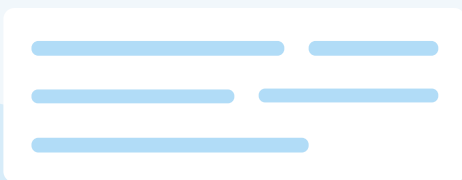
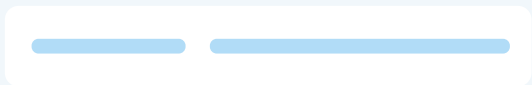
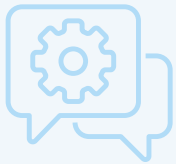


Build Your Omnichannel Communications Strategy

Creating Meaningful Customer
Experiences Across Touchpoints



Introduction

As consumer preferences for communication continue to shift towards digital methods, marketers, sales representatives, and customer support teams need to adapt their communications strategy accordingly. Instead of thinking of ways to provide a stellar phone experience versus a chat or text message experience, you'll want to focus on unifying your messaging and service experience across your different communication channels. By adopting an omnichannel engagement strategy, you eliminate any disconnect customers may feel in interacting with your brand via different methods, and provide a seamless, consistent experience—no matter how they choose to contact you.

In this e-book, we'll explore the benefits and challenges of adopting an omnichannel communications strategy and how capturing data throughout your customer's journey will inform this strategy and make it more effective. We'll also touch on how using your data and unifying your communication channels empowers you to create more meaningful customer experiences across those various touchpoints.

This e-book will cover:

- 1 What is omnichannel marketing?
- 2 How to capitalize on data you're gathering throughout your customer's journey
- 3 Creating meaningful customer experiences across touchpoints

PART ONE:

What is Omnichannel Marketing?



Omnichannel marketing is a cross-channel communications strategy that organizations use to unify and improve their user experience across methods.

With an effective omnichannel strategy in place, there should be no disconnect between the various touchpoints a consumer has with your brand, including how they feel when interacting with your customer service team, the type of visuals or branding they're exposed to, and their expectations for being able to connect with your business in a timely and effective manner. Businesses that employ omnichannel communication tactics often see higher conversion and retention rates as well as increased customer satisfaction because customers are empowered to contact them in the way they prefer, while still experiencing the same level of service.

“A customer in an omnichannel experience should feel that no matter how or where they reach out to your business, they’ll get the same impression and experience of your brand... every time.”

- NapoleonCat

Today's consumers enjoy several ways of communicating with businesses, including:



**PHONE
CALLS**



**TEXT
MESSAGES**



**FORM
SUBMITS**



**LIVE
CHATS**



**SOCIAL
MEDIA**



**MESSAGING
APPS**



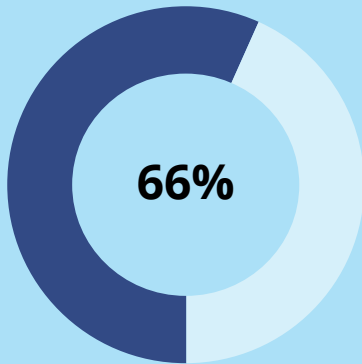
EMAIL

Among these channels, live chat and text messaging in particular have seen significant growth over the past several years with consumers. Live chat, once considered a “nice to have” feature, is now an essential part of any customer communications strategy. More than half of consumers prefer to contact a business over live chat versus phone calls or other methods. This is because it’s easy, allows them to multi-task, and reduces their wait time to connect with an agent. Similarly, [66% of customers](#) prefer to communicate via text message versus phone. And with a whopping [98% of text messages](#) read in the first two minutes, there’s no doubt adopting an effective text messaging channel for your business to communicate is a rapid way to engage new leads as well as customers.

