

Making Omnichannel a Reality

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Introduction

What exactly is an omnichannel customer experience? As customer expectations have evolved, so too has the answer to this question.

Years ago, brands celebrated the mere idea of being present in a full spectrum of contact channels. The next iteration involved elevating the experiences within each channel, ensuring every touch point adequately reflected the brand and its commitment to customer centricity.

Thought leaders then began to dismiss this approach as a mere exercise in multichannel customer engagement. Omnichannel, in their eyes, referred not to the number of channels in which a business engages with customers but to the act of unifying those channels in a cohesive experience.

A new evolution is underway. In today's marketplace, omnichannel involves not only connecting all touchpoints but using this integrated framework to deliver highly personalized and proactive journeys that get progressively more relevant – and more valuable – over time. Rather than simply making it easy for customers to move from channel to channel, leading companies will ensure that journeys get progressively better as brands assess consumer behavior, analyze customer preferences, and anticipate short- and long-term needs.

“Delivering a truly personalized, omnichannel experience requires two key areas of focus: a deep understanding of your customer, and then utilizing this data to tailor the customer experience to specific needs and behaviors. All while providing every channel that customers use and not over complicating your employee experience.”

Lenore Files, Twilio

In an era where building meaningful customer relationships has never been more essential, this more human-centric approach to omnichannel makes sense. Unfortunately, for a contact center community that has routinely struggled to even connect its channels and departments, this iteration of omnichannel may seem quite daunting.

How can you overcome the most pressing challenges to make personalized omnichannel engagement a reality? This special report has the answers.

Why Omnichannel Remains Elusive

If only 20% of contact centers feel they can deliver a connected end-to-end experience, let alone a frictionless, personalized, predictive, and proactive one, it is safe to say that omnichannel remains the exception rather than the rule. The many years of inescapable hype and enthusiasm have not translated into widespread results.

Why does omnichannel remain so rare in customer contact circles? Some of the biggest challenges follow.

Contact Center Remains Disconnected

Conversations about “silos” and “fragmentation” persist for a reason: these challenges are still quite prevalent within the customer contact community.

Brands continue to rely on antiquated legacy systems that neither integrate with other key platforms nor support continued evolution and expansion. Without a single platform for supporting customers across the channels of today, let alone those that will become popular tomorrow, brands are unable to deliver experiences that are simultaneously seamless and personalized.

Frankly, they may struggle to deliver either of those tenets. Disconnected systems impose friction on both customers and employees, leading to interactions and journeys that are slow and frustrating. And insofar as fragmentation also makes it difficult to gain a 360-degree view of customers and their experiences, the support the brand can provide will likely be impersonal and inconsistent – and thus not worth all the undue waiting and hassle.

Certain Channels, Experiences Remain Underwhelming

Whereas unifying experiences remains challenging, the ability to deliver great experiences in individual channels is supposed to be table stakes. It is a tenet of the antiquated multichannel movement.

Unfortunately, few brands are even excelling at great disparate experiences in all environments.

Traditional phone conversations remain more complete and supportive than interactions in digital channels, causing customers to remain skeptical of newer options. [According to CCW Digital research, consumer trust levels in channels like social media and chatbots are particularly low.](#)

When customers perceive certain channels as blatantly inferior, there are numerous consequences for the business and its customer contact operation.

1. The customer may not feel they can properly engage in their channel of choice, thus erasing even the most superficial notion of personalization.
2. If customers consciously avoid engaging in certain channels, brands will gain a skewed perception of consumer preferences and behaviors. For example, they may think customers actually like talking on the phone when, in reality, they simply do not want to waste time in an unsatisfactory chatbot. They will also miss an opportunity to capture valuable customer data from these touchpoints – and thus face more difficulty anticipating and personalizing future interactions.
3. If customers gravitate toward higher-touch channels, brands will face a resourcing burden. In turn, they will either face higher staffing costs or have to subject customers to longer wait times.

Data Is Insufficient – and Insufficiently Connected

Customer intelligence is the centerpiece of omnichannel engagement. It is how brands learn about customers and their behaviors and thus how they can anticipate needs and personalize interactions. Unfortunately, the majority of brands are struggling to acquire, democratize, or leverage the data they need.

