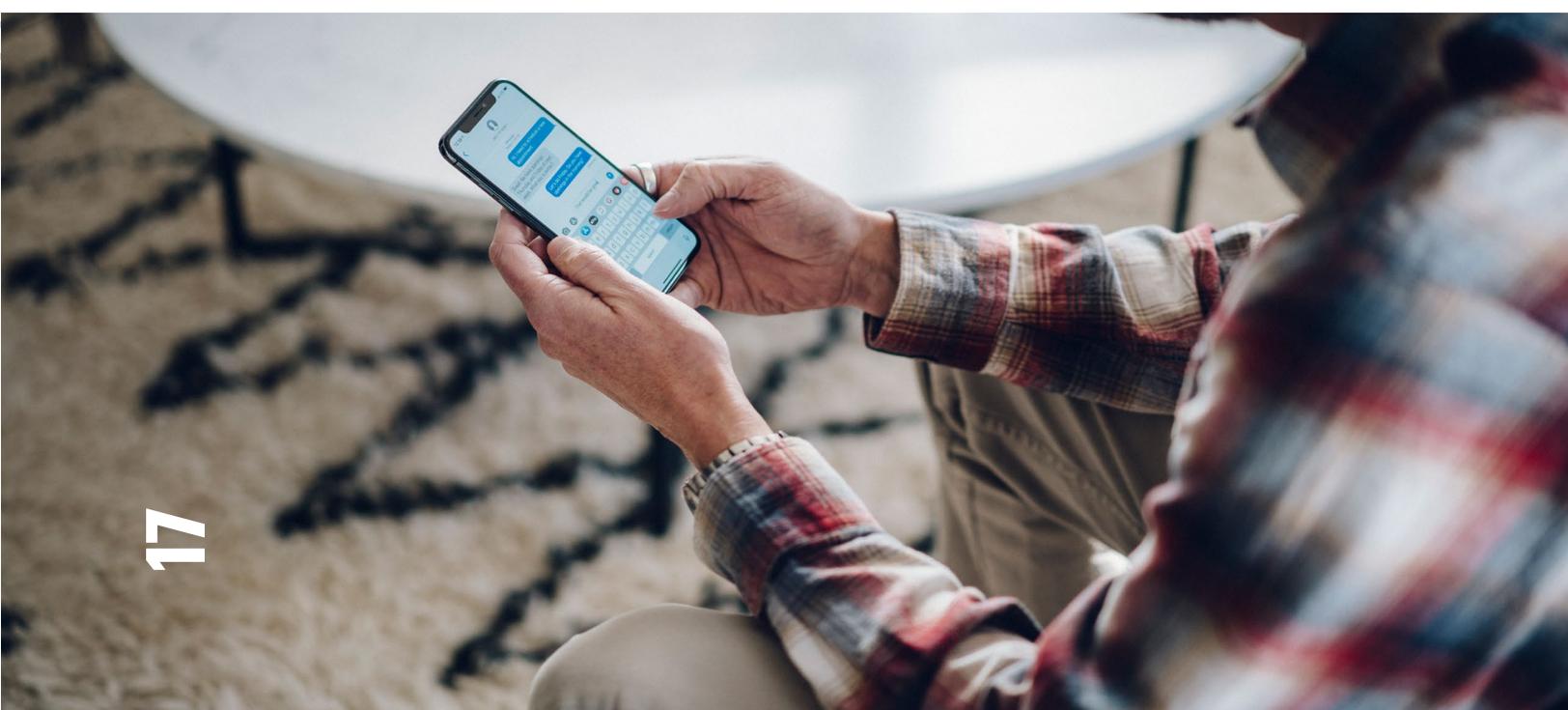
on one outcome for your site, the most important thing would be to make sure your visitors can get ahold of you easily.

“ We’re seeing more newer clients that visit our website, and with Webchat, they can ask questions if they felt too skeptical to come into the shop. It’s making them more comfortable before they even walk in the door.”

Javier Becerra, Loyalty Pawn

- **Include a number or a textable link.**

You need to interact with customers the way they want to. Customer communication preferences can vary from person-to-person, so make sure you provide options such as a phone number or email. Including a textable link allows you to cater to customer expectations—90% of customers prefer messaging to traditional communication choices.