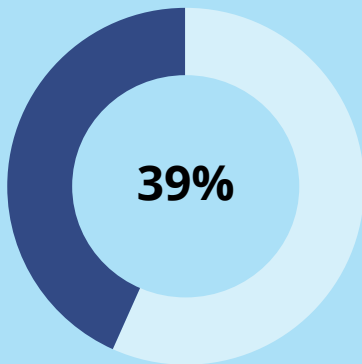
That said, managing a number of communication channels presents a real challenge for businesses of any size. As you scale, you likely will have different teams or people dedicated to managing your channels—and with that, an array of tones, personalities, and approaches to engaging with customers. (Not to mention varying bandwidth for managing inquiries and response times.) You may have a large cohort of employees dedicated to answering phones in your call center, but only one or two social media or community managers addressing comments and questions coming in across multiple social media accounts. In turn, it can be frustrating as a consumer to have one customer experience over the phone, and an entirely different type of interaction over live chat. After a negative customer service experience, [39% of customers](#) said they would avoid a company for two years. [91%](#) of customers who are unhappy with a brand will just leave without complaining.

While it’s more expensive and takes time and resources to invest in coordinating your communication strategy across channels, adopting an omnichannel strategy will elicit higher ROI over time because you will gain deeper insights into all the touchpoints customers have with your brand and deliver a stronger customer experience. Finding the right tool that can help you automate your messaging across channels also guarantees a more streamlined and consistent experience for customers, especially as you scale. And, if your tools also empower you to proactively engage with your customers, whether through a chatbot prompt or a texting automation tool that can re-engage past customers when it’s time to renew their service, for example, then you’ve uncovered new opportunities to drive sales and revenue just by updating your communications strategy.

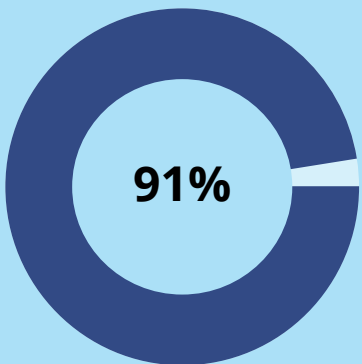
Did you catch that?



66% of customers prefer to communicate via text message versus phone



After a negative customer service experience, 39% of customers said they would avoid a company for two years

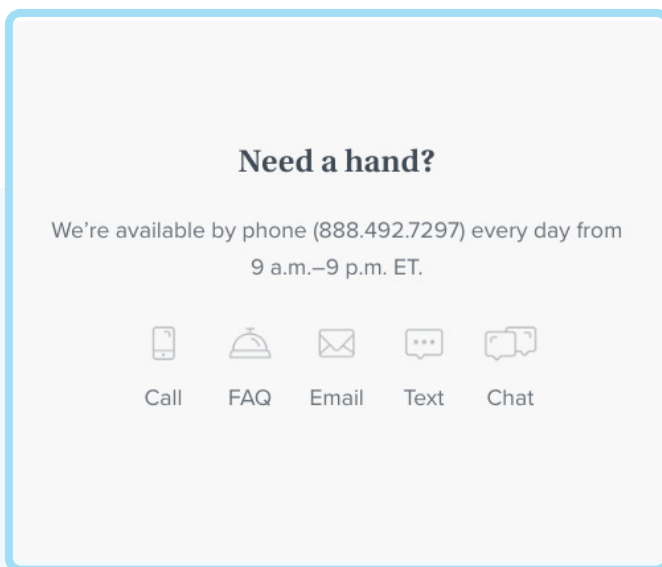


91% of customers who are unhappy with a brand will just leave without complaining

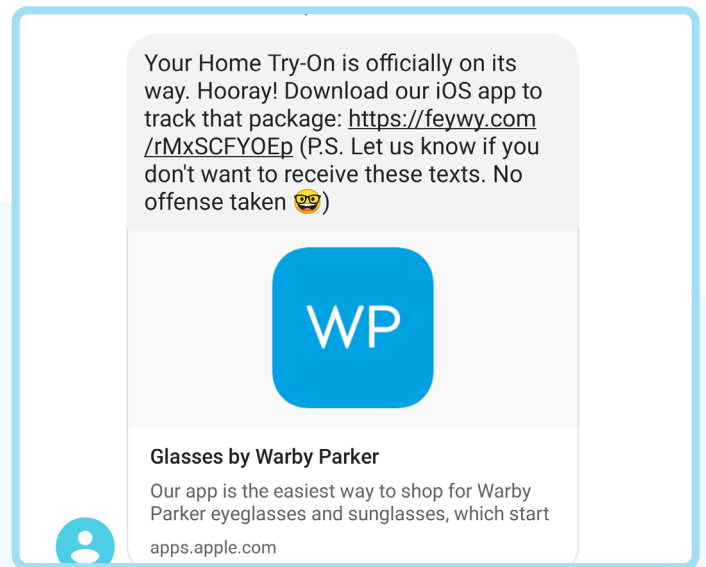
Effective omnichannel marketing in action