Nearly **58% of contact center leaders believe data challenges prevent agents from building relationships with customers.** This statistic is unsurprising given that only 20% feel data is thoroughly democratized across their organization and nearly 62% feel agents lack easy access to customer profile details.

The product of failing to capture enough insights from customer journeys, struggling to properly unify and analyze the insights they are gathering, or lacking a platform for distributing actionable intelligence to key stakeholders at moments of truth, inadequate intelligence strategy is an irrefutable bottleneck on the omnichannel revolution. It is forcing brands to settle for the kinds of generic, impersonal, fragmented experiences that rarely achieve customer satisfaction let alone lasting loyalty.

As debilitating as these issues are in the status quo, they may become even more problematic in the months and years ahead. The impending death of third-party cookies means businesses will become more reliant on their ability to capture and manage first-party data. The potential addition of new channels, moreover, risks creating new silos and fragments that could prevent businesses from establishing the coveted “single source of truth.”

Employee Experiences are Not Empowering

What happens inside the contact center directly impacts what happens on the frontlines of the customer experience. Indeed, a business’ success in empowering its agents will directly inform its ability to deliver seamless, personalized experiences at scale.

Empowering is not, however, an accurate word to describe today’s contact center employee experiences. Contact center tools and data sources remain slow, disconnected, and utterly difficult to use. A whopping **75% of contact center leaders**, in fact, say their technology platforms require too much agent effort.

The issue, notably, goes beyond antiquated or unintuitive systems. Contact center workflows further stifle performance, with nearly 70% of leaders acknowledging that agents still have to spend too much time on low-value work.

Without the tools, data, or time to properly deliver empathetic, personalized interactions, today’s agents will face immense difficulty supporting today’s customers. The experiences they provide, no matter how theoretically well-intentioned, will not meet the modern standard for omnichannel.



4 Keys to Personalized Omnichannel Experiences

Omnichannel may not be omnipresent in today's marketplace, but it absolutely should be. It speaks to the reality of how today's customers want to engage – and how today's businesses and employees can engage at scale.

The good news is that it is also very achievable. By making the following shifts in mindset and technological infrastructure, you can deliver a highly personalized, irrefutably convenient, unmistakably omnichannel experience.

Acknowledge Lifetime Value as the Holy Grail

Meaningful transformation requires a clear sense of purpose. Decision-makers, influencers, and users have to agree on the “why” behind new investments and initiatives.

When it comes to omnichannel engagement, leaders need to know why it makes sense to transition from solving problems on a one-off, transactional basis into designing complete, end-to-end journeys for customers.

The answer comes down to lifetime value.

Customer-centric businesses recognize that every interaction informs a customer's willingness to support the brand over the long-term. Optimizing an interaction, therefore, does more than simply lead to a pleasant call or a completed sale. It dictates the amount of money a customer will spend over time.

When brands can use data to not only predict a customer's potential spend but identify the factors that could increase that lifetime value, they maximize the ROI from their customer service efforts. They also establish safety nets in the face of economic uncertainty and new competition.

Omnichannel frameworks enable businesses to capture – and then action – this vital data. They enable businesses to form lasting, lucrative connections with customers.

Harness The Power of a CDP

A business may want to design more personalized, data-driven experiences. It may invest in platforms for unifying channels. These efforts are for naught, however, if the business does not have a mechanism for managing the data it collects – and then surfacing real-time insights to the right stakeholder at the right time.

Customer data platforms (CDPs) provide this mechanism. Not simply capable of creating single, democratized sources of truth, these solutions can empower experiences with real-time insights about given customers and their experiences. Agents and bots can, in turn, tailor conversations to sentiments, intentions, and behaviors of customers, yielding experiences that are frictionless, personalized, predictive, and proactive.

“Effective engagement begins with combining quality data with communications. A Customer Data Platform (CDP), such as Twilio Segment, enables the ability to deliver real-time customer data from multiple enterprise systems to customer-facing teams. This enables personalizing the interaction using any necessary data sources and analyzing data using AI such as Google Cloud CCAI or ChatGPT. Imagine a customer journey informed by real-time data, this is achievable with a CDP, like Twilio Segment. Better context leads to higher sales conversions and increased customer lifetime value.”

