OMNICHANNEL:

The Unicorn of Improving Experiences

Author: Jennifer Passini Ph.D., Senior Strategic CX Consultant

> **"Is the reason that we keep talking about (and striving for) omnichannel experiences because they are not obtainable?"**
>
> **"Is an omnichannel approach the unicorn of modern customer experience? "**

CUSTOMERS EXPECT MORE

Delivering omnichannel experiences has been a hot topic in the industry for a number of years. The reason that we keep talking about it is that very few have actually achieved omnichannel delivery. Another important reason that we continue to talk about omnichannel experiences is because it's what customers expect (especially in today's environment). They want the organizations that they choose to know them and what they want as a customer, including product and channel usage and preferences. Is the reason that we keep talking about (and striving for) omnichannel experiences because they are not obtainable? Is an omnichannel approach the unicorn of modern customer experience?

In this paper, we discuss what is needed to deliver on an omnichannel experience and the barriers that keep companies from delivering on this objective.

What is Omnichannel?

The promise of omnichannel is simple: to provide the customer with a single, consistent, and seamless experience. It's about putting the customer at the center of the experience. What does this mean specifically?

BLURRING CHANNELS

Companies must deliver the same experiences regardless of channel or touchpoint. Customers should be able to complete the same tasks, obtain the same information, and experience the same outcomes regardless of their path. The key to delivering exceptional experiences precisely, as a company, intends it to begin with having well-defined, communicated, and reinforced business and customer experience goals and standards. In the omnichannel world, those standards must be translated, communicated, and applied consistently across each channel and across each brand to prevent widely varying experiences from channel to channel and brand to brand.

Doing business and dealing with a pandemic highlighted customers' expectations for similar experiences regardless of channel. When customers could not visit or do not feel comfortable with in-person interactions, they are expecting to be able to accomplish through other channels and, most importantly, they expect the same experiences and outcome. The seamlessness of experiences across channels is now an expectation. We believe that the blurring of channels and expectations of similar experiences regardless of channel will continue well into the future.

KNOWING CUSTOMERS

This relates to knowing how and when customers interact with the company. It is much more than just tracking experiences, it's about integrating experiences across channels and finding new and modern ways to understand them.

Recently, a friend shared an experience when he dialed a call center. The representative that answered his call already knew what question he would have because of his recent activity on his online account. Omnichannel is much more than just knowing your customer in terms of profile and product ownership, it is about engaging in a relevant dialogue based on profile, product ownership, usage, interaction, and like-minded activities.

USING PREFERENCES

Because an omnichannel approach ensures that companies really know their customers, interacting with customers based on preferences is key.

A couple mistakes many companies make when they consider their touch-point or channel CX programs are:

- Customers always interact with their preferred channel

- Customers interact with one channel to complete a task.

Both of these are dangerous assumptions. Here's the reality: customers may interact with your company via multiple channels to complete a task and if this was unexpected OR if they had disparate experiences, they are unhappy. Additionally, customers may interact with your company through a less than preferred channel because either they cannot do what they need to do through their preferred channel OR they do not know it is possible to do through their preferred channel. To support digital conversion, many companies leverage very targeted campaigns to inform and educate customers that interact with them digitally.

For example, during the onset of COVID-19 many companies actively communicated their commitment to quality digital experiences and educated and informed customers of what they could accomplish via their digital platform.

Omnichannel Roadblocks

Unfortunately, achieving the goal of seamless omnichannel experiences is not always simple. There are a lot of things that keep companies from delivering on an omnichannel customer experience. Some of the biggest roadblocks include:

NO DEFINITION

Companies, especially those that have been very channel-focused or those that are organizationally siloed, have a hard time even defining what omnichannel would mean for their organizations. Therefore, no definition leads to no action.

SYSTEMS CONSTRAINTS

Technology can both enable and hinder omnichannel approaches. Companies that leverage multiple systems to track interactions and experiences can have a hard time actually achieving omnichannel execution. Integration and consistency among all systems are critical. For some companies, this can be a multi-million dollar investment.

COMPLEXITY

For businesses that have complicated offerings or are hampered by a regulatory environment, the ability to completely deliver on an omnichannel experience may not be possible. For example, within the financial services sector, it may not be possible for banks to allow customers to open certain types of accounts through digital channels.