Let's take a look at one brand using omnichannel engagement effectively: Warby Parker. The brand, which launched in 2010, started out with one goal: to offer high-quality, designer eyewear at an affordable price. While they initially launched as an e-commerce only business, Warby Parker has since expanded into dozens of retail locations across the United States and Canada and is now valued at around \$2 billion.

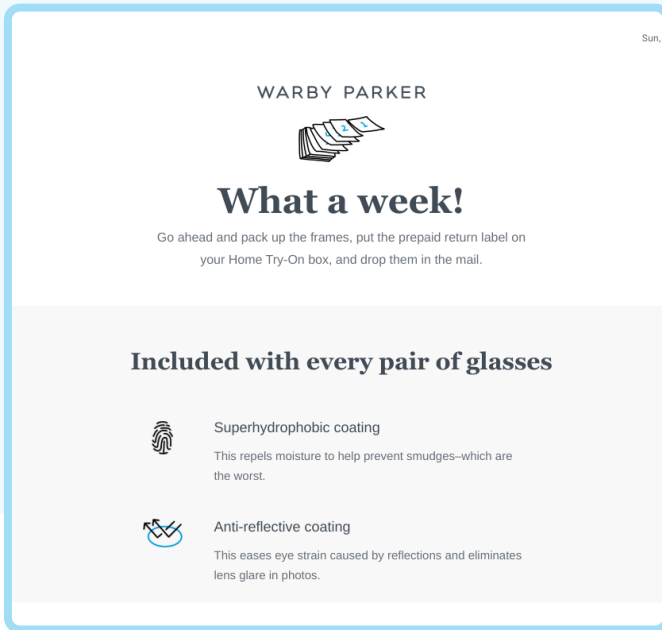
Co-founder and co-CEO Dave Gilboa recognized early on in their brick-and-mortar expansion that, "The future of retail is the tight integration of online and offline. We really want to offer the best experience to our customers." The brand has since built a powerful and consistent omnichannel marketing and communications strategy, offering customers several avenues to get in touch with them whether by phone, email, text, or chat, and delivering a strong and unified experience across those channels.



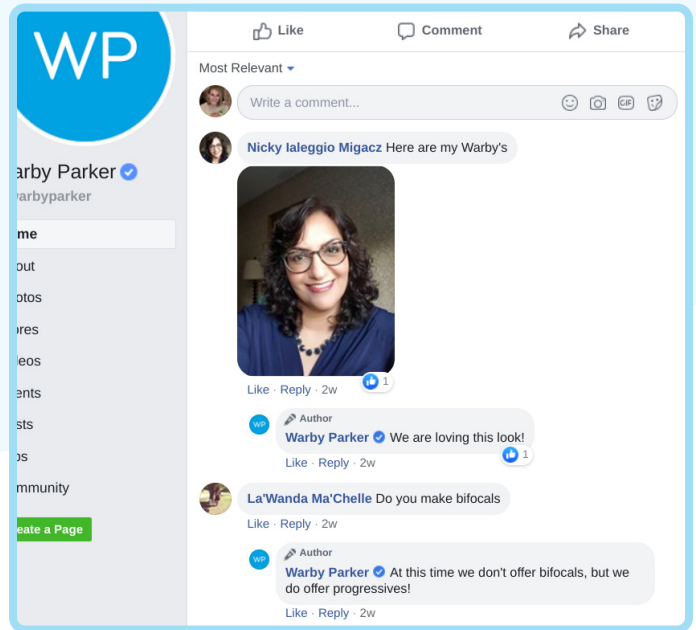
The Warby Parker brand offers phone, email, text messaging, and chat as their communication channels.