Lenore Files, Twilio



“Combining excellent data management with communications allows you to create a constant cycle of improvement. At Twilio, we like to refer to this as the ‘virtuous cycle of customer engagement.’ Using every customer data point to enhance a customer’s profile and improve personalization for future engagements.”

Lenore Files, Twilio

Turn Omnichannel Inward

Any friction agents face accessing data and supporting customers will trickle down to the frontline. Customers will feel this friction and lose any illusion of a seamless, personalized experience. This trickling down of inefficiencies, of course, says nothing of the frustration that angry agents will transfer to customers as they fumble through complicated tools and processes.

Delivering an omnichannel customer experience, therefore, begins with designing an omnichannel employee framework.

“Customer experiences should also empower the employees. A single pane of glass to handle omni-channel interactions, with a contextual view of previous interactions and customer information.”

Lenore Files, Twilio

When employees can access the data and tools they need in a single pane of glass, they can **deliver experiences that are both seamless and highly personalized**. They will neither have to wait to glean insights that can fuel more empathetic and relevant conversations nor jump through hoops to provide their support in the channel of a given customer's choice.

Use AI Intelligently

The modern approach to omnichannel is a fundamentally human initiative. It requires understanding who customers are, anticipating what they want to achieve, and then creating experiences that empathize with their current situations while providing future value.

It takes great technology, however, to facilitate this degree of humanity.

Modern artificial intelligence solutions provide this form of empowerment, enabling businesses to capture insights and enhance conversations at scale,

1. Generative AI-driven chatbots elevate the caliber of digital engagement, enabling customers (and brands) to enjoy the efficiency of low-touch communication without sacrificing relevance or substance.
2. AI analytics solutions can uncover and democratize vital customer intelligence at scale, helping customers personalize real-time conversations and orchestrate more valuable overarching journeys.
3. AI assist and knowledge tools augment agent performance, enabling employees to quickly and accurately access what they require to proceed with a customer engagement. Without stressing over the knowledge-gathering process, they can focus on using the knowledge to deliver more empathetic, personalized support.
4. Generative AI can also facilitate proactive engagement based on customer data, further reducing customer effort, increasing personalization, and driving favorable customer behaviors and conversions.

“ChatGPT, for example, is something we have all been hearing a lot about. It can be integrated to provide generative AI capabilities to agents, as well as transform conversational AI bots. But data is at the heart of the ability to do all this. CDP provides superior data inputs that unlock the potential for superior outputs.”

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The Lucrative Reality of Omnichannel

When brands establish a mechanism for better understanding their customers, they can start to anticipate and design more meaningful journeys. When they orchestrate these journeys, they open the door to more meaningful customer connections.

Not simply a “feel good” endeavor, this journey toward personalized omnichannel produces superior experiences and coveted business results.

“Customers like Uhaul have used Twilio Flex to simplify customer experiences with in-app concierge services. These teams can help customers find what they’re looking for, recommend products based on previous purchases, and answer any questions they may have.

Yelp and Vacasa are using Twilio Flex to provide their Sales teams with relevant customer information and a variety of channels to engage prospects through. Now, their teams can click-to-call or click-to-text while knowing everything about a prospective customer.”

Lenore Files, Twilio

Case Study Insights - TravelPerk

TravelPerk knew they needed to more deeply understand who its users were well before they began using the platform to book trips. But, the travel company lacked insight into its customer data and had no standard procedure for data governance.

TravelPerk uses Segment Connections and Protocols to collect and standardize data across all business units using one platform.

Equipped with a unified customer data pipeline through Twilio Segment and a Twilio Flex-powered contact center, Travelperk provides its customers with a next-level customer engagement experience, beginning with their very first encounter with the travel company. The company’s ability to better understand and serve its customers has manifested in its **95% NPS score**.

About the Author



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Brian Cantor is the Managing Director of Customer Management Practice's Digital division. Driven by a passion for helping brands better empower their employees and more meaningfully connect with customers, Brian oversees research, product development, editorial vision, and commercial strategy for properties like CCW Digital and Customer Engagement Insider. Reaching a community of almost 200,000, these digital properties offer industry-leading commentary, research reports, and virtual event sessions.

Far from a "boardroom manager," Brian routinely speaks at leading customer contact events and directly engages with global enterprises and innovative start-ups via training and advisory services sessions.

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