Impactful Experiences

Product & Services

The Experience

External Factors

Sales Interaction

Marketing, Advertising & Public Relations

Channels Experiences & Preferences

Beyond addressing the roadblocks that plague an omnichannel approach, creating a healthy omnichannel strategy also requires an integrated process for ongoing designing, listening, understanding, transforming and realizing to make it successful.

Very few businesses have actually achieved omnichannel delivery or transformed their digital experiences to improve experiences.

OMNICHANNEL CX:
Comprehensive & Connected

Like technology infrastructure, much of customer experience measurement is still approached from a siloed perspective.

By definition, an omnichannel experience requires creating continuity across all aspects of the customer experience. Effectively measuring the experience using an omnichannel approach requires that we mimic this continuity and breadth with a unified CX strategy.

It's essential to design omnichannel research broadly as a comprehensive, relationship-oriented CX effort. The approach starts with understanding experiences across all channels that the customer utilizes and the interrelationship among channel experiences. Channel interactions are a critical part of the customer experience, but there are other components that blend with channel experiences to form the customer relationship. It's imperative to measure these other critical aspects of the experience and understand the interplay among them to truly understand the broad customer experience.

An omnichannel approach begins with the basics, but takes a broader look at experience with four tenets in mind:

1 **Measure the Experience Not Just Within Channels, But Across Channels**

Most organizations spend the majority of their customer experience measurement resources on deep, single-channel transactional CX.

While transactional CX is essential and provides critical information to the front-line to help improve channel operations, this focused view does not evaluate the consistency and seamlessness of the experience. To measure the omnichannel experience holistically, we recommend a relationship-oriented CX approach to explore not just the customer experience in a single channel, but the consistency of their experiences across channels. This approach ensures understanding of how experiences online, on the phone, or store location work together to impact a customer's satisfaction and engender loyalty.

2 **Take a Broad Perspective by Looking Beyond Just Channel Experiences**

Understanding how well channels work together to foster loyal and profitable customers is the first step, but that alone is not enough. Our research has shown that evaluating the customer experience solely from the channel perspective leaves vital portions of customer loyalty unexplained. It is only when we introduce the concepts of how well channels work together and how they interact with products that the loyalty equation comes into focus. Customer loyalty is driven by a customer's broad perspective, including not just channel experiences, but also product experiences, marketing communications, moments of truth, and much more. To complicate matters more, customer opinions are also impacted by factors outside of the company's control—such as traditional and social media communications, competitive moves, and new players in the marketplace.

Omnichannel CX includes measuring different constructs to explore the breadth of factors customers use to form their opinions of a brand:

The Customer Journey: Understand the motivations for purchasing, the consideration process, emotions, and how the customer arrives at the point where they purchase.

Channel Experiences and Preferences: Evaluate customer satisfaction with interactions at various touch-points, identify and measure the drivers of channel satisfaction, and determine how well the channels work together to form a seamless experience.

Impactful Experiences: Explore the effects of various impactful experiences or "moments of truth" such as problem incidence and handling, poor product quality, fraud, and policy changes on satisfaction and loyalty.

Sales Interactions: Assess the sales process, from the advisory conversation to product selection and cross-sell efforts.

Products and Services: Evaluate experiences with the products and services to explore the relationship between product and channel.

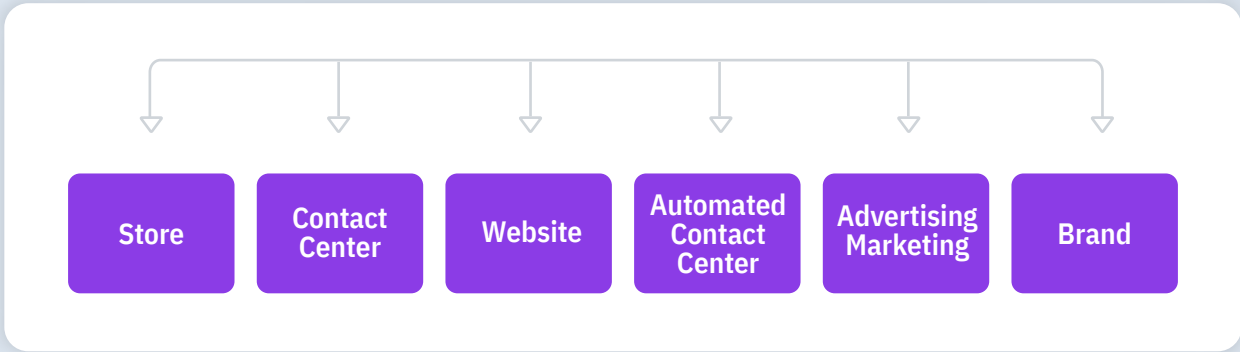**Marketing, Advertising & Public Relations:** Evaluate the exposure of customers to various forms of marketing and communications and determine their impact on the perceptions of the company.