When a customer places an order, they receive a personalized text message as well as an email notifying them of their shipment, which they can track through the brand's unified mobile app experience.



Warby Parker proactively anticipates customers' needs, providing automated reminders when needed that are in line with the brand's voice and visual style.



The brand loves engaging with its customers on social media and offers a fast and consistent messaging experience when replying to customer comments.

Beyond providing a strong omnichannel experience, however, what makes Warby Parker especially successful is that they've made interacting with their brand not only easy, but fun. Delivering a satisfactory experience for your customers is one thing, yet if you want to leave an impression and win over valuable brand advocates, you should consider ways to infuse personality into your omnichannel engagement strategy and excite customers to interact with you—as demonstrated in how customers will proudly post selfies to Warby Parker's Facebook page showing off their new frames. This is one of many ways Warby Parker manages to stand out in an otherwise crowded market filled with large, brick-and-mortar competitors as a brand committed to customer experience.

Continue reading to explore ways to personalize your customer's experience with your brand, while still managing and scaling this process effectively as you grow your business and volume of customer support contacts.

The difference between multichannel and omnichannel

Brands like Warby Parker also help demonstrate a key distinction that we want to highlight, which is the difference between multichannel and omnichannel marketing. You might be thinking, “Well, I already have all (or some) of these communication channels, as well as a website, a blog, and social media accounts, and I’m using them to connect with my customers.” Note, however, that simply having multiple channels running at once does not mean that the experience is unified and seamless across them. Even if they are each effective in their own way, if they are not aligned and working together, then they are not considered omnichannel.

“All omnichannel experiences will use multiple channels, but not all multi-channel experiences are omnichannel.” [Source: Hubspot](#)

An omnichannel experience takes into account each platform and device a customer will use to interact with your company in order to provide your customer the right service in the right way at the right time.

With the Warby Parker example, once a customer has placed an order, they receive an email confirming their order, as well as a text message when it’s shipped complete with tracking info—and a very fitting glasses emoji. 🕶️ This demonstrates how the brand is proactively considering their customer’s concerns (“Where’s my order?”) and messaging them in their preferred digital method via a unified experience. The brand is also giving the customer an easy answer, versus the customer having to look up their order details or call the business to check on the status of their order—conserving valuable time and resources for the Warby Parker support team while keeping the customer happy.

RECAP: Why omnichannel marketing matters

- 1 Deliver a seamless customer experience
- 2 Eliminate disconnect and frustration for customers
- 3 Empower customers to contact you via their preferred method

PART TWO:

Capturing Data Throughout the Customer Journey

Today's customer journey is an iterative, complex, pinball of touchpoints.

DAVID LOUIS EDELMAN
Author

Being able to connect the dots between how someone discovers your brand, whether it was clicking through an ad, visiting your social pages, or going into a store, is key to winning their business. It's also essential to inform your omnichannel engagement strategy, so that you know where and when to engage with a prospective customer to increase their likelihood of conversion.

Tracking the customer journey is not always straightforward, especially with so many online and offline touchpoints that can occur between when a customer first discovers your brand and ultimately decides to purchase. That's why it's essential to have tracking tools implemented across as many communication channels as you offer so you're not missing any valuable data around what campaigns or channels inspire customers to contact you and whether they are primed to buy or not. The goal is to turn the information you're gathering into insights.

Capture missing data with call tracking tools



TRACKING TOOLS HELP YOU ANSWER:

Which of my campaigns are driving the most leads?

Which channels generate the highest quality leads and conversion rate?

Which channels generate the highest return on investment (ROI)?

At what point in their journey are my customers inspired to purchase?

What roadblocks do they face?

Beyond the standard advertising and website tracking tools that most marketers have in place, it's essential to also set up tracking for communication channels such as phone calls, text messaging, form submissions, and live chat interactions. This way, you can attribute every conversation your business has with a potential customer back to the advertisement or web page they landed on and have concrete data around what campaigns are actually driving conversions (and which ones aren't!). Insights like these inform your future marketing investments and empower you to get buy-in from your leadership team so that you can allocate more budget to the areas that are working.