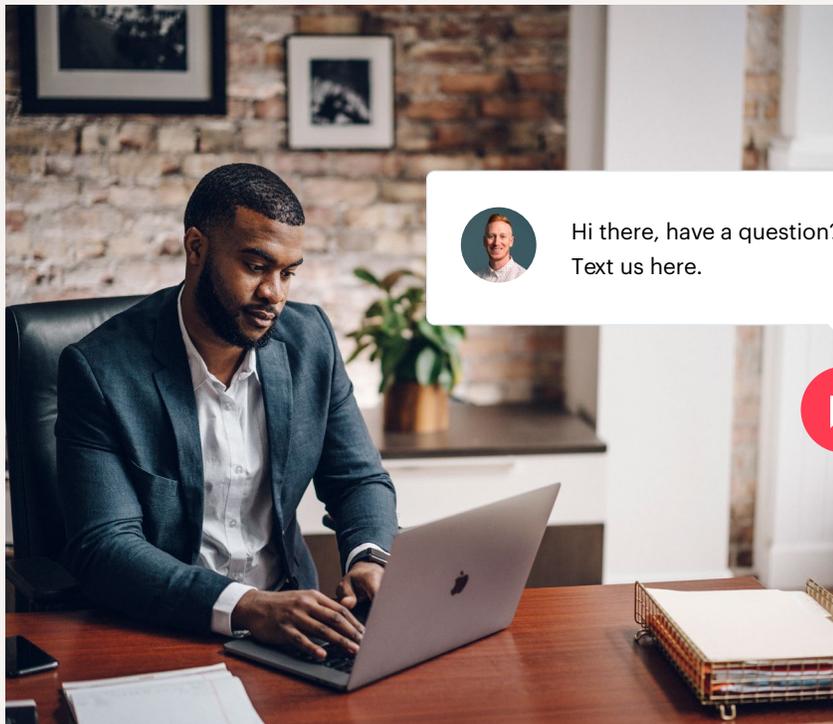




- **Add a chat-to-text solution to your website.**

No one likes being put on hold or having to wait to speak with someone. The average wait time for most live chat tools is 10 minutes—and in those 10 minutes, you can easily lose your lead. With a chat-to-text solution, customers skip the wait time and get the answers they need.

A chat-to-text tool, like Podium’s Webchat, is just like a standard live chat tool. But instead of customers being chained to their computer while they wait for assistance, this tool transfers the conversation to text messaging, so both of you can continue the conversation on your own time. Ultimately this allows customers to ask questions quickly or schedule an appointment—and you never lose touch with them.





02.

How to Earn Repeat Customers

Once you've generated a new lead, you want to make sure they stay a customer for life. After all, it's cheaper to keep existing customers than it is to get new ones—it costs 5x more to acquire a new customer and increases overall spend by 16x more, too.

The key to earning repeat customers entails a twofold approach. First, set yourself apart from the competition by making your business easy to communicate with online. An Interaction Management platform like Podium helps you connect online and offline experiences. Next, you'll want to gather feedback and reviews from customers.



Step 4: Use Two-Way Messaging

Two-way messaging through texts, Facebook, and other tools is the most popular way to communicate—90% of consumers prefer messaging to phone calls or email. With Podium’s Messaging product, businesses can conveniently interact with customers at every touchpoint.

“*Somebody is now in your text inbox, that’s a very familiar friendly place. So I think it helps you earn some trust with the customer because it’s not like they’re emailing with some nameless entity.*”

James Smith, James + James Furniture

How to Provide the Best Messaging Experience

Positive customer experiences through messaging go a long way. Additionally, messaging helps you build relationships and trust with customers, which is a crucial component in gaining repeat customers.

- **Templatize and automate some messages.**

Responses to questions like ‘what are your hours’ or ‘how do I reach you?’ can be easily templatized and automated. If a customer question comes in after-hours, you can provide an automated out-of-office response. Other types of customer inquiries might require more specific, personalized responses to provide the best customer experience possible.



- **Don't be afraid to use personality.**

Emojis are an easy way to keep the conversation light and friendly, and remind the customer that there is a human on the other side of the conversation. Just remember to keep messages to the point and keep the exclamation points to a minimum—overuse of these can feel overwhelming to the customer.

- **Clarify and directly address their questions or statements.**

Doing so makes the customer feel as though they're being heard. It also gives you an opportunity to remedy any misunderstandings and miscommunications.

How to Best Use Messaging

There's very little messaging can't do, but there are specific tasks that messaging does best.

- **Close leads.**
- **Schedule appointments.**
- **Send pictures or videos of inventory.**
- **Provide delivery or technician updates.**
- **Answer questions.**
- **Identify problems.**
- **Gather feedback.**
- **Send appointment or service reminders.**
- **Collect customer reviews.**



Step 5: Get Customer Feedback

Rather than wait around for customers to provide feedback, you need to proactively reach out and gain insight into what they loved (and disliked). Feedback enables you to solve problems and improve customer experiences in real time. To capture insight easily and quickly, we created Feedback to collect information over two-way messaging.

How to Get Feedback In the Moment

The sooner you can get feedback from customers, the faster you can transform a potentially negative experience into a positive one.



There is a much higher response rate with messaging versus email, which increases the amount of feedback that we need to continue improving our business!”

Ryan Levitz, Ashley Furniture HomeStore

- **Ask if the customer was satisfied with your business.**

You need to know if your business can do things better for your customers. If customers enjoyed the experience, you're well on your way to transforming customers into promoters.

- **Collect feedback through two-way messaging.**

Don't make your customers jump through hoops. Two-way messaging allows customers to respond quickly and gives you access to responses in minutes—not months later.



- **Ask for feedback in the moment.**

You need to ask for feedback when customers are most engaged, and when the experience is fresh in their minds.