External Factors: Highlight the impacts of traditional media, customer-driven social media content, and other aspects that could impact brand perceptions that are outside of an organization's control.

Overall Impression

Store	Contact Center	Website	Automated Contact Center	Advertising Marketing	Brand
Friendliness of Staff	Ease of Completing Transaction	Ease of Access	Needs Met	Message Aligned with Brand Promise	Community Focus
Availability of Products & Services	Wait Time	Intuitiveness	Expected Options Available	Believability	Environmental Focus
Knowledge of Staff	Knowledge of Staff	Completeness of Information	Easy to Understand	Expectations Met	Customer Centric
Ease of Completing Transaction	Ability to Answer Questions	Needs Met	Easy to Complete Transaction	Resonate with Audience	Targeted Product/ Service Offering

Interaction/Touchpoint

Drivers

3 **Bring Together the Depth of Channel Transactional CX with the Breadth of Omnichannel CX**

While insight from an omnichannel relationship study provides organizations with a broad perspective, we believe the ideal approach integrates omnichannel intelligence with those derived from existing channel transactional studies. This approach combines the broad learning across channels and experiences with channel-specific deep intelligence.

Bringing these pieces together offers several key benefits:

- An understanding of competitive strengths and weaknesses

- A full view of the drivers of satisfaction and loyalty from both the organization and competitive perspective

- A deeper knowledge to help develop strategies and coaching efforts that leverage strengths and mitigate weaknesses

- A scorecard combining the results of the omnichannel and individual channel studies

- The ability to develop common metrics for tracking across studies

4 **Voice of the Customer (VoC) Comes in a Lot of Shapes & Sizes**

Consider all sources when building out a holistic, omnichannel experience improvement program.

Customers provide feedback of their experiences in a lot of different ways—both solicited and unsolicited. There may be some sources of VoC that are best captured through sources outside of traditional relationship and transactional measurement, such as social media or review websites. Companies should broaden their horizons to include all different types of listening posts to gauge how well they are delivering on omnichannel experiences.

Some important data sources are:

- Social media

- Online review sites

- Comments and complaints gathered outside of the measurement programs

- Front-line employees' notes from interactions with customers (could be in-person or call center experiences)

- Interactions online using web analytics and usage data

Use the Building Blocks You Already Have

Organizations can achieve an experience improvement omnichannel approach through designing and outlining a CX strategy with business goals in mind. Whether the goal is focused on retention, acquisition, cross-sell upsell etc. Using the proper systems, data and human expertise to listen and understand clients needs, the data and its findings to transform experiences, processes and business direction. All, while realizing and reassessing the appropriate changes that will drive customer, employee, and business outcomes.

While not many organizations have truly achieved a consistent omnichannel solution, most do have the right building blocks to make it happen. Having an integrated CX program is a critical piece on the path to finding that omnichannel CX unicorn.

ABOUT THE AUTHOR

Jennifer Passini Ph.D.
Senior CX Consultant, InMoment

Over the past 19 years, Jennifer Passini, Ph.D., has grown up designing and implementing experience improvement programs. Today, she is a strategist dedicated to supporting the needs of InMoment clients. While her passion at InMoment is identifying the best ways to address clients' strategic goals, at home she is the quintessential soccer and baseball mom for her daughter and son.

InMoment

To demo a product or to contact us call:

NORTH AMERICA
+1 385 695 2800

UK & IRELAND
+44 121 296 5245

APAC
+61 (2) 8397 8131

GERMANY
+49 (0) 40 369 833 0

Or email us at sales@inmoment.com

About InMoment

Improving experiences is why InMoment exists. Our mission is to help our clients improve experiences at the intersection of value—where customer, employee, and business needs come together. The heart of what we do is connect our clients with what matters most through a unique combination of data, technology, and human expertise. With our hyper-modern technology platform, decades of domain authority, and global teams of experts, we uniquely deliver a focus on Experience Improvement™ (XI) to help our clients own the moments that matter. Take a moment and learn more at inmoment.com