In addition, the right tools will enable you to not only track customer's various touchpoints with your brand, but also perform deeper analysis around *how* they are interacting with you. For example, conversation intelligence tools such as call recordings and transcriptions, keyword spotting, and call scores and tags help you isolate trends in customer interactions, such as an increase in types of inquiries during a particular time of year, or the types of interactions that are taking too long for your frontline customer support team to handle effectively.

Four call tracking tools to know



CALL RECORDINGS

Record the audio of your calls to hear customers in their own words, coach your sales team, or discover patterns in conversations.



CALL TRANSCRIPTIONS

Transform the audio of your calls into speaker-organized scripts so you can quickly isolate trends in conversations and use them as a training tool for new employees.



CALL SCORING

Score your calls based on criteria unique to your business, such as identifying high- vs. low-quality leads.



KEYWORD DETECTION

Automatically detect when specific words are spoken on a call to filter for reporting or route the call to a particular team.

When you combine tracking and conversation intelligence tools in one platform, with the ability to then automate how you handle the outcome of the conversation based on details from the interaction, you're able to eliminate unnecessary manual tasks for your team and reduce the overall time to conversion.

PART THREE:

Creating meaningful customer experiences across touchpoints

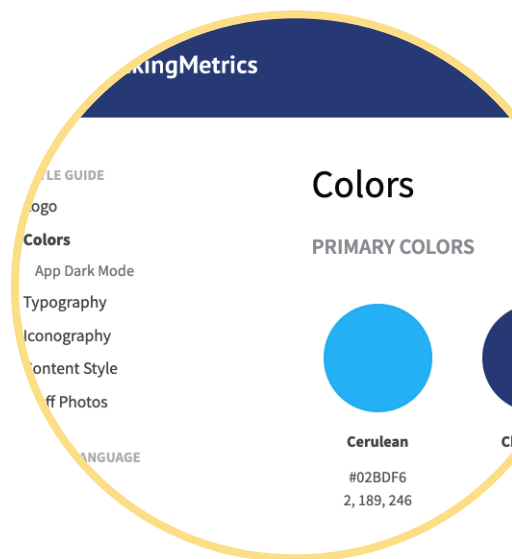
Now that you understand all the components that go into an effective omnichannel strategy, let's explore how to define what that looks like for your own business and how to ensure your customers are satisfied with the outcome.

It's important to note that implementing an omnichannel communications strategy is **not solely a marketing effort**—it will require buy-in across your entire organization in order to be effective, including your product, sales, and customer support teams. Everyone must understand the goals and objectives of adopting an omnichannel strategy in order for it to work. Including key stakeholders from different teams in the early planning stages will help inspire adoption and align others around your common mission of building a stronger customer experience.

Unify your branding and message

Once all departments are on the same page, your next step is to button up your voice, messaging, and visual style that you use across your communication channels. One way to get your team members on the same page is by providing a company brand book and style guide. There are both visual and written components that make up this guide. First and foremost, you'll want your company's approved logos in a variety of formats and sizes as well as the exact hex codes you want used for your colors. If you use imagery or illustrations, specify what kinds and if there are any rules or guidelines around use. Everything—logo, colors, imagery—should fall within the same visual family wherever they are used. Make sure employees know when certain logos, colors, or images have been retired as well, and archive files so they don't accidentally get used.

While you may have multiple people managing your different communication channels, you want the voice and messaging coming from your brand to remain consistent. Offer a voice guide as part of the brand book that describes the tone, language, character, and purpose you want your business to portray and distribute this company-wide, and especially to your support team, sales team, social media managers, copywriters, marketers, and anyone else directly interacting with customers via your channels. That way, you eliminate any disconnect around the way a customer feels when interacting with you over text message, versus chat, versus phone, etc.



A peek at the CallTrackingMetrics brand guide

Consolidate tools

In order to manage all the different communication channels you want to offer, such as phone, email, text, and live chat, your business likely has a number of tools. This just presents another obstacle to streamlining your communications and making them consistent across methods. By consolidating your software into one tool—such as [CallTrackingMetrics](https://www.calltrackingmetrics.com), which offers multiple communications channels in one unified dashboard—you not only improve the likelihood that messaging remains consistent across channels, but agents can share context and notes about customer interactions with other agents and channels seamlessly. Having a centralized database of your customer conversations also means customers don't have to repeat their issues more than once and your team can more effectively manage inbound inquiries and concerns.