- **Respond quickly.**

The beauty of getting feedback through two-way messaging is that you can provide real-time fixes and remedies for customers who've had negative experiences. Responding quickly to customer feedback shows you're committed to customer satisfaction.

- **Actively listen and validate.**

Feedback is tough to give and receive. Take customer input into consideration. Avoid undermining their experience, after all, it's their personal experience. Doing so could further exacerbate a potentially tense customer relationship.



- **Offer a solution that genuinely fixes their problem.**

Compensate for negative experiences by doing what you can to make it right before you lose a customer for life.

Step 6: Earn Customer Trust and Loyalty Through Reviews

Once you've gathered feedback, ask customers to leave a review. As discussed on page 11, reviews enhance your online reputation and allow customers to share their experience with others, which in turn gives you new customers or repeat ones.

Reviews allow you to control your online reputation and can help persuade a customer to do business with you—or not. Our Reviews product enables you to leverage happy customers by giving them a convenient way to leave reviews. More importantly, reviews elevate customer loyalty and help build trust with new or existing customers.

Reviews simultaneously offer a snapshot of your expertise and highlight customer experiences, as well as your ability to respond to them. Keep in mind, you and your customer have something to gain through a review. You benefit from insight and better review ratings, whereas your customer feels appreciated and delighted that you asked for their opinion and contribution. So it's crucial that you ask for a review because the act of leaving a review reinforces the customer's positive experience. Customers want to leave a review too—50% of customers have happily left reviews for businesses who asked for one.



10% Detractors

10% Passives

80% Promoters

9 Catherine

1 hour ago

They had the exact car that I was looking for at a great price!

7 Tyler

6 hours ago

Customer service was good but they didn't have what I was looking for.

3 Susan

1 day ago

The salesperson helping us wasn't helpful at all and very pushy.



03.

How to Do More as a Team

Convenient interaction tools aren't *just* for your customers—your employees need them, too. By equipping your teams with easy-to-use solutions, you help promote efficient communication and effective collaboration between departments and locations.



After all, people work better together. Studies show that businesses who offer and facilitate collaborative environments for their employees are 5x more likely to be higher performing and productive than competitors. That said, collaboration isn't limited to corporate meeting rooms—local businesses can use team communication tools, like Podium's Teamchat, to achieve this type of success and modernize their business, in turn enabling them to win more leads and earn repeat customers.

 **Podium has become a tool that we use every day just to manage all of our locations.”**

Jenn Nicole, Tire Outlet

How to Best Use an Internal Communications Tool

An internal communications tool, like Teamchat, offers a myriad of benefits. Such as:

- **Regular updates on customer interactions.**
- **Communication about leads—in the moment.**
- **Discussion about scheduling conflicts.**
- **Collaboration surrounding roadblocks.**
- **Immediate opportunities to learn from customer feedback.**
- **Shared team experiences.**



How to Do More as a Team

Until recently, local businesses had to make do with communication methods that simply didn't fit their needs. Podium's Teamchat allows employees to connect and collaborate—no matter where they're at or what they're doing.

- **Connect through one inbox.**

Having a single dashboard for your lead, customer, and team interactions allows employees to connect the dots between customer journey touchpoints. This keeps employees engaged, productive, and informed—and also helps them close leads or earn repeat customers.

- **Promote an active learning environment.**

Visibility into what is working and what isn't boosts active learning opportunities for employees. It enables collaboration across departments or locations and encourages employee engagement. With an internal communications tool like Teamchat, employees can achieve this type of active learning, problem-solving, and collaboration in real-time.

- **Internally assign and delegate tasks to employees.**

Assigning conversations is another way you can promote engagement within the interaction platform. This distribution of tasks holds employees accountable and helps them succeed in their position. Additionally, it ensures that important messages are reaching employees when it matters the most, which allows your business to close leads and serve customers more effectively.



- **Leverage customer experiences into learning moments.**

Educational sessions about negative customer experiences can help your employees learn from each other and improve performance over time. On the other hand, highlighting positive interactions can help you identify potential leaders, boost morale, and set incentives internally.

- **Apply reviews and feedback—as a team.**

Keep track of any patterns relative to customer reviews and feedback. This will help you adjust strategies and tactics to provide the best customer experience possible. Podium offers insight into these patterns, so you can identify them without added effort.





04.

Putting Everything — Into Practice

How Interaction Management Brings
Customer Touchpoints Together



Local business isn't dead or dying. Local businesses simply haven't had the right tools or solutions that bridge the gap between the online and offline customer experience. However, by connecting the customer journey touchpoints with Interaction Management, local businesses can stand out against the competition in the online arena—all through one platform. So instead of watching customers disappear into thin air, Interaction Management enables your business to do a day's work—to get found, convert visitors, gather feedback, save time, collect reviews, and collaborate as a team—efficiently, effectively, and conveniently.

Your Interaction Management Checklist

- Be where your customers are.
- Get found with Reviews.
- Convert visitors into customers using Webchat.
- Make communication convenient through Messaging
- Gain customer-related insights via Feedback.
- Transform customers into promoters with Reviews.
- Do more as a team and collaborate using Teamchat.