Personalize your approach

Today's customers appreciate and expect a personalized approach in the communications they receive from brands. Sending an email with the person's name in the subject line, for example, is shown to increase open rates by [up to 20%](#). You'll want to infuse your customer's personal attributes and details into your interactions with them across channels whenever possible, which you can do by integrating your CRM, ads accounts, or visitor data with your communications software or a platform like CallTrackingMetrics. Including details such as your customer's name, the product they were looking at, their tracking information, their unique appointment details, and more in the communications you have with customers increases the likelihood they will engage with the content (especially if it's a proactive, outbound message). It also cuts down on unnecessary support contacts where you're going back and forth collecting basic information like first and last name and order number. The right tools will already have that information tied to your customer when they contact you so you can skip the mundane and get right to helping them or picking up where your last conversation left off.



5 STEPS TO EFFECTIVE OMNICHANNEL ENGAGEMENT

- 1 Get buy-in from departments across your organization
- 2 Unify your branding and message
- 3 Consolidate tools
- 4 Personalize your approach
- 5 Automate whenever possible

Automate whenever possible

Those who work in a customer support setting are likely already familiar with macros, or pre-written responses to common inquiries that can be quickly applied to a message. Macros provide value by cutting down response times so you can serve more customers faster. They also help you maintain that consistent, unified message across channels. Yet while macros give your organization more control over what's being communicated to customers, they can also instigate frustration if they are used in the wrong context, like when a customer needs a more personalized answer.

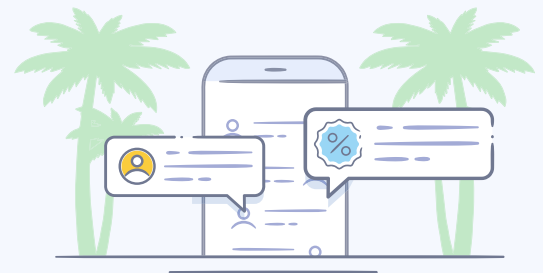
Macros are just one of many ways you can automate and enhance your communication workflow, which will continue to grow in necessity as you scale and find a higher volume of customer contacts coming in. Scale effectively by combining automation with those personalized touchpoints we just mentioned. Implementing personalized tokens in text messaging, or automating follow-up messaging to people who viewed one of your promotional campaigns but haven't converted yet, are just a few ways to personalize while using automation.

Automation is a great way to eliminate the initial friction between your customer and sales and support teams and jump right into interactions, and provide a seamless experience even if they switch the methods they've used to contact you.



3 USE CASES:

AUTOMATED OUTREACH IN ACTION



A TOURISM COMPANY

can follow up with a customer after they did not convert over the phone with a personalized text message offer that gives them 15% off the booking they discussed.

A REAL ESTATE FIRM

can embed a form on their property listings so prospective home buyers can indicate interest in a particular home. Once the buyer submits their information, the company can send automated and personalized text message follow-up with custom details about upcoming Open Houses or similar homes they might be interested in, or offer to connect them with an agent.

A CUSTOMER SUPPORT TEAM

can embed a form on their community page so users can submit urgent inquiries and automatically be connected with an agent over text or phone.

Let's Wrap This Up

Implementing an omnichannel communications strategy for your business is an investment of time, resources, and energy and will require buy-in and adoption from different teams across your organization. It will pay off in dividends, however, when it comes to improving your customer experience and increasing conversion and retention rates. The right tools can also help you consolidate your software spend and make adopting omnichannel easier for teams by streamlining all of your communication channels within one platform.

CallTrackingMetrics is the only digital platform combining omnichannel tracking and analytics and contact center functionality in one tool. Track and manage your customer conversations across digital channels, including phone calls, text messages, form submissions, and live chat, and use the insights gathered from your conversations to engage more effectively with customers.



To learn more about CallTrackingMetrics and how it can work for your business, visit us at calltrackingmetrics.com.

[Book a Demo](#)



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